



Regional Economic
Development Councils

STATE OF THE REGION:

Western New York

2023 STRATEGIC PLAN



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PART ONE

Executive Summary & Progress

The Buffalo Philharmonic Orchestra performed outside the recently renovated Buffalo AKG Art Museum in July 2023.

LETTER FROM CO-CHAIRS

We are pleased to present the Western New York Regional Economic Development Council's (WNY REDC) Strategic Plan Update & Challenge Competition, showcasing our continued focus on WNY's foundation for sustainable economic growth that advances refined local strategies that directly align with New York State's (NYS) core pillars for economic development—Placemaking, Innovation, Workforce and Tradable Sectors.

We couldn't have predicted the circumstances and challenges that affected the WNY economy since our award-winning original strategic plan, *A Strategy for Prosperity*, was developed in 2011. It is undeniable that a global pandemic, racially-motivated violence and racial injustices, climate disasters and disruptions in global markets—at home, nationally and globally—had tremendous impacts on our workforce, equitable wealth generation, small business growth, construction timelines and numerous other implications in recent years. With these factors in mind, our re-established vision builds on our strategic strengths and economic drivers, while striving for greater equity, greater resiliency and an economy that brings the latest innovations to the forefront.

Our re-established regional priorities build off the region's unique assets—its unique geographic location at the confluence of two Great Lakes with abundant natural assets based on its freshwater resources. They also reflect our rich history as a center of manufacturing and pioneer of innovation, important community and cultural assets, core urban centers and quaint villages, and world-class research and innovation resources. Over the past ten years, by building on these and burgeoning strengths such as growing population segments, new entrepreneurs and a strong Tech workforce, WNY made tremendous investments in places, people and industries critical to a sustainable economic future. This report continues to look at the region's new and historical assets in refining our regional priorities.

Key industries in tradable sectors are advanced through investments in placemaking to create accessible job centers, sustainable infrastructure and livable communities; in workforce through targeted job training and talent attraction; and in innovation by investing in the support networks that attract entrepreneurs and ensure a healthy and diverse business climate. We continue to identify opportunities to advance key industries in this way through our refined strategies.

Empire State Development (ESD) and the WNY REDC developed numerous investment strategies over the past decade. These investments have proven successful because they were based on objective data and analysis; they garnered community support through a collaborative and inclusive process; and they were designed around our region's strategies. In many cases, projects had strong momentum and were built through strong collaborations leveraging additional public, private and philanthropic resources. Key regional projects in the updated strategic plan exemplify these principles that we will continue to employ.

Our Challenge Competition Proposal builds on the momentum in the region to fully integrate New Americans in the regional economy. Workforce development has always been a priority for WNY and will continue to fuel our post-pandemic recovery. With our region's influx of New Americans in recent years, our competition idea focuses on strengthening the workforce for refugees and immigrants, spurring new business growth and leveraging global talent to support target industries and regional economic development. Our Challenge topic focuses on strengthening partnerships and the ecosystem that work with immigrant and refugee populations; increasing access to education and job training; creating career ladder opportunities; alleviating common barriers to training and placement such as English proficiency, transportation and poverty; and retaining international talent from our colleges and universities. A holistic approach to better preparing New Americans for work in the regional economy is pivotal to support hiring needs across regional target industries.

Our 2011 strategic plan, developed when WNY was still recovering from a recession and a half century of economic decline, helped WNY and NYS achieve great progress. In the past decade, our region has been successful in bringing forward home-grown initiatives with clear, attainable goals and smart implementation plans that result in the biggest impacts for the region. While there are refinements to our strategies to address new challenges and opportunities, our core economic drivers remain the same. Guided by our new strategic plan, we are excited to continue this track record in developing new catalytic projects to help create a more sustainable, prosperous and equitable region.

Steve Stoute
President, Canisius University

Eric Reich
Founder, Campus Labs

Executive Summary

VISION

Western New York will become a more prosperous, sustainable and equitable region through strategic and coordinated public/private investments in our diverse people, unique places, innovative ideas and high-growth industries.

STATE OF THE REGION

KEY ECONOMIC INDICATORS



A long period of job growth was stalled by COVID-19, and our recovery has been slow. Wages, exports, and Gross Regional Product (GRP) are up even with inflation, but not keeping pace with NYS and US trends. Our population increased for the first time in decades, but that growth is limited to certain population groups. A shrinking labor force and record low unemployment creates hiring shortages for employers and slows job growth.

TRADABLE SECTORS

Together, five industry sectors (Professional Services, Health Care, Retail, Tourism, and Manufacturing) account for two out of every three jobs in WNY, and most make up a larger share of the WNY economy than the US overall. These sectors represent regional strengths that WNY can catalyze with strategic economic and workforce development.

PREVIOUSLY FUNDED CONSOLIDATED FUNDING APPLICATION (CFA) PROJECTS

The CFA process helped WNY retain 17,791 jobs and create 5,193 new ones. These jobs are attributed to the 1,011 total projects endorsed through the WNY REDC and awarded through state agencies in the 11 CFA rounds. Through the CFA, WNY awarded over \$426M in state funding since 2011 in projects that cost nearly \$2.8B.

