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Finger Lakes  
Regional Economic  
Development Council

2020 Economic Recovery Strategy:

# FINGER LAKES



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DEVELOPMENT COUNCIL MEMBERS LIST:**



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PART ONE

# Executive Summary

University of Rochester's River Campus and downtown Rochester are seen alongside the Genesee River. (J. Adam Fenster, University of Rochester)

## MESSAGE FROM CO-CHAIRS

When the Regional Economic Development Councils were created in 2011, no one could have predicted that we would find ourselves facing a global pandemic (COVID-19) impacting every facet of our lives, our region, and our economy. As a result, our work has never been more important. Since 2011, the Finger Lakes Region has received \$721 million supporting 950 projects. Each of those projects has made our region a better place to live, work, and play. Our thanks go to Governor Cuomo for his leadership and support in creating and nurturing the Regional Economic Development Council (REDC) process, which has engaged local stakeholders in each region in the decisions that matter most to New York families seeking stronger and more prosperous futures. We also thank Empire State Development Finger Lakes Regional Director Vinnie Esposito, his great team, and each member of our council for their support, engagement, and encouragement. Collectively their work has been instrumental in moving the Finger Lakes Forward.

COVID-19 has forced us to reimagine the way we live and the way we do business. In just a few short months, New York State found itself at the epicenter of this global pandemic. With the leadership of Governor Cuomo, we went from worst to first in the nation. Governor Cuomo acted back in May by releasing New York Forward: A Guide to Reopening New York & Building Back Better. He tasked each region with developing a Recovery Strategy. In that spirit, our Finger Lakes Regional Economic Development Council (FLREDC) endeavored to establish a strategic recovery plan inclusive of every corner of our Finger Lakes Region.

Additionally, the Rochester region is facing unrest that stems, in part, from longstanding economic inequality. The recent protests highlight the need to address head-on the inequities which have plagued our community for far too long. The onus is on us to ensure members of historically marginalized and underrepresented communities are treated fairly. With the leadership of Governor Cuomo, we are already seeing positive change. We will follow that leadership and do our part as we look to recover economically and emotionally.

On the topic of needed change, we realize the role we play in addressing other pervasive

issues like environmental justice. This Council will continue to endorse sustainable business practices and corporate social responsibility among businesses and organizations within our nine-county footprint. Any funding we receive as part of the recovery effort will take this into strong consideration.

The wonderful economic diversity of our region demands a plan inclusive of varying industries and market sectors. It involved soliciting feedback from dozens of stakeholders and industry experts to collaboration among twelve specific sectors of our region. This report includes strategic feedback on key short-term and long-term needs and challenges from a representative group of leaders within agriculture and food; k-12 education; higher education; health care; manufacturing; non-profits; childcare; broadband; workforce development; optics, photonics, and imaging; retail; services; software and IT; and tourism.

Our regional recovery effort cannot simply return us to where we were pre-pandemic. Indeed, this plan was crafted in such a way that our region will realize the Governor's vision of building back better and revitalizing our Finger Lakes Region.

In this report you will learn about key strategies for each industry sector. This correlates to our previous core efforts to further the mission of our regional council to reduce poverty, grow jobs, increase regional wealth, and drive private investment.

Our resolve is not hindered by COVID-19, rather it emboldens our efforts and priorities to re-invigorate the Finger Lakes Region.

Join us in making our region better than it has ever been.

**BOB DUFFY,**  
Co-Chair

**DENISE BATTLES,**  
Co-Chair



Bob Duffy, Greater Rochester Chamber of Commerce



Denise Battles, SUNY Geneseo

Governor Cuomo tasked the Finger Lakes Regional Economic Development Council [FLREDC] with developing a Recovery Strategy to highlight our region’s challenges after the statewide COVID-19 shutdown. This inclusive endeavor identifies recommendations crucial for a full economic recovery to safeguard our regional economy against future public health crises and economic impacts.

We are grateful for all Governor Cuomo and his team have done to champion New York State and guide us through this unprecedented, uncertain, and unsettling time.

### ECONOMIC IMPACT OF COVID

The Finger Lakes Region has a considerable distance to go to return to its pre-COVID growth trajectory. At the depths of the downturn in April, the Rochester Metropolitan Statistical Area had shed almost one-in-five nonfarm jobs or more than 101,000 in total. Eighty-seven thousand were in the private sector. Tourism and Hospitality and Retail Trade Sectors accounted for nearly a third of job losses as of July.

Now on the rebound, the region continues to narrow its year-over-year job losses for three consecutive months, but not at a sustained rate or with consistency across sectors. Weekly unemployment filings as of this publication are far below the peak of March–April but continue to run more than 2,000% higher than year-earlier levels.

### CHALLENGES TO A FULL RECOVERY

Triage of our stakeholder input illuminated the extent to which COVID-19 has exacerbated deep-rooted racial and socioeconomic inequities and inadequacies throughout systems underpinning our regional economy. Their universal recommendations include:

**Accessible and affordable child care.** By June 2020, at least 25% of Monroe County child care centers closed temporarily when working families needed it most. An already strained and underfunded Child Care Sector struggles to respond without adequate funding to create slots and meet the unprecedented need.

**Innovative workforce development.** While more than 13,000 jobs remain unfilled in the region,

employers anticipate the shortages will only get worse as workers retire or do not return to work due to the pandemic. Employers struggle to reopen and operate at full capacity.

**Equal access to opportunities.** Of more than 3,100 counties in the nation, Monroe County recorded the fifth-highest income disparity between Whites and African Americans and Latinos.\* Systemic inequities rooted in generations of discrimination keep People of Color from accessing resources needed to compete in the marketplace and the workforce.

**Broadband and digital literacy.** In Rochester alone, 37% of residents have inadequate or no internet access to fully engage with online education, telemedicine, and remote employment, widening the divide between the haves and have nots. Rural residents face a similar dilemma.

**Ample, affordable, and reliable COVID testing.** The demand for testing and supplies to detect and contain the spread of COVID-19 far outweighs the reserve, which is costly and difficult to obtain. Limited testing sites place individuals with no access to public transportation—often People of Color, elders, and the medically vulnerable—at significant risk.

**Revitalizing communities.** Necessary COVID-19 related shutdowns and cancellations continue to have a ripple effect throughout our communities. After the tragic events tearing our region apart, ways are needed to safely bring people together to heal and rebuild our deep sense of community.

**Adequate transportation.** Frontline and essential workers relied on public transit to care for our community, especially at the height of the pandemic. Yet, the much-anticipated transit system expansion remains on pause, limiting greater access to everyday needs, work, and school.

The Finger Lakes Region is ready for a course of action that leads to equality and equity to strengthen our diverse and interdependent economic ecosystem.

### OPPORTUNITIES TO BUILD BACK BETTER

The Healthcare Sector is the largest industry in the Finger Lakes regional economy and remains at the core of the region’s response to COVID-19.



Canandaigua Lake — Finger Lakes Visitors Connection

Extensively impacted at every level by the pandemic, hospitals, healthcare systems, and related services will require extra attention, both to ensure adequate healthcare services for our population and continued growth as a primary driver of our economy.

A robust recovery that ripples throughout our region requires innovative public/private partnerships to support the stability and growth of our top sectors:

- **Agriculture and Food Production**
- **Higher Education**
- **K–12 Education**
- **Manufacturing**
- **Nonprofit**
- **Optics, Photonics, and Imaging**
- **Retail and Service**
- **Software/IT**
- **Tourism and Hospitality**

From our origins in agriculture and manufacturing to our high-tech industries and incubators, Finger Lakes Region innovation is ready to help lead New York State’s recovery.

### OUR STAKEHOLDERS

Our Recovery Strategy represents the collaboration and brainpower of hundreds of stakeholders from 10 major industry sectors contributing to our robust, nine-county regional economy. Hundreds of individuals from the community contributed by participating in work groups, email surveys, and virtual town halls throughout the pandemic. Many of the workgroups also leveraged data from recent community studies and reports to widen their lenses when prioritizing their recommendations.

\*Brookings Institution, Metropolitan Policy Program. As reported in the Rochester Democrat and Chronicle, May 19, 2019.



RIT student Jake Hamilton is one of many faculty, students, staff and alumni at RIT helping provide support and expertise to improve or create much-needed equipment and protective gear for medical personnel fighting the Coronavirus. (A. Sue Weisler, RIT)

PART TWO

# Overview of Covid-19 Related Impacts

**COVID-19 served as a major shock to a Finger Lakes Regional economy that had been growing steadily over the previous decade. Consider: the Rochester Metropolitan Statistical Area’s (RMSA) total nonfarm employment level in February 2020—the last month before COVID-related impacts started to be seen in the data—was 535,200, an increase of 36,000 from February 2010, and its annual average job total increased for 10 consecutive years. At the depth of the downturn in April, the RMSA had shed almost one-in-five jobs, or more than 101,000 in total.**

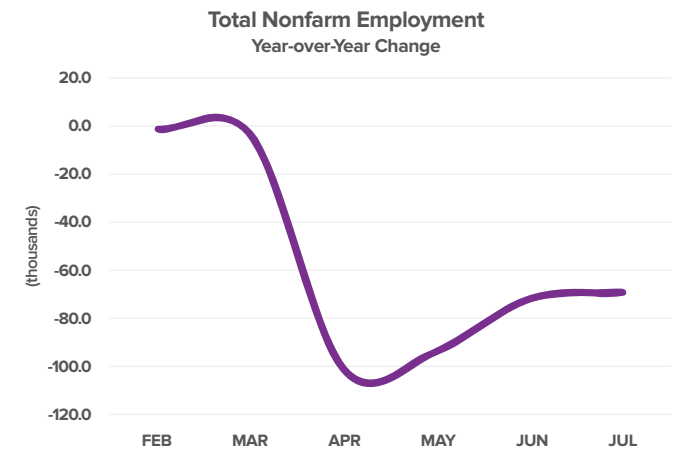
The Region continues its rebound today, having narrowed its year-over-year job losses for three consecutive months. That rebound, however, has not occurred at a sustained rate. Nor is it consistent across sectors. Just two sectors—leisure and hospitality and retail trade—accounted for nearly a third of job losses as of July, and recovery in sectors like information, financial activities, and professional and business services slowed in July. The ebb and flow of recovery is also evident in initial unemployment claims. Although weekly filings are far below the peak of March–April, they continue to run more than 2,000 % higher than year-earlier levels.

There are positive signs in the Region’s economic recovery, and movement since May has been directionally positive. However, the Region has a considerable distance to go to return to the growth trajectory it had been pre-COVID.

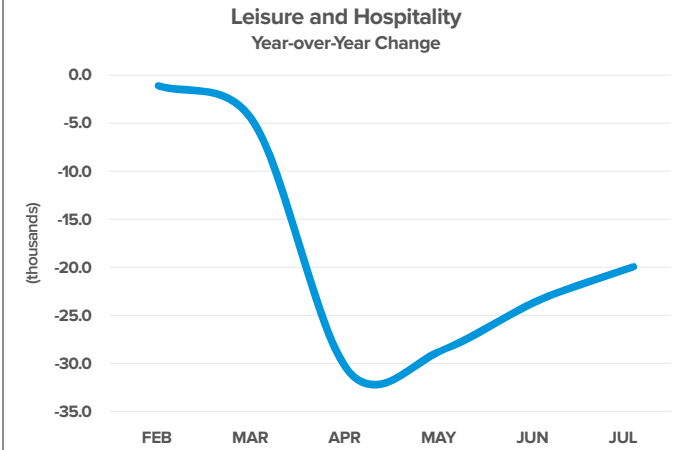
**JOB LOSSES DUE TO COVID-19\***

COVID-19 has had a significant impact on employment levels in the Finger Lakes Region. At its peak decline in April, the RMSA had 101,500 fewer nonfarm jobs than a year earlier, including nearly 87,000 in the private sector. May through July brought partial recovery, with the July year-over-year decline totaling 69,500 overall jobs (including 59,400 in the private sector).

The most significant declines have occurred within private sector service providers, specifically the leisure and hospitality and retail sectors – both critical segments of the regional economy.



At its lowest point, leisure and hospitality employment was off nearly 31,000 jobs in April, dropping almost 67%. It had recovered approximately one-third of those lost positions through July, though the sector remains nearly 40% below July 2019 levels. Similarly, retail trade employment fell by 16,500 jobs (31%) in April; as of July,



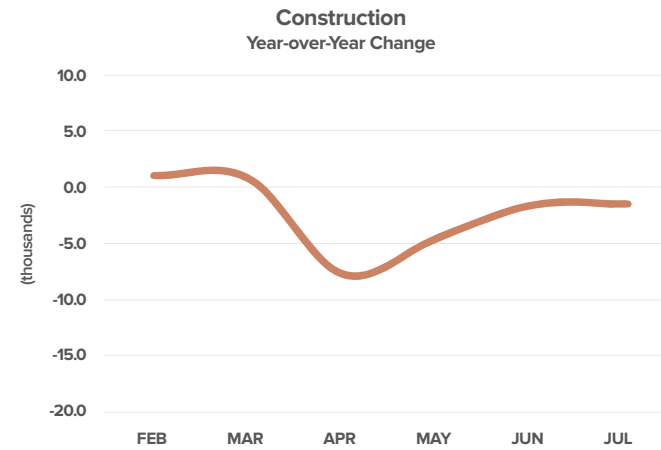
it was off 12,100 positions (23%) compared to a year earlier.

