



# Comprehensive Economic Development Strategy 2022 - 2026



Prepared by:





# CONTENTS

Introduction .....	(3)
Summary Background .....	(5)
Economic Recovery & Resilience .....	(7)
Equity & Inclusion .....	(8)
Key Policy Considerations .....	(9)
Strategic Framework .....	(10)
Action Plan Matrix .....	(14)

## Appendices

A: Economic Base Report .....	(28)
B: Planning Workshop Summaries.....	(40)
C: Stakeholder Survey Summary.....	(48)
D: Alignment with Other Plans.....	(51)
E: SWOT Analysis.....	(52)
F: Resiliency & Post Pandemic Toolkit.....	(53)



The Erie County Industrial Development Agency (ECIDA) provides economic assistance and support to businesses throughout Erie County and acts as the County's primary economic development entity. Due to its ongoing relationship with the U.S. Economic Development Administration (US EDA), and in particular its US EDA funded revolving loan program, ECIDA has the responsibility of keeping and updating a Comprehensive Economic Development Strategy (CEDS) for Erie County.

The map displays the following towns in Erie County, New York:

- Grand Island
- Tonawanda
- Kenmore
- Buffalo
- Blackawana
- Blasdell
- Hamburg
- Evans
- Angola
- Farnham
- Brant
- Cattaraugus Indian R.
- Gowanda
- Amherst
- Clarence
- Newstead
- Williamsville
- Getz
- Depew
- Lancaster
- Alden
- West Seneca
- Elma
- Marilla
- East Aurora
- Aurora
- Wales
- Holland
- Concord
- Sardinia
- Springville
- Collins
- North Collins

Neighboring areas include:

- NIAGARA (North)
- GENESEE (East)
- WYOMING (South)
- CATTARAUGUS (South)
- CHAUTAUQUA (West)
- LAKE ERIE (West)

**Legend:**

- Erie County (Blue outline)
- Buffalo (Dark grey fill)
- Other Urban Areas (Hatched pattern)
- Rural Areas (Light grey fill)

**Inset Map:** Shows Erie County's location within the state of New York.



# ABOUT THIS PLAN

The heart of this CEDS is the Action Plan Matrix, which represents the culmination of a broad strategic planning process that led to stakeholder consensus on goals, measurable objectives, and prioritized tasks. That process included the SWOT analysis, the development of an economic base report, a review of other relevant regional and local plans, a capacity assessment, stakeholder information surveys, an Opportunities & Challenges Workshop, and a Resiliency Workshop, plus continuous guidance from the CEDS Strategy Committee. The Action Plan Matrix is built around four key goal areas: infrastructure, business support, quality of life, and regional collaboration.

ECIDA took an asset-based approach to creating a strategy that generates economic progress over the next five years, incorporating actions to address equity and the economic resiliency of the County. This CEDS builds on existing relevant planning documents and is grounded in the current capacities of ECIDA and its partners.

This plan lays out the strategic direction that ECIDA and its partners will pursue from 2022-2026, along with performance measures that will be used to evaluate outcomes—that is, the impact of the CEDS' implementation on the County's economy. Following that, this document presents the Action Plan Matrix, organized around the four key goal areas and their respective objectives, and including prioritized actions, partner roles, general timeline, level of cost, and potential funding sources.

## CEDS STRATEGY COMMITTEE

**Peter Ahrens**, Buffalo Niagara Manufacturing Alliance  
**Felicia Beard**, Community Foundation of Greater Buffalo  
**John Cappellino**, ECIDA  
**Dan Castle**, Erie County Department of Environment & Planning  
**Cody Clement-Sanders**, Westminster Economic Development Initiative  
**Peter DeJesus**, Buffalo Area Labor Federation  
**Kelly Dixon**, Greater Buffalo Niagara Region Transportation Council  
**Stephen Gawlik**, Empire State Development  
**Lisa Hicks**, City of Buffalo – Planning  
**Patrick Kaler**, Visit Buffalo Niagara  
**Tom Kucharski**, Invest Buffalo Niagara  
**Ken Kujawa**, National Grid  
**Marnie LaVigne**, Launch NY  
**Brendan Mehaffy**, City of Buffalo Office of Strategic Planning  
**Brandye Merriweather**, Buffalo Urban Development Corporation  
**David Mingoia**, Amherst IDA  
**Christina Orsi**, John R. Oishei Foundation  
**Derrick Parson**, The Exchange at Beverly Gray  
**Seth Piccirillo**, Buffalo Niagara Partnership  
**Willems Ransom**, Western New York Sustainable Business Roundtable  
**Angela Rossi**, Town of Amherst  
**William Smith**, Southtowns Community Enhancement Coalition  
**Geoff Szymanski**, Erie County Workforce Investment Board  
**Craig Turner**, World Trade Center Buffalo Niagara  
**Paul Vukelic**, Try-It Distributing Co.  
**Maria Whyte**, Erie County



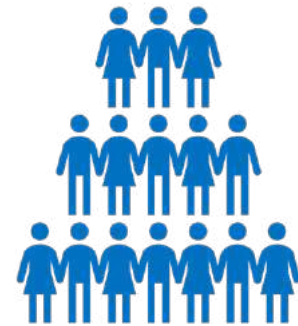
# SUMMARY BACKGROUND

*For additional detail on the economic conditions of Erie County, see Appendix A: Economic Base Report.*

## Demographics

Despite projections to the contrary, the 2020 Census showed a strong growth pattern for Erie County with 954,236 residents, up 2.9% from 2010. According to the American Community Survey, the County's median age is 42.2, almost two years older than the State's median age. Over 20% of the County's residents possess a Bachelor's Degree (about 2% below the national average), and 11.9% hold an Associate's Degree (6% above the national average).

The County's median household income is \$58,945, over \$13,000 lower than the New York State figure. However, there are large disparities in income in different parts of Erie County, with lower incomes in the City of Buffalo and higher incomes in suburban and rural areas. Throughout Erie County, 14% of households live in poverty, roughly the same as the statewide figure of 13.9%. Like many areas of the country, the coronavirus pandemic and related business shutdowns in 2020 caused significant job losses, impacting every major industry, but especially leisure and hospitality. Unemployment stood at 4.7% in September 2021, up from a pre-pandemic rate of 3.6% in 2019, but down from a peak in 2020.



954,236  
Residents



42.2  
Median Age



\$58,945  
Median Houshoeld Income

# SUMMARY BACKGROUND

*For additional detail on the economic conditions of Erie County, see Appendix A: Economic Base Report.*

## Industry

The Government sector accounts for 16.3% of jobs in Erie County, followed by Health Care and Social Assistance; Retail Trade; and Manufacturing. The County has uniquely high concentrations of jobs in the Junior Colleges; Electrical Equipment Manufacturing; and Nonferrous Metal (except Aluminum) Production and Processing industries. The tourism industry is also a sizable employment driver (32,395 jobs in 2019 according to Tourism Economics) when accounting for tourism-related positions across multiple industries. While these jobs were particularly hard hit during the pandemic, tourism will likely continue to be a driver of the economy and is anticipated to fully recover.

The County lost about 30,147 jobs from 2011-2021, but much of that loss can reasonably be tied to the impacts of the pandemic, since the County had gained 17,862 jobs from 2011-2019. Over the next ten years, the County is projected to add 1,677 jobs overall, with the largest gains in the Health Care and Social Assistance; Government; Finance and Insurance; and Transportation and Warehousing sectors. Amid this growth, which is significantly slower than the projected state growth rate, the County's Retail Trade sector will continue to shrink.

Real estate data shows that market rents for industrial space currently stand at \$6.14 per square foot, and the industrial vacancy rate has begun to recover after a spike in 2020. Delivery and absorption of industrial space has been somewhat volatile, but generally industrial space is absorbed quickly. This in conjunction with recent studies and qualitative evidence shows that there is a shortage of industrial space in Erie County. The same is not true of office space, which seems to consistently have greater supply than demand.

Employment by Sector in 2021				
NAICS & Description		Erie County		
		2021 Jobs	% of All Jobs	Payrolled Business Locations
90	Government	74,233	16.3%	649
62	Health Care and Social Assistance	67,678	14.9%	2,564
44	Retail Trade	45,319	10.0%	2,966
31	Manufacturing	41,092	9.0%	1,003
72	Accommodation and Food Services	29,607	6.5%	2,208
52	Finance and Insurance	29,292	6.4%	1,193
54	Professional, Scientific, and Technical Services	27,073	5.9%	2,297
56	Administrative/Support and Waste Mngmt. and Remediation Services	21,962	4.8%	1,904
81	Other Services (except Public Administration)	20,526	4.5%	2,514
23	Construction	18,058	4.0%	2,093
48	Transportation and Warehousing	17,328	3.8%	646
42	Wholesale Trade	17,191	3.8%	1,222
61	Educational Services	12,983	2.9%	396
55	Management of Companies and Enterprises	11,709	2.6%	232
53	Real Estate and Rental and Leasing	6,843	1.5%	859
71	Arts, Entertainment, and Recreation	5,962	1.3%	403
51	Information	5,237	1.2%	306
11	Agriculture, Forestry, Fishing and Hunting	1,442	0.3%	93
22	Utilities	969	0.2%	30
99	Unclassified Industry	555	0.1%	999
21	Mining, Quarrying, and Oil and Gas Extraction	188	0.0%	17
<b>Totals</b>		<b>455,245</b>	<b>100.0%</b>	<b>1,696</b>

*Source: Emsi. Payrolled business locations are for the year 2020.*



# ECONOMIC RECOVERY & RESILIENCE

Economic and community resilience is incorporated throughout the matrix, with several actions reinforcing the County's resilience through enhanced economic vitality, connectivity, and capacity building.

In addition to a series of resiliency-focused interviews with key stakeholders, ECIDA hosted a facilitated planning session in which stakeholders identified the most likely and impactful economic shocks for the County and then brainstormed actions that would prevent, reduce impacts, and/or respond to those shocks. The resiliency strategies incorporated into the Action Plan Matrix were determined to be the highest priority steps the County and its jurisdictions can take to 1) enhance the County's ability to avoid, reduce the impacts of, or withstand future shocks (steady-state planning), and 2) improve the County's ability to respond to future shocks (responsive planning).

As reflected in this CEDS, it became clear that a regional organization would best serve the County's resiliency needs by making cross-organizational and cross-county connections, building relationships, and creating and enhancing communication networks that can regularly disseminate information and readily be called on in times of crisis. Additional resiliency-related actions discussed in interviews and the workshop include repairing and modernizing infrastructure, preparing a resilient workforce, and improving public transportation that enhances community connectedness.

# EQUITY & INCLUSION

The “Equity & Inclusion” topic stems from the recognition that people and communities do not all start from the same place and have different circumstances and needs. Therefore, it is important to allocate resources and initiatives that are appropriate for each community or group of individuals. ECIDA intentionally incorporated equity into all stages of the CEDS development process by including several equity-focused stakeholders on the CEDS Strategy Committee and working group, reviewing and incorporating existing equity-focused planning documents into the CEDS, and interviewing equity-focused stakeholders.

Throughout the CEDS process, equity concerns were identified throughout Erie County. In many surveys, interviews, and both planning workshops held, stakeholders from rural communities expressed that they feel disconnected from the rest of the County and their needs are not always considered or supported by Erie County’s economic development initiatives. Within the City of Buffalo, there is a healthy presence of various immigrant communities who have different needs and barriers when it comes to economic prosperity and responding to the adverse effects of economic shocks. Detailed discussions were held with stakeholders to understand what mechanisms may be useful to these immigrant communities.

In addition to researching plans and interviewing stakeholders, equity considerations shaped the Economic Base report (Appendix A) by comparing the socioeconomic characteristics of the City of Buffalo, other urban and suburban areas, and rural areas of the County to show the disparities between each. For example, there are significantly more households with low incomes in the City of Buffalo compared to other communities.





# KEY POLICY CONSIDERATIONS

Throughout the stakeholder engagement process, a few key policy items were identified as barriers to advancing economic development in Erie County. These items, or perceptions thereof, will need to be addressed to truly implement the priorities of this plan.

First, there is a common perception that economic development and community development are separate, and as such economic development resources should not be used to advance community development goals. However, it is becoming increasingly clear that these two concepts are inherently intertwined and can no longer be viewed as separate issues in Erie County. As workforce shortages continue on, **Erie County must compete for workforce** in order to sustain and enhance its economy. Initiatives traditionally considered to be community development, such as housing, poverty, childcare, transportation, recreation, etc., are critical to enhancing economic conditions through talent retention and attraction. This CEDS intentionally recognizes and connects **economic and community development activities as interdependent**, and policy makers and funders will need to do the same in order to make comprehensive progress.

Second, Erie County is facing a critical shortage of shovel-ready industrial sites and buildings. Business attraction efforts are hampered by this shortage, and prospects are being lost to communities that can offer ready industrial space. Invest Buffalo Niagara's recent analysis of industrial sites in the region quantifies the need for more **speculative development of industrial sites and buildings**. However, many funding agencies and policy makers are hesitant to support speculative development. The common question is "What if you build it and they don't come?", but the situation in Erie County is to the point that the answer is "If we don't build it, they certainly won't." Without funding and support to expand infrastructure, prepare sites,



remediate brownfields, and build/renovate facilities for future use, business attraction will come to a halt.

Third, recent experience has shown the importance of **logistics infrastructure** to economic functioning. Supply chain disruptions have caused new challenges and increased costs for businesses and organizations across the country, and closures at the Canadian border have been particularly costly to Erie County's economy. There are various logistical enhancements that would improve Erie County's economic competitiveness and resilience moving forward. Local partners should continue to work with regional, state, and federal entities to advocate for additional funding and continued prioritization of logistics projects

Finally, **Opportunity Zones** were created to incentivize capital investment in distressed communities for the purpose of economic development. The program has been successfully utilized by projects in some parts of the State and country, but at this time has limited remaining benefit or applicability for Erie County due to the program structure, 2026 sunset, and decoupling of certain benefits in New York State. As such, while Opportunity Zones were a consideration in relation to this CEDS, it was determined that ECIDA's existing efforts in relation to the zones is sufficient and that further dedication of time and resources under this plan was not the highest and best use of ECIDA's limited capacity.



## STRATEGIC FRAMEWORK

The Action Plan Matrix is built on a strategic framework of four goals areas: infrastructure, business support, quality of life, and regional collaboration. These goals and objectives capture elements of community and economic development that are critical to advancing economic growth, vitality, and resilience. Together with clear outcome measures to gauge progress and success, this strategic framework will provide direction to Erie County's various partners and stakeholders over the next five years. Based on feedback from stakeholders during interviews and workshops, the creation of a CEDS Implementation Committee is among the most important actions that ECIDA can dedicate capacity to in order to ensure ongoing progress, communication, and collaboration around the goals and objectives in this plan.

**GOAL: INFRASTRUCTURE**

**GOAL: BUSINESS SUPPORT**

**GOAL: QUALITY OF LIFE**

**GOAL: REGIONAL COLLABORATION**



# GOALS

## GOAL: INFRASTRUCTURE

**Erie County has strong, future-ready infrastructure that effectively serves residents, businesses, and visitors.**

### Objectives:

- Ensure safe, sufficient and productive access to water through expansion and modernization of **water and wastewater** systems.
- Expand access to **broadband** internet services to ensure equitable access to employment and educational opportunities.
- Build Erie County's **energy** systems to be sustainable and resilient, and to be leveraged for economic development.
- Improve community connectivity, vibrancy and equity through enhanced **transportation** systems.

## GOAL: BUSINESS SUPPORT

**Erie County is properly resourced and able to support all entrepreneurs, businesses, and prospects.**

### Objectives:

- Expand **access to capital and resources** for existing, entrepreneurial and startup businesses.
- Create more **shovel-ready industrial and commercial sites** to allow for higher conversion of business attraction prospects.
- Ensure access and opportunity to all of Erie County's diverse **workforce**.
- Strengthen and support **target and tradeable industry sectors**, particularly agriculture, manufacturing, and tourism.
- Identify, assess, and build upon **emerging and community-based industry sectors**.
- Prioritize **logistics** as a driver and key component of economic activity.
- Foster a smooth flow of people and goods across the **U.S.-Canadian border**.

# GOALS

## GOAL: QUALITY OF LIFE

**Residents and working families are empowered and supported in achieving a stable, sustainable, and thriving quality of life.**

### Objectives:

- Residents and families in Erie County will have **safe, affordable housing**.
- Residents and families in Erie County will have greater **financial security** through broader employment opportunities and enhanced benefits.
- Residents, families, and workforce in Erie County will have access to quality, **affordable childcare and elder care**.
- Enhance **recreational opportunities** for the benefit of residents and visitors alike.

## GOAL: REGIONAL COLLABORATION

**Development efforts are coordinated and messaging is streamlined and consistent.**

### Objectives:

- Improve and align **outward messaging** about Erie County to advance quality of life, visitation, and business attraction/growth.
- Create opportunities for more communication and **collaboration among the various partners** working on economic and community development initiatives.
- Provide programs, initiatives, and information for the **County's rural areas**.



# EVALUATION FRAMEWORK

## Infrastruture Outcome Measures

- Decreased average age of water and wastewater systems throughout Erie County
- Reduced instances of combined sewer overflow and similar instances of water/watershed pollution
- Increase in population with access to broadband, particularly in low-income and rural areas
- Increased renewable energy and energy efficiency implementation
- Increased electrical capacity at commercial and industrial sites
- Expansion of public transit and multi-modal transportation options
- Reduced average commute time

## Business Support Outcomes

- Increased number of payrolled business locations and/or self-employment.
- Job growth
- Labor force and labor participation growth
- Expanded participation from underrepresented groups in the economy
- Regional earnings growth
- Amount of private sector and foreign direct investment in the County
- Increased employment and activity in emerging sectors
- Decreased average cost of shipping per container
- Shorter wait times at the US-Canadian border

## Vitality Outcome Measures

- Alignment of housing stock to residents' needs
- Equitably distributed increase in median household income and household savings
- Higher level of individuals with healthcare coverage and retirement savings at all income levels
- Increased number of childcare slots available for all age groups and income levels
- Expanded elder care options
- Expansion of trails, greenspace, and water access for all
- Higher enrollment in vocational and training programs

## Regional Collaboration Outcome Measures

- Identification or creation of a regional convener
- New programming to support development of rural communities
- Creation of communication mechanisms for municipalities and key community sectors
- Increased public awareness and support of economic and community development as interconnected
- Shift in economic development metrics to reflect critical community development goals

# ACTION PLAN MATRIX

## About the Action Plan Matrix

As noted previously, the Action Plan Matrix (“Matrix”) is the heart of this CEDS. The Matrix expands upon the goals and objectives by offering a series of actions, along with relevant partners, priority level, timeline, cost level, and potential funding sources. This Matrix is a culmination of the interviews, stakeholder survey, plan review, and workshops that were undertaken as part of the CEDS updating process. There are some key things to understand when reviewing and using the Matrix:

- 1) Many of the action items are pulled directly from or based on other existing plans in the County and region. There are many ongoing initiatives, plans, and strategies that will be critical to the implementation of this CEDS. Part of the goal when creating the Matrix was to leverage and draw connections between these existing efforts. See Appendix D for a list of plans that were reviewed and drawn from as part of this process.
- 2) All the actions in the Matrix are important, so an assignment of “low” priority should not indicate otherwise. A low priority designation could indicate any number of things, such as external barriers preventing immediate implementation, that other actions must be completed first, or simply that other actions in the category have a higher level of urgency.
- 3) Some of the actions could reasonably fit under multiple goals and objectives, and many are interconnected despite being located in different sections of the Matrix. For instance, childcare access is critical for workforce attraction and retention, but is covered under a separate goal within the matrix. It is important to keep in mind that these efforts are not mutually exclusive or independent.
- 4) The roles and funding sources listed in the matrix are intended to identify possible partners and funders. None of the organizations or agencies are committed to any particular action at this time. Furthermore, the matrix does not include funding tools that are specific to a relatively small geographic area. Note that there may be more locally specific funding tools available, such as neighborhood-based programming or existing LWRPs and BOAs.
- 5) Each action will need to have an entity leading the effort to coordinate and ensure progress is being made. Proposed lead partners are bolded within the roles column, but these partners are not committed at this time. These are simply suggestions, and it may in reality be more appropriate for a different entity to lead any given effort.