2011-2022 ALL PROJECTS

1,011 ALL PROJECTS FUNDED THROUGH THE CFA

\$2.8B
IN TOTAL
PROJECT COSTS

\$426M
IN CFA FUNDS
AWARDED

143 OF THESE ARE PRIORITY PROJECTS

EMERGING THEMES

Certain themes—including building partnerships and organizational capacity, capitalizing on growing population segments, and sustainability and resiliency—cut across our economic drivers. These topics emerged in recent years and were reinforced in our work group sessions. The themes respond to unique challenges, influx of federal, state and local dollars, and demand for innovative, effective ways to stimulate economic development.

ECONOMIC DRIVERS



IMPLEMENT SMART GROWTH

Economic strategies grounded in smart growth principles set the stage for regional success. By adhering to principles of growing effectively and efficiently, targeting development decisions, and enhancing and protecting core resources such as our waterways and historic town and village centers, WNY is reducing costs of new infrastructure and building sustainable communities that are attractive to the creative talent that drives today's economy.



FOSTER A CULTURE OF ENTREPRENEURSHIP

Entrepreneurial capacity depends on many factors, including a concentration of new ideas, local education and talent, and dedicated capital to support new start-ups. By building networks that facilitate knowledge exchange and collaborative problem solving, attracting capital through structures and incentives that assist funders in connecting with good ideas, and helping People of Color (POC) start new businesses, WNY is creating a diverse and sustainable ecosystem necessary for the innovation economy.



PREPARE OUR WORKFORCE

We've seen many changes in the workforce since the COVID-19 pandemic placed new demands on the labor market, requiring an adjustment in skills development at all levels, and stronger partnerships among educators, industries and employers. This transition, however, is an opportunity for the region to expand the supply of human capital, build sustainable career paths for underrepresented populations, and fuel emerging industries.

PARTICIPATION

Four work groups—Smart Growth, Workforce, Entrepreneurship, and Workforce Development for New Americans—made up of economic development, industry, workforce development, academia, nonprofit, community-based and public sector partners ensured our strategies and Challenge topic were developed early in the planning process and had support at multiple levels.



Smart Growth
WORK GROUP



Workforce
WORK GROUP



Entrepreneurship
WORK GROUP



Workforce Development
for New Americans
WORK GROUP

CHALLENGE COMPETITION PROPOSAL

With our region's influx of New Americans in recent years, our competition idea focuses on **strengthening the workforce for refugees and immigrants**, spurring new business growth and leveraging global talent to support target industries and regional economic development.

6 Recommended Strategies

Strengthen connections, coordination and referrals across the ecosystem to ensure New Americans receive the support they need as they journey into work and a career.

Strategically leverage resources to bridge funding gaps and bolster the ecosystem's capacity to meet evolving needs.

Expand training, job placement, career coaching and other wraparound services to New Americans to prepare them for success in training, work and career advancement.

Support businesses in cultivating welcoming, diverse and inclusive work environments with best practices and other resources.

Raise awareness of the H-1B visa process and help employers navigate it.

Expand business development and entrepreneurial programs to New Americans including access to credit and financial services.



State of the Region

WNY has 2% fewer jobs overall than in 2010, based on 2022 figures. However, private sector jobs show slight growth over 2010 (+0.1%), and there are 6% more firms operating in the region. These numbers lag state and national trends which showed greater economic growth through the 2010s and recovered more jobs lost since the pandemic.

From 2010 to 2019, WNY added more than 22,000 jobs (+4%). Although this growth lagged NYS (+14) and US (+16%), this marked the strongest period of job growth for WNY in decades. This is particularly consequential when compared to past decades in which WNY experienced economic decline with recessions that hit hard and recoveries that took longer compared to the rest of the country. Considering the previous decades' deep economic hole is important to understanding the incremental growth from 2010-2019 that can be attributed to community-driven investments on four