While leisure and hospitality and retail trade currently account for nearly one-third (31.9%) of all job losses in the area, few industries are unscathed. Compared to July 2019 levels, educational and health services fell by 5,400 positions (4%), professional and business services are down 2,800 (4%), and financial activities are down 2,200 (10%). Nor is the impact confined to the private sector. Public sector employment in the RMSA was down 10,100 (14%) in July compared to a year earlier, with most of those losses in the local government and education sector.

**AN UNEVEN RECOVERY\***

Although job levels have begun to bounce back since April’s low point, the recovery pace has been uneven across the region’s economic sectors. The rate has been most significant in the hardest-hit leisure and hospitality sector. Over the past three months, its sustained trajectory has—more than any other industry—most resembled a “V-shaped” bounce. But as noted, the industry still has far to go to return to pre-pandemic job levels.

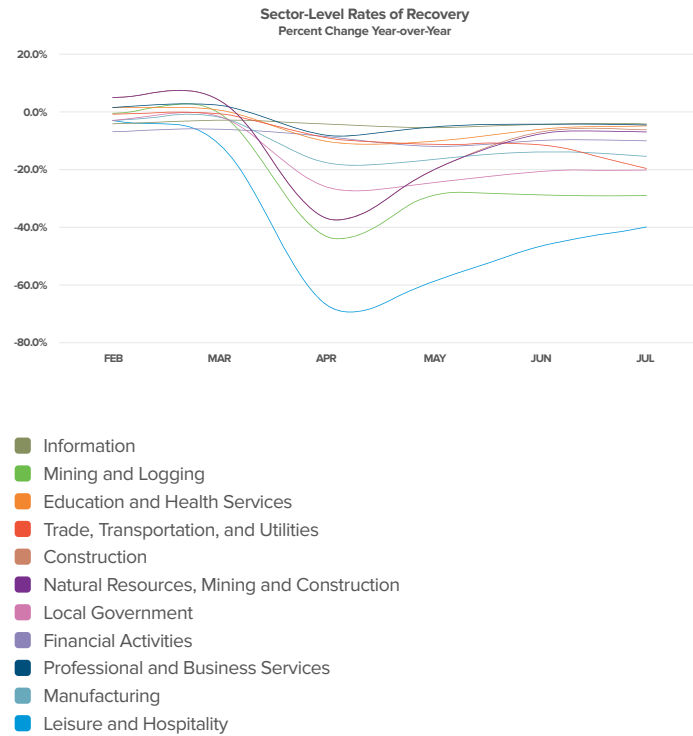
Another sector to experience positive bounce-back is Construction. Before the onset of COVID, the region's Construction industry was up year-over-year by approximately 1,000 jobs in February and March. After dropping nearly 8,000 in April, it has moved closer to near-normal levels. As of July, the Construction sector was off 1,400 positions from a year earlier.



Still, the pace of job recovery in other sectors—and the region's total nonfarm employment overall—stalled somewhat in July. Comparing levels for the same period in 2019 to 2020 levels, nonfarm work improved by 8,000 positions in May and more than 20,000 in June, but only by 2,500 in July. It remains down more than 69,000 from last year.

Other critical sectors show a similar slowing in the pace of recovery, including:

- **Trade, Transportation and Utilities:** After improving by nearly 3,000 in June, July's recovery slowed to 600 and remained 16,300 below last-year levels.
- **Manufacturing:** After improving by 1,400 in June, the trajectory turned *negative* in July and remained 8,600 below last-year levels.
- **Professional and Business Services:** After improving by 2,000 in May and 700 in June, the trajectory turned *negative* in July and remained 2,800 below last-year levels.
- **Financial Activities:** This sector experienced its peak decline (about 2,600 jobs) in May, a month later than most other region sectors. After adding a portion of those positions back in June, the recovery was flat in July and remained 2,200 below last-year levels.



### RATES OF JOB LOSS DURING COVID-19 PANDEMIC, BY SECTOR

INDUSTRY	LOW POINT	MONTH	CURRENT
Mining and Logging	-42.9%	April	-28.6%
Natural Resources, Mining and Construction	-36.7%	April	-6.6%
Construction	-36.5%	April	-5.9%
Manufacturing	-17.4%	April	-15.0%
Trade, Transportation, and Utilities	-25.8%	April	-19.7%
Information	-5.1%	May	-3.8%
Financial Activities	-11.6%	May	-9.6%
Professional and Business Services	-7.7%	April	-4.0%
Education and Health Services	-9.9%	April	-4.2%
Leisure and Hospitality	-66.9%	April	-39.6%

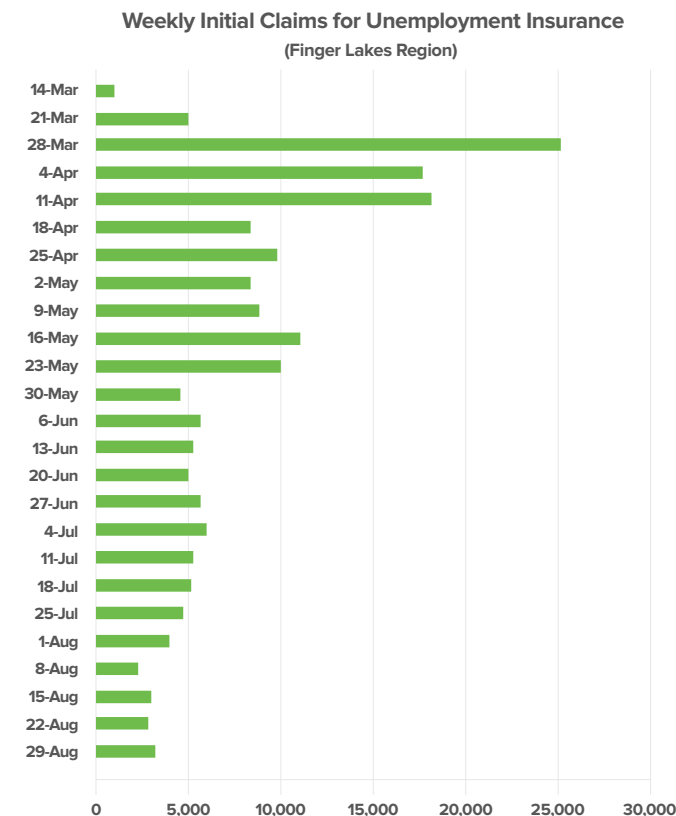
### INITIAL CLAIMS FOR UNEMPLOYMENT INSURANCE

Since the pandemic's start, workers in the Finger Lakes Region filed a staggering number of initial unemployment claims—nearly 186,000—starting with the week ending March 14 through August 29.

The rate of initial filings has declined significantly since the peak weeks ending March 28 (25,000 filings), April 4 (18,500), and April 11 (18,800). Over the five most recent weeks as of this writing (weeks ending Aug 1, 8, 15, 22, and 29), the region averaged 2,700 initial filings per week—still approximately 200-300 % higher than year-earlier levels, but a dramatic improvement from the depths of March and April.

On a sector by sector basis, the number of initial filings has generally tracked the region's hardest-hit industries. With nearly 24,000 total filings, Accommodation and Food services have been highest, followed by Manufacturing (21,000), Retail trade (18,000), Healthcare and social assistance (18,000), and Educational services (18,000).

The Finger Lakes Region's unemployment rate peaked at 14.9% in April, before falling to 11.0% in May. Since that time, the unemployment rate has trended slightly



upward. June's revised figure was 11.2%, and July's preliminary estimate suggests the rate increased to 12.9%. Rates have been considerably higher in the City of Rochester, jumping to 18.2% in April and rising to 20.0% in July.

### WEEKLY INITIAL CLAIMS FOR UNEMPLOYMENT INSURANCE DURING COVID-19 PANDEMIC, BY SECTOR

SECTOR	TOTAL INITIAL FILINGS (weeks ending 3/14-8/29)
Accommodation and food service	23,982
Unclassified	22,471
Manufacturing	21,463
Retail trade	18,296
Health care and social assistance	18,204
Educational services	18,034
Administrative and support services	12,945
Construction	11,833
Other services	8,418
Professional, scientific and technical services	6,813
Transportation, warehousing and utilities	5,545
Wholesale trade	4,639
Arts, entertainment and recreation	4,059
Real estate, rental and leasing	2,334
Information	1,985
Public administration (including government)	1,959
Finance and insurance	1,416
Natural resources and mining	1,168
Management of companies and enterprises	329
<b>TOTAL</b>	<b>185,893</b>

\*To assess COVID-related impacts on the Finger Lakes Region, the first two sections above rely on data from the Department of Labor's Current Employment Statistics (CES) survey. Unlike the Quarterly Census of Employment and Wages (QCEW) data series published at a county level and assembled for the 9-county Finger Lakes Region, the DOL publishes CES data at the metropolitan area level. For that reason, the data presented in the first two sections of this report are for the 6-county Rochester Metropolitan Statistical Area (RMSA). Notwithstanding this limitation, we rely on CES data because they are available through July 2020, and therefore better capture the period impacted by the COVID-19 pandemic. By contrast, QCEW data are only available through Q1-2020 and miss the period most affected by COVID.



A volunteer meets with an RN before receiving a dose of COVID-19 vaccine or placebo at the University of Rochester Medical Center. The University of Rochester Medical Center (URMC) has joined a phase 3 clinical trial for a potential coronavirus vaccine being developed by AstraZeneca and the University of Oxford known as AZD1222. (J. Adam Fenster, University of Rochester)

PART THREE

# Healthcare Sector—Economic and Pandemic Impacts

**For several years, Healthcare has been the largest industry sector in the Finger Lakes regional economy. Extensively impacted at every level by the COVID-19 pandemic, this sector will require extra attention to both insure adequate healthcare services for our population and continued growth as a primary driver of our economy.**

## OUR SYSTEM

Our region’s healthcare system is incredibly diverse and comprehensive: 17 hospitals; a premier academic medical center; locally controlled not-for-profit health systems and health insurance plans; more than 50 nursing homes; and more than 60 Certified Home Health Agencies (CHHA) and Licensed Home Care Service Agencies (LHCSA). There are several community health centers, including Federally Qualified Health Centers (FQHCs); one of the only health research and planning organizations in the state; more than 350 private physicians; and many nonprofits dedicated to the improvement of the region’s care and access.

Many hospitals in our region are the largest private employers in their respective counties. Our healthcare systems—UR Medicine and Rochester Regional Health—are the first and second largest private employers in the region. The University of Rochester Medical Center (URMC) is also Upstate New York’s largest private employer.

In the Rochester area alone, hospitals create more than \$9 billion in economic activity. This translates to more than 62,000 jobs, more than \$2.7 billion in payroll, over a \$1 billion in tax revenue, and more than \$770 million in community benefits, including charity care. However, the region faces structural challenges amplified by the COVID-19 crisis.

## FLATTENING THE CURVE

While healthcare providers in the Finger Lakes thankfully did not see the anticipated surge of COVID patients experienced by downstate providers, upstate hospitals incurred severe financial losses and expenses fighting on the frontline against COVID-19. They increased bed capacity by suspending all non-essential activities, including cancelling or postponing elective surgeries, relocating programs, and suspending routine care and other procedures to preserve our healthcare workforce and facilities for this crisis.

Home care and hospice stepped in to help prevent patient surges into hospitals, and to assist in rapid and effective hospital discharges ensuring safe transition to care at home. This has been essential to opening hospital bed capacity for incoming acute and critical care patients.

These unprecedented steps to contain the virus and protect their patients, staff, and this community worked, but the cost has placed our healthcare systems in the greatest fiscal crisis in their histories.

An analysis completed for the Healthcare Association of New York State by Kaufman, Hall & Associates, LLC estimates that in just a little more than one year (second half of March 2020 through April 2021), hospitals across the state will suffer \$20-\$25 billion in losses and new expenses due to the COVID-19 response. This reflects about 25-30% of our hospitals’ patient service revenue in a year—a devastating blow to any business, but especially devastating to those businesses fighting on the front lines of COVID-19, which must also retain essential healthcare services 24/7.

Severe financial losses forced providers to take funding advances and loans with unreasonably high interest and balloon payments. The fallout from delayed accounts payables, thousands of furloughed staff, salary cuts and reduced benefits, closed programs and services, and the postponement of much-needed capital projects continues to impact our regional economy.

With more patients uninsured and high unemployment, hospitals are seeing more charity care cases. Expenditures related to the pandemic went up while revenues went down because the shutdown reduced operations. It’s unlikely they will return to previous revenue levels as patients hesitate to seek care for fear of COVID. Reduced capacity will continue for safety and to ensure available beds and resources in the event of a new COVID spike.

## OUR WORKFORCE

Healthcare providers depend on a stable and available workforce to provide care to patients, especially in a crisis. During NY PAUSE, essential healthcare workers were also caregivers and parents without supports due to the closure of schools and child care facilities. Healthcare providers had to step in and provide emergency child care so frontline healthcare workers could continue to report to work and provide care to our community in its time of crisis. As many staff move to per diem or flex schedules to take care of their children and/or home school, staffing challenges will continue.

COVID-19 placed a disproportionate burden on the FQHCs workforce, which provides primary and preventative care for the most vulnerable patients. These

staff struggle to meet patient needs due to technology constraints, mobile plans that constrain access to tele-visits, lack of appropriate facilities to manage COVID assessments and swabbing safely, and the lack of access to social services.