# ACTION PLAN MATRIX



**GOAL: Erie County has strong, future-ready infrastructure that effectively serves residents, businesses, and visitors.**

**OBJECTIVE: Ensure safe, sufficient and productive access to water through expansion and modernization of water and wastewater systems.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
<b>Assess</b> the state of sewer systems, stormwater systems, and other related existing assets. <b>Repair</b> infrastructure that is identified as unsafe and modernize infrastructure as appropriate.	Erie County, WNY REDC <b>Towns/Villages/Cities</b> , water and sewer authorities	High	Mid Term	\$	ARPA, NYS DEC, NYS EFC
Coordinate a <b>comprehensive approach</b> to water and wastewater needs throughout the County in order to leverage funding and realize economies of scale.	<b>Erie County</b> , Towns/Villages/Cities, water and sewer authorities, Buffalo Niagara Waterkeeper, WNY REDC	Med	Near Term	\$	NYS DEC, NBRC, USEPA, NYS DEC WQIP, NYS EFC WIIA
<b>Protect water quality and quantity</b> through activities such as remedying sewer overflows and stormwater pollution, installing green infrastructure, and planning with the watershed in mind.	UBRI, City of Buffalo, Erie County, Buffalo Niagara Waterkeeper, WNY REDC, <b>Towns/Villages/Cities, water and sewer authorities</b>	Med	Long Term	\$\$\$	NYDEC, USEPA, Community Foundation for Greater Buffalo, NYS EFC Engineering Planning Grant, NYS DEC WQIP, NYS EFC WIIA, NYS EFC GIGP, National Fish and Wildlife Foundation (NFWF), Niagara River Greenway, NYS DEC Trees for Tribes/Buffer in a Bag

**OBJECTIVE: Expand access to broadband internet services to ensure equitable access to employment and educational opportunities.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Leverage Erie Broadband middle-mile project to <b>extend broadband access</b> throughout the county by investing in infrastructure that would promote and attract last mile connections by private internet service providers, thereby encouraging more equitable and affordable access through market competition.	Erie County, <b>ErieNet</b> (new utility), WNY REDC, Towns/Villages/Cities, private sector providers	High	Long Term	\$\$\$	ARPA, NYS ConnectALL, USDA ReConnect Program, USDA-RD Community Connect Grant Program
Evaluate accessibility of <b>free and low cost wifi access</b> points in low income areas/neighborhoods, and identify possible partners to provide access where there are gaps.	<b>Erie County</b> , City of Buffalo, BNP, Libraries, Towns/Villages, Community & Recreation Centers, NFTA (bus stops), private sector providers	High	Mid Term	\$	ARPA, NYS ConnectALL, John R. Oishei Foundation

**OBJECTIVE: Build Erie County's energy systems to be sustainable and resilient, and to be leveraged for economic development.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Study <b>electrical capacity</b> and opportunities, particularly at potential industrial sites, that would have the highest ROI for additional infrastructure (traditional or alternative).	private sector utilities, PSC, Invest Buffalo Niagara, Erie County Executive, <b>ECIDA</b>	High	Near Term	\$	USDA-RD, NYSEDA, USDOE Building a Better Grid
<b>Assess</b> the state of utility lines and other related existing assets. <b>Repair</b> infrastructure that is identified as unsafe or insufficient, and <b>modernize</b> and increase capacity of electric infrastructure.	<b>private sector utilities</b> , PSC, Erie County, Towns/Villages/Cities, Climate Action Council	High	Long Term	\$\$\$	ARPA, USDOE Building a Better Grid, NYSEDA
Support <b>renewables, clean energy, energy efficiency, battery storage, microgrids, and sustainable design</b> through funding, incentives, and technical assistance to address electricity needs and capacity in business and industrial areas and government-owned facilities, including <b>electrification of building and transportation systems</b> .	<b>Erie County</b> , BUDC, WNY SBR, Towns/Villages/Cities, private sector utilities, ECIDA, Climate Action Council, WNY REDC	Med	Mid Term	\$	USDA-RD, NYSEDA Clean Energy Communities and C&I Carbon Challenge, DOE, NYS EFC GIGP, USDOT Low or No Emission Vehicle Program, DEC Climate Smart Communities, USDOT RAISE, PACE

# ACTION PLAN MATRIX



**GOAL: Erie County has strong, future-ready infrastructure that effectively serves residents, businesses, and visitors.**

**OBJECTIVE: Build Erie County's energy systems to be sustainable and resilient, and to be leveraged for economic development.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Study <b>electrical capacity</b> and opportunities, particularly at potential industrial sites, that would have the highest ROI for additional infrastructure (traditional or alternative).	private sector utilities, PSC, Invest Buffalo Niagara, Erie County Executive, <b>ECIDA</b>	High	Near Term	\$	USDA-RD, NYSEDA, USDOE Building a Better Grid
<b>Assess</b> the state of utility lines and other related existing assets. <b>Repair</b> infrastructure that is identified as unsafe or insufficient, and <b>modernize</b> and increase capacity of electric infrastructure.	<b>private sector utilities</b> , PSC, Erie County, Towns/Villages/Cities, Climate Action Council	High	Long Term	\$\$\$	ARPA, USDOE Building a Better Grid, NYSEDA
Support <b>renewables, clean energy, energy efficiency, battery storage, microgrids, and sustainable design</b> through funding, incentives, and technical assistance to address electricity needs and capacity in business and industrial areas and government-owned facilities, including <b>electrification of building and transportation systems</b> .	<b>Erie County</b> , BUDC, WNY SBR, Towns/Villages/Cities, private sector utilities, ECIDA, Climate Action Council, WNY REDC	Med	Mid Term	\$	USDA-RD, NYSEDA Clean Energy Communities and C&I Carbon Challenge, DOE, NYS EFC GIGP, USDOT Low or No Emission Vehicle Program, DEC Climate Smart Communities, USDOT RAISE, PACE

**OBJECTIVE: Improve community connectivity, vibrancy and equity through enhanced transportation systems.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Adapt existing maintenance plans to better utilize capital funding by incorporating elements that <b>rethink and diversify infrastructure use and functionality</b> to improve safety and mobility for all users. This could include efforts such as installing multi-modal accommodations, including smart mobility technology, and incorporating designs to improve connectedness.	FHWA, NYS DOT / NYS Thruway, NFTA, <b>GBNRTC</b> , NITTEC, <b>Erie County</b> , Towns/Villages/Cities	High	Mid Term	\$	ARPA; Bridge NY; USDOT Safe Streets and Roads Grant Program, State of Good Repair Grants, SMART Grants, RAISE, Surface Transportation Block Grant Program, and CMAQ Improvement Program
Draw on NFTA strategy documents identifying major employment and low vehicle-ownership areas to enhance <b>high-capacity transit</b> and connections to it. Also use this data to create on-demand, <b>multi-modal mobility</b> options that will provide more flexible connectivity between people, employment, services, and recreation. Draw on the model of NFTA's existing collaborations with the private sector.	BNP, <b>GBNRTC</b> , Chambers, <b>NFTA</b> , Towns/Villages/Cities, Erie County, Workforce Centers, LISC, private sector, community/neighborhood associations	High	Long Term	\$\$\$	John R. Oishei Foundation; USDOT RAISE, TA Set Aside, and Surface Transportation Block Grant Program
Incentivize and promote <b>transit oriented development</b> and increased ridership, including mixed income housing along public transit routes, mixed use redevelopment of surface parking lots in otherwise high density areas, employer incentives for public transit use, etc. Draw from GBNRTC's Comprehensive TOD Plan.	Erie County, City of Buffalo, NFTA, <b>GBNRTC</b> , ECIDA, private developers, WNY SBRT, Cities/Villages/Towns, WNY REDC	High	Long Term	\$\$\$	NYS HCR, DOT, and ESD; public/private partnerships; US FTA; John R. Oishei Foundation; USDOT Surface Transportation Block Grant Program, RAISE, CMAQ Improvement Program, and TA Set Aside
Address infrastructure barriers that create disconnects between people and employment/services. Redesign, soften, or eliminate physical barriers (e.g. surface level highways, overpasses, etc.), add walk/bike infrastructure (e.g. sidewalks, crosswalks, bike lanes, etc.) and implement projects prioritized in the Bike Buffalo Niagara 2020 Regional Bicycle Master Plan to improve <b>walkability and bikeability</b> .	Erie County, GBNRTC, Towns/Villages/Cities, GoBike, WNY REDC	Med	Long Term	\$\$\$	NYS Bridge NY and OPRHP Recreational Trails Program; USDOT, Safe Streets & Roads Grant, RAISE, TA Set Aside, Healthy Streets Program, CMAQ Improvement Program; Niagara River Greenway; Ralph Wilson Jr. Trails Maintenance Fund for WNY; Parks & Trails NY Partnership Grant; American Trails Trail Fund; John R. Oishei Foundation; People for Bikes
Analyze how residents with limited transportation access are currently getting around. Identify and create ways to promote, stabilize, improve, or organize the systems they are already using and establish an Erie County Mobile Services Van and/or a volunteer transportation model to <b>fill transit gaps</b> .	Erie County, NFTA, <b>GBNRTC</b> , <b>LISC</b> , Rural Transit, human services agencies, neighborhood/community centers, Cities/Villages/Towns	Low	Mid Term	\$	John R. Oishei Foundation, USDOT Enhanced Mobility for Seniors and Individuals with Disabilities Program, USDOT TA Set Aside



# ACTION PLAN MATRIX



**GOAL: Erie County is properly resourced and able to support all entrepreneurs, businesses, and prospects.**

**OBJECTIVE: Expand access to capital and resources for existing, entrepreneurial and startup businesses.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Promote existing <b>business financing</b> programs in a consistent and comprehensive way.	43North, Launch NY, <b>BNP</b> , Chambers, IDAs, economic development professionals, WEDI, LISC, Buffalo State College SBDC, WNY REDC	High	Near Term	\$	
Promote <b>entrepreneurship</b> and provide a variety of ongoing, long term <b>support to new entrepreneurs</b> , particularly people of color and underserved populations.	43North, BNP, Chambers, <b>Launch NY</b> , WEDI, LISC, IDAs, community organizations, RCAP, The Exchange at Beverly Gray, Visit Buffalo Niagara, Invest Buffalo Niagara, WNY Sustainable Business Roundtable, Buffalo State College SBDC	High	Long Term	\$\$	NYS ESD, Community Foundation for Greater Buffalo, John R. Oishei Foundation, USDA-RD Rural Business Development Grants, CDBG Microenterprise Program, NYS Small Business Seed Funding & RECAP, LISC
Assist in building <b>social capital</b> among business owners and entrepreneurs in underserved and under resourced communities.	LISC, WEDI, BNP, Chambers, community organizations, RCAP, <b>The Exchange at Beverly Gray</b> , Visit Buffalo Niagara, Launch NY, WNY Sustainable Business Roundtable, Buffalo State College SBDC	Med	Near Term	\$	John R. Oishei Foundation, USDA-RD Rural Business Development Grants, Launch NY
Continue to support Launch NY in <b>monitoring and advancing intellectual property and innovation driven startups</b> from universities and the community to drive new economic activity through funding, incentives, and ongoing supports to early stage businesses (e.g. site selection assistance, workforce development, professional development, etc.)	Universities, medical manufacturers, IDAs, 43North, <b>Launch NY</b> , Invest Buffalo Niagara, BNP, Buffalo State College SBDC, The Exchange at Beverly Gray, WNY REDC	Med	Near Term	\$	
Educate the local community about opportunities to <b>invest in local startups</b> and how to go about doing it.	<b>43North</b> , BNP, Chambers, WEDI, Visit Buffalo Niagara, Invest Buffalo Niagara, Buffalo State College SBDC, The Exchange at Beverly Gray, Launch NY	Med	Mid Term	\$	

# ACTION PLAN MATRIX



**GOAL: Erie County is properly resourced and able to support all entrepreneurs, businesses, and prospects.**

**OBJECTIVE: Ensure access and opportunity to all of Erie County's diverse workforce.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Coordinate messaging and <b>improve community awareness</b> of workforce development programming through inter-agency collaboration and outreach.	WIB, BNP, BCAT, workforce centers, school districts, Greater Buffalo Equity Roundtable, Chambers, WEDI, LISC, Visit Buffalo Niagara, Goodwill Industries, human services agencies	High	Near Term	\$	
Improve communication among workforce development providers, employers, and educational institutions to better align the workforce system to address <b>shifting industry needs</b> , programming in <b>middle and high schools, aging workforce</b> in key industry sectors (e.g. manufacturing), and <b>essential jobs</b> that are under stress (e.g. healthcare, elder/childcare, teachers, hospitality).	WIB, BNP, BCAT, Workforce Development Institute, higher education, school districts, BOCES, WNY REDC, economic development professionals, workforce centers, Child Care Resources Network, Goodwill Industries	High	Near Term	\$\$	Lee Foundation and Scholarship Program, Workforce Development Institute, NYS RECAP, ECMC Foundation
Provide foundational <b>literacy, math, and soft skill training</b> supports for adults wishing to pursue more advanced workforce and vocational training programs. Soft skills training should expand to include additional concepts to <b>strengthen long term growth and success</b> (e.g. advocating for better/safer working conditions, recognizing and planning for potential job disruptions, etc.).	WIB, <b>Workforce Centers</b> , BCAT, academic institutions, community organizations, WEDI, Greater Buffalo Equity Roundtable, Goodwill Industries, WNY REDC	High	Mid Term	\$\$	Community Foundation for Greater Buffalo, Baird Foundation, Margaret L Wendt Foundation, John R. Oishei Foundation, ARPA
Establish a <b>Re-entry Hub</b> to support employment opportunities and financial security for recently incarcerated individuals, including a one-stop career center at Erie County Correctional Facility.	WIB, WNY REDC, Community Organizations, Erie County Sheriff's Dept., <b>Greater Buffalo Equity Roundtable</b> , Goodwill Industries	Med	Near Term	\$\$	Community Foundation for Greater Buffalo, John R. Oishei Foundation, US EDA Public Works Program, ARPA
Develop an <b>occupational ENL</b> (English as a New Language) program to serve immigrants and refugees.	WIB, LISC, WEDI, Community Organizations, <b>Greater Buffalo Equity Roundtable</b> , Goodwill Industries	Med	Mid Term	\$\$	Community Foundation for Greater Buffalo, John R. Oishei Foundation, Baird Foundation, ARPA
Provide workforce <b>trainee transportation</b> or connectivity throughout the county, either via shuttle buses, travel stipends, or increasing or focusing public transit routes.	Erie County, <b>WIB</b> , NFTA, GBNRTC, Goodwill Industries	Med	Long Term	\$\$	Community Foundation for Greater Buffalo, USEPA EWDJT
Define and identify employment opportunities that would advance the implementation of <b>green design</b> for energy efficiency and electrification, and create <b>trades training programs</b> for those career pathways.	WIB, <b>WNY SBR</b> , architecture/engineering firms, WNY REDC, Workforce Development Institute, Goodwill Industries	Low	Mid Term	\$\$	Workforce Development Institute, NYS RECAP, NYSEDA, DOE, USEPA EWDJT, ARPA



# ACTION PLAN MATRIX



**GOAL: Erie County is properly resourced and able to support all entrepreneurs, businesses, and prospects.**

**OBJECTIVE: Strengthen and support target and tradeable industry sectors, particularly agriculture, manufacturing, and tourism.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Advocate for a balanced approach to new farm labor laws, particularly around overtime, and work with agricultural businesses to strategize and <b>adjust to changes in regulations</b> in order to sustain the workforce pipelines and farming operations.	CCE, Cities/Villages/Towns, <b>Farm Bureau</b> , Erie County, Agriculture and Farmland Protection Board, WNY REDC	High	Near Term	\$	
Invest in physical plant and technological upgrades to the existing <b>Buffalo Convention Center</b> , as well as the surrounding infrastructure to create a more <b>walkable convention district</b> , to adapt to new trends and demands. Communicate the benefit of the convention center to local stakeholders and the media.	Visit Buffalo Niagara, Erie County, <b>City of Buffalo</b> , WNY REDC	High	Mid Term	\$\$\$	NYS DOT, Market NY, RECAP; USDOT CMAQ Improvement Program, TA Set Aside, Healthy Streets Program; Project for Public Spaces
Establish and expand technical assistance initiatives, tools and resources to aid <b>manufacturers' resiliency efforts</b> and help <b>legacy manufacturers</b> transition their business models and marketing to more innovative practices align with shifting technology and markets.	FuzeHub, Insyte Consulting, Northland Workforce Training Center, WIB, <b>Buffalo Niagara Manufacturing Alliance</b> , WNY REDC, IDAs	High	Mid Term	\$\$	US EDA Planning and Local Technical Assistance Program, US EDA Economic Adjustment Assistance
Integrate <b>agritourism</b> more comprehensively into Erie County tourism sector, including by incorporating agritourism stops into broader tourism marketing campaigns.	<b>CCE, Visit Buffalo Niagara</b> , Erie County Office of Agriculture	Med	Near Term	\$	USDA Agricultural Marketing Service; Northeast SARE
Develop community-wide programs to increase awareness and support of <b>tourism and hospitality as a key economic driver</b> that provides growth opportunities for all residents and small businesses.	<b>Visit Buffalo Niagara</b> , Erie County, BNP	Med	Mid Term	\$	
Formalize programming to help farmers learn the skills and processes needed to expand into <b>food processing</b> and other <b>value-added ag</b> , such as training, licensing, recipe development, marketing, supply chain assistance, etc.	Erie County, <b>CCE</b> , Buffalo Niagara Manufacturing Alliance, Erie County Office of Agriculture, Agriculture and Farmland Protection Board, WNY REDC	Med	Mid Term	\$\$	Workforce Development Institute, USDA-RD Rural Business Development Grants
Promote <b>local food procurement</b> and work with large and anchor institutions to adjust their procurement policies to allow for more local procurement of food products, using existing partnership with the Buffalo School District as a model. This can help to address ongoing supply chain challenges.	Harvest NY, Erie County, School Districts, Higher Education, CCE, Erie County Office of Agriculture, <b>Buffalo and Erie County Food Policy Council</b> , Agriculture and Farmland Protection Board	Low	Long Term	\$	USDA Agricultural Marketing Service

# ACTION PLAN MATRIX



**GOAL:** Erie County is properly resourced and able to support all entrepreneurs, businesses, and prospects.

**OBJECTIVE:** Identify, assess, and build upon emerging and community-based industry sectors.

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Identify, leverage, and better connect existing assets in the <b>creative economy</b> throughout the county, including the film, arts, music, and design industries, to provide stronger and more active networks, <b>enhanced workforce programming</b> , and clear <b>career pathways</b> . Utilize these efforts to attract more and larger creative projects and investments, such as episodic filming, to Erie County.	<b>SUNY Buffalo</b> , higher education, Buffalo Niagara Film Commission, Visit Buffalo Niagara, Invest Buffalo Niagara, PBS studio, existing film-related employers, art galleries/studios, museums, film organizations	High	Near Term	\$	Community Foundation for Greater Buffalo, US EDA Planning and Local Technical Assistance Program
Explore whether regional <b>target industries</b> (and strategies to support/attract them) are reflective of the realities in <b>under resourced/underserved communities</b> . If not, identify and advance industries that would be more appropriate targets for growth in those communities.	<b>LISC</b> , East Side Avenues, West Side Promise Neighborhood Program, IDAs, WNY REDC	High	Near Term	\$	Community Foundation for Greater Buffalo, John R. Oishei Foundation, US EDA Planning and Local Technical Assistance Program
Identify and invest in the infrastructure and services needed for <b>post-production film work</b> (editing, animation, sound, etc.) to build local career paths that are not filming-location dependent.	<b>Buffalo Niagara Film Office</b> , higher education, PBS studio, existing post production companies, Invest Buffalo Niagara, WNY REDC	Low	Long Term	\$\$	NYS ESD

**OBJECTIVE:** Create more shovel ready industrial and commercial sites to allow for higher conversion of business attraction prospects.