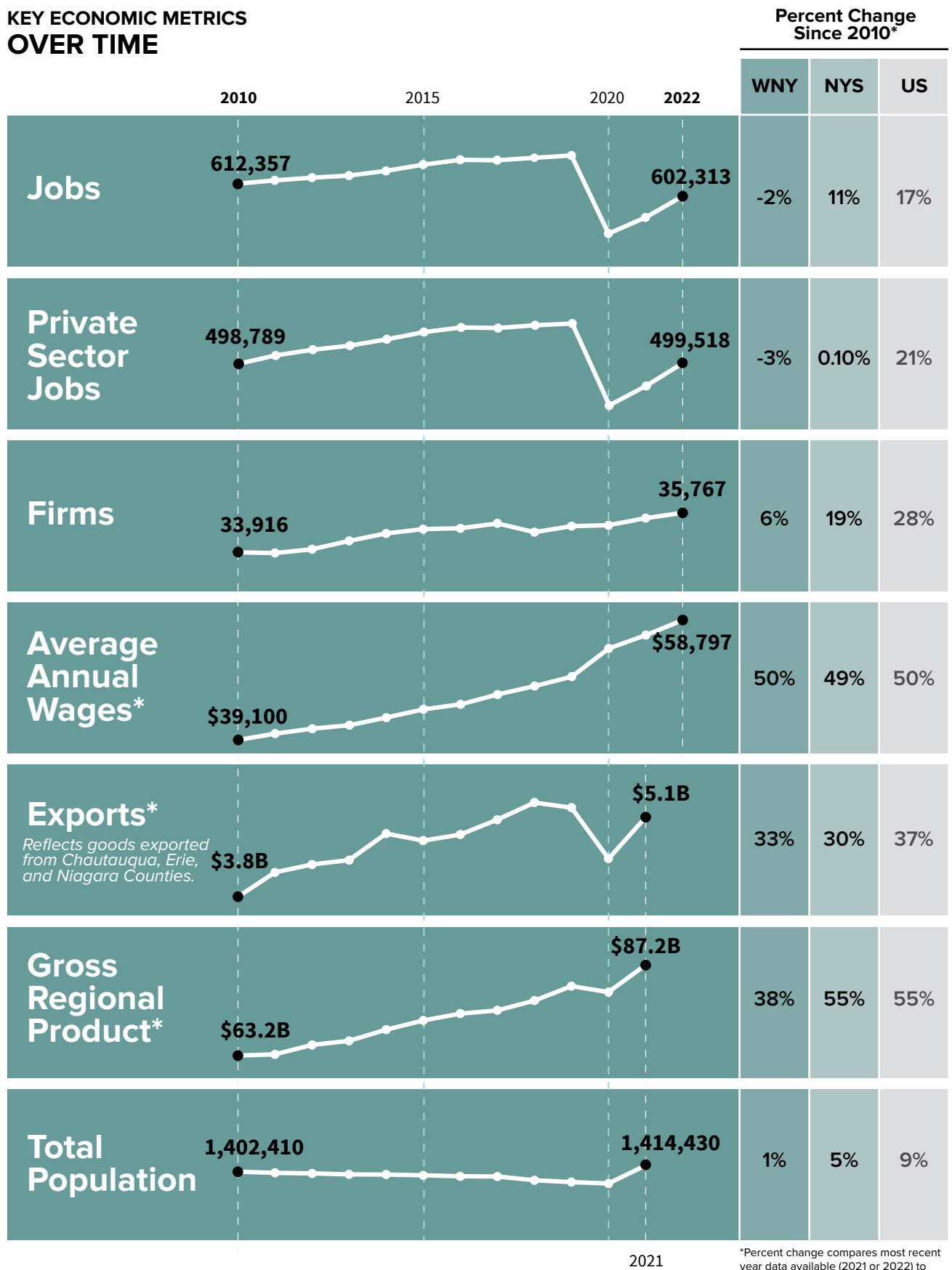
pillars critical to a healthy economy—placemaking, workforce, innovation and tradable sectors—resulting in measurable economic gains in jobs and across other economic indicators.

This period of job growth was erased by COVID-19, as jobs fell by 10% from 2019 to 2020. WNY added over 29,000 jobs from 2020 to 2022, about half (48%) of overall jobs lost in 2020. As of 2022, total jobs in 2022 were down by 5% compared to 2019, rebounding less from the pandemic than the state (-3%) and nation (+1%).

Annual average wages increased by 15 percentage points above inflation (overall inflation rate 2010-2022 is 35%). The GRP grew faster than inflation (28%) from 2010 to 2021 but falls short of the growth across NYS and US (55%). Manufacturing remained strong, as the value of goods exported from WNY was 33% higher in 2021 than in 2010. This growth in exported goods exceeds NYS but lags national trends.

KEY ECONOMIC METRICS OVER TIME

*INFLATION RATE (2010-2021) = 35%



*NOTE: Dollar amounts are not adjusted for inflation. Overall inflation rate from 2010 to 2021 is 35%. (US BLS, Consumer Price Index Calculator.)

Sources: **Jobs, Firms, Wages:** NYS DOL, US BLS, Quarterly Census of Employment and Wages; **Exports:** U.S. Department of Commerce, International Trade Administration. *Based on the three-county metro region (Chautauqua, Erie, and Niagara counties). Includes exported goods, not services. **GRP:** US Bureau of Economic Analysis, GDP by County in Current Dollars; **Total Population:** US Census, ACS 5-year estimates. NOTE: The ACS underestimated the regional population from 2011 to 2020. The 2021 numbers were adjusted to match the 2020 Census figures which showed 3.8% population growth in Erie County from 2010-2020.

*Percent change compares most recent year data available (2021 or 2022) to 2010 figures.

The regional population increased for the first time in decades, growing by 1%. Population estimates showed a slight decline from 2010 to 2019 until the 2020 census showed regional population growth for the first time in decades. The age groups who saw population growth were those age 65 or over, increasing by 19%, and young adults age 20-34 whose population grew by 8%. Meanwhile, the number of children under 18 declined by 7%, while individuals age 35-64 fell by 4%.

The regional population and workforce are becoming more diverse than ever. POC grew by 22% (+54,000) while the white population declined by 4% (-42,000). As of 2021, more than one out of five (21%) employed workers in the region are POC.

Population growth in WNY was limited to Erie County, which grew by 3% while the other counties combined declined by 3%. Regional outmigration persisted over the 2010s and current levels are on par with 2010, while outmigration has increased across the state.

The foreign-born population in WNY experienced considerable population growth since 2010. From 2010 to 2021, WNY's foreign-born population increased by 17% while the native-born population remained the same. From 2010 to 2021, the foreign-born population increased by a higher percentage in WNY (+17%) than the US (+16%) and NYS (+8%) as a whole.

While the regional population grew slightly since 2010, the size of WNY's labor force is down significantly. The labor force in 2022 is eight percent smaller than in 2010. This works out to 54,000 fewer people in the workforce overall, while the US labor force grew by 7%.