While all non-essential research activities at colleges and universities came to a halt during NY PAUSE—placing years of work and potential scientific breakthroughs at risk—many University of Rochester scientists and clinicians were on the forefront of the national response to the COVID-19 pandemic. The New York Influenza Center of Excellence (NYICE) at URM is one of five international centers in the Centers of Excellence in Influenza Research and Surveillance network. Also, URM is one of nine National Institutes of Health (NIH) Vaccine Trials and Evaluation Units where many of its scientists and clinicians conduct clinical trials of vaccines, treatments, and diagnostics for COVID-19 and other infectious threats. Physicians at URM and Rochester Regional Health are investigating new coronavirus vaccines with help from more than 4,000 Rochester-area adult study participants.

### DISPARITIES IN OUR COMMUNITY

Rochester ranks among the poorest cities in the nation, and our healthcare system has become a safety-net for our most vulnerable citizens. Healthcare outcomes vary wildly, with poor outcomes largely driven by poverty and racism. A 2019 report by the regional health planning organization, Common Ground Health (CGH), entitled *Overloaded* identified poverty as the

region's top health concern. As an example, compared to residents with household incomes of more than \$75,000, those with incomes under \$20,000 are 105% more likely to lose their teeth, 154% more likely to have diabetes, and 224% more likely to be diagnosed with depression. Most notably and tragically, residents from neighborhoods with poverty rates of 30% or more die eight years earlier on average than residents from neighborhoods with poverty rates of less than 5%. This is not merely an urban problem; many of our rural communities face similarly stark statistics.\*

COVID-19 and the resulting economic recession have worsened the epidemic of poverty and racism evident throughout our community. People of color and those with fewer resources are disproportionately affected. In 2020, a group of prominent African-American leaders called the Black Agenda Group have led the charge to declare racism a public health crisis. Many of the pathways by which people obtained care historically are disrupted, and the new pathways require resources that are difficult or impossible for many to attain. As the pandemic forced much of routine preventative and maintenance care for existing conditions to go online, those who lack access to the tools necessary to connect invariably suffered, increasing their risk for poor outcomes. As many residents embrace new ways of engaging their providers remotely to receive the same high-quality care, many more go without access.

*\*My Health Story Survey, conducted by Common Ground Health, 2018, and the VITAL statistics from New York State in 2014-2016.*



Common Ground Health's *Overloaded* study finds poverty is the region's #1 health concern.



Lieutenant Governor Kathy Hochul attends a University of Rochester Medical Center COVID-19 research event in July 2020.

### RECOMMENDATIONS

**Workforce development.** Improved and expedited licensing procedures and approval by the Department of Health and State Education Department of our proposed online/hybrid training program for providers, including home health and personal care aides. Health aides, in particular, have been cited by the Rochester-Monroe Anti-Poverty Initiative as large segment of minority workers that receive low wages and Common Ground Health had led a community initiative to increase income, reimbursement for care and services, and career advancement opportunities for this growing work force within the healthcare industry. Support New York State's Diversity in Medicine Program that prepares students from underrepresented backgrounds for medical school. Strengthen New York State life science research capability by increasing support for the New York Fund for Innovation in Research & Scientific Talent (NYFIRST).

**Telehealth & other tools.** Patients on Medicaid need free cell phone minutes to allow them to use telehealth. Investment in home monitoring tools will facilitate better management of chronic conditions in the underserved communities. Primary care providers need new equipment with digital capabilities to help patients access specialty care from the comfort and safety of their office. Permanent use of the new capabilities in home care and hospice telehealth, as well as in other areas where COVID-era flexibility was added, has led to new and innovative practice techniques.

**Consumer education.** Increase community awareness about the importance of seeking healthcare for things such as chest pain, stroke, and preventive screenings. Redesign the human service sector, integrating healthcare and social services to ensure everyone can be served. Promote greater community education that care in the home during a pandemic is a safe alternative to a hospital or nursing facility.

**Capital support.** Provide substantial support for capital projects to ensure hospitals/systems can better respond to public health crises now and into the future, as well as continue to be economic engines for communities. For example, facility and infrastructure modifications might include HVAC systems/clean air, and touchpoints to improve safety.

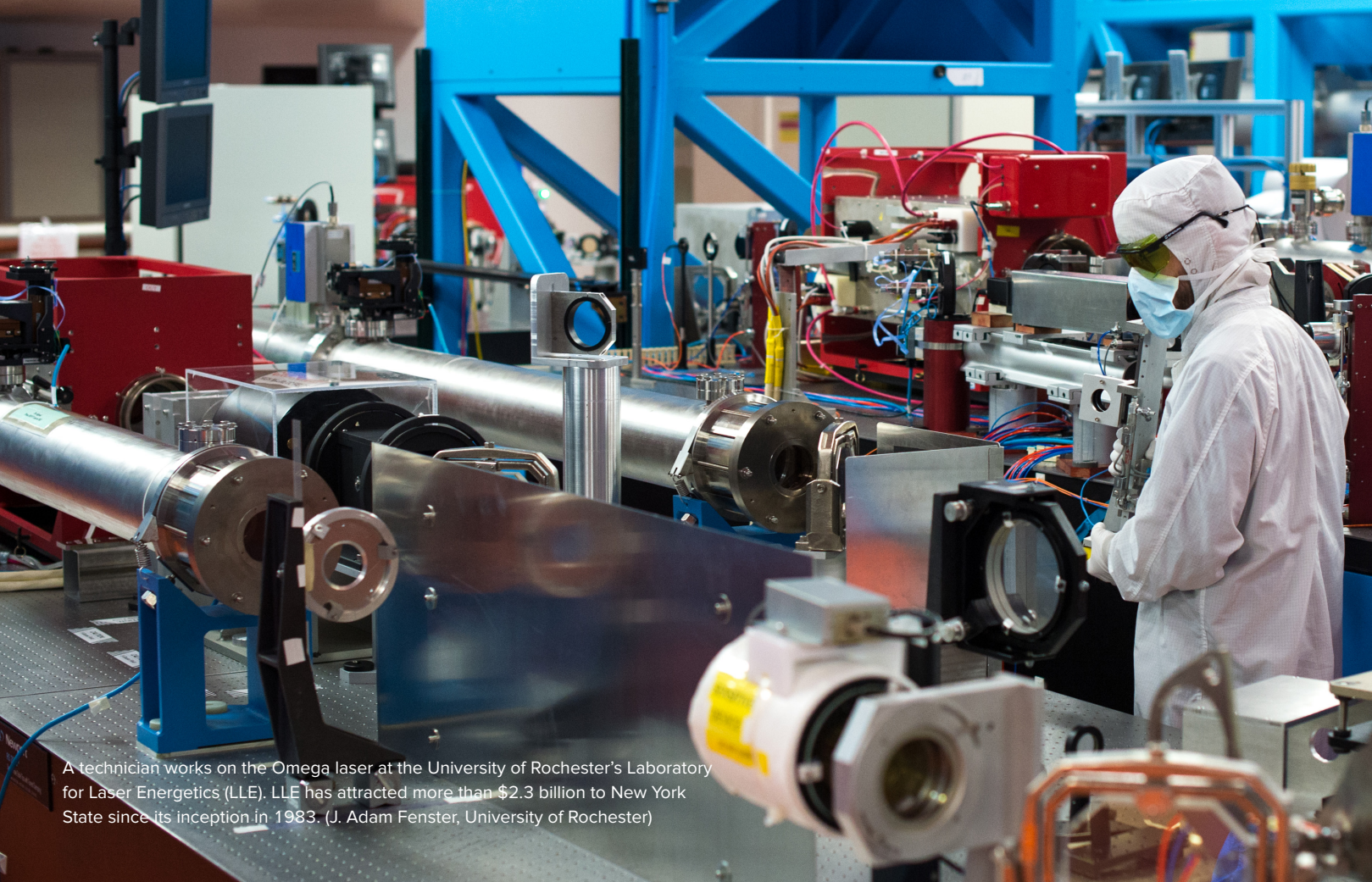
**Emergency preparedness.** Preparing for future pandemics could be supported as a public good, similar to how public health finance pools currently support emergency medical services, poison control, and other public health needs. Consider how to better connect and match the demand for staff and the reserves and availability of trained, capable workers.

**Regional planning.** The pandemic illuminated the need to change our thinking about community capacity and providing a more preventative, outcome-focused care system moving forward. Regional planning requires consideration of elements that exist outside of the current healthcare environment to help us understand the 'why' behind the 'what' when certain communities experience disparate outcomes. This effort requires data-driven collaboration between health systems, policy makers, and community members to achieve an efficient system. With COVID, knowing hospitalization and death rates is as important as understanding why those rates vary by community. More importantly, how to address those disparities requires a deep understanding of individual and community needs and the thoughtful development of infrastructure, policies, and payment structures.

**Regulatory relief.** The response to COVID accomplished many advancements in care management, service techniques, and protocols; the result of regulatory and procedural flexibility at state and federal levels. Examples include the ability to utilize telehealth/telephonic means to monitor patients, provide services, evaluate patients, and supervise and guide staff. Further evaluation of statewide policies to make these temporary adjustments permanent would benefit providers and patients alike.

**Re-imagine long-term care.** In the wake of COVID-19 and the experiences and preferences expressed by patients and their families, a New York Home Care First policy could be beneficial for disease management, prevention, patient outcomes, satisfaction and cost-reduction. Reallocate existing infrastructure and resources and identify new ways to provide a continuum of long-term care person-centered services. Individuals, as medically appropriate and able, would age in place at home, in their community. Referral structures, policies and finance provisions could be reset to support this systemic goal.





A technician works on the Omega laser at the University of Rochester's Laboratory for Laser Energetics (LLE). LLE has attracted more than \$2.3 billion to New York State since its inception in 1983. (J. Adam Fenster, University of Rochester)

PART FOUR

# Regional Economy Challenges and Recommendations

As the COVID-19 pandemic continues, implementation of the data-driven re-opening strategy employed by New York State and Governor Cuomo's New York Forward plan, which provide detailed safety guidelines for all economic activity to expand following industry and public health best practices, has enabled most Finger Lakes Region stakeholders to begin the slow recovery process.

Inspired by and building on the earnest efforts of those we serve, the Finger Lakes Regional Economic Development Council (FLREDC) offers the following recommendations to support our regional recovery. While consistent with the existing Finger Lakes Forward strategies underway, we recognize that the new realities we face will shift some focus and prioritization.

# Cross-cutting Challenges and Recommendations

**T**riage of our sector work groups' recovery input illuminated just how badly COVID-19 exacerbates the economic injustices present in our regional economy. While many of the issues already identified by the FLREDC in recent years—coordinate marketing, access to capital, technological digitization, climate change and sustainability, and environmental justice—remain challenges, other cross-cutting challenges have become even more imperative to address. Every sector reported experiencing the impact of child care, workforce development, connectivity, equal opportunity and testing. Successfully tackling these issues is essential to recovery, growth, and enhancing the Finger Lakes regional economy's resiliency against possible future pandemics and economic disruptions.

## CHILD CARE ACCESS AND AFFORDABILITY

COVID-19 has placed the already economically fragile childcare sector on the verge of collapse. Governor Cuomo has made it clear that New York cannot reopen, and families cannot fully return to work without addressing urgent child care needs.

In an alarming statement, the NYS Office of Children and Family Services reported on June 20, 2020, that 25% of licensed child care providers in Monroe County closed, at least temporarily, under COVID. 36% closed statewide.

As New York State's COVID-19 cases decline and schools reopen with hybrid remote learning models, child care, afterschool, and Pre-K providers prepare as best they can to meet the surge of child care requests. Their top priority is to meet NYS guidelines to ensure children, families, and caregivers' safety. Also, they are attempting to completely revamp programming to provide online educational support for individual students.

In September, Governor Cuomo released the remaining \$70M of child care funding allocated through the federal CARES Act to support child centers that remained open. These funds help support providers with upfront dollars to make necessary purchases, meet social distancing guidelines, provide staff training to meet health and safety guidelines and new educational needs, given the lack of daily, in-person schooling. Those centers that had temporarily closed during the shutdown, approximately 40%, did not qualify for these funds, leaving them without much-needed resources to aid their reopening process.

Because of the significant increase in demand driven by working parents seeking a safe place for their children to be, and to learn, during remote schooling hours and non-school hours, the child care sector remains highly susceptible to collapse during this current economic climate.

## RECOMMENDATIONS

**Upfront and discretionary grant funding opportunities.** Make grants discretionary and upfront rather than reimbursable for facility adaptations, PPE expenditures, especially clear masks for young children, and cleaning and disinfecting supplies and equipment. This change will alleviate immediate cash flow challenges for providers and allow them the flexibility to meet the needs of the children for whom they are caring for and the buildings in which they are providing services.

**Establish state and local coordinating/accountability taskforces.** Community and provider response to COVID-19 requires representation for all agencies and stakeholders responsible for our child care system's stability and outcomes for young children. Establish state and local accountability task forces and include entities from all sectors.

**Increase coordination and flexibility between agencies and regulatory bodies.** The Office of Children and Family Services and the State Education Department, guided by the Department of Health, should review and coordinate regulations and policies in one voice before releasing them to providers to ensure continuity and reduce confusion for emergency guidance and beyond.

The Federal mandate to the state that requires families to count unemployment benefits when calculating eligibility for child care subsidies at recertification penalizes many families, resulting in lost daycare subsidies and precious enrollment slots. Waive the mandate during the pandemic.