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Prioritize and incentivize <b>infill development</b> , including through the revision and use of ECIDA's adaptive reuse policy.	<b>ECIDA</b> , Town IDAs, Erie County, WNY REDC, Cities/Towns/Villages	High	Near Term	\$	Restore NY, NY Main Street, NYS RECAP (proposed)
Utilize and support <b>speculative building development</b> and renovation to increase ready industrial building stock. This could include providing incentives, funding, infrastructure support, risk mitigation mechanisms, and advocacy for additional state and federal funding for speculative building projects.	IDAs, Erie County, City of Buffalo, <b>Invest Buffalo Niagara</b> , National Grid, BNP, Towns/Villages/Cities, NYSEDC, BUDC, WNY REDC	High	Mid Term	\$\$	NYS ESD, US EDA Public Works Program, USDA-RD Rural Business Development Grants, FAST NY, NYS RECAP
Provide <b>technical assistance to municipalities</b> planning industrial parks.	Invest Buffalo Niagara, Erie County, National Grid, <b>ECIDA</b> , Town IDAs	Med	Near Term	\$	USDA-RD Rural Business Development Grants
Redevelop the <b>Renaissance Commerce Park</b> (former Bethlehem Steel site), including logistics and utility infrastructure, and road/trail access.	Erie County, City of Lackawanna, <b>ECIDA</b> , WNY REDC	Med	Long Term	\$\$\$	NYS ESD, NYS DOT, US EDA Public Works Program, NYS DOS BOA
Create a <b>Shovel Ready Program</b> and leverage new FAST NY program to provide financial resources for brownfield remediation and site development.	<b>Erie County</b> , City of Buffalo, IDAs, Invest Buffalo Niagara, WNY REDC	Low	Long Term	\$\$	NYS ESD FAST NY, US EDA, NY DEC, NYS RECAP, USEPA, NYS DOS BOA



# ACTION PLAN MATRIX



**GOAL: Erie County is properly resourced and able to support all entrepreneurs, businesses, and prospects.**

**OBJECTIVE: Prioritize logistics as a driver and key component of economic activity.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Prioritize, advocate for, and enhance logistics infrastructure and technologies to support <b>e-commerce, supply chains and business trade</b> throughout Erie County.	World Trade Center Buffalo, <b>Buffalo Niagara International Trade Gateway Organization</b> , Port of Buffalo, Invest Buffalo Niagara, IDAs, WNY REDC	High	Long Term	\$	USDOT Surface Transportation Block Grant Program, US EDA Public Works Program, USDA-RD Rural Business Development Grants, FAST NY
<b>Map supply chains</b> and <b>assess vulnerabilities</b> for key industries in Erie County to better anticipate, prepare for, and/or recover from disruptions. Address identified gaps in logistics.	World Trade Center Buffalo, <b>Buffalo Niagara International Trade Gateway Organization</b> , Invest Buffalo Niagara, Insyte Consulting, CCE, IDAs	Med	Mid Term	\$	US EDA Public Works Program, USDA-RD Rural Business Development Grants, US EDA Planning and Local Technical Assistance Program
Address <b>logistics gaps</b> for the <b>agricultural industry</b> , such as warehousing shortages, cold storage, and service gaps. For example, explore the feasibility of a new USDA-certified meat processing facility in the region.	Erie County, CCE, Farm Bureau, Buffalo Niagara International Trade Gateway Organization, World Trade Center Buffalo, WNY REDC	Med	Long Term	\$	USDA Meat and Poultry Inspection Readiness Grant, US EDA Public Works Program, USDA-RD Rural Business Development Grants
Facilitate a stronger relationship with the <b>Port of New York/New Jersey</b> to expand freight and logistics options.	<b>World Trade Center Buffalo</b> , Buffalo Niagara International Trade Gateway Organization, Erie County Executive, Invest Buffalo Niagara, IDAs	Low	Near Term	\$	

# ACTION PLAN MATRIX



**GOAL:** Erie County is properly resourced and able to support all entrepreneurs, businesses, and prospects.

**OBJECTIVE:** Foster a smooth flow of people and goods across the U.S.-Canadian border.

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Prioritize implementing a bi-national approach to <b>maintaining an open U.S.-Canada border</b> based on science-based criteria and mutually accepted risk-mitigation measures and health protocols.	World Trade Center Buffalo, Buffalo Niagara International Trade Gateway Organization, <b>Invest Buffalo Niagara</b> , Visit Buffalo Niagara	High	Near Term	\$	
Implement <b>border efficiency measures</b> , especially enhancements for commercial vehicles crossing the Peace Bridge, by placing inspection technology in Canada to derive the benefits of pre-clearance.	World Trade Center Buffalo, <b>Buffalo Niagara International Trade Gateway Organization</b> , NITTEC	High	Mid Term	\$\$\$	
Strengthen and leverage <b>relationships with leaders</b> and economic developers in Canada to attract business and visitors.	World Trade Center Buffalo, Buffalo Niagara International Trade Gateway Organization, <b>Invest Buffalo Niagara</b> , Visit Buffalo Niagara	Med	Mid Term	\$	
Expand <b>export assistance</b> to businesses engaged in trade with Canada, while also providing <b>supply chain supports</b> to identify alternatives in the case of border closures.	<b>World Trade Center Buffalo</b> , Buffalo Niagara International Trade Gateway Organization, FuzeHub, WNY REDC	Med	Long Term	\$\$	Global NY, Trade Adjustment Assistance for Firms
Organize and participate in <b>foreign trade missions</b> to cultivate relationships and cross-border business. Ensure that all partners are consistent in terms of messaging about Erie County and the region.	World Trade Center Buffalo, Buffalo Niagara International Trade Gateway Organization, <b>Invest Buffalo Niagara</b> , NYS ESD, Visit Buffalo Niagara	Low	Mid Term	\$	Global NY

# ACTION PLAN MATRIX



**GOAL: Residents and working families are empowered and supported in achieving a stable, sustainable, and thriving quality of life.**

**OBJECTIVE: Residents and families in Erie County will have safe, affordable housing.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Explore financing mechanisms such as Limited Equity Cooperatives (LEC) to fund <b>low interest mortgages</b> and <b>property tax reductions</b> for the purpose of selling units in apartment buildings to low income households.	LISC, Erie County, financial institutions	High	Mid Term	\$\$	John R. Oishei Foundation, Community Development Corporations
Incentivize <b>mixed income housing</b> development, particularly in proximity to public transit.	Erie County, <b>ECIDA</b> , Cities/Towns/Villages, NFTA, WNY REDC	High	Mid Term	\$\$	John R. Oishei Foundation, Restore NY, NY Main Street Program
Educate <b>municipal Planning Boards</b> on strategies to increase affordable housing in their municipalities, including addressing <b>exclusionary zoning</b> and creating <b>new incentives</b> to make development of affordable and market rate rental units feasible.	Home Investment Partnership (HOME), <b>Erie County</b> , LISC, Cities/Towns/Villages, HUD, ECIDA	Med	Mid Term	\$	
Remediate <b>lead hazards</b> in homes throughout the county.	<b>Erie County</b> , Cities/Towns/Villages, Green and Healthy Homes Initiative	Med	Mid Term	\$\$	Erie County DEP Housing Rehabilitation Program, John R. Oishei Foundation, NYS DEC EJ Community Impact Grants, Green and Health Homes Initiative
Rehabilitate <b>owner-occupied affordable housing</b> properties throughout the county.	BENLIC, BURA, Cities/Towns/Villages, C&R Housing	Med	Long Term	\$\$\$	John R. Oishei Foundation, NYSEDA, US HUD HOME and CDBG
Continue to <b>build new units</b> of affordable rental housing, particularly in proximity to public transit.	Cities/Towns/Villages, Erie County, LISC, ECIDA, private developers, WNY REDC	Med	Long Term	\$\$\$	HUD Home Investment Partnership (HOME), Restore NY, NY Main Street Program
Increase <b>weatherization</b> opportunities for homeowners, landlords, and tenants. Specifically target families using HEAP.	BENLIC, BURA, Cities/Towns/Villages, C&R Housing, Clean Energy Communities, WNY REDC	Low	Long Term	\$	NYSEDA, John R. Oishei Foundation, Green and Health Homes Initiative

**OBJECTIVE: Residents and families in Erie County will have greater financial security through broader employment opportunities and enhanced benefits.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
<b>Quantify benefits cliff</b> and identify key challenges/barriers that need to be addressed to make upward mobility viable for families, and provide this information to employers to better align career/wage pathways to retain and advance workers.	Erie County, <b>BNP</b> , LISC	High	Near Term	\$\$\$	
Identify clusters of employers that participate in programs placing <b>under-employed</b> individuals and individuals with <b>multiple barriers to employment</b> (e.g. PIVOT, re-entry programs, etc.) and their proximity to supports (e.g. transportation, childcare, etc.). Prioritize development of these supports around these clusters that are isolated.	<b>Erie County</b> , NFTA, WEDI, LISC, WNY REDC	High	Mid Term	\$	John R. Oishei Foundation
Work with employers in Erie County to <b>expand/enhance benefits</b> offered to their employees (e.g. health insurance, paid time off, retirement, etc.), particularly low and moderate income employees. Develop and provide cost-benefit information, including effects of retention, productivity, etc. to outline the true net costs of expanding benefits.	<b>BNP</b> , <b>Chambers</b> , economic development professionals, WNY SBRT, Workforce Development Institute	Low	Long Term	\$	John R. Oishei Foundation



# ACTION PLAN MATRIX



**GOAL: Residents and working families are empowered and supported in achieving a stable, sustainable, and thriving quality of life.**

**OBJECTIVE: Residents, families and workforce in Erie County will have access to quality, affordable childcare and elder care.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Increase awareness of and expand available <b>daycare subsidy</b> programs.	Workforce Development Institute, Erie County Dept. of Social Services, <b>Child Care Resource Network</b>	High	Mid Term	\$	
Support the development of <b>elder care programs and subsidies</b> and work with employers to identify and create flexible work opportunities (e.g. job share, adjusting shifts, remote/hybrid work, etc.) to address the needs of aging adults and their working adult children who often care for them.	LISC, <b>Erie County Senior Services</b>	High	Mid Term	\$	Cummings Foundation, Health Foundation of Western & Central NY
Support the development of <b>additional childcare</b> programs and facilities in all areas of the county, understanding that centers need to be accessible to workforce and in proximity to existing infrastructure. Facilitate collaboration between employers, parents, and providers to identify <b>innovative solutions</b> .	Erie County, <b>Child Care Resource Network</b> , LISC, WNY REDC	High	Long Term	\$	John R. Oishei Foundation, Margaret L Wendt Foundation, Cummings Foundation, Health Foundation of Western & Central NY
Develop an easy to follow, <b>step by step guide</b> about requirements and timeline for becoming a childcare provider.	<b>Child Care Resource Network</b>	Med	Near Term	\$	
Use Geographic Information Systems (GIS) and existing data from Child Care Resources Network to <b>plot existing childcare</b> centers throughout the county and then work with employers, healthcare providers, and schools to <b>share information</b> about the location of quality childcare and available options.	Erie County, <b>Child Care Resource Network</b>	Low	Long Term	\$	

**OBJECTIVE: Enhance recreational opportunities for the benefit of residents and visitors alike.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Market and improve access to the County's existing <b>cultural amenities</b> and <b>fresh water resources</b> for the benefits of residents, visitors, and individuals considering relocation.	<b>Visit Buffalo Niagara</b> , Buffalo Niagara Waterkeeper, Cities/Towns/Villages, <b>Erie County</b> , arts & cultural institutions, WNY REDC	High	Long Term	\$	John R. Oishei Foundation, Baird Foundation, Margaret L Wendt Foundation, Project for Public Spaces, Community Foundation for Greater Buffalo, NYS OPRHP EPF, Niagara River Greenway, NYS Canal Corp Canalway Grants Program, NY OPRHP Land & Water Recreation Fund
Expand <b>outdoor recreational opportunities</b> by developing and promoting experiences that emphasize engaging with the county's parks and outdoor spaces.	<b>Erie County</b> , Visit Buffalo Niagara, WNY REDC, Cities/Towns/Villages, National Parks Service Rivers, Trails, and Conservation Assistance Program	Med	Long Term	\$	Community Foundation for Greater Buffalo, USDOT TA Set Aside, NYS Parks EPF, NYS Parks Recreational Trail Program, Parks & Trails NY Partnership Grant, American Trails Trail Fund, Project for Public Spaces Community Placemaking Grants; NFWF Five Star & Urban Waters Grant, USEPA Environmental Education grants
Enhance the presence and offerings of <b>arts and cultural organizations</b> through new <b>infrastructure</b> and <b>programming</b> , for example the new Visitor Center proposed at Graycliff and upgrades to the Broadway Market This could include providing technical assistance, promotion, and support to funding efforts, among other activities.	Visit Buffalo Niagara, <b>Erie County</b> , arts & cultural institutions, WNY RED, Cities/Villages/Towns	Med	Long Term	\$	Market NY, Community Foundation for Greater Buffalo, John R. Oishei Foundation, Baird Foundation, Cullen Foundation, Margaret L Wendt Foundation, NYS RECAP

# ACTION PLAN MATRIX



**GOAL: Development efforts are coordinated and messaging is streamlined and consistent.**

**OBJECTIVE: Improve and align outward messaging about Erie County to advance quality of life, visitation, and business attraction/growth.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Collaborate with partners to create <b>clear and aligned messaging</b> about the advantages of <b>doing business</b> and living in WNY.	ECIDA, 43North, <b>Invest Buffalo Niagara</b> , BNP, Visit Buffalo Niagara, World Trade Center Buffalo, WNY REDC, chambers	High	Mid Term	\$	Western New York Foundation
Align regional economic development efforts to create a <b>holistic strategy</b> for positioning Buffalo and Erie County as a place to <b>live, work, and visit</b> .	<b>ECIDA</b> , Cities/Towns/Villages, Erie County, BNP, Invest Buffalo Niagara, BUDC, Visit Buffalo Niagara, World Trade Center Buffalo, WNY REDC	High	Long Term	\$\$	Western New York Foundation
Participate with key partners to <b>educate</b> businesses about <b>ECIDA and other economic development programs</b> and offerings.	<b>ECIDA</b> , Chambers, 43North, BNP, Cities/Towns/Villages, World Trade Center Buffalo	Med	Near Term	\$	
Improve communication networks with <b>non-English speaking residents and business owners</b> to better inform the community about hazards, happenings, public health, etc. This should include expanding translation of community notices and resources.	<b>Erie County</b> , City of Buffalo, Greater Buffalo Equity Roundtable, WEDl, media, community organizations	Med	Mid Term	\$\$	Community Foundation for Greater Buffalo, Western New York Foundation, NYSDEC EJ Office - Community Impact grants

**OBJECTIVE: Create opportunities for more communication and collaboration among the various partners working on economic and community development initiatives.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Explore the option of creating a <b>regional Economic Development District (EDD)</b> with US EDA.	<b>ECIDA</b> , Erie County, US EDA	High	Near Term	\$	US EDA
ECIDA will <b>convene</b> a CEDS Implementation Committee to improve <b>communication</b> among economic and community development partners and better <b>coordinate</b> efforts around key initiatives, such as transportation and housing.	<b>ECIDA</b> , Erie County, BNP, Invest Buffalo Niagara, WNY SBR, Visit Buffalo Niagara, WNY REDC, NYS ESD	High	Near Term	\$\$	Western New York Foundation
Create an <b>Economic Rapid Response Group</b> that will be the first to meet in times of crisis or responding to a shock. Create methods for this group to communicate/convene quickly, and tools/processes to communicate out to stakeholders and the public with information and guidance.	<b>ECIDA</b> , Erie County, BNP, Invest Buffalo Niagara, WNY REDC, NYS ESD	High	Mid Term	\$	Western New York Foundation
Improve <b>outreach</b> to and <b>communication</b> with <b>municipal leaders</b> throughout Erie County to ensure a better understanding of priorities and needs.	ECIDA, <b>Erie County</b> , Invest Buffalo Niagara	High	Mid Term	\$	Community Foundation for Greater Buffalo
Ensure that <b>county meetings about key topics</b> (e.g. COVID updates/response, county-wide programming) are <b>recorded</b> and available to municipal leaders for later viewing, even if they are not subject to Open Meetings Law.	<b>Erie County</b>	Med	Near Term	\$	
<b>Convene municipal leaders</b> and create <b>educational/informational resources</b> to ensure consistent understanding of various topics, such as economic development tools and resources, county programming and priorities, changes to regulations, resiliency responses, etc. Incorporate methods for <b>emergency communication</b> in times of crisis/shocks.	<b>Association of Erie County Governments</b> , BNP, Invest Buffalo Niagara, Erie County, Invest Buffalo Niagara, Visit Buffalo Niagara, ECIDA, Cities/Towns/Villages, WNY REDC	Med	Long Term	\$	Community Foundation for Greater Buffalo

# ACTION PLAN MATRIX



**GOAL: Development efforts are coordinated and messaging is streamlined and consistent.**

**OBJECTIVE: Provide programs, initiatives, and information for the county's rural areas.**

STRATEGIES & ACTIONS	ROLES	PRIORITY	TIMING	COST	FUNDING SOURCES
Review ECIDA and other county-level <b>economic development programs and policies</b> to identify where they can be more <b>inclusive of rural communities</b> . Adjust where needed or create new opportunities for rural communities and businesses, and increase understanding of those and the programs already available to them.	<b>ECIDA, Erie County</b> , Erie County Association of Governments, Towns/Villages	High	Near Term	\$	
Provide <b>technical assistance</b> to help small and rural communities plan for and identify resources to fund the <b>development</b> they'd like to see.	ECIDA, BNP, Invest Buffalo Niagara, <b>Erie County</b>	High	Mid Term	\$\$	US EDA Planning and Local Technical Assistance Program
Create and implement a strategy to ensure that rural towns and villages in the county have <b>access</b> to the same <b>information</b> about economic development opportunities, initiatives, and updates as the City of Buffalo and surrounding suburban municipalities. Consider tools such as a specific web portal, assigning a liaison, newsletter, digital bulletin board, etc.	<b>Erie County</b> , ECIDA, BNP, Invest Buffalo Niagara, Visit Buffalo Niagara, Villages/Towns	Med	Near Term	\$	USDA-RD Rural Business Development Grants
Develop programs that support the <b>economic development</b> and <b>resiliency</b> of rural villages and towns by addressing their <b>unique strengths, needs, and industries</b> .	<b>Erie County</b> , CCE, ECIDA, Villages/Towns	Low	Long Term	\$\$	USDA-RD Rural Business Development Grants



# APPENDIX A

## Economic Base Report

Contents

Introduction ..... 26

    Data Note ..... 26

    Market Area ..... 26

Demographics ..... 28

    Overview ..... 28

    Race Composition ..... 29

    Household Income Distribution ..... 29

    Projected Income Growth ..... 30

    Access to Transportation..... 30

    Housing Stock ..... 31

Industry Analysis ..... 32

    Industry Composition ..... 32

    Employment Trends..... 33

    Projected Employment Trends ..... 35

Shift Share ..... 36

    Location Quotient Analysis ..... 38

Real Estate Market Analysis..... 39

    Industrial..... 39

    Office ..... 39

    Retail ..... 41

    Multi-Family Residential ..... 42

# APPENDIX A

## Economic Base Report

### Introduction

The following market overview presents information on the current economic conditions of Erie County, in terms of demographic, industrial, and real estate trends. The data displayed throughout the market profile was collected from numerous sources, as noted below, that collectively depict current market conditions. Insights from the following analysis will provide a foundation for strategic planning purposes in later phases of the project.

### Data Note

Data included in the following analysis was sourced from the American Community Survey estimates from the US Census Bureau, Esri, Emsi, and CoStar.