The number of unemployed in WNY is historically low. In 2022, the average unemployment rate in WNY was 3.7% with 23,800 individuals across the region actively seeking work. This means there were 38,000 fewer people unemployed and looking for work in 2022 than in 2010 (-62%).

A number of major economic development projects helped create jobs and put residents to work. The rate of unemployment steadily declined since 2010 when it was 8.8%, with the exception of 2020 and 2021 when it increased due to COVID-19-related shutdowns.

Today, the rate of unemployment is less than half of what it was in 2010. Unemployment in WNY is on par with what it is across the US and lower than the statewide level of unemployment.

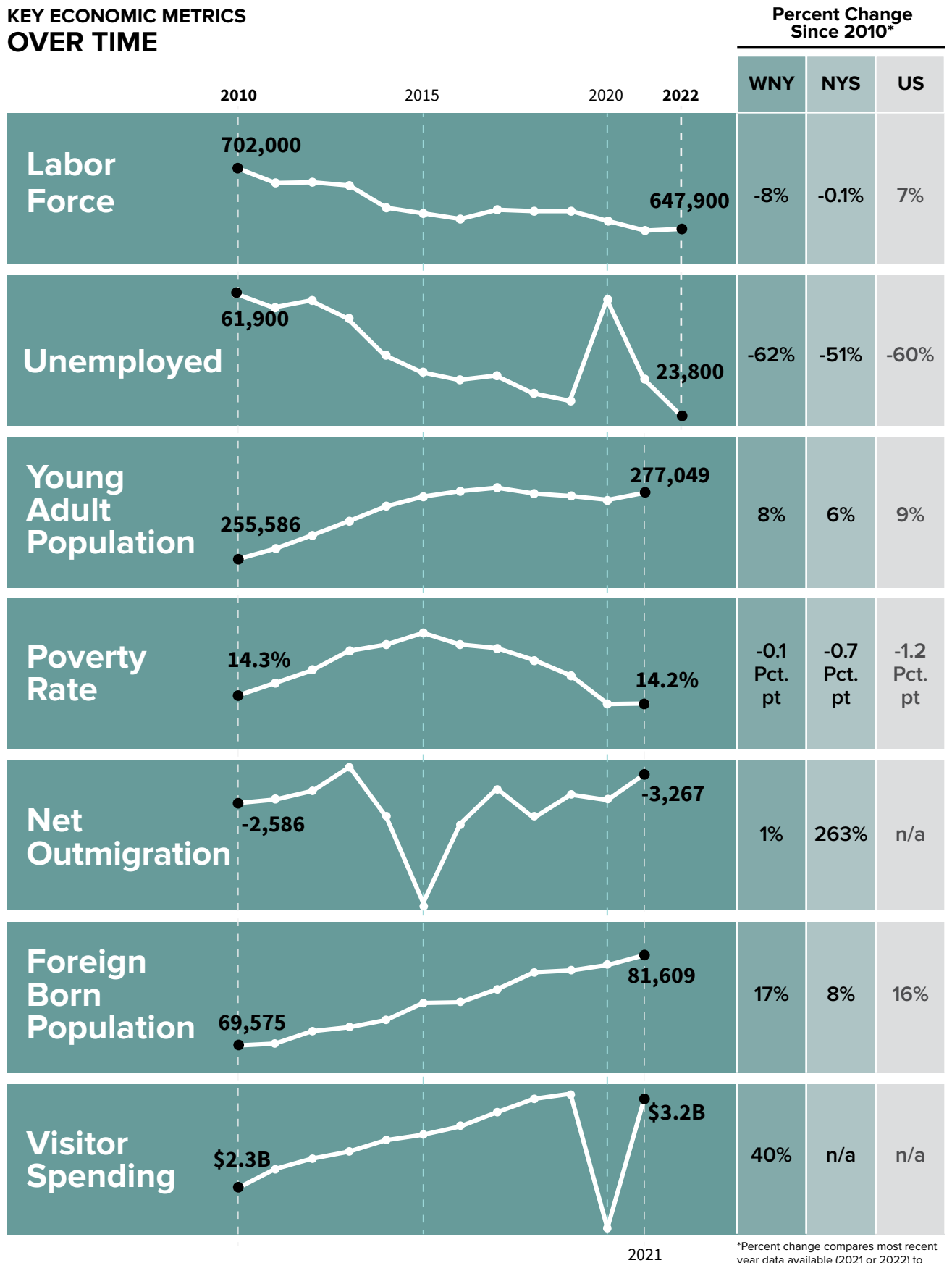
While low unemployment is good for job seekers, this shrinking pool of workers creates hiring gaps for employers and slows job growth. This elevates the importance of regional strategies to attract and retain workers. There were 190,445 job postings in 2022, more than any other year, and the median time to fill is 29 days.

Meanwhile, the population in poverty remains relatively unchanged since 2010 and is higher than both the state and nation. Strategic investments in workforce and placemaking can help bring new workers into the labor force to fuel job growth and improve the economic well-being of the region.

Strategic workforce and economic development can mitigate persistent racial equity wealth gaps in WNY. Labor force participation rates for POC in WNY are 12 percentage points below white residents (for those ages 16 to 64). Average incomes for white households are 53% higher than POC households (\$85,370 and \$55,770). Poverty rates for POC are 29%—nearly triple the rates for white residents (10%). Regional strategies must also work to address unique disparities in wealth-building opportunities in rural communities. Poverty rates in WNY's more rural counties (Allegany, Cattaraugus, and Chautauqua) are 17%—nearly four percentage points higher than across Erie and Niagara counties (13.5%).