Additionally, the family income eligibility cap for child care subsidies should be increased to 300% of the Federal Poverty Level and make this permanent across programs. Also, raise the market rate for the child care subsidy back to the 75th percentile.

**Offer spending flexibility for out-of-school-time funding.** Advantage Afterschool, Empire State Afterschool, New York State Education Department extended school day and school violence prevention funding, and 21st Century funding streams could become more flexible to meet the increased demand for child care slots.

**Increase funding for the childcare sector.** Achieve revenue streams specific to child care funding through a tax (e.g., a tax on soda and beverages containing sugar, marijuana, business tax) to back this critical need and its role in developing our workforce and supporting economic participation among families.

## WORKFORCE AVAILABILITY AND DEVELOPMENT

As the Finger Lakes Economy reopens and continues its recovery through a strategic, data-driven approach, employers and workers alike face new challenges and new opportunities. Remote workers need reliable computer equipment and broadband access. For workers returning to the workplace—and essential workers and employers that never stopped working through the pandemic’s height—safety and health are top concerns.

As the economy recovers, Finger Lakes residents are returning to work, either remotely or in person. Consider that as of mid-September, there are more

than 13,000 job openings in the Finger Lakes region. Our economic and workforce development partners’ main challenge is to meet employers’ needs with a business-led approach to strengthening our workforce and aligning training to employer needs.

In the near-term, there remains a dearth of available skilled workers, especially for available tech-based jobs. To address that need, Monroe Community College published the *Future of the Technician Workforce Study* just before the pandemic accelerated the need to keep us connected while working remotely. The study presciently calls for coordination and alignment of the workforce system around programs to train a tech workforce needed across industry sectors, with competencies that will drive future economic growth in this region like coding and programming.

Other training programs and platforms taking shape pre-pandemic are now well-positioned for success in this current environment, like Finger Lakes Community College’s Synchronous Learning program, which uses remote learning a network of hubs and remote sites. Similarly, Rochester Institute of Technology kicked off a virtual cybersecurity apprenticeship program to meet the need for skilled IT employees, providing the course work through a remote environment that meets the need for social distancing in today’s environment.

Workers who graduate from training programs with these technological skills will lead the Finger Lakes Region to greater prosperity. But as we progress down that path, we cannot repeat the past mistakes by excluding people of color from opportunities that lead to good-paying, family-sustaining jobs that will build our communities. Throughout this recovery and beyond, all players in the region’s workforce development system need to address structural racism. Working to end racial inequality starts by following the lead of the Rochester-Monroe Anti-Poverty Initiative (RMAPI) and ensuring all people have access to training, career pathways, and good-paying jobs.

### RECOMMENDATIONS

**Virtual services.** Encourage state and local partnerships to develop and implement virtual job fairs and teleconferencing platforms to provide remote re-employment services to job seekers, such as workshops, resume help, and job search activities. Similarly, the opportunity now exists to invest in remote learning and

online training programs with synchronous or asynchronous support and instruction. One example is Finger Lakes Community College, which delivered accelerated home health aide and CNA training remotely to New York City workers during the pandemic height. Applications like this exist across sectors and attest to the capability, flexibility, and speed of virtual training.

**Supportive services.** Training programs should include supportive services that assist trainees with critical needs, such as child care and transportation. Often, trainees are forced out of programs or never enroll in training in the first place due to these barriers. To the extent possible, these supports should help bridge the digital divide by providing laptops, tablets, and broadband service for participants in need, since much of our near-term learning will take place remotely. Support should continue through training and job placement. Community-based organizations and training providers are increasingly offering follow-up job coaching services to help companies retain trained workers. Successful employers focus on worker retention by implementing policies and utilizing programs that help employees overcome challenges with the barriers mentioned above. For example, the New York State Department of Labor’s Shared Work Program allows employers to keep trained employees and avoid layoffs during business downturns by allowing staff members to receive partial Unemployment Insurance benefits while working reduced hours.

**Work-based learning opportunities.** Whether remote or in-person, support for work-based learning opportunities, like clinical experiences, co-ops, and internships, will be vital to filling the talent pipeline and providing employers with skilled workers in the future.

Similarly, employer-based training programs like apprenticeships will be crucial to our regional recovery. The New York State Department of Labor and the US Department of Labor promote this training platform, so traditional construction and non-traditional trades need apprentice candidates. These work-based programs must also include individuals from underserved populations denied employment opportunities for too long.

**Meet the employer’s need for skilled technicians.** As technology rapidly advances, businesses across the Finger Lakes’ industry sectors need trained, skilled technicians with various competencies. Artificial intelligence, robotics, and automation drive the increased

need for workers skilled in coding, data analysis, cybersecurity, and many other tech skills. Education and training programs in the region should align to meet this growing industry demand.

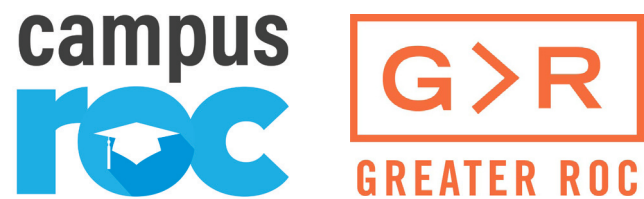
**Support the GLOW Workforce Training Center.** With recent manufacturing growth in Greater Batavia, area employers have agreed to invest in a GLOW Workforce Training Center. These companies will collaborate with the Genesee County Economic Development Center, the GLOW Workforce Development Board, and other community partners to establish a training center in Batavia focused on agriculture and food companies. Discussions about effective training models for the center are underway between Buffalo’s Northland Training Center, Genesee Community College, and Monroe Community College. Establishing this center aligns with state priorities, including Batavia DRI investments, developing training programs to support advanced manufacturing, and connecting the unemployed, underemployed, and underserved to training for in-demand jobs. State and local partners should support this effort.

**Strengthen partnerships.** Our business and trade organizations, the public workforce system, community-based organizations, and local colleges need to continue to strengthen their partnerships, working together to align their services to meet our regional employers’ workforce needs. To provide employers with the skilled workers they need as the Finger Lakes recovers, regional workforce coordination is essential. Organizations such as the Finger Lakes Advanced Manufacturers Enterprise (FAME) and other talent pipeline-focused groups will be key players as we build back better with trained, highly skilled employees.

Developing new industry-focused workforce development and entrepreneurship programs to drive new business development during the recovery requires money. As part of this effort, our workforce development partners should pursue grant funds and partner with colleges and universities to assist with these programmatic costs.

**Attract talent to the Finger Lakes region.** To accelerate the region’s economic growth, employers need skilled workers. Given the region’s recent increase in the 25–34-year-old population, regional talent attraction strategies prioritize working-age adults and recent college graduates. ROC 2025 recently kicked

off its multi-year Greater ROC campaign, designed to trumpet the region's strengths on a national stage and showcase the quality of life and career opportunities the Finger Lakes region offers. This effort is especially important as mid-size metro regions become more competitive for career opportunities and attractive for remote workers. The Greater ROC effort includes Campus ROC, which focuses on the thousands of college students attending the region's 19 colleges and universities. Campus ROC engages students across the Finger Lakes community both socially and professionally, to keep graduates in Rochester post-graduation. While the pandemic has changed how Campus ROC engages with students, the program will continue to connect with students, holding virtual social events, job fairs, and other networking opportunities.



Relatedly, Monroe County is launching its Rochester Emerging Talent and Innovation Network (RETAIN) Program. This effort will focus on connecting students to work-based learning opportunities that lead to jobs after graduation. It will explore other ways to keep students in the region after graduation, including year-round housing options, expanding transportation options, and creating networking opportunities that foster a connection to the area. These talent attraction strategies and related future efforts will be prioritized and supported by the FLREDC.

### ECONOMIC JUSTICE: DIVERSITY, EQUITY, INCLUSION

COVID-19 and its ramifications have exacerbated glaring socio-economic disparities in the Finger Lakes Region. Changing systems and advancing racial equity requires shifting power within initiatives that seek economic justice. These enterprises' structure and governance reflect who holds power, what kind of power they have, and how they intend to use it. Community voice and control in spaces where planning and decision-making are taking place is essential. The Finger Lakes Regional Economic Development

Council understands the inequities in our region are deeply rooted in systemic racism that has oppressed and excluded People of Color for generations. Our commitment is to engage these communities and take decisive actions to help sever these roots and cultivate opportunities accessible and beneficial to the advancement of all.

Too often, economic revitalization dollars have been directed at downtown at the expense of other neighborhoods, leaving underserved communities without opportunities for both work, recreation, and social connection. The IBM Smarter Cities Challenge report noted that the community seeks neighborhood revitalization and development to bring a range of services and businesses in close vicinity to people who need them. Equitable investment in neighborhood development via a process informed and led by a community is a pivotal opportunity to support recovery using an equity lens.

Likewise, homeownership is often an unattainable goal for People of Color, making it difficult to amass wealth. According to *Hard Facts\**, a report published by the Rochester Area Community Foundation capturing asset measures in educational testing results, income, and homeownership, the results for African Americans and Latinos are often lower than those of their White counterparts in the Finger Lakes Region, and are far below their contemporaries nationwide. These disparities result from local patterns of discrimination, such as historical discrimination in housing and zoning through restrictive racial covenants and redlining.

Workers who are vulnerable or living in poverty must be connected to and bolstered by a system of support that delivers needed services, such as childcare, financial empowerment, eviction prevention, and transportation. Concurrently, this system must provide quality employment opportunities that firmly place individuals on the path to prosperity. Only then will the structural root causes of inequities be addressed and changes made to the systems that shape community conditions and individual well-being.

Small businesses also face challenges and constraints in technical know-how, networks, financial, and human resources because they're confined to working *in* their companies rather than *on* them. While the nature and extent of these challenges vary among businesses, they exist across all sectors and types. Particularly during the pandemic, businesses have expressed

concerns about not being aware of federal, state, local, and philanthropic grant opportunities, expressly under the federal Paycheck Protection Program. For small businesses aware of such programs, many owners often don't have the time or knowledge required to apply for funding and technical assistance. Also, they usually do not have the capital to continue operations after these resources expire. More commonly known loan programs provide additional barriers because loans, unlike grants, put more financial strain on already struggling small businesses.

Common reasons businesses fail are popularly discussed in mainstream business texts and scholarly literature, with general failure rates encompassing 30% by the second year, 50% by the fifth, and 70% by the tenth year of operations, respectively.

Structural and systemic racism, sexism, ableism, and xenophobia can exacerbate these obstacles for historically underserved and marginalized groups, including African-Americans, Latinx, Asian, and Native American (ALANA), women-owned, disabled-owned, and immigrant-owned businesses. Moreover, these obstacles manifest through all phases and stages of business development, accelerating business failure rates in some instances, stifling growth, and preventing others from even getting started.

As COVID-19 widens the digital divide and disproportionately affects People of Color, the Finger Lakes Regional Development Council supports public/private partnerships to address structural racism and provide equitable opportunities for minority workers and business owners to climb the ladder of success.

### RECOMMENDATIONS

**Leverage existing resources.** Local chambers of commerce, Monroe County, and the City of Rochester's Office of Community Wealth Building provides resources to small businesses and entrepreneur support organizations like *nexusi90.org* and the Rochester Financial Empowerment Center (RFEC), and the Department of Neighborhood and Business Development funding programs.

**Support emerging programs.** The Rochester Economic Development Corporation's (REDCO) Resource Partner Enhancement Program and Revitalize Rochester Fund will provide financial and technical support to small businesses.

**Pledge to be more thoughtful and diverse in hiring practices.** Champion open hiring strategies and create sustainable employment for those looking to become more self-sufficient, as articulated in the Rochester-Monroe Anti-Poverty Initiative's (RMAPI) Employer Pledge.

**Harness community voice.** Engage community members in the planning, implementation, and decision-making process to ensure the solutions are community-centered and comprehensive.

**Streamline and improve programs and initiatives.** Make it easier for more small business owners to navigate the state's Minority and Women-Owned Business Enterprise (MWBE) certification process and promote its benefits, including new sales opportunities and free business development training.

**Strive for long-term change through recently formed groups and organizations.** For example, the City of Rochester/Monroe County combined Commission on Racial and Structural Equity (RASE) is a 21-person commission formed in June 2020 to develop policies and legislation designed to overcome systemic racism and inequality. The commission has 13 community members and 8 city and county officials to represent a cross section of the area.

### DIGITAL DIVIDE

New York State's response to COVID-19 has made remote learning and digital access permanent features of our education, health, and human services systems, not to mention work and daily life. This shift raises several immediate concerns that threaten to widen the digital divide, making our goal of reducing the disparity much farther out of reach.

COVID-19 has elevated the need for Broadband connection for everyone. Without additional infrastructure, technology enhancements, and support for virtual learning, our students, workers, companies, and organizations will be left behind and may never catch up. The COVID-19 pandemic highlighted and exacerbated the negative effects of the digital divide, which persists—in part—due to income disparities that continue to characterize our regional economy.

\*Hard Facts, Page 8.



Greenlight Networks is providing fiber-optic internet to the community, a vital service that many rely on to live, work, learn and play.