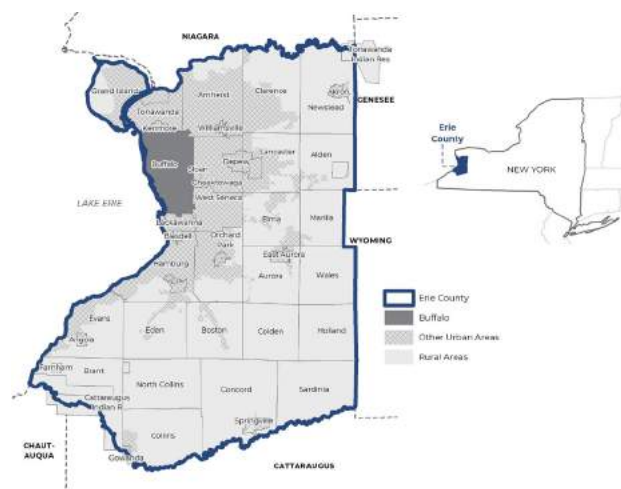
### Market Area

The following sections on demographic, economic, and industry trends incorporate data covering two geographies: (1) Erie County and (2) the State of New York. Demographic and housing data is also provided broken down into three component parts for Erie County: City of Buffalo, other urban and suburban areas (referred to as "other urban areas" or simply "urban" throughout the remainder of this report), and rural.

As shown on the map on the next page, the population density of Erie County is highest in and around the City of Buffalo and decreases in the mostly rural southern and eastern areas. This urban-rural difference impacts the economic needs and strategies of different areas throughout the County. The City of Buffalo is the second largest city in New York State, shares a border with Canada, and is a part of the Great Lakes' international shipping economy, while rural areas have small populations and significant agricultural production. There are also other urban municipalities surrounding the City of Buffalo that are located in between the City of Buffalo and the rural areas.

The map depicts the area that makes up the City of Buffalo and then utilizes data from the [U.S. Census Bureau's 2010 Urban-Rural classification](#) to depict the "Other Urban Areas" that meet the Census Bureau's Urban Area (50,000 or more people) or Urban Cluster (at least 2,500 and less than 50,000 people) criteria outside of the City of Buffalo. The Rural Areas encompass all areas within Erie County that are not included within an urban area.

Note that a few block groups around the edge of Erie County that were identified for the purpose of looking at the different component parts of the County do include some populations (about 3,000 individuals and 1,000 households) from other counties. This does not significantly impact the analysis, but does mean that the sum of counts for the component parts exceeds that of Erie County for select indicators.



## Demographics

### Overview

The table shown to the right is a comparison of demographic trends for Erie County and its component parts as defined in the Market Area section, along with New York State.

- According to ACS estimates, all geographies except for the City of Buffalo have realized some growth in population over the last ten years. New York's population growth slightly outpaced growth in Erie County as a whole, but the rural areas of Erie County have grown the fastest. However, the 2020 Census shows **substantial population growth in the City of Buffalo (278,349, 6.5% growth)** and even greater **growth in Erie County (954,236, 2.9% growth)** compared to the 2010 Census. Meanwhile, the Census showed growth of 4.2% for New York State. The Census is a count and more reliable than the ACS sample-based estimates, so it is likely that the **overall trend was one of growth**.
- The number of households has grown across the board, but household growth in Erie County has outpaced New York as a whole. This growth is driven primarily by areas outside of the City of Buffalo, although Buffalo has seen an increase as well.
- Average household size has declined in both Erie County and New York, with a larger decline in Erie County. Household size in rural areas is declining the fastest.
- Erie County's median age is 42.2, more than two years above the State median age. However, both the County and State are aging at a similar pace, so the gap is not widening. The median age in Buffalo is approximately a decade younger than other areas. This in part could be driven by the presence of college students.

Demographic Fundamentals				
Population				
	2010	2021	Change	% Change
Erie County	919,040	927,328	8,288	0.9%
City of Buffalo	261,441	260,077	-1,364	-0.5%
Other Urban Areas	573,743	580,798	7,055	1.2%
Rural	87,451	89,920	2,469	2.8%
New York	19,378,102	19,625,500	247,398	1.3%
Households				
	2010	2021	Change	% Change
Erie County	383,164	395,093	11,929	3.1%
City of Buffalo	112,577	114,002	1,425	1.3%
Other Urban Areas	239,018	247,598	8,580	3.6%
Rural	32,976	34,859	1,883	5.7%
New York	7,317,755	7,482,516	164,761	2.3%
Average Household Size				
	2010	2021	Change	% Change
Erie County	2.32	2.28	-0.04	-1.7%
City of Buffalo	2.24	2.20	-0.04	-1.8%
Other Urban Areas	2.33	2.28	-0.05	-2.1%
Rural	2.57	2.50	-0.07	-2.7%
New York	2.57	2.55	-0.02	-0.8%
Median Age				
	2010	2021	Change	% Change
Erie County	40.4	42.2	1.8	4.5%
City of Buffalo	33.4	35.5	2.1	6.3%
Other Urban Areas	42.5	44.7	2.2	5.2%
Rural	43.8	46.7	2.9	6.6%
New York	37.9	39.6	1.7	4.5%

Source: ESRI



**Race Composition, 2021**

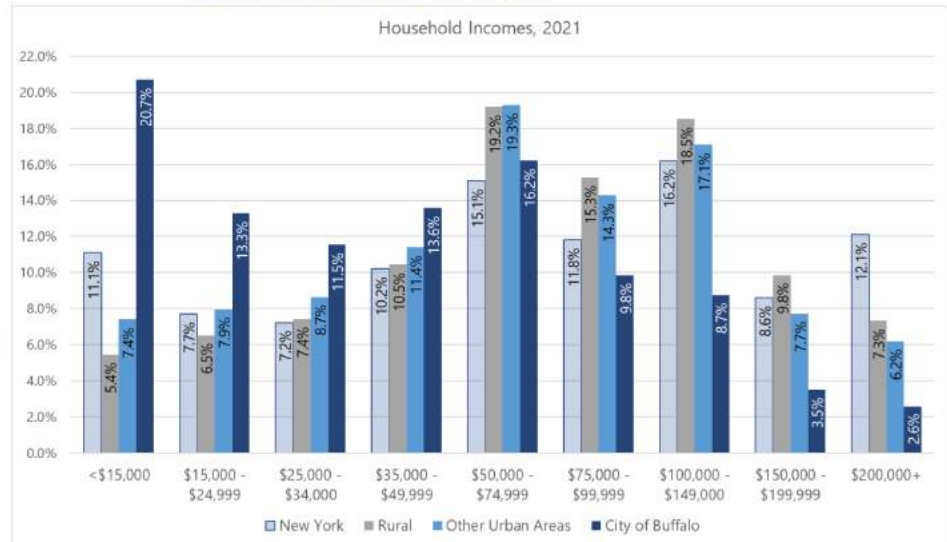
	Erie County	City of Buffalo	Other Urban Areas	Rural	New York
White Alone	80.0%	40.5%	86.2%	90.7%	62.7%
Black Alone	13.5%	37.5%	4.0%	1.9%	15.9%
Native American Alone	0.6%	0.6%	0.3%	2.9%	0.6%
Asian Alone	2.6%	4.5%	4.2%	1.1%	8.9%
Pacific Islander Alone	0.0%	0.0%	0.0%	0.0%	0.1%
Some Other Race Alone	1.5%	0.2%	0.1%	0.1%	8.2%
Two or More Races	1.8%	3.0%	1.7%	1.1%	3.7%
Hispanic Origin (Any Race)	4.5%	13.7%	3.3%	2.3%	19.7%

Source: ESRI

**Race Composition**

The chart to the left shows racial composition of Erie County and its component parts, as well as New York State. The data for Erie County reflects substantially less racial diversity than the State as a whole, but Buffalo is significantly more diverse than other parts of Erie County. The more diverse racial composition in Buffalo is enough to make Erie County notably more diverse than surrounding counties, which range from 82.7% to 88.9% White alone (Census, 2020). The Native American population in Erie County is primarily present in rural areas where the Cattaraugus and Tonawanda Reservations are located.

The figure to the right compares the household income distribution of the geographies. Compared to the State, Erie County has a higher percentage of households earning less than \$50,000 annually, at 41.6% for the County and 36.2% for the State. This level of income is highly concentrated in the City of Buffalo and other urban areas. The County has a lower percentage of households earning more than \$150,000 annually at 12.0%, compared to 20.7% at the State level. Only 6.1% of households in Buffalo and 13.9% of households in other urban areas have household income above \$150,000, compared to 20.7% with incomes below \$15,000 in Buffalo and 15.3% with incomes below \$25,000 in other urban areas.

**Household Income Distribution****Projected Income Growth**

The five-year projected growth in median household income is displayed in the table to the right. Although income is expected to grow in all geographies, it is expected to grow at a lesser rate in Erie County compared to the State. The City of Buffalo has the lowest projected growth, which is notable because it also has the lowest median income. This means that the income gap between Buffalo and other, wealthier parts of the County is projected to continue expanding. The highest rate of growth is expected in the other urban areas of the County, which will slightly reduce the income gap between those areas and rural areas. These trends are important to consider when looking at issues of equity, poverty, and accessibility.

**Projected Income Growth**

Median Household Income				
	2021	2026	Change 2021-2026	Growth %
Erie County	\$58,945	\$64,911	\$5,966	10.1%
City of Buffalo	\$38,933	\$42,606	\$3,673	9.4%
Other Urban Areas	\$66,971	\$75,083	\$8,112	12.1%
Rural	\$76,189	\$83,770	\$7,581	10.0%
New York	\$72,042	\$80,540	\$8,498	11.8%

**Access to Transportation**

The chart below shows the breakdown of households with access to a vehicle based on housing tenure. In all areas of Erie County, households that own their home are more likely to have access to at least one vehicle. Residents of the City of Buffalo are the least likely to have access to a vehicle. A review of relevant housing and transportation plans, as well as municipal comprehensive plans, indicates that there is greater access to alternative forms of transportation in the City of Buffalo than other areas, but there are still many households throughout the City and County without easily accessible transportation options. This is noted in various plans as a key barrier to employment, training, and improved quality of life.

**Households by Vehicles Available**

	City of Buffalo		Other Urban Areas		Rural		Total	
	Owner occupied	Renter occupied	Owner occupied	Renter occupied	Owner occupied	Renter occupied	Owner occupied	Renter occupied
No vehicle available	10%	40%	3%	21%	3%	11%	4%	30%
1 vehicle available	44%	43%	32%	54%	24%	52%	33%	48%
2 or more vehicles available	46%	17%	65%	26%	73%	37%	63%	22%

Source: ESRI, U.S. Census Bureau, 2015-2019 American Community Survey

### Housing Stock

The table below shows some general indicators around housing and households in Erie County. While median rents are similar throughout the County, median home values vary widely with homes in rural areas approximately double the value of homes in the City of Buffalo. Some of this variation is likely due to associated land, with parcels being larger on average in rural and suburban areas than in more densely populated areas. Furthermore, the percentage of households renting is more than double in the City of Buffalo than other areas of the County. Home ownership and value is a key factor in generating wealth (often generational wealth), so these variations indicate that residents of Buffalo are less able to build assets and wealth through home ownership.

General Housing Statistics, 2019			
	City of Buffalo	Other Urban Areas	Rural
Total Households	110,594	242,217	36,774
Owner Occupied	45,122	174,785	31,676
Renter Occupied	65,472	67,432	5,098
% Owner Occupied	40.8%	72.2%	86.1%
% Renter Occupied	59.2%	27.8%	13.9%
Median Home Value Range	\$80,000 to \$89,999	\$150,000 to \$174,999	\$175,000 to \$199,999
Median Gross Rent Range	\$750 to \$799	\$800 to \$899	\$750 to \$799

Source: ESRI, U.S. Census Bureau, 2015-2019 American Community Survey

The housing stock is also considerably older in the City of Buffalo than in other areas of the County. More than 60% of housing units in the City were built prior to 1940, compared to 16% in other urban areas and 23% in rural areas. Housing age can impact value, safety, and resilience. Older housing is more likely to have toxic materials, such as lead and asbestos, and can be more

Housing Units by Year Built						
	City of Buffalo		Other Urban Areas		Rural	
Total	131,290	100%	257,649	100%	39,423	100%
Built since 2000	4,015	3%	22,498	9%	5,407	14%
Built 1970 to 1999	10,952	8%	73,307	28%	12,898	33%
Built 1940 to 1969	33,950	26%	120,190	47%	11,921	30%
Built 1939 or earlier	82,373	63%	41,654	16%	9,197	23%

Source: ESRI, U.S. Census Bureau, 2015-2019 American Community Survey

vulnerable to severe weather events. With nearly 300,000 housing units throughout the County built prior to 1970, this should certainly be a consideration when looking at community resilience and vulnerability.



## Industry Analysis

## Industry Composition

The following figure shows the industry sector composition of Erie County in 2021. The largest industry sector in the County is **Government**, accounting for 74,233 jobs, or approximately 16.3% of total jobs. **Health Care and Social Assistance** is the second largest industry sector by employment with 67,678 employees. **Retail Trade** is third largest, employing 45,319.

Employment by Sector in 2021							
NAICS & Description		Erie County			New York		
		2021 Jobs	% of All Jobs	Payrolled Business Locations	2021 Jobs	% of All Jobs	Payrolled Business Locations
90	Government	74,233	16.3%	649	1,486,013	14.5%	16,362
62	Health Care and Social Assistance	67,678	14.9%	2,564	1,691,212	16.5%	58,035
44	Retail Trade	45,319	10.0%	2,966	826,520	8.1%	71,872
31	Manufacturing	41,092	9.0%	1,003	409,436	4.0%	16,279
72	Accommodation and Food Services	29,607	6.5%	2,208	517,066	5.1%	51,848
52	Finance and Insurance	29,292	6.4%	1,193	556,510	5.4%	28,424
54	Professional, Scientific, and Technical Services	27,073	5.9%	2,297	764,346	7.5%	73,147
56	Administrative/Support and Waste Mngmt. and Remediation Services	21,962	4.8%	1,904	490,800	4.8%	39,378
81	Other Services (except Public Administration)	20,526	4.5%	2,514	504,401	4.9%	70,946
23	Construction	18,058	4.0%	2,093	442,770	4.3%	50,701
48	Transportation and Warehousing	17,328	3.8%	646	318,546	3.1%	12,529
42	Wholesale Trade	17,191	3.8%	1,222	297,738	2.9%	33,486
61	Educational Services	12,983	2.9%	396	444,618	4.4%	9,672
55	Management of Companies and Enterprises	11,709	2.6%	232	130,749	1.3%	4,098
53	Real Estate and Rental and Leasing	6,843	1.5%	859	218,322	2.1%	35,263
71	Arts, Entertainment, and Recreation	5,962	1.3%	403	154,031	1.5%	12,951
51	Information	5,237	1.2%	306	286,879	2.8%	14,279
11	Agriculture, Forestry, Fishing and Hunting	1,442	0.3%	93	44,115	0.4%	2,964
22	Utilities	969	0.2%	30	36,804	0.4%	671
99	Unclassified Industry	555	0.1%	999	29,936	0.3%	49,946
21	Mining, Quarrying, and Oil and Gas Extraction	188	0.0%	17	4,943	0.0%	345
<b>Totals</b>		<b>455,245</b>	<b>100.0%</b>	<b>1,696</b>	<b>10,219,675</b>	<b>100.0%</b>	<b>653,194</b>

Source: Emsi. Payrolled business locations are for the year 2020.



### Employment Trends

As shown in the table on the following page, from 2011 to 2021 Erie County has had a net loss of jobs of 6.2%, or 30,147 jobs, compared to job growth of 1.6% for New York. However, the table also shows that job growth overall was on a positive trajectory through 2019 (increase of over 17,800 jobs from 2011 through 2019), indicating that the COVID-19 pandemic had a substantial impact on employment in Erie County.

In terms of job count, employment growth from 2011 to 2021 was primarily driven by **Transportation and Warehousing**, **Finance and Insurance**, and **Health Care and Social Assistance**. These industries have also grown throughout the State. Notably, the **Transportation and Warehousing** has grown 34.5% in Erie County, adding 4,445 jobs, and **Finance and Insurance** had grown 16.4%, adding 4,116 jobs. These two industries are growing considerably faster in Erie County than in the State. While these industries did see slight declines from 2019 to 2021, it appears that they were less impacted by the pandemic than other industries.

Conversely, there have been substantial job declines in **Administrative and Support and Waste Management and Remediation Services** and **Government**, both losing over 6,000 jobs over the last 10 years. **Accommodation and Food Service** also shows as having lost over 10,000 jobs, however the vast majority of those were lost in 2020 and were likely directly connected to the COVID-19 pandemic. The industry had lost over 1,000 jobs from 2017 to 2019, but a major decline occurred in Q2 2020, correlating with the start of the pandemic. A sizeable decline is also seen in the **Retail Trade** industry in 2020, but it does not account for as much of the overall job loss as it does for Accommodation and Food Services. The industry had already lost approximately 2,700 jobs from 2011 to 2019. As such, it is worth noting both the effect of the pandemic and that the industry was seeing a consistent downward trend prior. This is important as Retail Trade is among the top employing industries in the County. All four of these high-loss industries are losing jobs at a higher rate than the State. **Arts, Entertainment and Recreation** was also, as expected, hard hit in 2020 and 2021. Between 2011 and 2019 the industry had grown 25.5%, adding nearly 2,000 jobs and making it the second fastest growing industry in the County. By 2021 that entire gain, plus over 1,700 additional jobs in the industry, had been wiped out.

Furthermore, while Erie County has seen **Manufacturing** job loss of 2,041, the rate of decline is substantially less than that of the State (4.7% versus 13% respectively). Manufacturing had seen a slight (.7%) gain in Manufacturing jobs from 2011 to 2019.

Employment Change by Sector 2011 - 2021												
NAICS & Description		Erie County							New York			
		2011 Jobs	2019 Jobs	2011-2019 # Change	2011-2019 % Change	2021 Jobs	2011-2021 # Change	2011-2021 % Change	2011 Jobs	2021 Jobs	# Change	% Change
48	Transportation and Warehousing	12,883	17,459	4,576	35.5%	17,328	4,445	34.5%	272,484	318,546	46,062	16.9%
52	Finance and Insurance	25,176	29,344	4,168	16.6%	29,292	4,116	16.4%	536,114	556,510	20,396	3.8%
62	Health Care and Social Assistance	64,422	72,037	7,615	11.8%	67,678	3,255	5.1%	1,401,396	1,691,212	289,816	20.7%
55	Management of Companies and Enterprises	10,937	13,195	2,258	20.6%	11,709	772	7.1%	132,987	130,749	(2,238)	(1.7%)
53	Real Estate and Rental and Leasing	6,548	7,420	872	13.3%	6,843	295	4.5%	204,244	218,322	14,077	6.9%
99	Unclassified Industry	471	527	57	12.0%	555	85	18.0%	28,361	29,936	1,575	5.6%
11	Agriculture, Forestry, Fishing and Hunting	1,371	1,434	62	4.6%	1,442	71	5.2%	42,997	44,115	1,118	2.6%
21	Mining, Quarrying, and Oil and Gas Extraction	317	196	(122)	(38.4%)	188	(130)	(40.9%)	4,817	4,943	126	2.6%
22	Utilities	1,243	1,047	(195)	(15.7%)	969	(274)	(22.0%)	37,130	36,804	(326)	(0.9%)
54	Professional, Scientific, and Technical Services	27,401	28,531	1,129	4.1%	27,073	(329)	(1.2%)	664,667	764,346	99,679	15.0%
81	Other Services (except Public Administration)	21,188	24,123	2,936	13.9%	20,526	(662)	(3.1%)	532,064	504,401	(27,662)	(5.2%)
23	Construction	18,794	19,553	759	4.0%	18,058	(736)	(3.9%)	400,557	442,770	42,212	10.5%
61	Educational Services	14,296	14,262	(34)	(0.2%)	12,983	(1,313)	(9.2%)	401,438	444,618	43,180	10.8%
42	Wholesale Trade	18,699	18,112	(587)	(3.1%)	17,191	(1,508)	(8.1%)	340,783	297,738	(43,045)	(12.6%)
71	Arts, Entertainment, and Recreation	7,718	9,685	1,967	25.5%	5,962	(1,756)	(22.8%)	188,091	154,031	(34,060)	(18.1%)
51	Information	7,179	6,366	(813)	(11.3%)	5,237	(1,942)	(27.1%)	271,560	286,879	15,319	5.6%
31	Manufacturing	43,133	43,454	321	0.7%	41,092	(2,041)	(4.7%)	470,771	409,436	(61,335)	(13.0%)
90	Government	80,436	77,148	(3,288)	(4.1%)	74,233	(6,203)	(7.7%)	1,522,138	1,486,013	(36,126)	(2.4%)
56	Administrative/Support and Waste Mngmt. and Remediation Services	29,884	25,221	(4,664)	(15.6%)	21,962	(7,922)	(26.5%)	466,677	490,800	24,122	5.2%
44	Retail Trade	53,262	50,564	(2,698)	(5.1%)	45,319	(7,943)	(14.9%)	940,089	826,520	(113,569)	(12.1%)
72	Accommodation and Food Services	40,035	43,577	3,542	8.8%	29,607	(10,428)	(26.0%)	639,887	517,066	(122,821)	(19.2%)
Totals		485,392	503,254	17,862	3.7%	455,245	(30,147)	(6.2%)	9,499,253	9,655,755	156,502	1.6%

Source: Emsi

### Projected Employment Trends

Over the next ten years, the County's largest sector, **Government**, is projected to gain roughly 2,500 jobs. Just over half of the industries listed below are projected to grow over the next ten years. In terms of job count, **Healthcare and Social Assistance** is projected to add the most jobs, at 7,671 jobs, and **Accommodation and Food Service** is projected to lose the most jobs, at 5,671. **Retail Trade** is projected to continue to decline.