These trends point to a regional need to engage and train more diverse pools of labor to strengthen the regional labor force and attract talent, companies, and promote job growth.

KEY ECONOMIC METRICS OVER TIME



Sources: Labor Force and Unemployed: NYS DOL, US BLS, Local Area Unemployment Statistics; Young Adults, Poverty, Foreign Born Population; Income, and Labor Force Participation (page 10): US Census, ACS 5-year estimates; Net Migration: US Internal Revenue Service, Statistics of Income Migration Data; Visitor Spending: ESD/Tourism Economics, Inc.

Tradable Sectors

KEY INDUSTRY SECTORS IN WNY

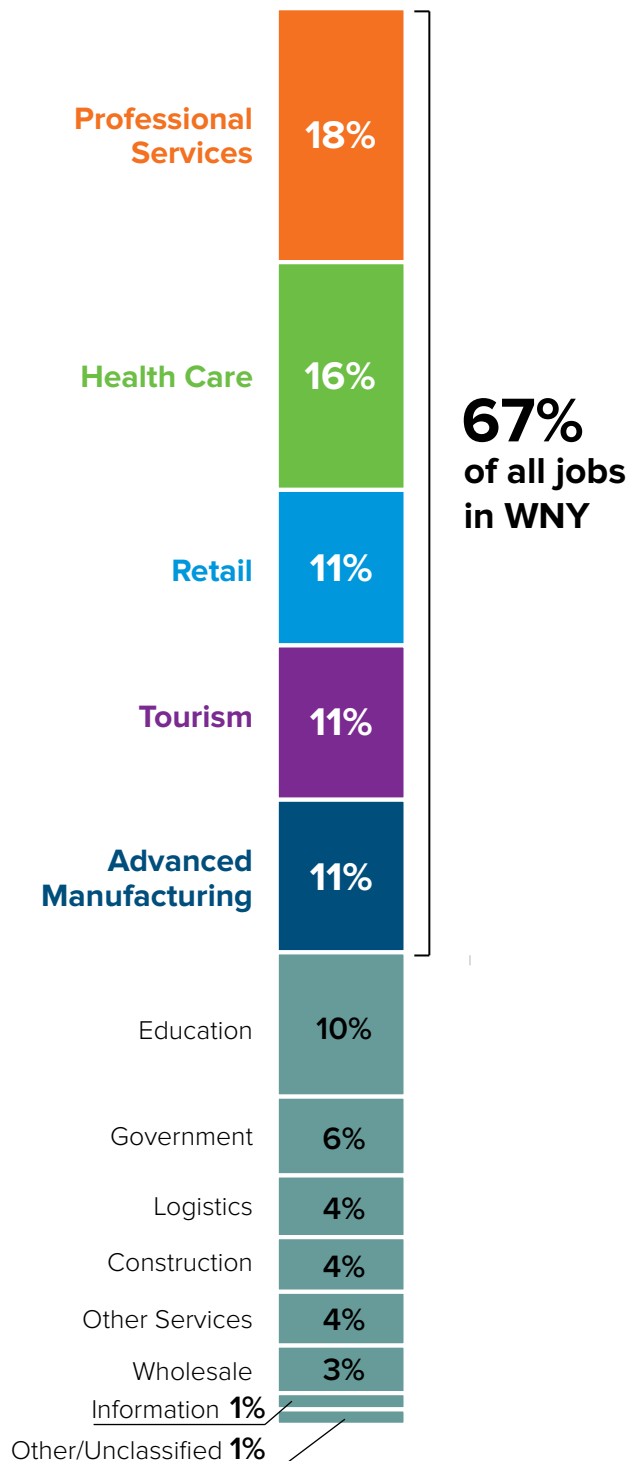
There are over 603,000 jobs in WNY—more than any region outside of the New York City metro area. Most of these jobs are in service-based sectors, such as health care, retail, tourism and professional services. Manufacturing remains a regional strength, making up 11% of jobs in WNY compared to 9% of US jobs. Together these five industry sectors account for two out of every three jobs in WNY, and most make up a larger share of the WNY economy than the US overall. These sectors represent regional strengths that WNY can capitalize on with strategic economic and workforce development.

The region's five largest sectors drive economic activity in WNY, with over 21,850 firms making up over \$53.6B in GRP, or about 63% of WNY's total GRP. These sectors offer higher-paying job opportunities for workers, as average wages in health care, manufacturing and professional services are above the regional average (\$58,837). Retail and tourism sectors offer some higher-paying job opportunities, but with lower wages overall, most workers in these sectors can be a key focus for workforce development initiatives—especially growing population groups who are overrepresented in lower-paying sectors, such as POC, young adults and New Americans.

The region's largest industry sectors rebounded since the pandemic, besides Health Care. Since 2020, jobs in tourism and manufacturing grew more in WNY than across the US and faster than the regional economy as a whole (+5%).

Looking ahead from 2022 through 2032, tourism, manufacturing and health care are projected to grow faster than the region overall (+12%). Job growth in professional services is expected to be slightly behind the region. Employment in retail is expected to be stagnant across the nation and in WNY through 2032.