ROC the Future's *Digital Divide Report* indicates, for the City of Rochester alone, 20% of residents in Rochester have no internet of any type, and only 17% of residents only have a cellular data plan with no other kind of internet. Added up, 37% of residents do not have internet access that would allow them to engage with online education or access healthcare via telemedicine fully. Lack of internet access also disproportionately impacts residents 65+ years of age, those living in households with less than \$20,000 annual income, and Black and Hispanic residents.

Similar access problems exist in rural communities throughout our region, too.

Equitable access to broadband for digital learning experiences is critical to create pathways for students across the region and ensure that zip code alone does not determine the quality of a student's educational opportunity and success.

Universal Broadband is also crucial to our regional economy for visitors and residents alike, and wayfinding in rural communities. It is imperative for small businesses that need access to credit card processing capabilities, and it is necessary for business development at all levels.

### RECOMMENDATIONS

**Push for systems-level changes that support closing the digital divide.** Options include national affordability standards, affordability standards as a condition of grants, subsidy program for businesses that provide free or low-cost internet access, regulating the internet

as a public utility, publicly owned network, direct subsidy program, and connecting homes to municipally owned lines.

**Leverage existing community partnerships.** Enhance collaborations like the region-wide Systems Integration Project and ROC the Future that involve regular check-in on families' experiences with remote and online learning and to improve teaching and professional development. This type of collaboration also creates an opportunity to provide the social supports that families need as they embrace the new reality of remote living. Continued NYS investment in these collaborations is vital.

**Connect people to computers, the internet, and in-person technology.** Develop after-hours IT and Community Help Desks through higher education partnerships like the SUNY ATTAIN Lab out of Rochester Educational Opportunity Center (REOC). Pay or give extra credit to student staff, including marginalized communities, to help community members feel comfortable connecting with a resource when it fits their busy schedules. Offer classes through the public library system and Mobile Internet Bus to build digital literacy skills. Expand public access to school libraries and computer labs after school hours and weekends to meet the community's diverse needs.

**Strengthen the digital literacy of families and educators.** Provide online teaching and learning for Pre-K teachers, out-of-school providers, and parent leaders committed to supporting their community's children. Ensure pre-K students and their families have access to the internet and age-appropriate devices. Strengthen families' digital literacy with the help of community-based partners so they can support community-wide online learning or engage with telemedicine or digital services/resources.

**Raise awareness through media.** Create an integrated digital awareness campaign for traditional and social media to spotlight broadband access and digital technology and how it can meet individual and community needs.



In an effort to provide assistance during the pandemic, Kodak entered into an agreement with New York State to supply isopropyl alcohol to aid in the production of "NYS Clean" hand sanitizer. (Office of Governor Andrew M. Cuomo)

### TESTING AND RISK MITIGATION

As the Finger Lakes Region strives to fully reopen its economy, preventing the additional spread of the virus is critical to averting another wave of human lives lost, shutdowns, and economic decline. While our region's commitment to the successful course of action set forth by Governor Cuomo to contain COVID-19 remains fervent, our country needs to continue increasing access to fast, accurate, and affordable testing.

Supply shortages impact the region and its healthcare sector every day. With reopening underway, increased demands to meet testing requirements—especially for colleges and universities, school districts, and business—outpace the available lab capacity. UR Medicine and Rochester Regional Health—the two largest testing sources in our community—face difficulties in providing specimen collection and laboratory processing for patients who are not undergoing their procedures within health system facilities due to supply shortages. Answering the increasing need for critical double-testing capacity to verify positive test results would require adding capabilities at a significant expense. Currently, third-party payers don't cover surveillance testing, forcing asymptomatic individuals to pay out of pocket.

The lack of free, available testing sites in our poorest zip codes, both in rural settings and urban communities of color, place them at a disproportionate risk of contracting and dying from COVID-19 due to co-morbidities.



A volunteer receives a nasal swab before receiving a dose of COVID-19 vaccine or placebo at the University of Rochester Medical Center. (J. Adam Fenster, University of Rochester)

The ongoing need for PPE across sectors to meet mandates and ensure safety makes securing an adequate and affordable supply difficult. The demand for PPE translates to soaring prices and quantity limits on orders. In some cases, building a PPE stockpile to meet state mandates requires adding storage space at an additional cost.

Waiting for test results conflicts with productivity. Labs cannot return results for several days, keeping people off the job and out of school. Manufacturers noted losing production time to cleaning and disinfecting workplaces and facilities.

With fewer income streams due to shutdowns and capacity limits, all sectors struggle to pay for the unexpected costs associated with COVID testing and PPE while adequately covering their daily operations. Especially hard hit are micro-communities like colleges and universities that must test faculty, students, and staff.

### RECOMMENDATIONS

**Expand testing and screening.** Prioritize sectors with essential and frontline workers and schools, colleges, and manufacturing environments where social distancing severely hampers the ability to operate at capacity. Establish more free, state-run COVID-19 testing sites like the successful drive-through test site at Monroe Community College. Expand testing options within the hardest-hit communities located in the 14608, 14611, and 14619 zip codes.

**Strengthen the domestic supply chain.** Until the release of a COVID vaccine, assist health care entities with the procurement process by incentivizing New York manufacturers to produce PPE and testing supplies to help control costs and minimize supply chain disruptions. A state stockpile of PPE would also help mitigate future shortages and maintain supply in future pandemics and emergencies.

**Increase laboratory processing capacity.** Provide labs with funding to add equipment, supplies, and staff to increase capacity and add double testing capability to screen out false positives. The waiver for remote supervision for clinical labs, which significantly increases the ability to continue COVID testing on the overnight shifts (EO 202.18), could be made permanent.

**Funding for testing and PPE.** Provide reimbursement to help offset testing and PPE expenses, including the costs associated with implementing deep cleaning and disinfecting procedures.

## DOWNTOWN REVITALIZATION

Necessary COVID-19 related shutdowns and cancellations continue to have a ripple effect throughout our communities. After the tragic events now tearing our community apart—we need to find ways to bring people together safely across our region to heal and rebuild our deep sense of community.

While downtown construction continues and the housing market remains robust, the rapid restructuring of commercial space may result in longer-term changes to the marketplace.

Early reports indicate that more than 75% of the downtown workforce continues to work from home. Prevailing thoughts are that the density and inability to socially distance during the workday undermines worker confidence. The proximity of workstations, elevator and restroom protocols, and in-person meeting requirements continue to contribute to workers' safety concerns.

As a result, employers reconsidering their workspace needs are more willing to adapt, changing their workspace layouts and no longer resisting the concept of a virtual workforce. How these shifts impact the demand for office space will become apparent as leases turn over. Also, co-working spaces may evolve again—seven locations opened in downtown Rochester

pre-COVID—and whether the current model works in this redefined marketplace remains to be seen.

Street-level commercial spaces downtown—retail stores, restaurants, and bars—have experienced enormous headwinds due to COVID. While 8,400 people live downtown, the Rochester International Jazz Festival's cancellation in June and online adaptation of September's famous Fringe Festival devastated merchants' foot traffic. As the pandemic drags on, many downtown restaurants are closed for lunch, and others have not reconfigured their space to permit outside dining. As the weather cools down, even that opportunity will be closed. Operating indoors at 25% capacity (even if customers feel comfortable) is financially infeasible for many food operations.

## RECOMMENDATIONS

**Leverage public-private partnerships.** The government at all levels is under extraordinary financial strain due to the pandemic. Working together in an authentic way with the private sector to advance a deep and meaningful post-COVID recovery will be essential, particularly in downtown Rochester. Many businesses and business organizations are ready and willing to participate and recognize that government assistance may be limited until the economy recovers more fully.

**Incorporate basic place-making principles.** As we recover from the pandemic and its economic fallout, and the community divisions revealed during the calls for racial equity in our community and its institutions, we will need to focus on what it takes to make great cities. That includes downtowns that belong to everybody and places where businesses want to invest. Good urban planning will need to undergird everything we do moving forward. Increased walkability, making better connections between downtown's 13 neighborhoods, investing in exciting street-level activity, finding ways to grow first-floor tenancy, and building Complete Streets principles into infrastructure improvements, has been proven to increase vibrancy and investment levels again and again in cities around the globe and in American places like Savannah, Syracuse, Columbus, Troy, and New Orleans.

**Satisfy the community's hunger for events.** Events and activities that bring people together in places where they can relax and following social distancing:

parklets, sidewalks, public spaces. Think differently about four-season events and leverage new site layouts to accommodate lower density when necessary.

**Create season-proof outdoor spaces.** Permit the use of electric and propane heaters for outdoor dining, facilitate festivals, and reduce the fees required for restaurants and event organizers to make sidewalk dining and outdoor community activities possible.

**Recognize arts and culture as economic development lynchpins.** The richness that arts and culture bring to communities has an economic impact. Not only artists as businesses, but in creating environments that are far more attractive to talent, tenants, companies, and real estate investors. These installations and activities reflect the community's authentic and unique character and offer powerful visual and social media messages that appeal to relocating businesses and workers.

**Move the ROC the Riverway work forward.** Creating new and meaningful public outdoor gathering places will be critical, which means we need an entity in place and empowered to program and manage these new riverfront spaces. Let's reignite the excitement that existed before COVID hit.

## PUBLIC TRANSPORTATION

COVID-19 demonstrated how the Rochester-Genesee Regional Transportation Authority (RGRTA) serves as the mobility safety net in our region. At the peak of the pandemic, when much of the community was on pause, RGRTA maintained its normal service level. Even though ridership dropped by as much as 60%, keeping that service level helped us promote social distancing on the bus and promote safe, essential travel. While that decline in ridership speaks to the number of businesses that closed and people who stayed home, it also indicates that many people in our community—essential workers and customers—rely on public transportation every day to access work, groceries, and pharmacies.

RGRTA significantly increased cleaning and disinfection protocols across transit facilities and buses to keep its employees and customers safe. They provided employees with Personal Protective Equipment (PPE) to do their jobs safely and free masks to customers to help them comply with face-covering requirements. Waived fares and required rear-door boarding supported safe distancing between bus operators and



An RTS employee disinfects a bus at the RTS Transit Center.

customers. Also, RGRTA partnered with organizations throughout the region to support those in need by delivering PPE to non-profits and more than 34,000 meals to children and families. They also gave free rides to families with infants to help them keep critical medical appointments.

Since RGRTA never stopped operating during the pandemic, it remains perfectly positioned to serve as the bridge for our region from being on pause to the new normal.

## RECOMMENDATIONS

**Funding to ensure continued mobility.** Maintain funding for public transit in the Finger Lakes Region to connect our community as the region recovers. Support the upcoming Reimagine RTS implementation, so the redesigned transit system serves as a needed engine for economic growth and success in Monroe County. Expand public transit routes to new job sites in the region to increase employment opportunities and promote sustainability.

**Continue to explore partnerships.** Help residents and workers throughout the nine-county region overcome barriers associated with transportation. Transporting workers in training programs like the Young Adult Manufacturing Training Program (YAMTEP) in Rochester to employment in the suburbs and neighboring counties creates a win-win for all.

# Challenges and Recommendations by Sector

## AGRICULTURE AND FOOD PRODUCTION

Known as the Northeast's breadbasket, the Finger Lakes Region places New York in the top three states in the US for milk production, yogurt, wine, and apples. In addition to farms and orchards, large food and beverage companies in our region include LiDestri Foods, Constellation Brands, Hood, Baldwin Richardson Foods, Barilla, Seneca Foods, Motts, Bonduelle, and Wegmans. There are 21,000 workers in the sector, and the workforce has grown by 5,000 over the past seven years.

Considering COVID-19, two overriding themes—not enough workforce and access to investment capital—emerged for the Agriculture and Food Production sector. We need both to attract companies to locate and expand here.

### RECOMMENDATIONS

**Training in agriculture and food production.** Genesee County has many programs we could replicate across the area, like the Genesee County Youth Apprenticeship program, cultivating the exchange and continuity of knowledge and know-how between the generations to ensure younger people are prepared to step in as our aging workforce retires.

**Access to capital.** A helpful strategy would include a comprehensive and integrated grant and loan program for farmers, small companies, entrepreneurs, and large companies willing to locate or grow in the region. Several programs can solve this problem. Renew Grow NY for the entrepreneurs. Expand upon the GAIN fund for farmers and small companies. Reinstitute CFA funding for larger companies and institutions.

**Better utility infrastructure.** Broadband, electrical, and natural gas utility improvements will enhance companies' competitive position and regional quality of life for our residents. Invest in utility infrastructure and upgrades for rural areas, while preserving, where possible, the valuable agricultural land and beautiful landscape that are hallmarks of the Finger Lakes Region.

**Public/private partnerships.** A more formal relationship between public and private stakeholders could enhance the robust ecosystem in the Finger Lakes. A help strategy for relationship building would be a publicly funded internship program that includes high schools, colleges, universities, and private companies. In addition to administering the initiative to help mitigate some of the disparities in economic status, the program could also help with Workforce Development programs and worker shortage problems.

## HIGHER EDUCATION

The High Education Sector within the Finger Lakes Region includes a diverse array of institutions, ranging from two-year to doctoral-granting institutions, public and private colleges and universities, and including liberal arts, comprehensive, research, and faith-based schools. There are nine private/independent colleges and universities and seven SUNY institutions in the Finger Lakes Region.

In 2018, SUNY and private higher education institutions in the Finger Lakes Region employed more than 40,000 and had a combined economic impact of \$4.72 billion. The Rochester region has more STEM degrees (science, technology, engineering, and math) graduates per capita than any other metropolitan area in the US, with over one million. Also, the region ranks 13th nationally for life science degrees per capita.