**Projected Employment Growth by Sector through 2031**

NAICS & Description		Erie County				New York			
		2021 Jobs	2031 Jobs	# Change	% Change	2021 Jobs	2031 Jobs	# Change	% Change
62	Health Care and Social Assistance	67,678	75,349	7,671	11.3%	1,691,212	2,074,725	383,512	22.7%
90	Government	74,233	76,810	2,577	3.5%	1,486,013	1,620,464	134,451	9.0%
52	Finance and Insurance	29,292	31,296	2,004	6.8%	556,510	595,370	38,860	7.0%
48	Transportation and Warehousing	17,328	19,130	1,803	10.4%	318,546	342,728	24,181	7.6%
55	Management of Companies and Enterprises	11,709	12,968	1,259	10.8%	130,749	129,270	(1,478)	(1.1%)
54	Professional, Scientific, and Technical Services	27,073	28,192	1,120	4.1%	764,346	847,270	82,924	10.8%
61	Educational Services	12,983	13,655	672	5.2%	444,618	517,084	72,466	16.3%
81	Other Services (except Public Administration)	20,526	21,089	563	2.7%	504,401	518,322	13,920	2.8%
11	Agriculture, Forestry, Fishing and Hunting	1,442	1,511	69	4.8%	44,115	46,280	2,165	4.9%
99	Unclassified Industry	555	602	47	8.4%	29,936	35,202	5,265	17.6%
21	Mining, Quarrying, and Oil and Gas Extraction	188	222	35	18.5%	4,943	6,004	1,061	21.5%
53	Real Estate and Rental and Leasing	6,843	6,736	(107)	(1.6%)	218,322	219,007	686	0.3%
22	Utilities	969	813	(156)	(16.1%)	36,804	37,689	885	2.4%
23	Construction	18,058	17,682	(375)	(2.1%)	442,770	446,066	3,296	0.7%
31	Manufacturing	41,092	40,390	(702)	(1.7%)	409,436	396,314	(13,122)	(3.2%)
42	Wholesale Trade	17,191	16,250	(941)	(5.5%)	297,738	274,746	(22,992)	(7.7%)
51	Information	5,237	4,264	(973)	(18.6%)	286,879	316,743	29,863	10.4%
71	Arts, Entertainment, and Recreation	5,962	4,598	(1,363)	(22.9%)	154,031	139,460	(14,571)	(9.5%)
56	Administrative and Support and Waste Manage	21,962	19,882	(2,080)	(9.5%)	490,800	514,940	24,140	4.9%
44	Retail Trade	45,319	41,490	(3,829)	(8.4%)	826,520	784,050	(42,470)	(5.1%)
72	Accommodation and Food Services	29,607	23,990	(5,617)	(19.0%)	517,066	466,089	(50,977)	(9.9%)
<b>Totals</b>		<b>455,245</b>	<b>456,922</b>	<b>1,677</b>	<b>0.4%</b>	<b>9,655,755</b>	<b>10,327,823</b>	<b>672,068</b>	<b>7.0%</b>

Source: Emsi



## Shift Share

Shift share analysis provides insights on industry-specific employment growth by distinguishing influences of local competitive advantages from national employment trends. These insights can explain why employment has grown or declined in a given local industry over a specified period of time. There are four components of shift share analysis:

1. **Industrial Mix Effect** is the share of regional industry trends that can be attributed to nationwide trends in the specified industry.
2. **National Growth Effect** is the share of regional industry growth that is explained by the growth in the national economy as a whole.
3. **Expected Change** is the sum of the industrial mix and national growth effects. Both the national-level industry trends and the performance of the national economy will have a measurable impact on regional industry growth. This figure reflects industry-specific and economic trends at the national level.
4. **Competitive Effect** indicates how much of the job change within Erie County is the result of some unique competitive advantage of the Region. The competitive effect measures the job change that occurs within a regional industry that cannot be explained by broader trends (i.e. the National Growth Effect and the Industrial Mix Effect).

The table to the right displays the shift share analysis for Erie County from 2011-2021. Assuming the County mirrored national industry and economic growth trends over the same time period, the County would have added approximately 39,850 jobs. Instead, the County lost 30,147 jobs, indicating a negative overall competitive effect. The 70,811 difference in expected versus actual job count could be attributed to unique regional characteristics. However, it is also likely that the impacts of COVID are impacting this analysis.

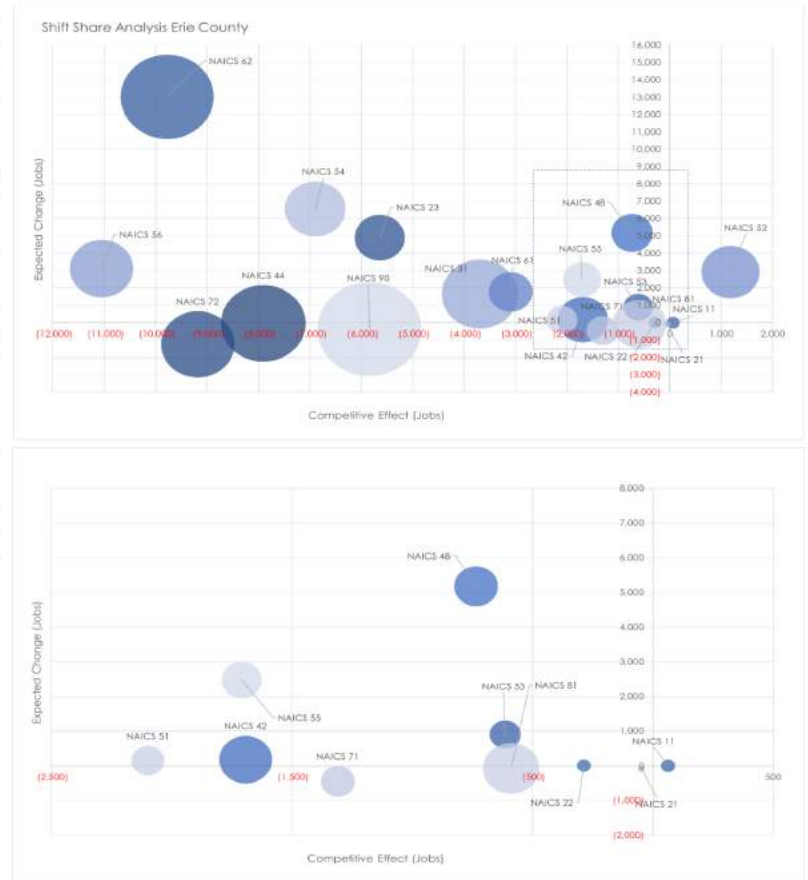
NAICS	Industry	Ind. Mix Effect	Nat'l Growth Effect	Expected Change	Competitive Effect
90	Government	(6,966)	6,604	(363)	(5,840)
62	Health Care and Social Assistance	7,739	5,289	13,028	(9,773)
44	Retail Trade	(4,407)	4,373	(34)	(7,909)
31	Manufacturing	(1,886)	3,541	1,655	(3,695)
72	Accommodation and Food Services	(4,531)	3,287	(1,244)	(9,184)
56	Administrative/Support and Waste Mngmt. and Remediation Services	674	2,453	3,128	(11,050)
54	Professional, Scientific, and Technical Services	4,321	2,250	6,570	(6,899)
52	Finance and Insurance	870	2,067	2,937	1,180
81	Other Services (except Public Admin.)	(1,812)	1,739	(72)	(590)
23	Construction	3,364	1,543	4,907	(5,643)
42	Wholesale Trade	(1,350)	1,535	185	(1,693)
61	Educational Services	609	1,174	1,783	(3,096)
48	Transportation and Warehousing	4,122	1,058	5,180	(735)
55	Mngmt. of Companies & Enterprises	1,583	898	2,481	(1,709)
71	Arts, Entertainment, and Recreation	(1,081)	634	(447)	(1,309)
51	Information	(434)	589	155	(2,098)
53	Real Estate and Rental and Leasing	371	538	909	(614)
11	Agriculture, Forestry, Fishing & Hunting	(104)	113	8	63
22	Utilities	(89)	102	13	(287)
99	Unclassified Industry	(70)	39	(32)	116
21	Mining, Quarrying, and Oil and Gas Extraction	(108)	26	(82)	(48)
Total		814	39,850	40,664	(70,811)

Source: Emsi



The charts to the right show graphically how Erie County is performing in the broader context of national industry and economic trends. The bottom chart is just a closer look at clustered industries outlined by a dotted line. The chart represents the following factors:

1. **Industry Size:** The size of each bubble shows the relative size of each industry in terms of employment in Erie County. Industries with larger bubbles make up a larger percentage of employment in the County.
2. **Expected Change:** the vertical axis shows the change in jobs that Erie County could have expected given national economic and industry trends, without consideration for regional factors.
3. **Regional Context:** The Competitive Effect on the horizontal axis reflects the impact of regional factors on job growth. It is the difference between actual job growth and expected job growth. A positive number indicates a competitive advantage in the County, whereas a negative number indicates a competitive disadvantage.



### Location Quotient Analysis

A location quotient (LQ) analysis compares the concentration of a regional industry to the concentration of the same industry across the country. By comparing regional employment patterns to that of the country as a whole, we can identify industries with high local concentration that may represent specialization and competitive advantages of Erie County. Note that we generally consider LQ values above 1.20 or below 0.80 as "significant."

The table to the right contains the results of the LQ analysis for Erie County at the 4-digit NAICS code level. The County has the highest concentration of jobs in the **Junior Colleges** industry. Erie County also has a high industry concentration in various **manufacturing** industries. **Depository Credit Intermediation** and **Insurance Carriers** are also notable, as these sectors are both highly concentrated, substantial employers, and projected to grow employment more than 10% over the next 10 years.

All of the top thirty (30) 4-digit industries by LQ are considered highly concentrated, producing far more goods and services than are required by local demand, making them important export-led economic drivers.

NAICS	Industry	2021 Jobs	2021 % of Total Jobs	2021 LQ
6112	Junior Colleges	741	0.16%	7.05
3353	Electrical Equipment Manufacturing	2,323	0.51%	5.83
3314	Nonferrous Metal (except Aluminum) Production and Processing	905	0.20%	5.40
3262	Rubber Product Manufacturing	1,745	0.38%	4.82
3115	Dairy Product Manufacturing	2,052	0.45%	4.59
3271	Clay Product and Refractory Manufacturing	372	0.08%	3.47
3112	Grain and Oilseed Milling	576	0.13%	3.18
3251	Basic Chemical Manufacturing	1,310	0.29%	3.03
3159	Apparel Accessories and Other Apparel Manufacturing	108	0.02%	3.02
4885	Freight Transportation Arrangement	2,176	0.48%	2.85
3279	Other Nonmetallic Mineral Product Manufacturing	625	0.14%	2.77
6239	Other Residential Care Facilities	1,248	0.27%	2.67
3254	Pharmaceutical and Medicine Manufacturing	2,348	0.52%	2.53
6232	Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	4,647	1.02%	2.48
4854	School and Employee Bus Transportation	1,077	0.24%	2.46
4852	Interurban and Rural Bus Transportation	96	0.02%	2.40
4831	Deep Sea, Coastal, and Great Lakes Water Transportation	244	0.05%	2.40
5241	Insurance Carriers	8,918	1.96%	2.23
3324	Boiler, Tank, and Shipping Container Manufacturing	558	0.12%	2.21
8133	Social Advocacy Organizations	1,416	0.31%	2.13
5221	Depository Credit Intermediation	10,842	2.38%	2.13
4241	Paper and Paper Product Merchant Wholesalers	688	0.15%	2.00
3113	Sugar and Confectionery Product Manufacturing	416	0.09%	2.00
3339	Other General Purpose Machinery Manufacturing	1,525	0.34%	1.99
7112	Spectator Sports	830	0.18%	1.97
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	1,909	0.42%	1.95
3365	Railroad Rolling Stock Manufacturing	118	0.03%	1.86
7113	Promoters of Performing Arts, Sports, and Similar Events	588	0.13%	1.79
4239	Miscellaneous Durable Goods Merchant Wholesalers	1,501	0.33%	1.77
4859	Other Transit and Ground Passenger Transportation	518	0.11%	1.76

### Real Estate Market Analysis

The following market analysis uses CoStar data on industrial, commercial, and multi-family residential real estate trends in Erie County.

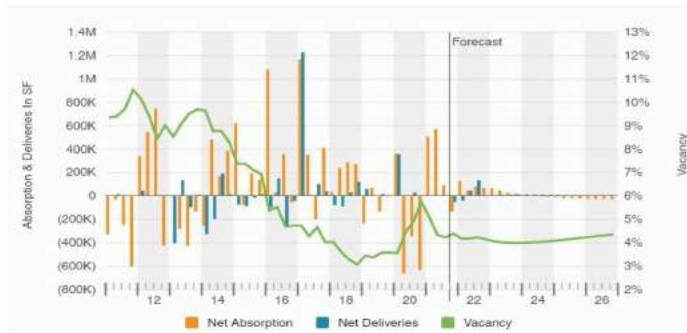
#### Industrial

According to the most recent CoStar data, there is approximately 77.1 million square feet of industrial real estate in Erie County. The County's vacancy rates had been trending downward from 2014 to 2020. While there was a spike in vacancy in 2020, it has started to decline again in 2021. There have been net deliveries of 737,000 square feet in the last 10 years. One particularly large delivery of 1.2M square feet in 2017 has substantially offset some of the industrial space lost over the time period.

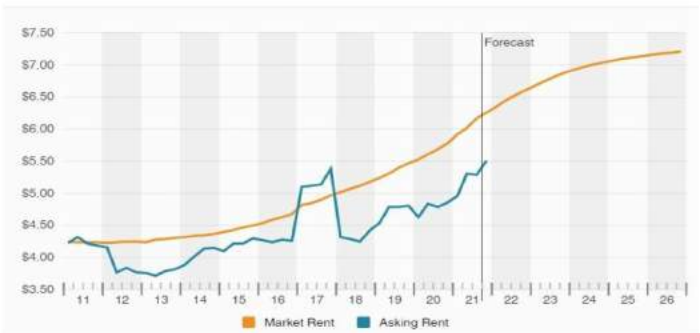
Market rents have consistently grown between 1% and 3% per quarter from 2016, with market rents from 2011-2016 remaining relatively stable with growth rates of less than 1%. Current market rent is \$6.14 per square foot.

#### Industrial Real Estate Trends: Erie County

Net Absorption, Net Deliveries & Vacancy



Market Rent & Asking Rent Per SF



Source: CoStar

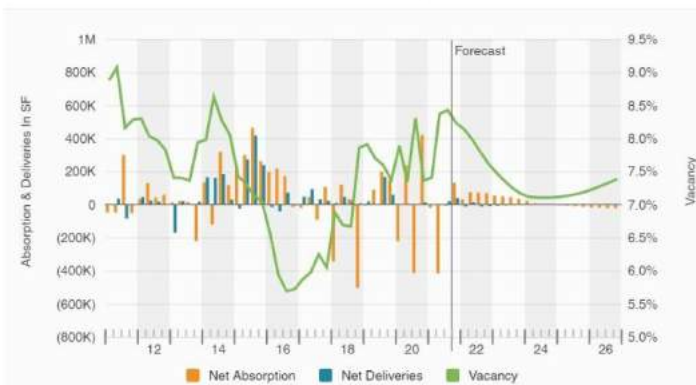
#### Office

Erie County's office inventory includes 43.2 million square feet of space. Vacancy rates in the office space have been volatile over the last ten years, starting at a high of 9% in 2011, then dipping to a low of 5.7% in 2016, and finally increasing to 8.4% currently. Deliveries and absorptions have been generally positive over time, with the exception of some large losses in absorption since 2018. Since 2018, there has been a net loss in absorption of 655,885 square feet but net deliveries of 336,456 square feet. This indicates that in recent years there has been more supply for office space than demand.

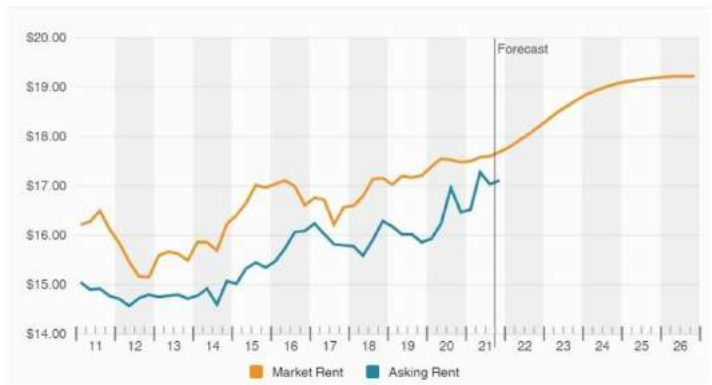
Market rent has also been volatile, but trending upwards, particularly since 2017. Current market rent for office space in the County is \$17.59 per square foot.

#### Office Real Estate Trends: Erie County

Net Absorption, Net Deliveries & Vacancy



Market Rent & Asking Rent Per SF



Source: CoStar



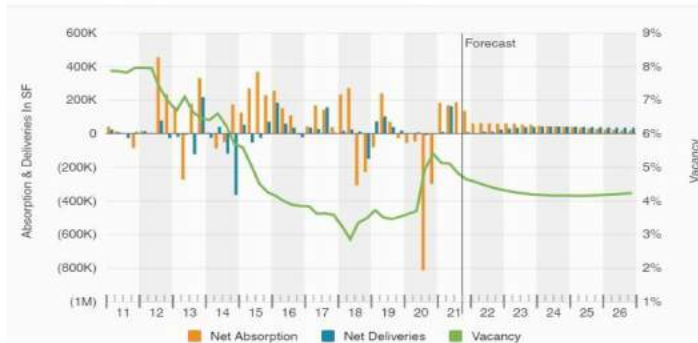
### Retail

Erie County's retail real estate market has shown strong fundamentals over the last ten years. Vacancy rates have been below 6% since 2014, even despite some retail losses in 2020 due to the pandemic. Up until 2019, net absorption exceeded net deliveries each year, indicating strong and persistent demand in the retail market. Most recently, the market in 2021 has started to recover with positive growth in both metrics.

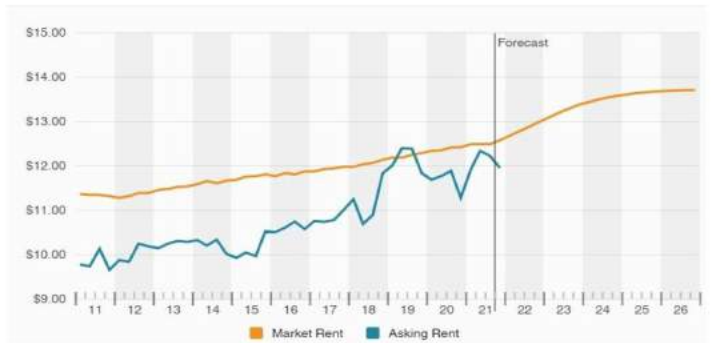
From 2011, rental rates have been slowly increasing by 0.5-1.4% per year. Current market rent prices for retail real estate in the County are \$12.48 per square foot. Rent prices are projected to grow at a slightly faster pace over the next few years. Despite generally consistent demand for retail space over the years, the market rents have remained lower than would be expected for a thriving retail market.