WNY INDUSTRY COMPOSITION BY % TOTAL EMPLOYMENT, 2022



Sources: NYS DOL QCEW, 2022; US BLS, QCEW, 2022.

This section looks more closely at the hiring demands and specialized subsectors within these industries to reveal key needs and opportunities for regional workforce and economic development in WNY.

	Jobs	Firms	Avg. Annual Wages	GRP	% Change in Jobs, 2020-2022	% Projected Growth, 2022-2032
Professional Services This broad sector includes business services, finance, insurance and technical services. Major employers and tech workers are concentrated in professional services. Hiring is competitive with over 9,400 job postings from September 2022 to 2023—more than the other four sectors combined. WNY can leverage talent from local colleges and universities and foster synergy between industries and education.	108,153	8,434	\$73,237	\$21.6B	4%	11%
Health Care Training and retaining a diverse health care workforce is crucial for WNY. Health care workers, like nurses, are among the most in-demand jobs in WNY. Although the sector has not yet recovered to pre-COVID-19 levels, Health Care jobs are projected to grow by 14% from 2022 to 2032. Focusing on Health Care can spur firm and job creation in life sciences.	97,017	3,585	\$61,134	\$7.5B	-2%	14%
Retail Retail is a big part of WNY's economy, making up a larger share of total jobs in WNY (11%) than the US (10%). Retail businesses can foster tourism and placemaking in commercial corridors and underserved areas while creating spin-off opportunities in other sectors. With minimal growth and low wages, retail firms and workers can be a focus of workforce and economic development.	66,152	4,390	\$35,976	\$6.3B	4%	0%
Tourism WNY is defined by tourism assets, including Niagara Falls, food, cultural attractions and sports. Tourism jobs grew by 25% from 2020 to 2022—more than any other sector, but not enough to recover all jobs lost during the pandemic. Employers face hiring gaps that limit growth and are likely to continue. From 2022 to 2032, tourism jobs are expected to grow more in WNY (24%) than the US (19%).	65,754	3,913	\$31,940	\$4.4B	25%	24%
Advanced Manufacturing Advanced manufacturing is a key strength for WNY. Manufacturing jobs in the region are expected to grow 12% from 2022 to 2032, twice as much as the US (6%). Manufacturing is challenged by retirement cliffs and hiring gaps. Strategic workforce initiatives that promote manufacturing careers and leverage research capacity can accelerate sector growth.	64,941	1,531	\$72,191	\$13.8B	6%	12%

Sources: NYS DOL, QCEW, 2022; Lightcast, Industry Data from US Bureau of Economic Analysis; Lightcast Job Postings Data, September, 2022 to September 2023; Lightcast Industry Employment Projections, 2022-2032, using NYS DOL, US BLS, US Census, and other sources.

Recent and projected job growth in these sectors is higher than the US average.

IN-DEMAND JOBS AND SKILLS

Looking at recent online job postings to find which jobs and skills are most in-demand across industries can provide key insights for strategic workforce and economic development. The top in-demand occupations show that there are a wide range of career opportunities in every industry, from entry-level positions to management. Tech and tech-enabled jobs are important across all sectors, especially professional services. Common workforce skills, like communications and management, are needed across all sectors, and cultivating these skills can present diverse career growth opportunities for job seekers. This analysis can promote a shared understanding of career opportunities and industry needs to support employers, workforce trainers, job seekers and colleges/universities.