Rochester Institute of Technology (RIT) students remain active in clubs and organizations. (A. Sue Weisler, RIT)

## 2018 HIGHER EDUCATION ECONOMIC IMPACT IN THE FINGER LAKES REGION

HIGHER EDUCATION SECTOR	EMPLOYEES	ECONOMIC IMPACT
State University of New York (SUNY) service	5,128	\$1.32 Billion
Private non-profit colleges and universities	34,900	\$3.4 Billion
<b>TOTAL</b>	<b>40,028</b>	<b>\$4.72 Billion</b>

Data Source: Rockefeller Institute of Government, Commission of Independent Colleges and Universities (CICU)

## STEM DEGREES BY U.S. METROPOLITAN AREAS > 1 MILLION

METRO AREA	RANKING
Rochester, NY Metro Area	1
Pittsburgh, PA Metro Area	2
Boston-Cambridge-Newton, MA-NH Metro Area	3
Salt Lake City, UT Metro Area	4
Raleigh, NC Metro Area	5
San Jose-Sunnyvale-Santa Clara, CA Metro Area	6
Buffalo-Cheektowaga-Niagara Falls, NY Metro Area	7
Phoenix-Mesa-Scottsdale, AZ Metro Area	8
San Diego-Carlsbad, CA Metro Area	9
Hartford-West Hartford-East Hartford, CT Metro Area	10

Data Source: Center for Government Research (CGR), Integrated Postsecondary Education Data System (IPEDS)

Not only is the High Education Sector a major employer in the Finger Lakes Region, but it is also an unparalleled economic asset that provides the foundation for future economic growth. The regional economy depends on the sector for knowledge and innovation, industry and workforce resource, and anchor for the region's rich quality of life.

Research is a crucial driver of partnerships between institutions and industries that help develop workforce

talent and attract and grow businesses. The Finger Lakes Region is #1 in the US in patents per 1,000 workers. With more than \$486 million in FY19 research funding and more than \$2.28 billion in sponsored research over the last five years, the region attracts the most R&D among all areas in Upstate New York. Also, the SUNY Research Foundation (SUNYRF) is the largest comprehensive university-connected foundation in the country. Overall, research in higher education directly employs more than 5,700 individuals in the region.

The region is home to two federal advanced manufacturing institutes: the REMADE (Reducing Embodied-energy and Decreasing Emissions) Institute based at Rochester Institute of Technology (RIT) and the AIM Photonics Institute. The Laboratory for Laser Energetics (LLE) at the University of Rochester is the US Department of Energy's largest university-based research program in the country and home to the two of the largest and most capable lasers at any academic institution in the world. SUNY Geneseo has a robust partnership with the University of Rochester's LLE spanning more than 25 years. According to a recent study by the American Institute of Physics, with an average of 40 grads in the three years from 2016-18, Geneseo ranked #1 among 503 institutions at which the bachelor's degree is the highest physics degree offered. RIT is also home to the National Technical Institute for the Deaf, a federally sponsored institution that is the first and largest college in the world for deaf and hard-of-hearing students. The region's R&D assets also include six state-supported Centers of Excellence (COEs) and Centers for Advanced Technology (CATs) that provide companies across the state with access to faculty expertise, talented students, and state-of-the-art technology to help the growth of their businesses.

Higher education is at a crossroads, experiencing unprecedented challenges and monumental budget impacts due to the COVID-19 pandemic. These unforeseen budget impacts include loss of revenue, mainly for student tuition, housing, and food services; broad campus-wide refunds from the spring 2020 semester; anticipated significant state budget cuts to higher education funding; shutdown of research labs; unexpected expenses due to distance learning measures; and declines in enrollment. Additionally, colleges and universities have incurred millions of dollars in expenditures to retrofit campus facilities, provide PPE, and implement testing and surveillance for asymptomatic students and employees.

Colleges and universities in the Finger Lakes Region are reimagining operations and reinventing policies to keep their campuses and surrounding communities safe. While higher education operations have continued to deliver on our core missions, the pandemic has affected nearly every aspect of our operations and has also taken a toll on enrollments. Those impacts translate to personnel impacts, including layoffs due to changed processes, thousands of furloughed employees, halting of capital projects, and freezing of hiring apart from health, safety, and maintenance of core operations. Additionally, many colleges and universities have cut salaries and reduced benefits. After a quick pivot to all remote learning in March 2020, campuses have moved to reduced-density models for the fall semester, including a mix of online, in-person, and blended courses.

The continuance of many on-campus functions has required substantial modifications to physical spaces and general operations to meet health and safety guidelines, all of which come with high and unbudgeted costs. The transition to a sizable complement of remote instruction has also required investment in information technology.

## RECOMMENDATIONS

**Financial impact and stability for colleges and universities.** Higher education will play a critical role as New York builds back better from the pandemic. Both SUNY and private colleges and universities must receive adequate funding in the state budget. To remain financially stable, they need financial support for state-supported programs that help with infrastructure, recruitment, and research, such as the Higher Education Capital (HECap) Matching Grants Program and the state's Centers of Advanced Technology (CATs) and Centers of Excellence (COEs).

**Financial aid for students and their families.** The state needs to sustain funding for student aid programs, such as the Tuition Assistance Program (TAP), Higher Education Opportunity Program (HEOP), Excelsior Scholarship, Bundy Aid, the NYS STEM Incentive Program, as well as provide more flexible financial aid for part-time and graduate students. Funding will protect colleges from costly enrollment declines that force job cuts, keep students on a path to their degrees, and provide the regions with an educated workforce. Additionally, the state should enact policies that allow severely financially disadvantaged students

with unmet needs to access programs providing food, housing, medical, and other basic needs. Only about one-quarter of food-insecure students receive help from SNAP, and food insecurity is one of the top needs reported by students.

**Classroom enhancements and technology improvements.** Colleges and universities place a tremendous emphasis on providing a personalized and student-centered educational environment. The current stock of classrooms on campus supports students sitting physically in class to receive face-to-face instruction and requires technology enhancements to support better asynchronous instruction, simulated laboratories, and other forms of hands-on learning via online delivery. Campuses must continue to increase video conferencing capabilities by expanding site licenses for Zoom, Web-Ex, lecture capture software, and other online learning tools. There also needs to be more support for students and employees with limited access to broadband internet and equipment. State support can help colleges and universities adapt campus infrastructure to meet the current and emerging needs for program delivery in the pandemic and post-pandemic era.

**Opportunities for student placement, performances, and participation.** Students in academic programs such as Education and Health and Human Services are required to do practica in community organizations, which is difficult for many in the current environment. The availability of clinical and student-teaching placements has been limited by the pandemic and is beyond colleges' and universities' immediate control. This situation presents a business challenge, as students need to complete the placements to meet their degree requirements. In addition to finding placements, there is an opportunity for the state to review education and health care program requirements to expand opportunities during this unprecedented time.

**Attracting students and faculty to New York.** New York is home to more out-of-state college students than any other state and is the #2 destination for all international students. However, the pandemic environment has created challenges for recruitment efforts. Restrictions on travel and immigration barriers have hurt colleges' and universities' ability to hire immigrants or attract students from other states and countries and need to be addressed. Promoting New York State as a destination for higher education, focusing on the assets and strengths of the state's public and private colleges

and universities, will improve their ability to continue attracting students to New York. This recommendation is timely, especially as enrollment trends indicate that the number of college-bound students will continue to decline nationally.

## K-12 EDUCATION

The Finger Lakes Regional Economic Development Council area has 67 public school districts, inclusive of Rochester City School District, contained within four BOCES regions: Monroe 1, Monroe 2-Orleans, Wayne Finger Lakes, and Genesee Valley. The economic diversity represented ranges from low- and average-need suburban districts to average- and high-need rural districts, and small city districts to a high-need urban district. In addition, there are multiple charter schools, mostly located in the City of Rochester, and numerous private and parochial schools.

In the 2018-19 school year, public school districts in the Finger Lakes Region generated 54,000 jobs: 33,000 directly employed through the school districts and 21,000 others employed by the spillover effects of school spending. Schools produced \$2,815 million in income and generated \$137.8 million in state income tax and \$71.4 million in state and county sales tax (source: NYSASBO).

The needs of our region's children from birth through high school graduation have never been greater, yet the systems designed to serve them have never been weaker. By the nature of its mission, the K-12 Education sector bears the brunt of most cross-cutting challenges that plague our region. COVID-19 simply exacerbates these problems more.

The potential health risks of returning to the classroom, added safety practices and protocols, and the shift to online instruction has many older and at-risk teachers opting for retirement. Districts already face existing teacher shortages—especially in the early intervention, special education, and specialty areas such as speech and occupational therapies. Districts in the Greater Rochester area don't have a significant regional pipeline of new graduates and graduates of color to these fill positions.

Teachers and parents with young and school-age children struggle to maintain their jobs while having to home-school. Most didn't have established child care arrangements pre-COVID or relied on extended

family members, who can no longer safely assume that responsibility. This challenge will worsen if instruction reverts to all remote learning.

Learners who live in or near poverty throughout our region have low or no Internet access and lack the adequate technology devices to connect to online instruction. These children tend to arrive at Pre-k developmentally behind, and the school-aged ones will lose ground. Education leaders anticipate a developmental slide of approximately 2.3 years for these children without consistent supports and instruction in place.

Childhood exposure to violence, loss, poverty is a reality for today's children and no longer limited by city boundaries. The trauma-informed care and instruction being championed in our districts before COVID-19 to support children's social and emotional well-being is more important than ever, given collective trauma and unrest in our region.

## RECOMMENDATIONS

**Maintain UPK and pre-school opportunities.** Continuing Governor Cuomo's investment in UPK and other early intervention initiatives like Primary Project offered by Children's Institute will help minimize the COVID slide and support children's social and emotional well-being during these uncertain and stressful times.

**Virtual learning regulatory flexibility.** To sustain learning, coordinated state and local guidance should support developmentally appropriate instruction and make it easy for parents to home school in real-time or through replay options that fit their schedules. Consider adjusting regulations that would allow districts to use virtual assessment tools validated for reliability as they become available.

**Educator recruitment and development.** To address teacher shortages, college students in education and related licensure fields need continued access to work environments for work-based learning and internships to complete their degrees. Provide incentives for education graduates from neighboring SUNY schools to accept positions in our region. Develop a partnership with these schools to support the recruitment and retention of Persons of Color for K-12 teaching opportunities. Provide ongoing professional development in trauma-based care and instruction so educators can better understand and support students.

## MANUFACTURING

Manufacturing is a critically important sector in our region. As of 2019, the Finger Lakes is home to over 1,500 manufacturing facilities employing 64,000 workers. That figure represents 11% of the regional job base. Due to its prevalence across our nine-counties, it would make sense that with total wages exceeding \$4.3 billion annually, the sector accounts for 15% of all wages paid. The average wage for manufacturing workers is \$66,751—32% higher than the regional average for all industries. Over the last five years, wages have increased by more than \$250 million, which shows just how significant local manufacturing is for our economy.

Obstacles to productivity due to COVID-19 are a recurring theme for the Manufacturing Sector. Required shutdowns for fogging between shifts and cleaning of shared work areas and equipment means reduces production time. Workers waiting for test results lose two to 14 days on the job, making it difficult to operate at capacity. The number of productive days lost increases exponentially when a cluster of workers requires testing. Many businesses struggle with having to pay non-productive employees while they wait for their test results.

In addition to reducing the workforce due to the COVID testing capabilities, many employees fear they will catch the virus going to work. In contrast, others choose not to return because their unemployment and Plus incentive provide enough income to survive.



Instead of shutting down production facilities, Black Button Distilling shifted operations to address the shortage of hand sanitizer.

## RECOMMENDATIONS

**Payroll reimbursement.** Employers would welcome New York State assistance to cover payroll for non-productive workers due to COVID potential exposure or symptoms. Consider providing a full refund for employees whose test results were negative. Pay for additional personnel to monitor cleanliness requirements and ensure a safe workspace.

**Return-to-work incentive.** Encourage employees to get back to work so manufacturers can ramp up production and operate at full capacity.

**Commission innovation.** Commission a regional OEM to develop and manufacture a device to detect and measure COVID contamination levels on surfaces to complement COVID cleaning protocols.

**Emergency protocol.** To ensure business sectors are ready for another pandemic or national emergency, create an audit process to ensure they have procedures to ensure employee safety. Include protocols and education for employers to implement to ensure the workplace is as safe as possible and quell employee fears. Develop a protocol that could eliminate the 6-foot social distancing requirement in workspaces so factories can operate at full production.

**Consult with sector experts.** Establish “Tiger Teams” to collaborate with state agencies to ensure a safe and fair playing field for all sectors and the community. Together, they could define critical needs and review relevant documentation and recommendations regarding operations going forward.

**Support hydrogen fuel cell commercialization and infrastructure.** Rochester’s rich history of hydrogen fuel cell research and development provides a unique opportunity for this region. Attracting investment in fuel cell manufacturing, along with needed hydrogen infrastructure, is possible by leveraging existing regional assets like the Rochester Institute of Technology, Plug Power, and the General Motors facility, with its highly skilled workforce. In addition to creating good-paying jobs, hydrogen fuel cell technology can help New York reach its clean energy goals.