#### Retail Real Estate Trends: Erie County

Net Absorption, Net Deliveries & Vacancy



Market Rent & Asking Rent Per SF



Source: CoStar

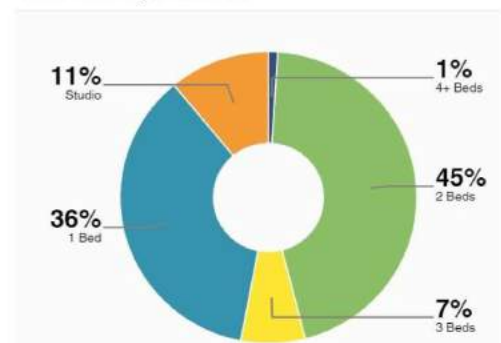
### Multi-Family Residential

There are approximately 59,892 multi-family units in the CoStar database across Erie County. Of these, 81% are one- and two-bedroom units. There have been several deliveries to the market over the last 10 years, but particularly since 2013. These deliveries have been steadily absorbed since 2016, resulting in a substantial decline in the vacancy rate from 5.36% at the end of 2016 to 2.58% currently.

Multi-family per-unit asking rents have been steadily rising across all bedroom types over the last ten years, typically between 1 and 3% per year. The current market asking rent is around \$1.30 per square foot per month for 1- and 2-bedroom units, while studios are \$2.08 and 3-bedroom units are \$1.07.

#### Multi-Family Real Estate Trends: Erie County

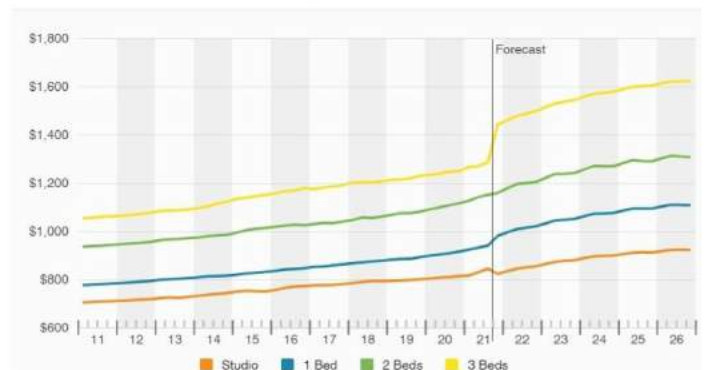
Total Units By Bedroom



Absorption, Net Deliveries & Vacancy



Market Asking Rent Per Unit By Bedroom



Source: CoStar

# APPENDIX B

## Planning Workshop Summary

### Summary of Workshop #1: Opportunities and Challenges (January 10, 2022)

#### Introduction

On January 10, 2022, ECIDA convened a workshop of stakeholders to discuss the Strengths, Weakness, Opportunities and Threats/Challenges (SWOT) facing the County. Below are the results of the polling and discussion groups from that workshop.

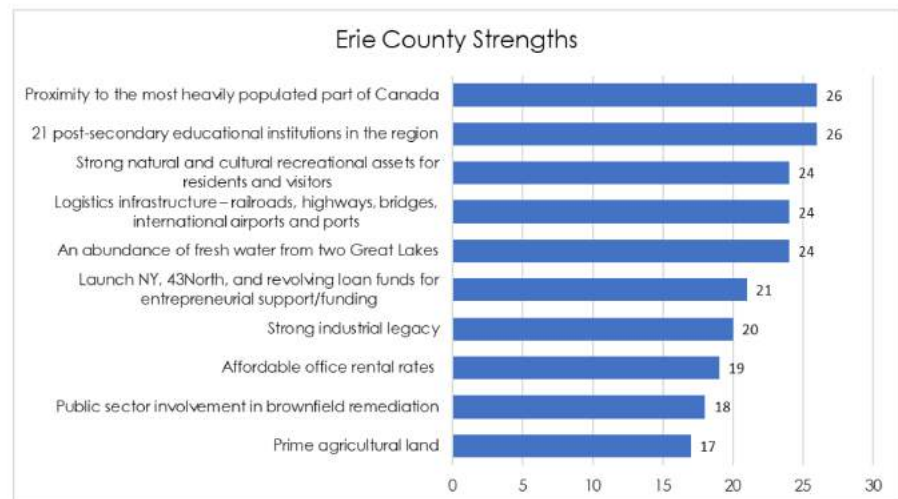
#### Attendees

Stakeholders: Angela Rossi, Anna Scime, Bill Smith, Cathryn Thomas, Cody Clement-Sanders, Daniel Castle, David Mingoia, Gary Dickson, Kathryn Helfer, Lynne Ruda, Patrick Kaler, Sr. Denise Roche, Willems Ransom, Thomas Kucharski, Marnie LaVigne, Kelly Dixon, Craig Turner, Seth Piccirillo, Lisa Hicks, Brian Kulpa, Ken Kujawa, Paul Vukelix, Christina Orsi, Vicki Haas, Chuck Clark, Andrew Schaefer, and Brandye Merriweather.

MRB Group/Prospect Hill Staff: Michael N'dolo, Tracy Verrier, Jenny Mogavero, Matthew Butwin, and Laura Evans. ECIDA Staff: John Cappellino, Lori Szewczyk, Robbie Ann McPherson.

#### Poll Results – Strengths

Participants were provided a list of Strengths that were included in the previous CEDS and various other plans available in the County and asked to vote whether those items continue to be Strengths in the County in 2022. Twenty-seven stakeholders voted, with the results shown to the right.

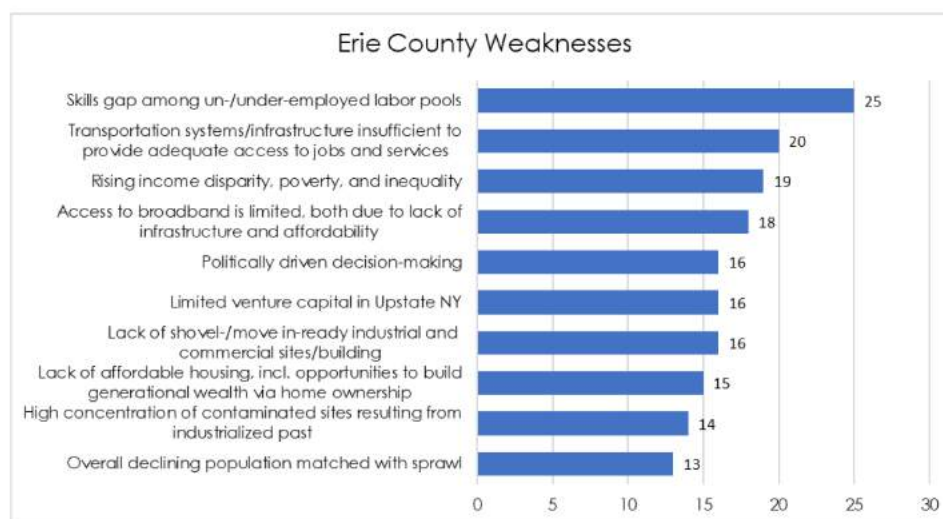


In addition, one or more participants listed the following as additional Strengths of the County:

- Significant research funding in region & innovation
- Low-cost hydropower programs from the New York Power Authority are available in approximately 80% of Erie County
- WNY has become a center for film and television production
- Broad trade expertise
- Strong governmental and private sector collaboration and partnerships
- Growing and Emerging medical sector
- Robust fiberoptic network/infrastructure that's helpful and attractive for tech development

#### Poll Results – Weaknesses

Participants were provided the list of Weaknesses that were included in the previous CEDS and various other plans available in the County, shown below, and asked to vote whether those items continue to be Weaknesses in the County in 2022. Twenty-five stakeholders voted, as shown below.



In addition, one or more participants listed the following as additional Weaknesses of the County:

- Poor coordination with towns
- Infrastructure barriers that cut off neighborhoods and investment in certain areas
- Population has increased, but sprawl is still an issue
- High taxes and regulation
- Limited walkability/multimodal transportation access

#### Breakout Session Results – Threats/Challenges

In this portion of the meeting, we reviewed Challenges that were identified in the previous CEDS and other plans for the County, shown below, and broke into three separate groups to discuss.

##### Previously Identified Challenges

- Brain Drain – young educated people are leaving the County
- Shifts in emerging labor market trends require adjustment to skill development
- Emerging trends in key industries require legacy companies to plan and adapt for new technologies (e.g. automation, electric vehicles, etc.) and adjustments to skill development
- Lack of communication and collaboration among economic and community development partners and stakeholders
- Unaligned supply and demand of office space
- Limited state and federal resources for remediation and redevelopment of greyfields and brownfields
- Aging water, sewer and stormwater infrastructure threatens water quality, access, development, and watersheds.
- NYS has high regulatory burden and costs to do business
- Ongoing impacts of COVID on businesses, including supply chain and workforce disruptions
- Lack of access to affordable childcare

We then reconvened and shared what each of the groups discussed and the major Challenges the County needs to address in the new CEDS. One or more groups noted the following:

- Workforce challenges: Access to affordable, quality childcare; gap between un-/under-employed workers and businesses that need employees; transportation and limited connectedness throughout the County.
- Talent challenges: brain drain, including foreign students moving to Canada for work due to complex immigration processes here, shifts the availability and skills of the labor market; labor shortages caused by early retirement and



mass resignation during the pandemic; population decline/stagnation is more of a function of failing to attract residents as opposed to losing residents; lack of mixed income housing and new housing stock makes it difficult for people to move to the area.

- Collaboration/Communication: connections between academia and industry are not strong enough; the County lacks a consistent narrative to attract visitors and residents alike; unmet opportunity for cross-agency collaboration, communication, and coordination of economic development efforts.
- Plan alignment/shortcomings: Some of the existing regional plans are good documents, but they aren't being implemented in a comprehensive way; this 5-year plan may end up being misaligned with the regional plan, which is 12 years old now.
- High taxation and regulation in New York State, but in the City of Buffalo in particular, are a barrier to development and business attraction.
- There is a disconnect between office space supply and demand.
- There are regulatory barriers to improving electric infrastructure.
- Climate change could make the region into a "climate oasis", Erie County needs to be prepared to take on population influx from areas experiencing extreme weather and natural disasters.

#### Breakout Session Results – Opportunities

Likewise, we reviewed the Opportunities identified in the previous CEDS and other plans, shown below, and broke out into discussion groups.

##### Opportunities from Previous CEDS

- Leverage regional post-secondary educational institutions to address skills gaps, and related R&D for technology commercialization and firm creation
- Create stronger partnerships among educators, industries, and employers
- Build sustainable career paths for underserved populations
- Incentivize development and adaptive reuse of abundant brownfields, greyfields (e.g. underutilized shopping malls, strip commercial properties, etc.), and in-fill sites
- Tiered incentive structures targeting growth sectors and distressed areas
- Leverage existing population to grow venture capital and small business investment opportunities
- Leverage stable climate and high quality of life to attract new residents and businesses
- Enhance, expand and connect recreational resources to serve residents and visitors
- Expand technical and financial assistance for existing, early stage, and new businesses

- Modernize infrastructure to improve community resilience, connectedness, and quality of life

We then reconvened and shared what each of the groups discussed and the major Opportunities for the County that should be addressed in the new CEDS. One or more groups noted the following Opportunities for the County:

- Transit-oriented development:
  - Mixed income and multigenerational housing development along transit routes and/or near employment centers.
  - Shifting from a vehicle-oriented transportation system to a multimodal transportation system will support all other development in some way.
  - NFTA's collaboration with the Medical campus is a good example of on demand transit, like bike sharing and car sharing. Explore replicating this model to provide on demand/last mile transit in other areas to connect more people to bus routes and metro rail.
  - Parking being readily available and cheap creates a disadvantage to public transportation. Surface parking lots may be a good place for infill development, and reducing availability/increasing price of parking would encourage people to use transit more.
  - Improve connections between the East and West Sides of Buffalo, as well as connections to major employment areas throughout the County.
- Address workforce needs:
  - Identify pathways for career advancement in order to retain talent, as well as attract career-oriented residents.
  - Leverage community colleges for job training and industry support.
  - Identify resources to subsidize childcare to improve availability and affordability.
  - Tap hidden talent in underserved communities by finding ways to empower and upskill individuals.
- Build stronger cross-organization collaboration and communication to break down silos and build momentum:
  - Strengthen relationships between academia and industry to help retain young talent (reverse the brain drain) and create industry-driven workforce training.
  - Build stronger relationships and communication between academic institutions (including high schools), cultural institutions, and economic development organizations. Use these relationships to craft quality of life efforts starting at a young age and build cultural awareness. Leverage existing "Be in Buffalo" efforts for this.
  - Establish a coalition or group that would coordinate and communicate economic development efforts among all of the stakeholder organizations – consider reconfiguring the Business Task Force that was initiated during the pandemic, or creating an initiative like ROC25, Columbus2025, or Rich and Forward could help to coordinate efforts.
- Create and promote consistent messaging about quality of life in WNY, and use/leverage this messaging in placemaking efforts, visitor attraction, and talent attraction.
- Utilize, build on, and promote recreational and cultural assets for placemaking and quality of life.
- Build supports and resources for entrepreneurs, particularly those from traditionally disadvantaged groups and underserved areas. These supports should be more than short term courses, they must include long term commitments and technical assistance. Need to address business skillsets, but also personal skills and needs like childcare, managing debt, etc. Consider Eco Incubators from NYSEDA and focusing on clean tech growth.
- Develop a proactive approach to leveraging business and investment from Canada.
- Advocate for more state support for logistics despite it not being a "target industry", or advocate to make it a target industry regionally, as all other industries depend on the supply chains that logistics provide.

## Summary of Workshop #2: Resiliency and Recovery (February 7, 2022)

### Introduction

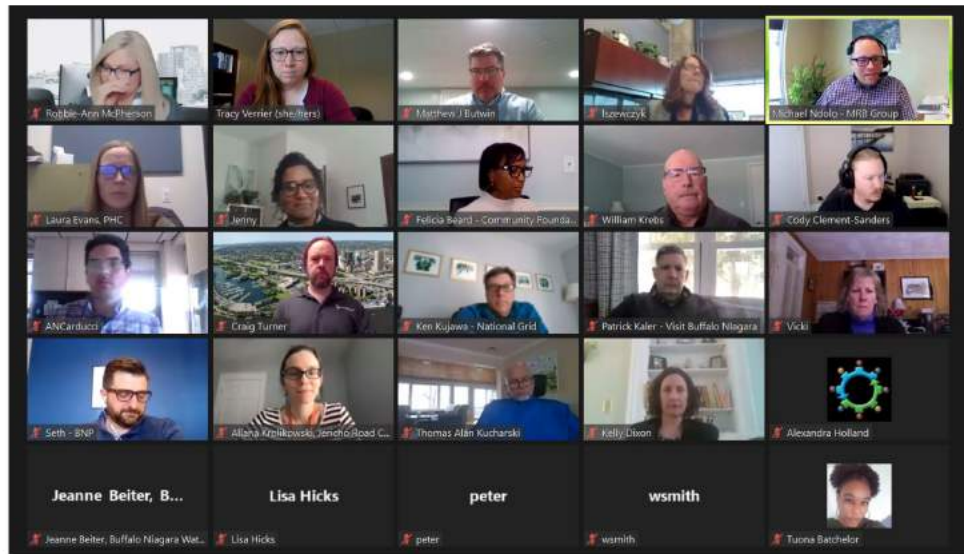
On February 7, 2022, ECIDA convened a workshop of stakeholders to discuss topics around resiliency and recovery in the County. Below are the results of the polling and discussion groups from that workshop.

### Attendees

Alex Carducci, Alexandra Holland, Allana Krolikowski, Angela Rossi, Bill Smith, Brandye Merriweather, Carolyn Welch, Cody Clement-Sanders, Craig Turner, Dan Castle, Felicia Beard, Jan Hutchinson, Jeanne Beiter, Kelly Dixon, Ken Kujawa, Kristina Groff, Lisa Hicks, Lynne Ruda, Maria Whyte, Marnie Lavigne, Matt Hubacher, Patrick Kaler, Peter Aherns, Rich Guarino, Scott Simmons, Seth Piccirillo, Steve Gawlik, Tom Kucharski, Tuona Batchelor, Vicki Haas, William Krebs.

MRB Group/Prospect Hill Staff: Michael N'dolo, Tracy Verrier, Jenny Mogavero, Matthew Butwin, and Laura Evans.

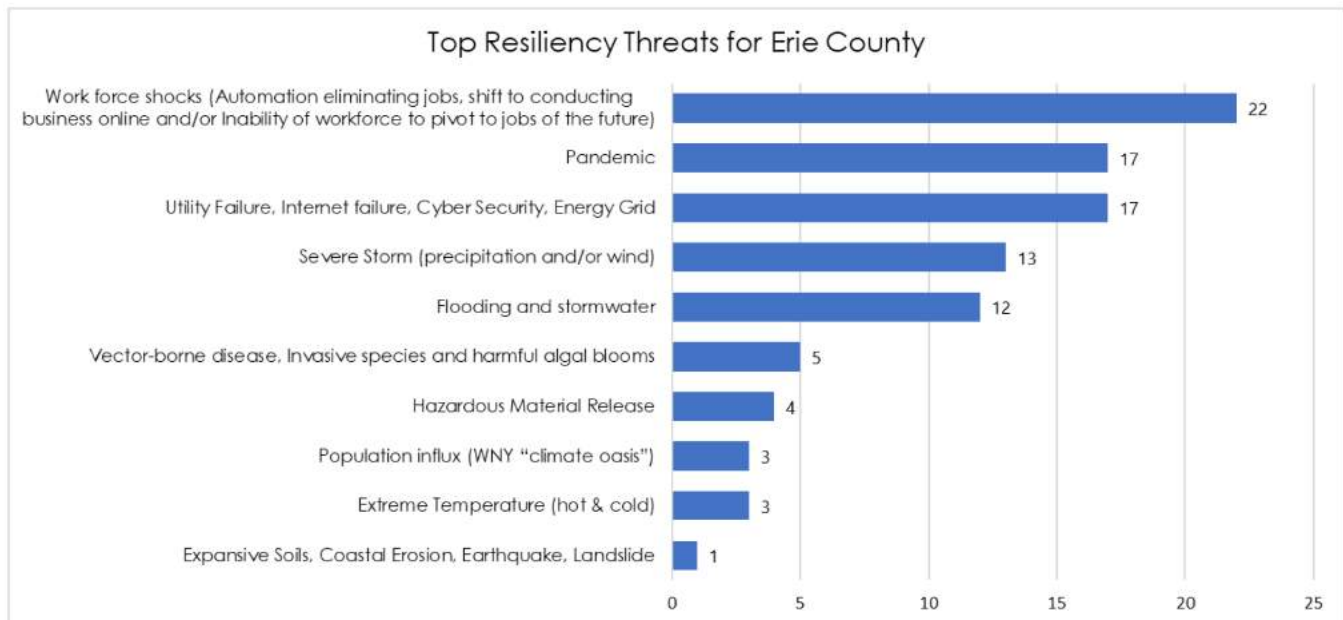
ECIDA Staff: Lori Szewczyk, Robbie Ann McPherson.





### Poll Results – Top Threats/Concerns for the County

Participants were provided a list of potential disasters and shocks the County faces, including natural disasters, man-made disasters, economic shocks, system failures and others. Participants were asked to select the three most important items on this list that the County should focus on in its resiliency planning. The results are below.



In addition, one or more participants listed the following as additional potential disaster priorities:

- Border issues – policy changes, Canada/US strife, closures, restrictions
- Political uprising
- Supply chain disruptions

#### Breakout Session Results – Steady-State Planning

We then held a breakout session to discuss what planning efforts and initiatives the County could use to bolster the community's ability to withstand or avoid a shock, or to recover quickly and minimize impact of a shock when it does occur.