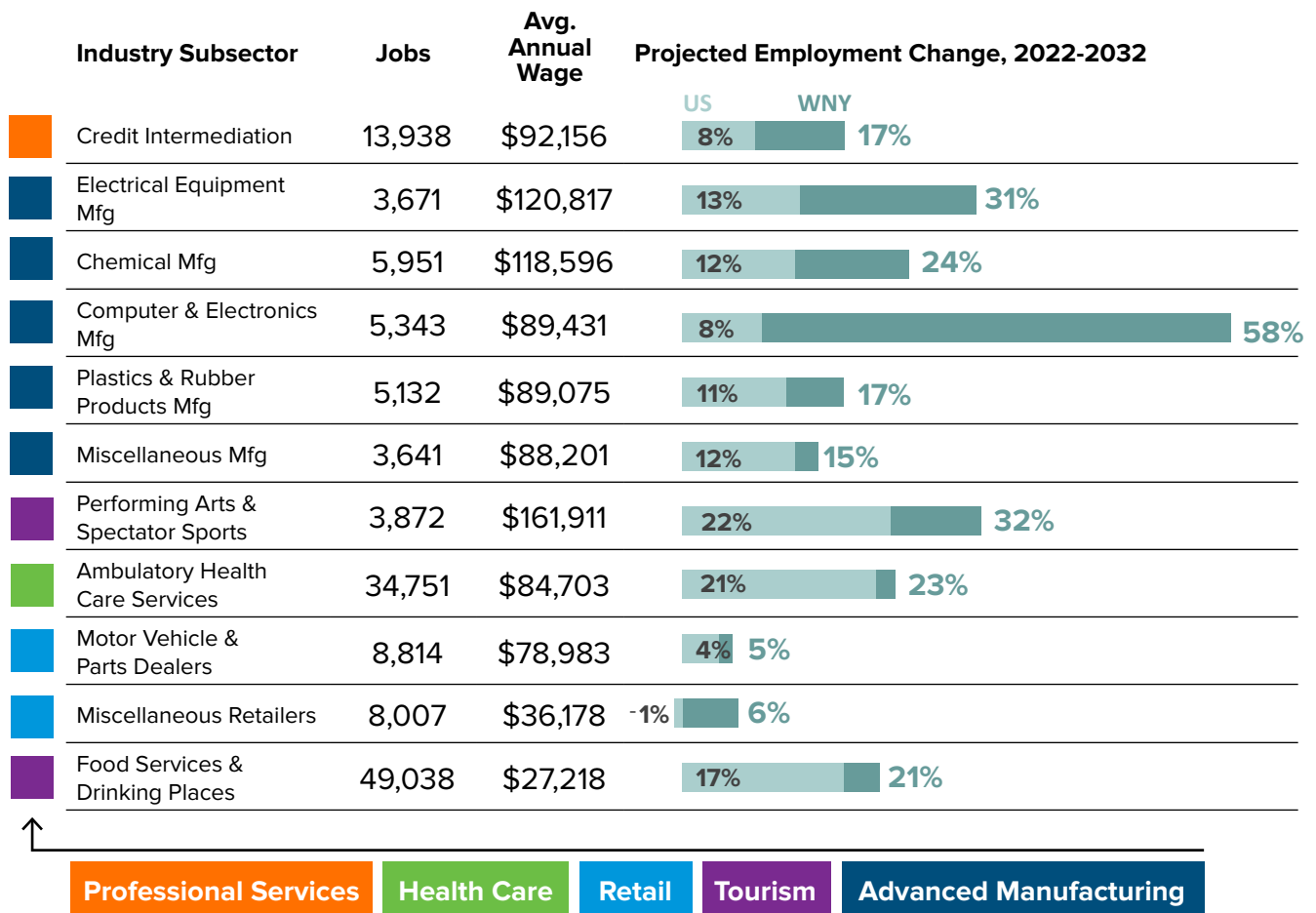
	JOB POSTINGS	TOP IN-DEMAND OCCUPATIONS	TOP IN-DEMAND SKILLS
Professional Services	9,435	Financial Analyst Software Developer/Engineer Sales Representative Project Manager Accountant	Communications Management Problem Solving Operations Customer Service
Health Care	3,062	Registered Nurse Licensed Practical/Vocational Nurse Nursing Manager/Supervisor Dental Hygienist Healthcare Administrator	Nursing Communications Management Planning Customer Service
Retail	1,223	Retail Store Manager/Supervisor Retail Sales Associate Tractor-Trailer Truck Driver Automotive Service Tech/Mechanic Business Development/Sales Manager	Customer Service Sales Communications Management Teamwork
Tourism	890	Restaurant/Food Service Manager General Manager Chef Financial Analyst Waiter/Waitress	Management Communications Sales Operations Customer Service
Advanced Manufacturing	2,080	Building and Maintenance Technician Sales Representative Machinist Production Supervisor Tractor-Trailer Truck Driver	Communications Management Operations Problem Solving Sales

Sources: Lightcast Job Postings Data, September, 2022 to September 2023. Based on 2-digit NAICS Codes. Professional Services = 52-56; Health Care=62; Retail=44-45; Tourism=71-72; Manufacturing=31-33.

STRATEGIC SUBSECTORS FOR WNY

A few specific subsectors in WNY represent regional strengths that may be strategically positioned for catalytic growth over the next ten years. In each of the subsectors shown below, jobs grew faster in WNY than the US from 2020 to 2022, are projected to grow more in WNY than across the US until 2032, and are regional specializations that make up a larger share of jobs in WNY than across the US. These subsectors fall within the region's five largest industries, including several subsectors in manufacturing. Average wages in most of these subsectors are significantly higher than the regional average. Some subsectors are projected to grow by 20% or more from 2022 to 2032, including chemical manufacturing, performing arts and sports, and computer and electronics manufacturing which is projected to grow by 58% in WNY.

These subsectors represent growing regional strengths with competitive advantages for WNY. Regional strategies for workforce and economic development can capitalize on these subsectors and other regional strengths to help drive economic growth.



Source: Lightcast Industry Data using data from the NYS DOL, US BLS, and US Census.

NOTE: Miscellaneous manufacturing includes household goods, novelties, and various products like decorations, candles, lighters, coin-operated machines, umbrellas, hairpieces and fire extinguishers. Miscellaneous retailers includes sporting goods, musical instruments, books, and other stores for hobbies or leisure activities.

Previously Funded CFA Projects



Historic Card Seed Company building
50 West Main Street, Fredonia



Massachusetts Avenue Project Farm House
and Community Food Training Center



Gateway Harbor Park Improvements,
North Tonawanda

PRIORITY PROJECTS







Our Priority Projects serve as a source of pride for our region. They enforce all of the WNY REDC's core drivers—often addressing more than one—and impact urban neighborhoods, suburban towns and rural villages in all five counties. We continue to endorse projects that show readiness to proceed and whose leadership has the capacity to achieve their stated goals.







Ongoing WNY REDC and ESD staff engagement through meetings and tours with anchor institutions, industry leaders and municipal and county governments, helps our region collaborate on current and future projects, connect with state agency representatives, strategize on ways to enhance business climates and foster community revitalization, and ultimately cultivate Priority Projects. Engagement with small and rural communities helps align their priorities with regional strategies and connects them to technical assistance and capacity building resources that ultimately result in state funding.