## NONPROFIT

COVID-19 has highlighted the essential role of the Nonprofit Sector in our communities. The strategic goals of FLREDC of reducing poverty, growing jobs, and increasing regional wealth require a strong nonprofit sector. Nonprofits are critical partners in providing services to our local communities to achieve the essential strategies of high quality of life, arts & culture, workforce readiness, and equitable access to economic opportunity. For our region to come back stronger, the recovery strategy must include nonprofits as partners in building the FLREDC framework foundation, from the ground up.

In the Finger Lakes Region alone, 740 human service nonprofits employ more than 17,000 workers, totaling just under \$460 million in annual wages.\* Vital in its mission, this sector tends to average \$522 per week in wages, nearly 50 % lower than the overall regional average of \$1,008. Nonprofit employers are substantial consumers of goods and services, adding to the sector’s economic power and contributions. At least one of every eight job opportunities in the state are for a nonprofit.

Human service organizations play a pivotal role in our regional response and recovery from COVID-19. Most human service agencies did not close when the pandemic hit and saw increases in demands for their essential services: emergency food, residential care for individuals with intellectual and developmental disabilities, services for older adults, child care, medical transportation, child abuse and domestic violence supports, shelter for the homeless, legal services, substance abuse and mental health services, and more. During the height of the pandemic, arts and culture, childcare services, and many youth-serving organizations reduced services to avoid closing.



Foodlink, Inc. has distributed emergency food supply packages through no-touch drive-thrus in response to COVID-19.

The dramatic increase in demand for human services will continue to grow as our economy declines. Calls to the regional 211/Lifeline, the central community call center, tripled during the first five months of COVID-19, with more than 51,000 calls for help compared to 17,000 during the same time last year.\*\* Nonprofit agencies are both experiencing and bracing for increased demand for services as public supports—including stimulus funds, enhanced unemployment, and moratoriums on rents and utilities—end.

In the face of mounting needs for services, the Nonprofit Sector is fragile. Recent data collected by the New York Council of Nonprofits (NYCON) indicates that up to 30% of community-based nonprofits are at risk of insolvency or dissolution by the end of 2020, largely depending on whether the state receives federal relief and whether there will be another round of Payroll Protection Program (PPP).

Funding for nonprofits is primarily through public contracts with state and local governments, private philanthropic support, and earned revenue. Canceled fundraising events and a slower stream of contributions represent a significant decrease in resources. Lost tax revenue and budget shortfalls in the public sector directly impact the ability to fund the nonprofit sector. New York State has announced a potential 20% reduction across the board of its human service contracts and has delayed payments on state and federal contracts. Many nonprofits are taking out expensive loans, lines of credit, furloughing and laying off staff, and implementing service reduction measures to survive.

Nonprofits operate as an interconnected ecosystem to support communities, so it is essential to look at the entire sector when making reductions or changes. One missing piece can have a detrimental and rippling effect. For example, a residential program would have nowhere to refer an individual if the mental health clinic closed. Reductions and changes like this also affect the more rural and less populated parts of our region—which already have fewer agencies and supports—more deeply.

\*Quarterly Census of Employment and Wages (QCEW), Q2 January 2020, of the 9-county region, includes: individual and family services, emergency and other relief services, Vocational rehabilitation services, Child day care services. Excluding healthcare and colleges and universities.

\*\*211 Counts/Goodwill of the Finger Lakes, calls for March–July in 2019 and 2020.



## RECOMMENDATIONS

**Engage the nonprofit sector as a partner for regional response and recovery.** Modernize payment procedures and processes to ensure prompt receipt of state funding and Federal pass-through funds to localities. Engage agencies about delays or reductions in state funds in aggregate, so nonprofits can best manage and preserve services. Change the practice of setting multi-year reimbursement rates that penalize nonprofits for having reserves or assets critical to weathering downturns. Exclude Payroll Protection Program (PPP) loans from NYS Calculations to remove potential harm to rates for the next two years.

**Provide flexibility on NYS contract deliverables.** Continue to support contracted agencies by providing revenue based on prior-year deliverables instead of current units of services. This support will help the Nonprofit Sector to remain viable and ready to serve, despite lower-density attendance and service requirements.

**Encourage employment by removing barriers to “sharing staff” across programs.** Waive repeat background checks by various state agencies if already completed by another agency, such as the Office of Mental Health, Office of Child and Family Services, and State Education Department. This step will allow a cleared staff member in one state program to temporarily work in a different state program within the same agency without repeating the full process.

**Allow flexibility on expenses.** Allow NYS contract reimbursement for costs incurred for staff overtime, enhanced cleaning costs, PPE, testing costs as a result of COVID-19. Provide access to funds for agencies to adjust their physical space to accommodate social distancing and safety protocols.

**Provide leadership for innovative redesign of service delivery.** The Nonprofit Sector will not look the same in the years ahead. New York State is in a leadership position to shape the nonprofit sector’s future by encouraging stronger cross-agency collaborations and supporting innovation and change. Now is the time to infuse funding into strategic planning, new business models, and leadership development for nonprofits from all sectors so they can move forward in recovery as vital partners to government. Additionally, nonprofits are challenged to find the resources required to

engage the Human Services help needed to interpret and support the new COVID-related workforce requirements and need a centralized support and resource center, which may also be of significant help to other sectors.

## OPTICS, PHOTONICS, AND IMAGING

The Finger Lakes Region is the heart of America’s Optics Industry. For 166 years, the leading technology developments and innovative products for the most demanding applications—for the Department of Defense, for prime contractors, biomedical and research companies and universities, and Big Tech—came from our region’s optics manufacturers. Today, over 120 companies in the area, employing about 17,000 people, sell optics and optics-based products in every vertical industry market, the Optics, Photonics, and Imaging (OPI) ecosystem is the envy of the world.

Multiple OPI members responded with confidence to COVID-19 impact surveys conducted from April–September: OPI business was strong, and, if the existing business conditions continued, the sector could sustain itself indefinitely. Highlights include that eligible OPI companies applied for and received funding from the Federal CARES Act Payroll Protection Program. By the end of summer, a mere 3% of companies said they had renegotiated bank loans. 69% indicated that orders were the same or better than this time in 2019. 52% reported having customers ask to delay existing orders. In August, 70% were still hiring.

The Monroe Community College Precision Optics Program, the only one of its kind in the nation, helps provide the new talent. New York Photonics companies have made a significant investment in the program, raising more than \$2.5M to support its growth, with additional investment scholarships, internships, co-ops, and time and equipment donations among regional high schools teaching dual-credit optics with the college.

While OPI remains healthy and robust, the lack of face-to-face meetings among members, new customers, and the ability to attend international conferences has stymied innovation.

## RECOMMENDATIONS

**Provide capital.** Consider long-term, low-interest loans to purchase capital equipment that would be very competitive with commercial banks. Offer corporate tax credits to free up money for continuing operations in 2021.

**Talent acquisition.** Earmark funds for the MCC Precision Optics Program to support training and development for students.

**Global New York State trade expansion program.** Additional dollars in 2021 to assist small businesses in attending international conferences so OPI salesforce can cultivate new international customers.

## RETAIL AND SERVICE

Among the hardest hit resulting from the COVID-19 pandemic, the Retail and Service sectors continue to struggle with capacity restrictions, changes in customer shopping habits, and the unknown that lies ahead. While most are open for business, owners hesitate to pursue additional funding as they don’t know what the fall/winter holds regarding the virus and potential shutdowns. As a focal point of community and downtown revitalization efforts, these sectors warrant attention moving forward with a recovery plan for this region.

Opening for business means complying with New York State COVID-19 sanitation mandates and absorbing the added expense of Personal Protective Equipment (PPE) supplies. Customers remain cautious about in-store visits. Businesses struggle to communicate that they are COVID-19 safe; many spent their limited resources to increase their online presence to convey their safety efforts and reassure customers.

Many owners in this sector struggled to get timely information on regulations and reopening procedures because things changed daily, sometimes hourly. While the Regional Control Room and the New York State website provided answers and information, local communities and trade associations did their best to provide information to those that needed it most.

Keeping up with a loan and commercial rental payments is also a burden for those who don’t yet have a healthy revenue stream. Limited appointment availability at local banks hindered or prevented their ability to process federal PPP loan applications. Traditionally, the

same business owners have difficulty accessing funding programs available to high-tech and manufacturing facilities in most economic development initiatives.

Filling positions continues to be a challenge. Many employees are not college educated and will have difficulty returning to the workforce if businesses continue to decline—and ultimately fail—due to pandemic restrictions.

## RECOMMENDATIONS

**Workforce development.** NYS Department of Labor can offer more job fairs, local job posting sites, and information about attracting the right candidates.

**Additional funding.** Continued Paycheck Protection Program (PPP), Economic Injury Disaster Loans (EIDL) assistance from the Small Business Administration would be helpful, and small business relief programs offered through Local Development Council’s (LDCs) or Industrial Development Agencies (IDAs) to use as grants or loans to local businesses, like the New York Forward Loan Fund. Funds to supplement current programs provided by local municipalities are needed. Allow LDCs or IDAs to disperse funds, so banks are not overwhelmed. Additional funding to help small businesses acquire cashless transaction technology.

**Local PPE supply banks.** Help business owners purchase safety supplies at bulk prices without a large quantity buy to meet state safety mandates. Ontario County Finger Lakes Visitor Connection has a supply bank and will need funding to be sustainable.

**One-stop marketing shop.** Create an online store that offers affordable promotional items like window decals, tent cards, templates for e-newsletters, and more. The articles would carry a consistent regional message to shop local/shop small for business owners to customize with their logo and go!

**Centralize information.** One access point for online information and resources would be a valued resource for busy business owners. Provide municipalities with a website interface or link to use on their sites. Open the regional control room concept to include one or two key individuals from each municipality.

## SOFTWARE/IT

Relevant findings from the 2019 Finger Lakes Strategic Plan recommended adding the Software/IT sector as a key regional industry pillar, based upon its high growth potential and strong interconnectivity to other pillars.

Software/IT companies—mainly B2B—are more resilient to economic downturns and inherently friendly to remote working conditions than capital-intensive industries. Also, these companies can scale up quickly to a global audience. New software companies can launch and be revenue positive with a relatively small investment (< \$100k) and in a short timeframe (< 1 year). With an average annual wage of \$103,000 in the Finger Lakes Region, our low cost of living translates to a very high quality of life for remote employees. Our average wages are still considerably lower than national averages for employers, making our region an attractive place for out of state companies to place satellite offices. This strategy works; witness companies like Datto, Live Tiles, Catalant, and others choosing to operate here.

Local industries formed the FLXDigital work group to help attract businesses and develop a technology hub in downtown Rochester. NextCorps has an emerging cluster of 40 software startups in its incubator that could yield significant mid- and longer-term results.

While the business sector is more resilient to the current COVID-19 environment, local Software/IT companies and startups need to replace sales declines due to the pandemic. Ideally, local customers would be the best customers.

Our region has a large amount of available tech talent coming out of our local colleges and universities to support the rapid growth of locally based firms. Yet, currently, only 34% of college graduates remain here.

### SOFTWARE/IT INDUSTRY AND LABOR OVERVIEW\* Nine-County Rochester/Finger Lakes Region

TOTAL # OF ESTABLISHMENTS	747
TOTAL # OF JOBS (2019)	11,228
PROJECTED JOB GROWTH (2020-2030)	+7.3% [national: +17.6%]
AVERAGE EARNINGS PER JOB	\$103,725 [national: \$153,876]

\*Data provided by Monroe Community College, using Q3 20202 Emsi industry data set, includes QCEW, County Business Patterns, BEA, NIOEM, and others. Based upon 20 NAICS codes related to computers, software, information technology

## RECOMMENDATIONS

**Seed the formation of new software companies.** Build upon the already emerging cluster of 40 startups downtown by funding a software-focused accelerator or ‘startup studio’ to accelerate new company formation.

**Grow existing software companies and attract new ones.** Encourage or incentivize larger firms in the region to buy from companies close to home whenever possible to bolster local growth. Help companies add jobs through programs like Economic Gardening, especially to help them increase customers and lost revenues from COVID. Double down on attraction efforts funded by ROC2025, especially with a focus on software companies, to build on the success like Datto and Catalant.

**Develop talent in our region.** To improve local graduate retention to 50% by 2025, develop a coding school to help local people from all walks of life learn software skills that can prepare them for a high-paying, long term career in the Software/IT sector. Collaboration between the FLXDigital work group and organizations like ROC2025 strives to train and retain future technology workers with help from workforce development organizations like Careers in Code, Catalyte, Rochester Institute of Technology, and the University of Rochester.

## TOURISM AND HOSPITALITY

The business of tourism and hospitality is vital to the Finger Lakes Region economy, generating an annual economic impact of \$1.7 billion and more than 32,000 jobs before the pandemic. This spending includes hundreds of millions of dollars in local and state tax revenue through sales and bed tax collection each year.

There is notable ‘brand equity’ in the name Finger Lakes. We are a highly recognizable destination that brings visitors into the region to experience the quality of life we offer. A powerful workforce development tool, tourism often seeds relocation, business development, and investment in the area.

Since 2010, the Finger Lakes Region has been mentioned 16 BILLION times across social media and stories. Besides, the brand “Finger Lakes” as a vacation destination has appeared in countless local, national, and international publications, including *The New York Times*, *Wall Street Journal*, *Travel +*



A family enjoys Grimes Glen Park in Naples, NY. (Finger Lakes Visitors Connection)

*Leisure, Food & Wine, Conde Nast Traveler, Bloomberg Businessweek, Luxury Escapes, Toronto Sun, Redbook, and Hemispheres Magazine.* This extraordinary level of tourism promotion is an economic generator for the region.