Participants were asked to consider all types of shocks- weather, economic, man-made, system failure, the unknown shocks. The groups reconvened and shared their ideas:

- Address aging infrastructure through repairs, replacement, upgrading, and modernizing. This is relevant across various types of infrastructure (water/wastewater, transportation, energy, broadband, etc.).
  - Redundancy is important, particularly in energy and broadband.
  - Improved road networks will become even more important as industries shift toward e-commerce and logistics.
  - Leverage regional relationships to pursue federal and state funding for infrastructure, particularly transportation, improvements. Example of 219 corridor bridge over Cattaraugus Creek that was replaced.
  - Prepare for infrastructure for new and emerging technologies, like electric vehicle charging stations and related IT/electrical needs.
- Improve technology access to enhance educational and economic opportunities.
  - Create redundancy in broadband and internet coverage, and greater access in rural communities.
  - Better access to devices for school-aged children at home.
  - Improved technology knowledge among residents and families.
  - Address cost of connection to broadband for households (connection from street to house).
- Intermunicipal/watershed level consideration of development and how it impacts soil erosion, stormwater, and flooding.
- Improve public transportation for the purpose of workforce development, particularly to connect residents of rural communities to training locations.
  - Rural poor are trapped, they are not able to get to training, jobs, internet, etc.
  - Explore ways to improve ridership so that new routes can be supported by fares.
  - Smart mobility options will help to move the needle on equity and better prepare people for shocks.
- Better workforce preparation.
  - Prepare the workforce for jobs of the future.
  - Train for and promote employment in critical, high need positions, like nursing.
  - Address education gaps in literacy and math.
  - Help low- and moderate-income individuals access and succeed in jobs with living wages. Higher wage workers can be better prepared to respond to shocks.
  - Examples of programming are coming out of the Greater Buffalo Equity Roundtable (re-entry, youth, juvenile justice, benefits calculator, etc.)
  - Identify partners and institutions that can provide flexible and responsive training as workforce needs shift, and support them in doing that.
  - Encourage employers to be patient and supportive in training or re-skilling workers.
- Better connections and support to rural communities for economic development.
  - Adjust economic development and incentive policies, particularly at ECIDA, to better serve rural communities and businesses.
  - Explore how to overcome the lack of staffing for economic development in small communities. Where can technical assistance and capacity come from?
- Promote business continuity and preparedness.
  - More resources and support for small businesses will help them be better prepared for shocks and to pivot.
  - Prepare a resource package to provide to businesses registering in Erie County pointing them to key agencies, supports, etc. and providing information about what they will need to apply for assistance or loans down the road as they grow or need financial support.
- Convene economic development and community partners intentionally.
  - This group should meet regularly so that the relationships and communication are in place to quickly respond to a shock when it happens.
  - Small Business Task Force during COVID was a good model, but should be sure to be more inclusive of the constituents the group is intending to serve.
  - Vision Lab in Charleston, SC is an example of a prescribed group that is pulled together in times of crisis.
- Intentional communication networks would be helpful for various groups, like healthcare practitioners and municipal leaders.
  - Implement liaisons or designated information portals that are relevant to key groups, specifically from the County to these groups.
- Explore ways to improve communication with non-English speaking residents.



### Breakout Session Results – Responsive Planning

We then held a second breakout session to discuss what mechanisms could be created to enhance information-sharing and communication that would aid in the response following a shock.

Participants were again asked to consider all types of shocks- weather, economic, man-made, system failure, the unknown shocks. The groups reconvened and shared their ideas:

- Communication and Information Sharing
  - Have a standing taskforce that can spin off specialized rapid response groups.
    - Small Business Task Force and convening of philanthropy organizations as examples.
  - Leverage partners like Chambers to help share information.
  - Identify how to help small businesses access/respond to opportunities like PPP more rapidly. Identify which service providers can help, and how those partners are able to get consistent and timely information/guidance.
    - Develop a network of contacts, like a phone tree.
    - Advance Amherst website is example of a dedicated portal to share information with businesses. Could be a model for a regional portal.
    - Consider industry-based liaisons, like VBN is for tourism.
  - Leverage employers to share information with residents. Employers know how to reach their employees, so they can be a network to communicate. This misses individuals who are not working, but a good start.
  - Identify and create information networks for non-English speaking residents. Cannot solely rely on news media and employers to reach this population, and not all are "connected". There needs to be a broader network/effort.
  - Similarly, address sign language barriers in crisis communication and inclusion in task forces.
  - To the extent possible, create liaisons, portals, or databases that allow for information to flow to key groups from single points of contacts (such as healthcare, small businesses, municipal leaders, etc.) so that everyone knows where to go and/or can rely on a flow of accurate information.
    - Small Business Social Distancing Program, Buy Black Buffalo, Reopen Buffalo as examples.
- Work with community leaders to create an "after action" report and lessons learned from responding to the COVID pandemic.
- Start preparing for the impending workforce shortage in the manufacturing industry. That workforce is nearing retirement and if those jobs can't be backfilled the businesses will go elsewhere and there will be a ripple effect through the economy.
  - Training, promotion.
  - Northland is working on moving toward a knowledge-based economy without sacrificing manufacturing, but a larger strategy is needed.
- Strengthen communication with and among municipal leaders.
  - Leverage Erie County Association of Governments to share information with and among municipal leaders. This will help with consistent information sharing, but also allow communities to see what others are doing.
  - Create an onboarding program to brief new leaders on programs and resources available in the County.
  - Create a liaison or dedicated information portal for municipal leaders to access ongoing information about programs, priorities, changing regulations, etc.
    - HOME program for municipalities as an example.
  - Erie County is working on a resource navigator through the Association of Towns, which could be a resource for municipalities and businesses.
  - Consider that many municipalities do not have extensive staff, so there is a need for capacity and ease of access to information.



# APPENDIX C

## Stakeholder Survey Summary

In early November, 2021, ECIDA issued a request for information to municipalities throughout Erie County. A total of 22 responses were received, which included the Town of Alden, Town of Amherst, Village of Angola, Town of Boston, City of Buffalo, Town of Cheektowaga, Town of Collins, Village of East Aurora, Town of Eden, Town of Evans, Village of Gowanda, Town of Grand Island, Town of Holland, City of Lackawanna, Town of Lancaster, Village of Lancaster, Town of Marilla, Town of Newstead, Town of North Collins, Village of North Collins, Village of Springville, and Town of West Seneca.

This survey informed us of the most pressing challenges and needs facing Erie County communities, and focused our CEDS work in the subsequent months. The survey included a list of 37 activities/items, plus space to add additional areas of need. Municipalities were asked to select the 5 most important priorities for their communities. Two areas in particular were identified by respondents, revealing these high-need focus areas:

- Infrastructure: Almost every respondent, 20 of the 22, identified at least one kind of infrastructure among their top priorities. This falls into multiple categories:
  - Water & Sewer Infrastructure: The most commonly identified individual priority was water and sewer infrastructure, with 11 municipalities selecting this item. Many also identified projects that are already underway or that are planned and in need of additional funding support. Additionally, 4 respondents selected "Storm water management".
  - Broadband: 8 respondents noted development of broadband as a priority for their community.
  - Transportation: 15 respondents selected at least one transportation related priority, however that is broken down into the following categories: public transportation (6), walkability (6), bikeability (4), and roadways and bridges (4).
- Business Support: Another commonly identified area of need was around supporting businesses and business growth. "Small business support and access to capital" was selected by 11 communities, "Dealing with COVID-19 impacts on existing businesses" was selected by 7 communities, and "Tools and capital for business retention" was selected by 7 communities. While some communities selected multiple business-related item, a total of 16 communities selected at least one item related to business support.
- Housing: Housing also showed up as a theme in the responses, although to a smaller extent. Senior housing options was a priority for 5 respondents, and 2 other respondents selected Housing affordability (for a total of 7 respondents).
- Preserving & Expanding Recreational Resources: 6 respondents selected this topic as among their top priorities. Furthermore, 4 of those respondents and 3 additional respondents (7 total) identified specific recreation-related projects that they are planning to undertake if additional funding can be identified.

In terms of current resources and planning, 16 of the respondents identified having an economic development strategy or comprehensive plan to which they refer. Most of the communities have not implemented any COVID-specific recovery plan or provided COVID-specific program resources.

What follows is more detail about responses to the survey.

## Information Request Answers

### Plans and Strategies

- What is your community's most recent economic development strategy?

Of the 22 responses, 16 indicated that they have an existing Economic Development Strategy or a Comprehensive Plan.

### Programs and Resources

- What programs and resources do you typically refer your businesses to for general economic development assistance?
- Has your community developed any COVID-19-specific economic recovery plans, programs, or resources?
- Are you aware of any "best practices" programs or resources that other communities have implemented that we could bring to the region?

Most municipalities identified specific programs that they offer or organizations to which they refer businesses for support. The most commonly mentioned entities were Industrial Development Agencies (Erie, Lancaster, or Amherst) and local Chambers of Commerce. County departments and State agencies, including Empire State Development, NYPA, and NYSEDA, were also mentioned.

In terms of COVID-specific programs and resources, only two respondents have implemented initiatives to support COVID-specific recovery, although a few others are working on plans or have applied for funding to implement specific activities.

Respondents were also asked to identify examples of "best practices" that other communities have implemented. Only 4 responses to this question were received. Two respondents pointed to Amherst, and one of those also pointed to Tonawanda. Another respondent looks to NYCOM as a resource for best practices. The last respondent pointed to some cities across the country, noting specifically that economic development initiatives should be mutually beneficial to businesses and governments, planning focused on resiliency and assessment of vulnerabilities, and investment in workforce and training.

### Topics and Priorities

Below is a table outlining the response rate for each of the 37 pre-determined priority topics. No municipality offered additional topics beyond this list.

Municipal Survey Responses - Priority Items			
Item	Response Count	Item	Response Count
Water & sewer infrastructure	11	Protecting environmental resources	2
Small business support and access to capital	11	Housing: Affordability	2
Broadband infrastructure	8	Municipal/Community Services: Emergency Services	2
Dealing with COVID-19 impacts on: existing businesses	7	Dealing with COVID-19 impacts on: hospitality and tourism sectors	1
Tools and capital for business retention	7	Dealing with COVID-19 impacts on: failed businesses	1
Transportation: Public transportation	6	Entrepreneurship support networks	1
Transportation: Walkability	6	Electric system: Expansion of access	1
Preserving and expanding recreational resources	6	Preserving rural character	1
Housing: Senior housing options	5	Historic preservation	1
Transportation: Bikeability	4	Dealing with COVID-19 impacts on: the real estate market	0
Transportation: Roadways and bridges	4	Dealing with COVID-19 impacts on: healthcare professionals	0
Storm water management	4	Dealing with COVID-19 impacts on: schools (teachers, students)	0
Supporting the agricultural industry	4	Technology funding and capacity building for businesses and schools	0
Public health response	2	Electric system: Advanced/Renewable Energy	0
Supply chain resiliency	2	Housing: Updating aging housing stock	0
Workforce development & training	2	Municipal/Community Services: Library	0
Childcare availability & affordability	2	Municipal/Community Services: Public Schools	0
Retaining young talent	2	Municipal/Community Services: Human Services	0
Preserving community character	2		

### Rural vs. Urban/Suburban Priorities

The table on the next page shows the breakdown of respondents' priorities separated by rural and urban/suburban ("(sub)urban") communities. Most of the priorities were relatively aligned, however there was some variation between these geographies. The three top priorities that did not align were: senior housing options (5 rural vs. 0 (sub)urban), broadband infrastructure (6 rural vs. 2 (sub)urban), and public transportation (1 rural vs. 5 (sub)urban).

<b>Municipal Survey Responses - Priority Items by Geography Type</b>		
	Rural	Urban/ Suburban
Total Surveys Received	12	10
Water & sewer infrastructure	6	5
Small business support and access to capital	5	6
Broadband infrastructure	6	2
Dealing with COVID-19 impacts on: existing businesses	4	3
Tools and capital for business retention	4	3
Transportation: Public transportation	1	5
Transportation: Walkability	4	2
Preserving and expanding recreational resources	3	3
Housing: Senior housing options	5	0
Transportation: Bikeability	2	2
Transportation: Roadways and bridges	2	2
Storm water management	1	3
Supporting the agricultural industry	2	2
Public health response	1	1
Supply chain resiliency	2	0
Workforce development & training	1	1
Childcare availability & affordability	0	2
Retaining young talent	0	2
Preserving community character	1	1
Protecting environmental resources	1	1
Housing: Affordability	1	1
Municipal/Community Services: Emergency Services	2	0
Dealing with COVID-19 impacts on: hospitality and tourism sectors	0	1
Dealing with COVID-19 impacts on: failed businesses	0	1
Entrepreneurship support networks	1	0
Electric system: Expansion of access	0	1
Preserving rural character	1	0
Historic preservation	1	0
Dealing with COVID-19 impacts on: the real estate market	0	0
Dealing with COVID-19 impacts on: healthcare professionals	0	0
Dealing with COVID-19 impacts on: schools (teachers, students)	0	0
Technology funding and capacity building for businesses and schools	0	0
Electric system: Advanced/Renewable Energy	0	0
Housing: Updating aging housing stock	0	0
Municipal/Community Services: Library	0	0
Municipal/Community Services: Public Schools	0	0
Human Services	0	0



# APPENDIX D

## Alignment with Other Plans

### Appendix D: Alignment with Other Plans

This CEDS builds on existing relevant regional and local planning documents, including the following:

- **ECIDA** Comprehensive Economic Development Strategy (2017-2021).
- **Erie County** strategies/plans including the 2013 and 2017 Initiatives for a Smart Economy, Live Well Erie, Erie County Hazard Mitigation Plan, Erie County Climate Vulnerability Assessment, and Erie County Opportunity Zone Prospectus.
- The most recent **municipality** Comprehensive Plans, Master Plans, and Economic Studies for the Town of Amherst, Town of Boston, Town of Cheektowaga, Town of Concord, Town of Eden, East Aurora, Town of Eden, Town of Elma, Town of Evans/Village of Angola, Town of Grand Island, Town of Holland, Town of Lancaster/Village of Depew, Town of Newstead/Village of Akron, Town of North Collins, Town of Tonawanda, Town of West Seneca, Village of Springville, and the East Aurora Regional Comprehensive Plan.
- Regional economic development strategies including **Western New York Regional Economic Development Council (WNY REDC)** 2020 Recovery Strategy, Buffalo Billion II, WNY Regional Sustainability Plan, Regional Strategy, and 2021 Annual Report; **Visit Buffalo Niagara** Tourism Master Plan and Strategic Plan; **Invest Buffalo Niagara** Western NY Industrial Real Estate Development Strategy (Executive Summary); 2006 Framework for Regional Growth; and **Buffalo Niagara Partnership** 2021 Advocacy Agenda .
- Neighborhood/Target area specific plans including Town of Evans LWRP, Lake Erie Beach Commercial District Revitalization Strategy, City of Lackawanna First Ward BOA Step 2 Nomination, Ellicott Street Placemaking Strategy, The Future of Mobility: Remaking Buffalo for the 21<sup>st</sup> Century, and the East Side Avenues 2019-2020 Annual Report.
- Transportation plans including **Greater Buffalo Niagara Regional Transportation Council (GBNRTC)** One Region Forward, Moving Forward 2050, Bike Buffalo Niagara Regional Bicycle Master Plan, Buffalo Niagara Regional Freight Plan, Comprehensive Transit-Oriented Development Plan and planning update, and Region Central Planning Study Update; and **UB Regional Institute** Rail-Volution 2020 WNY Delegation Action Plan.
- Equity specific studies including The Racial Equity Dividend, The Harder We Run, and Numbers in Need.
- Other topical studies and strategies including **Americans for the Arts** - Arts & Economic Prosperity 5, **UB Regional Institute** Buffalo Niagara Regional Report: the dollars and sense of development matters, **LISC** 2021 Regional Housing Market Study, and **ILR Buffalo Co-Lab** Engaging the Future of Housing in the Buffalo-Niagara Region: A Preliminary Exploration of Challenges that Lie Ahead.

# APPENDIX E

## SWOT Analysis

### Appendix E: SWOT Analysis

Throughout the CEDS updating process, input on strengths, weakness, opportunities, and threats (challenges) were gathered from multiple sources. This includes the previous CEDS, existing plans, interviews, and the Opportunities and Challenges Workshop. The following SWOT was developed based on this input.

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>21 post-secondary educational institutions in the region.</li> <li>An abundance of fresh water from two Great Lakes.</li> <li>Proximity to the most heavily populated part of Canada.</li> <li>Strong industrial legacy.</li> <li>Logistics infrastructure – railroads, highways, bridges, international airports and ports.</li> <li>Strong natural and cultural recreational assets for residents and visitors.</li> <li>Prime agricultural land.</li> <li>Affordable office rental rates.</li> <li>Public sector involvement in brownfield remediation.</li> <li>Launch NY, 43North, and revolving loan funds for entrepreneurial support/funding.</li> <li>Significant research funding in region &amp; innovation.</li> <li>Low-cost hydropower programs from the New York Power Authority are available in approximately 80% of Erie County.</li> <li>WNY has become a center for film and television production.</li> <li>Broad trade expertise.</li> <li>Strong governmental and private sector collaboration and partnerships.</li> <li>Growing and emerging medical sector.</li> <li>Robust fiberoptic network/infrastructure, particularly in Buffalo and surround areas, that's helpful and attractive for tech development.</li> </ul>	<ul style="list-style-type: none"> <li>Skills gap among un-/under-employed labor pools.</li> <li>Rising income disparity, poverty, and inequality.</li> <li>Lack of affordable housing, including opportunities to build generational wealth via home ownership.</li> <li>Transportation systems and infrastructure throughout the County are insufficient to provide adequate access to jobs and services.</li> <li>Access to broadband is limited, both due to lack of infrastructure and affordability.</li> <li>High concentration of contaminated sites resulting from industrialized past.</li> <li>Lack of shovel-/move in-ready industrial and commercial sites/building.</li> <li>Limited venture capital in Upstate NY.</li> <li>Politically driven decision-making.</li> <li>Previously declining population matched with sprawl, causing high maintenance costs and exacerbating issues of transportation and access to opportunity.               <ul style="list-style-type: none"> <li>Population has increased, but sprawl is still an issue.</li> </ul> </li> <li>Poor coordination with towns/villages.</li> <li>Infrastructure barriers that cut off neighborhoods and investment in certain areas.</li> <li>High taxes and regulation.</li> <li>Limited walkability/multimodal transportation access.</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>Leverage regional post-secondary educational institutions to address skills gaps, and related R&amp;D for technology commercialization and firm creation.</li> <li>Develop a proactive approach to leveraging business and investment from Canada.</li> <li>Create stronger partnerships among educators, industries, and employers.</li> <li>Build sustainable career paths for underserved populations.</li> <li>Tap hidden talent in underserved communities.</li> <li>Incentivize development and adaptive reuse of abundant brownfields, greyfields, and in-fill sites.</li> <li>Tiered incentive structures targeting growth sectors and distressed areas.</li> <li>Leverage existing population to grow venture capital and small business investment opportunities.</li> <li>Expand technical and financial assistance for existing, early stage, and new businesses.</li> <li>Build long-term supports and resources for entrepreneurs.</li> <li>Leverage stable climate and high quality of life to attract new residents and businesses.</li> <li>Create and promote consistent messaging for placemaking efforts, visitor attraction, and talent attraction.</li> <li>Enhance, expand and connect recreational resources to serve residents and visitors</li> <li>Modernize infrastructure to improve community resilience, connectedness, and quality of life</li> <li>Transit-oriented development:               <ul style="list-style-type: none"> <li>Mixed income/multigenerational housing development along transit routes and/or near employment centers.</li> <li>Shifting from vehicle-oriented to multimodal transportation system.</li> </ul> </li> <li>Identify resources to subsidize childcare.</li> <li>Build stronger cross-organization collaboration and communication to break down silos and build momentum.</li> <li>Advocate for more state support for logistics.</li> </ul>	<ul style="list-style-type: none"> <li>Brain Drain – young educated people are leaving the County.</li> <li>Shifts in emerging labor market trends require adjustment to skill development.</li> <li>Emerging trends in key industries require legacy companies to plan and adapt for new technologies (e.g. automation, electric vehicles, etc.) and adjustments to skill development.</li> <li>Lack of communication and collaboration among economic and community development partners and stakeholders.</li> <li>Weak connections between academia and industry.</li> <li>Unaligned supply and demand of office space.</li> <li>Limited state and federal resources for remediation and redevelopment of greyfields and brownfields.</li> <li>Aging water, sewer and stormwater infrastructure threatens water quality, access, development, and watersheds.</li> <li>NYS has high regulatory burden and costs to do business.</li> <li>Ongoing impacts of COVID on businesses, including supply chain and workforce disruptions.</li> <li>Lack of access to quality, affordable childcare.</li> <li>Workforce limitations:               <ul style="list-style-type: none"> <li>Gap between un-/under-employed workers and businesses that need employees.</li> <li>Early retirement and mass resignation during the pandemic has created a labor shortage.</li> </ul> </li> <li>The County lacks a consistent narrative to attract visitors and residents alike.</li> <li>Lack of mixed income housing and new housing stock.</li> <li>Transportation and limited connectedness throughout the County, impacting equity in the labor force.</li> <li>Regulatory barriers to improving electric infrastructure.</li> </ul>



# APPENDIX F

## Resiliency & Post-Pandemic Toolkit

### Contents

Communication and Collaboration .....	65
Community Preparedness .....	66
Resiliency.....	68
Businesses .....	69
Remote Work and Communication.....	70
Families and Households.....	71
Economic Development .....	71
Community Development.....	72
Healthcare .....	73
Accessing Authoritative Data .....	75

### Communication and Collaboration

“Toolkit: Creating and Maintaining Coalitions and Partnerships,” Community Tool Box  
This toolkit provides guidance for creating a partnership among different organizations to address a common goal.