While official figures for the pandemic’s impact on the tourism and hospitality industry are not yet available, the devastating effects will continue to have far-reaching economic detriment from lost jobs, tax revenue, and businesses. Rebuilding and reimagining the tourism and hospitality industry is critical to the Finger Lakes Regional economic ecosystem and financial health. The restaurants, arts, culture, museums, recreational and outdoor experiences, and much more also contribute to the overall quality of life for the nine-county Finger Lakes Region residents.

Businesses are not going to survive if the visitor base does not return. New restrictions and guidelines, infrastructure retrofits, adequate PPE for staff, and maintaining a high level of safety and security within their establishments leave business owners with little time, money, and energy to promote their business and encourage visitation.

Without a comprehensive relief package specifically for restaurants, 63.6% of New York restaurants said they are likely to close by the end of the year, according to the most recent survey of 1,042 restaurateurs from the New York State Restaurant Association (NYSRA).

Tourism and hospitality businesses are in peril and in no position to plan for long-term recovery. The sector asks for immediate actions by New York State to provide critical support to fuel recovery.

## RECOMMENDATIONS

**Fund marketing for regional tourism.** An allotment of promotional resources to rebuild the tourism and hospitality industry will, in turn, attract new visitors and customers to the region. Continue the I LOVE NY Matching Funds Grant Program for the professional tourism promotion agencies in the area to spread the word compellingly to bring customers and visitors back. Alter Market New York Grant guidelines so awardees can use the funds to market to residents within the Finger Lakes Region.

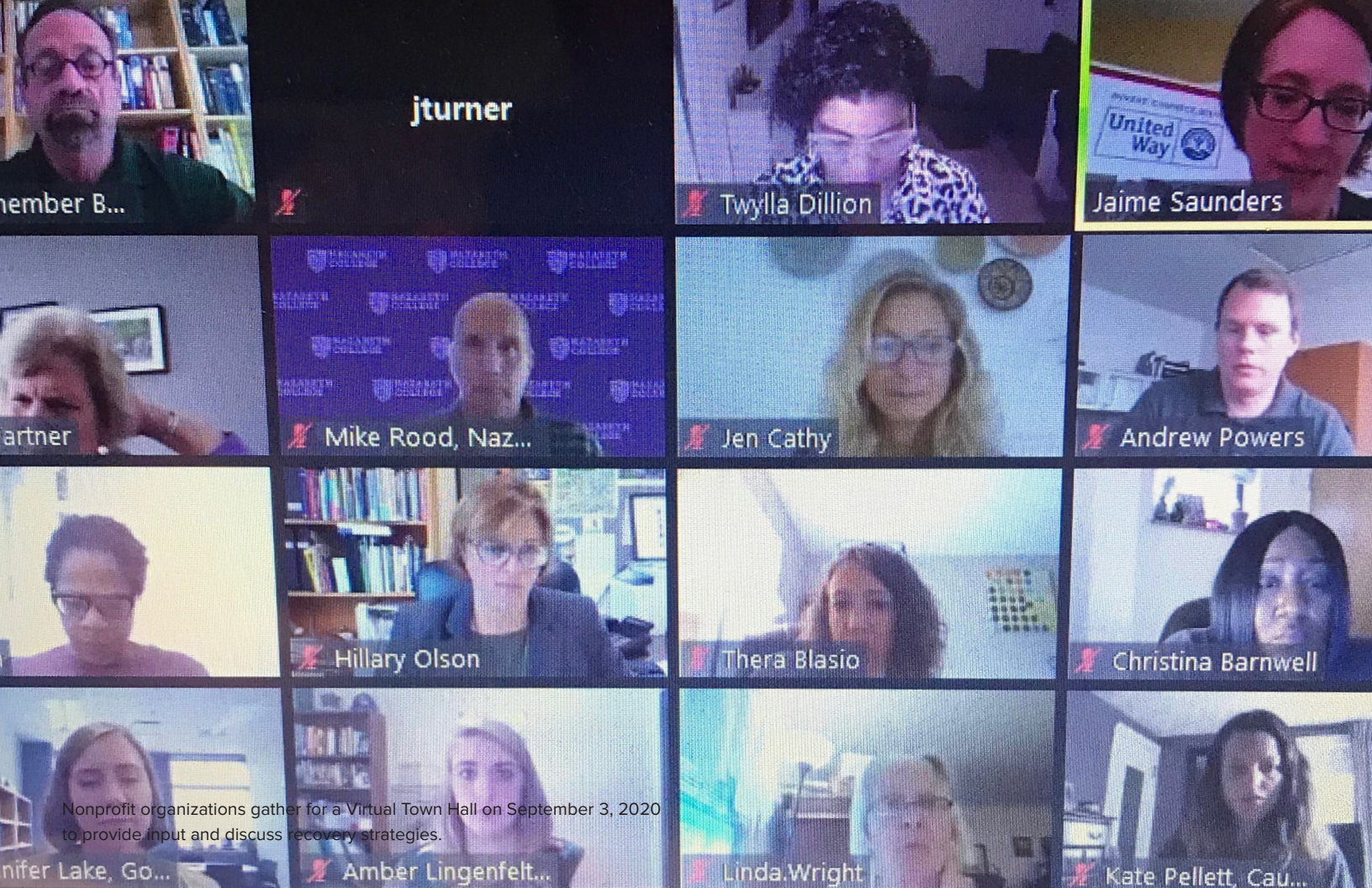
**Flex the rules.** Restaurants, bars, and the craft beverage industry need more room to adhere to social distancing and reduced capacity requirements while finding new ways to serve visitors to generate cash flow and keep their doors open. The NYS Liquor Authority could continue with temporary (to permanent) privileges of inter/intrastate shipping of NYS beer, delivery, curbside pickup, alcohol sales to-go. The state could increase event/gathering sizes in increments of 50 people (with data support) to allow restaurants and hotels to host social events, meetings, conventions, and other gatherings.

**Enable cross-border travel between Canada and NYS.** The perception of New York and its safety is very high among Canadian residents, a significant market and traveler demographic for the statewide tourism and hospitality industry, especially in the Finger Lakes Region. Welcoming back Canadian visitors would be a catalyst for recovery.

**Send direct financial relief.** Until cash flow returns to cover overhead and necessary expenses, provide rent relief for commercial tenants—advocate for prompt payment of business interruption insurance claims for New York State small businesses.

**Cap delivery fees.** Delivery has become an essential function of the restaurant industry to make up for fewer dine-in customers due to reduced capacity protocol. To keep more cash in owners’ pockets until restaurants can open fully, cap the percentage third-party delivery services like GrubHub and Door Dash can charge in New York State.

**Keep guidance coming.** Businesses appreciate the Governor’s leadership. Providing additional time to adapt to new regulations and compliance would help to ensure a steady recovery.



# Public Outreach and Engagement

**G**iving stakeholders a voice in the programs, initiatives, and policies that impact the Finger Lakes Region is our priority. Seeking sector, geographic, racial, and socio-economic diversity and inclusivity are important to informing our work. We want to ensure we provide Governor Cuomo with the information and recommendations he needs to determine how to move our regional and statewide COVID recovery forward.

With an ambitious timeframe and need for collaboration from a safe distance, the Finger Lakes Regional Economic Development Council (FLREDC) rallied businesses, organizations, and individuals to engage with their communities, peers, and neighbors about the economic effects of COVID-19. These work group participants used virtual and traditional tools for community engagement.

### VIRTUAL PUBLIC INPUT SESSION

In keeping with the Finger Lakes Regional Economic Development Council's commitment to public engagement, on August 13, the council held a virtual public input session attended by nearly 200 participants from throughout the region. FLREDC co-chairs Bob Duffy and Denise Battles hosted the session and spoke to participants about the importance of shared input and working together on the region's economic recovery.

FLREDC dedicated most of the meeting to hear from attendees, who shared their thoughts on the impacts of the COVID-19 Pandemic on our regional economy, and the issues we should focus on as our economic recovery picks up steam throughout the coming months. The session generated significant feedback that helped inform this report, from thoughts on challenges we face to ideas on short-term and long-term growth opportunities.

### EMAIL SURVEYS

Many of the work groups emailed surveys to get a quick sense of their communities' specific issues and received an enthusiastic response. Some examples include:

- Visit Rochester sent a survey to its membership as did the Genesee County Chamber of Commerce Tourism Office, Visit Finger Lakes (Ontario County) Seneca Lake Wine Trail, etc.
- The Child Care Sector collected input via email after extensive outreach by the Child Care Council, the United Way of Greater Rochester, Common Ground Health, and Children's Institute.
- NextCorps ran a survey among people working in the software and IT sector in the Rochester area to identify the impact of the economic crisis from COVID-19 on their organizations, and their recommendations for how the region can bolster the software and IT sector in the near-to-long term.
- Monroe County, the County's Department of Planning and Development, the Greater Rochester Chamber of Commerce, and Greater Rochester Enterprise released a COVID-19 Economic Impact survey for area businesses and other community members designed to capture the needs and concerns of Monroe County businesses related to the COVID-19 Pandemic. The County posted the survey on various social media channels and sent a press release announcing the survey's launch. Responses from approximately 125 completed surveys helped the County identify initiatives to support businesses in areas related to reopening, including retaining and hiring workers, policies for remote and in-office staff, childcare needs, personal protective equipment needs, and other issues that arose.

PART FIVE

# Engagement

**SOCIAL MEDIA AND VIRTUAL TOWN HALLS**

Social media helped some work groups encourage broader participation, while video conferencing technology helped them solicit feedback from impacted communities:

- The Nonprofit sector, for example, used virtual meetings, email, and social media to engage 204 community organizations (266 individuals) from the nine-county FLREDC area. The outreach targeted a broad range of providers, including faith-based and neighborhood-led groups. It focused on the needs of smaller providers not represented in high-level discussions and nonprofit providers that are led by and staffed by people of color and serve minority and marginalized groups.
- Assembly Member Harry Bronson and United Way of Greater Rochester held two virtual working sessions. On August 31, 2020, the first input session comprised a primary audience of 16 private foundations, funders, and capacity builders out of 21 organizations invited. On September 3, 2020, the second session had over 200 attendees, representing 190 unique organizations from six sectors and nine counties. Sectors included: Arts & Culture (15%), Disability Services (9%), Faith-based Organizations (3%), Resident-Led Neighborhood Organizations (1%), Health and Human Services (includes legal, financial, aging, children & youth, mental health & substance abuse) (45%), and Residential Services (youth and adult-serving) (3%). 23% of organizations self-reported in the ‘other’ sectors category, including Advocacy, Capacity Building, Emergency Services, Environmental, Government, Leadership Development, Libraries, and Workforce Development. Attendees represented Genesee, Livingston, Monroe, Orleans, Ontario, Seneca, Wayne, Wyoming, and Yates counties.
- The United Way of Greater Rochester engaged their existing Child Care Task Force to gather information on the issues surrounding child care quickly. Created in April 2020 in direct response to needs that surfaced due to the COVID-19 Pandemic, the task force expanded its circle to include more representatives from the nine-county region to include different geographic perspectives and collect additional input. The task force held two meetings in September and gathered feedback outside of the meeting via email.

**PROFESSIONAL CONNECTIONS AND ASSOCIATIONS**

- The Healthcare work group gathered information from regional providers and statewide associations, including the Rochester area hospital and health systems, county medical societies, and other regional health providers.
- Donned in a mask for safety, a member of the Retail and Service work group spends her afternoons chatting with small business owners and listens to their concerns and success. Their stories, along with dozens of responses to an email survey circulated, informed her report.

**MINING EXISTING PLANNING EFFORTS FOR DATA AND RESOURCES**

- The K–12 work group accessed the input available as part of each school’s required Re-opening Plan. Each school district had already held at least three public input sessions to gather feedback from parents and community members in August regarding the reopening of schools, the changes to instructional modality, and the impact of COVID-19 on the school district’s planning. The K–12 group also reviewed the data from the FLREDC Virtual Public Input Session on August 13.
- Colleges and universities in the Finger Lakes Region formed committees, task forces, and other teams consisting of leadership, faculty, staff, and students to begin planning for an on-campus fall semester in Spring 2020. They focused on teaching and learning, student engagement and success, campus operations, and employee relations. Planning teams met regularly to provide information, updates, and recommendations with an opportunity for input and questions from students, parents, faculty, staff, and community partners.
- Community partners made significant contributions to the reopening plans of colleges and universities. Throughout this global Pandemic, the Monroe County Department of Public Health provided invaluable support in response to this public health crisis. The University of Rochester Medical Center and Rochester Regional Health provided valuable education and support to inform planning and policies.

- The Healthcare work group, for example, derived guidance from Common Ground Health’s My Health Story Survey, which received input from nearly 7,000 Finger Lakes Residents in 2018. These respondents included almost 500 Latinos and 1,000 African Americans, 1,300 persons over the age of 65, and 1,200 people with household incomes less than \$25,000 per year.

- ROC the Future’s report, Digital-Divide-in-Rochester-Updated-Aug.-2020, provided information on the digital divide’s impact in the Rochester area based on examining census data.

# Sector Work Group Members

Thank you for being the consistent, driving force behind projects throughout the Finger Lakes Region.

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