<https://ctb.ku.edu/en/creating-and-maintaining-coalitions-and-partnerships>

**“ASPR TRACIE Topic Collections: Communication, Information Sharing, Risk Communications/ Emergency Public Information and Warning, and Social Media in Emergency Response” HHS Healthcare Emergency Preparedness Information Gateway**

Robust communication systems can allow first responders and medical professionals to maintain communication after a disaster, and the timely and effective sharing of information within and across jurisdictions, disciplines, and organizations is critical to an effective public health emergency and disaster response. These Topic Collections include resources focused on creating and maintaining resilient emergency communication systems, the types of information that need to be shared continuously and during an emergency, and using social media for communication in an emergency.

<https://optimizingruralhealth.org/optimizing-for-systems-change/>

<https://asprtracie.hhs.gov/technical-resources/80/information-sharing/77>

<https://asprtracie.hhs.gov/technical-resources/79/risk-communications-emncy-public-information-and-warning/77>

<https://asprtracie.hhs.gov/technical-resources/73/social-media-in-emncy-response/77>



**“Collaboration Training Resources,” Candid**

A compilation of resources offered by Candid, a philanthropy focused database and resource library, about building collaborative nonprofit efforts. Resources range from podcasts to trainings.

[https://learning.candid.org/training-search/?\\_search\\_field=collaboration&\\_format=on-demand](https://learning.candid.org/training-search/?_search_field=collaboration&_format=on-demand)

**Community Preparedness****“Preparedness Toolkit (PrepToolkit),” FEMA**

- Collaborative Environment: Share ideas, information, files, and data with national peers and stakeholders
- Interactive Tools: Link exercises to the Core Capabilities and targets defined in the latest Threat and Hazard Identification and Risk Assessment guidance
- Scalable Solutions: Designed for agencies, organizations, and jurisdictions of any size and type

<https://preptoolkit.fema.gov/>

**“Community Preparedness Toolkit,” ready.gov**

The Community Preparedness Toolkit provides step-by-step directions along with useful resources for making your community safer, more resilient, and better prepared. The Toolkit can be used to develop a community-based approach to preparedness, such as a Citizen Corps Council—FEMA’s grassroots strategy to bring together government and community leaders to involve citizens in all-hazards emergency preparedness and resilience.

<https://www.ready.gov/community-preparedness-toolkit>

**“Assistance for Governments and Private Non-Profits After a Disaster,” FEMA**

Guide of the relevant information needed to identify and navigate funding to help state, local, tribal, and territorial governments and certain types of private nonprofit organizations respond to and recover from major disasters or emergencies.

<https://www.fema.gov/assistance/public>

**“Defense Primer: Defense Support of Civil Authorities,” Congressional Research Service**

Defense support of civil authorities in response to disasters is typically carried out in accordance with the National Response Framework (NRF), which is a structure of preparedness that guides the nation in responding to domestic disasters and emergencies.

Under the NRF framework, local and state governments are expected to put forth their best effort during incidents within their jurisdiction. They should only request federal assistance when their resources are overwhelmed. At that point, DOD may provide support in response to the Request for Assistance (RFA), typically as part of a broader federal response.

Examples of Defense Support of Civil Authorities:

- Response to natural disasters
- Special events
- Border security
- Oil spill response
- The COVID-19 response

DOD evaluates requests based on six criteria:

- Legality: compliance with the law
- Lethality: potential for use of lethal force by or against DOD personnel
- Risk: safety of DOD personnel
- Cost: source of funding and effect on the DOD budget
- Readiness: impact on DOD's ability to perform its primary mission
- Appropriateness: whether providing the support is in the interest of DOD

<https://sgp.fas.org/crs/natsec/IF11324.pdf>

### **“Cyber Risks to Next Generation 911,” Department of Homeland Security**

Traditional 911 services typically operate over standard voice-based telephone networks and use software, such as computer-aided dispatch systems, that operate on closed, internal networks with little to no interconnections with other systems. As cyber threats grow in complexity and sophistication, attacks could be more severe against an NG911 system as attackers can launch multiple distributed attacks with greater automation from a broader geography against more targets.

[https://www.911.gov/pdf/OEC\\_Fact\\_Sheet\\_Cyber\\_Risks\\_NG911.pdf](https://www.911.gov/pdf/OEC_Fact_Sheet_Cyber_Risks_NG911.pdf)

## **Resiliency**

### **USEPA Regional Resilience Toolkit**

FEMA and EPA partnered with the Metropolitan Transportation Commission/Association of Bay Area Governments (MTC/ABAG) to create a toolkit that helps regions plan for disasters by working across multiple jurisdictions and with non-governmental partners.

<https://www.epa.gov/smartgrowth/regional-resilience-toolkit>

### **HUD Community Resilience Toolkit**

The HUD Community Resilience Toolkit is a user-friendly guide to help recipients of HUD Community Planning and Development (CPD) funds identify opportunities to use their CPD dollars to mitigate the impacts of natural related hazards. The toolkit is divided into 6 separate sections, each related to a specific natural hazard.

<https://www.hudexchange.info/resource/5981/community-resilience-toolkit/>

### **State and Local Planning for Energy (SLOPE) tool**

Department of Energy (DOE): The SLOPE Data Viewer is designed to deliver modeled energy data resolved at state and local jurisdictional levels. Users can explore energy data potential and projections to better understand opportunities and options in energy planning. Population and building area data provide metrics to enable quantifiable goal setting.

<https://maps.nrel.gov/slope/>

### **Clean Energy Solutions for Low Income Communities toolkit**

This toolkit provides an overview of tools, resources, and models for developing low-income energy efficiency and renewable energy programs based on work in the U.S. Department of Energy's CELICA, part of the Better Buildings Initiative Accelerators. This toolkit provides materials to help program administrators reduce energy burden for low-income communities by enhancing and expanding upon work funded through utility, state, or federal programs.

<https://betterbuildingssolutioncenter.energy.gov/CELICA-Toolkit>

### **Low Income Affordability Data (LEAD) tool**

This DOE Low-Income Energy Affordability Data (LEAD) Tool was created to help stakeholders understand housing and energy characteristics for low- and moderate-income households. Using data, maps, and graphs from the LEAD Tool, stakeholders can make data-driven decisions when planning for their energy goals.

<https://www.energy.gov/eere/slsc/low-income-energy-affordability-data-lead-tool>

### **Climate Change and the Electricity Sector: Guide for Climate Change Resilience Planning**

This Guide provides basic assistance to electric utilities and other stakeholders in assessing vulnerabilities to climate change and extreme weather and in identifying an appropriate portfolio of resilience solutions.



[https://toolkit.climate.gov/sites/default/files/Climate%20Change%20and%20the%20Electricity%20Sector%20Guide%20for%20Climate%20Change%20Resilience%20Planning%20September%202016\\_0.pdf](https://toolkit.climate.gov/sites/default/files/Climate%20Change%20and%20the%20Electricity%20Sector%20Guide%20for%20Climate%20Change%20Resilience%20Planning%20September%202016_0.pdf)

### **USEPA Smart Grown Tools**

EPA offers a wide variety of tools and resources to help communities learn about and implement smart growth approaches in various categories, including: Brownfields and Infill Development; Climate Change; Disaster Resilience and Recovery; Economic Development; Planning, Zoning, and Building Codes; Transportation; Water Quality.

<https://www.epa.gov/smartgrowth/smart-growth-tools>

### **Businesses**

#### **“Coronavirus Small Business Survival Guide: All Our Content in One Place,” U.S. Chamber of Commerce**

Complete listing of all U.S. Chamber of Commerce resources for small businesses, organized by category to help users easily navigate the content.

<https://www.uschamber.com/co/start/strategy/small-business-resources-for-surviving-coronavirus>

#### **“Business Continuity Plan,” ready.gov**

Development of a business continuity plan in four steps.

<https://www.ready.gov/business-continuity-plan>

#### **“Business Continuity Planning Suite,” ready.gov**

This software was created for any business with the need to create, improve, or update its business continuity plan. The Suite is scalable for optimal use by organizations of any size and consists of a business continuity plan (BCP) training, automated BCP and disaster recovery plan (DRP) generators, and a self-directed exercise for testing an implemented BCP. Businesses can utilize this solution to maintain normal operations and provide resilience during a disruption.

<https://www.ready.gov/business-continuity-planning-suite>

## Remote Work and Communication

### **“When governments go remote,” McKinsey and Company**

As COVID-19 forces government organizations to embrace virtual work, leaders must reimagine how they engage and collaborate with their colleges. This article provides basic tools for remote working.

<https://www.mckinsey.com/industries/public-and-social-sector/our-insights/when-governments-go-remote>

### **“Tips for Effectively Communicating with the Whole Community in Disasters,” FEMA**

Practices regarding effective communication to help jurisdictions meet their obligations to carry out their disaster related activities in a non-discriminatory manner.

<https://www.dhs.gov/publication/tips-effectively-communicating-protected-populations-during-preparedness-response-and>

### **“A Practical Guide on Teleworking during the COVID-19 Pandemic,” International Labour Organization**

Practical and actionable recommendations for effective teleworking that are applicable to a broad range of actors; to support policymakers in updating existing policies; and to provide a flexible framework through which both private enterprises and public sector organizations can develop or update their own teleworking policies and practices.

[https://www.ilo.org/travail/info/publications/WCMS\\_751232/lang--en/index.htm](https://www.ilo.org/travail/info/publications/WCMS_751232/lang--en/index.htm)

## Families and Households

### **“Make a Plan,” Ready.gov**

General content for making disaster preparedness plans for families, including several steps and a series of questions that identify whether a household is prepared to handle a disaster. Also includes materials for creating preparedness content such as emergency communication plans, documents to insure property, and information about alerts and warnings.

<https://www.ready.gov/plan>

### **“When Disaster Strikes: Promising Practices – Mobile Home Residents,” mdcinc.org**

A number of factors, including structural and non-structural issues, combine to make mobile home residents particularly vulnerable to natural disasters. Includes resources for preparedness, response, and recovery stages.

<https://www.mdcinc.org/wp-content/uploads/2017/08/When-Disaster-Strikes-Promising-Practices-Mobile-Home-Residents.pdf>

## **Economic Development**

### **“CEDS In Action,” CEDS Central**

The goal of the CEDS process is not just to create an accessible, well-researched, and engaging planning document. It is ultimately meant to encourage action and create the space for impactful initiatives to emerge that meet the economic development goals of the region. This resource provides examples of transformative projects that were inspired or identified through the CEDS process.

<https://www.cedscentral.com/ceds-in-action.html>

### **“Place Marketing: How One Midwestern City Is Transforming Its Brand,” Shama Hyder**

Placemaking generally refers to a manner of planning and designing public spaces to contribute to a community’s quality of life and wellbeing. It’s heavily reliant on taking the unique aspects of a specific community and communicating them through design—in other words, creating a space that feels grounded and specific to the community it’s in.

<https://www.forbes.com/sites/shamahyder/2019/10/30/place-marketing-how-one-midwestern-city-is-transforming-its-brand/?sh=7d0120272e05>

### **“Why Place Branding Is Becoming Place Doing (Consider Austin),” Marian Salzman**

“Branding” suggests that successfully selling a destination, company or individual is simply about giving it some catchy promotion. But selling a location involves so much more than sticking a label on it. Austin shows how ongoing “place doing” works. Actions speak louder than logos. Local marketers have found ways to play up the idea of “keeping Austin weird” without alienating the locals who truly want it that way.

<https://mariansalzman.com/blog/why-place-branding-is-becoming-place-doing-consider-austin/>

### **“WealthWorks Rural Economic Development Case Studies,” Carrie Kissel, NADO.org**

Rural wealth creation is an approach to community and economic development that is demand-driven, focusing on market opportunities that capitalize on a community’s existing assets or underutilized resources. Wealth creation is intentionally inclusive, building lasting livelihoods for those who may not have been at the table before, and it supports local ownership and control of assets. This series of case studies examines how livelihoods are being improved and communities are undergoing development in a variety of sectors and rural places.



<https://www.nado.org/wealthworks-case-studies/>

**“Reshoring advanced manufacturing supply chains to generate good jobs,” Andrew Fish & Nora Spillane, The Brookings Institution**

The United States has an opportunity to leverage industry-led supply chain resiliency strategies to localize advanced manufacturing and transition workers from low-paying retail and service employment into better jobs. The country can create strategic manufacturing industries in central cities and rural areas, connecting individuals who were disproportionately affected by COVID-19 to these high-quality jobs.

<https://www.brookings.edu/research/reshoring-advanced-manufacturing-supply-chains-to-generate-good-jobs/>

## **Community Development**

**“Toolkit: Applying for Grants,” Community Tool Box**

Part I gives a step-by-step overview of the grant-writing process. Part II provides a general template for writing a grant application. Completing Part II will give you a solid proposal that can be adapted to meet specific grant opportunities and review criteria for specific funders.

<https://ctb.ku.edu/en/applying-for-grants>

**“Affordable Housing – Toolkit for Counties,” National Association of Counties**

Although housing affordability affects counties of all sizes in every region of the U.S., each county is unique, facing its own set of obstacles and equipped with its own set of tools to navigate these obstacles. This toolkit, therefore, outlines the role of counties in identifying and addressing housing affordability gaps through solutions involving inter-jurisdictional partnerships; funding and financing solutions; planning and zoning strategies; and federal resources. The toolkit includes an appendix, which discusses common housing affordability metrics, reviewing their characteristics and limitations. This toolkit summarizes and builds on research conducted by the NACo Counties Futures Lab throughout 2018.

<https://www.naco.org/resources/featured/affordable-housing-toolkit-counties>

**“Outdoor Towns Toolkit,” townsandtrailstoolkit.com**

A variety of web-based resources that provide steps and case studies for building community engagement and progressing towards becoming a town that uses its natural assets to bring people together and revitalize economies.

<https://townsandtrailstoolkit.com/>

**“Trail Planning Workshop – Toolkit,” National Park Service**

Russell Clark designed this step-by-step guide for communities, partners, and local jurisdictions to use in developing and implementing a trail planning workshop. Included are tools to help workshop participants identify community assets, establish trail priorities and brainstorm ideas for future linkages.

<https://www.nps.gov/orgs/rtca/upload/Trail-Planning-Workshop-Toolkit.pdf>

**Healthcare****“Rural Community Health Toolkit,” Rural Health Information Hub**

Provides rural communities with the information, resources, and materials they need to develop a community health program.

<https://www.ruralhealthinfo.org/toolkits/rural-toolkit>

**“Optimizing for Systems Change,” Center for Optimizing Rural Health**

This organization works with rural facilities, their providers, and their communities to improve the quality of care, maintain access to care, and address the challenges unique to small hospitals and the towns they serve.

<https://optimizingruralhealth.org/optimizing-for-systems-change/>

**“ASPR TRACIE Topic Collection: Disasters and Healthcare Disparity,” HHS Healthcare Emergency Preparedness Information Gateway**

Healthcare professionals and emergency managers may benefit from a better understanding of the complex relationships that affect fair access to healthcare. The resources in this Topic Collection highlight the considerations, factors, and lessons learned from a variety of natural and human-caused disasters and provide guidance for healthcare practitioners who are committed to addressing healthcare disparity.

<https://asprtracie.hhs.gov/technical-resources/156/disasters-and-healthcare-disparity/0>

**“ASPR TRACIE COVID-19 Resources,” HHS Healthcare Emergency Preparedness Information Gateway**

Database of resources identified or developed to address current response and recovery operations to novel coronavirus 2019 (COVID-19), the disease caused by the SARS-CoV-2 virus.

<https://asprtracie.hhs.gov/COVID-19>

**“COVID-19: Local Action Tracker,” NLC in partnership with Bloomberg Philanthropies**

This resource tracked COVID-19 responses, relief, and vaccinations through February 2022. It is the most complete collection of municipal responses to COVID-19.

[https://www.nlc.org/resource/covid-19-local-action-tracker/?\\_zs=PS0EX&\\_zl=5UI22&utm\\_campaign=covid19&utm\\_medium=email&utm\\_source=informz&utm\\_content=newsletter-032420&utm\\_term=text-covid-19-local-action-tracker](https://www.nlc.org/resource/covid-19-local-action-tracker/?_zs=PS0EX&_zl=5UI22&utm_campaign=covid19&utm_medium=email&utm_source=informz&utm_content=newsletter-032420&utm_term=text-covid-19-local-action-tracker)

## Accessing Authoritative Data

One of the primary benefits of an effective geographic information system (GIS) is how it supports data-driven decision making. It empowers county leaders to stop guessing and to stop working off anecdotal or dated information, by using and analyzing authoritative geospatial data.

### **“Erie-Niagara Planning & Development Mapping Website”- Erie County Office of GIS**

Erie County hosts an internet mapping application that was developed for use by Erie and Niagara Counties, area municipalities, regional organizations, and developers to review projects within the context of the Framework for Regional Growth Policy Areas.

<https://erieny.maps.arcgis.com/apps/webappviewer/index.html?id=68197ebcdd6343438e9511d5487cb07f>

### **“Resilience Analysis and Planning Tool” (RAPT)**

The Resilience Analysis and Planning Tool (RAPT) is a free GIS web map that allows federal, state, local, tribal and territorial emergency managers and other community leaders to examine the interplay of census tract data (i.e., housing, socio-economic information, etc.), county indicators (including community resilience information), infrastructure locations, and hazards, including real-time weather forecasts, historic disasters and estimated annualized frequency of hazard risk.

<https://fema.maps.arcgis.com/apps/webappviewer/index.html?id=90c0c996a5e242a79345cdbc5f758fc6>

### **“National Economic Resilience Data Explorer” (NERDE) – Argonne National Laboratory**

The NERDE consolidates information and data on economic distress criteria, COVID-19 impacts to local economies, and the existence and emergence of industry clusters. These data also help inform communities on the types of criteria that may indicate eligibility for EDA assistance.

<https://www.anl.gov/national-economic-resilience-data-explorer-nerde>

### **“New York Climate Change Science Clearinghouse”**

The New York Climate Change Science Clearinghouse (NYCCSC) is a regional gateway to data and information relevant to climate change adaptation and mitigation across New York State. It provides climate science data and literature and other resources for policy-makers, practitioners, and the public, to support scientifically sound and cost-effective decision making. NYCCSC also provides baseline data related to social and economic conditions such as environmental justice screening, public health and vulnerability indexes.

<https://www.nyclimatescience.org/highlights/maps>