133 Priority Projects (81% of all projects) are completed or on schedule. Since 2019, the number of completed Priority Projects increased by nearly 53% (from 53 to 81 completed projects) proving that despite COVID-19 setbacks, our region is still making progress on some of our most important capital projects. At an overall project award to cost ratio of 1:9, these larger investments (on average nearly \$737,000 per priority project) guided by decisions made on the local level are resulting in the biggest return on investment.

Overview of Previously Funded Priority Projects

SUMMARY STATUS OF PAST PRIORITY PROJECTS BY ROUND

Status	Round I	Round II	Round III	Round IV	Round V	Round VI	Round VII	Round VIII	Round IX	Round XI	Round XII	Total
	15	8	8	5	11	19	7	4	2	2	-	81
	-	1	-	2	5	2	3	3	5	13	18	52
	1	1	-	-	-	-	2	-	2	-	-	6
	-	-	-	-	-	-	-	1	1	-	-	2
	-	-	-	-	-	-	1	1	-	-	-	2
	1	5	4	1	5	4	7	6	2	2	-	37
Total	17	15	12	8	21	25	20	15	12	17	18	180

-  Project is complete
-  Project concerns yet executed
-  Project is on schedule
-  Project contract not need to be resolved
-  Project is progressing more slowly than anticipated
-  Project canceled or funding declined

LEVERAGE OF STATE INVESTMENT IN ALL PAST PRIORITY PROJECTS

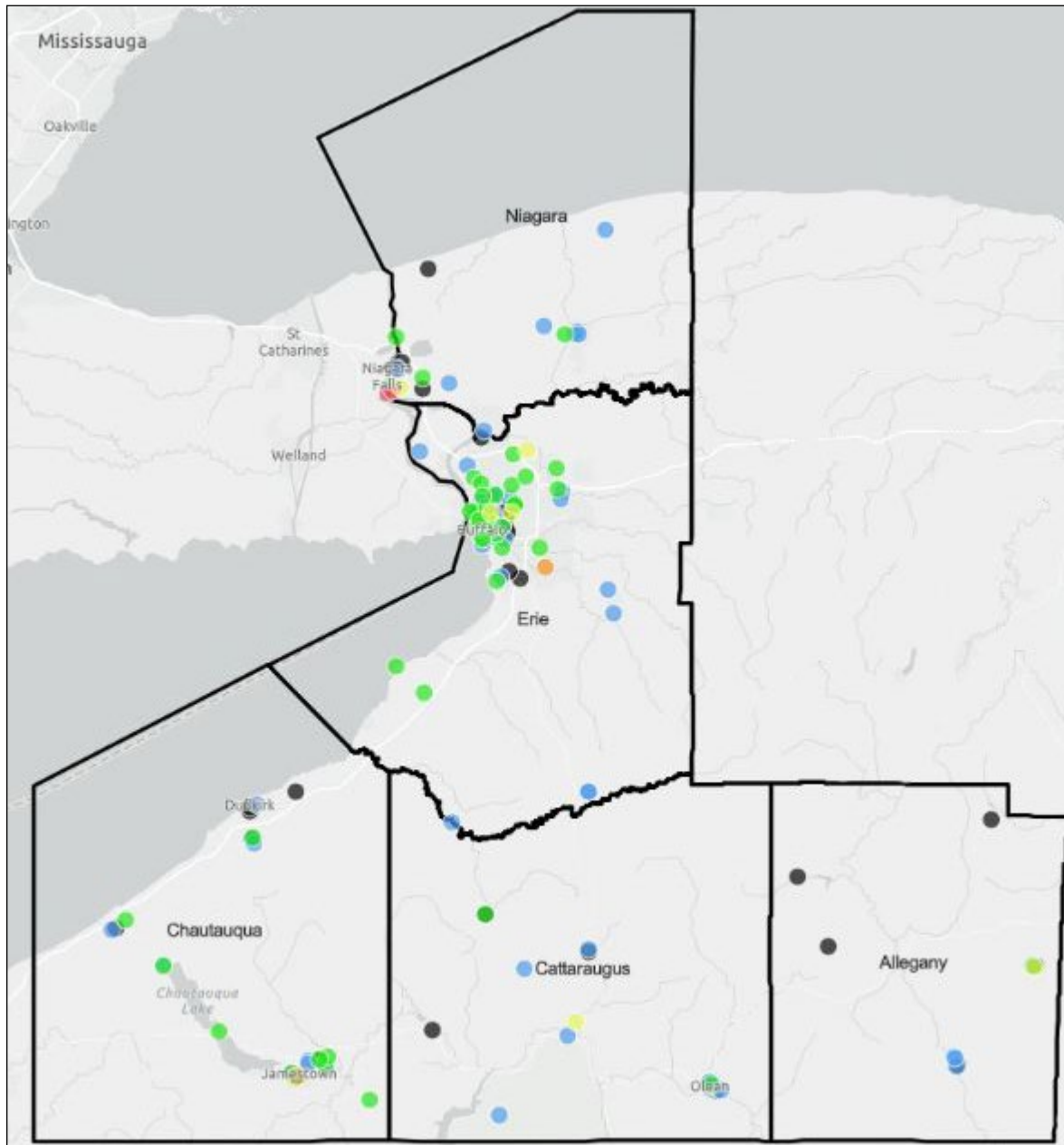
The table below lists the ratio of the total investment in past priority projects to the state investment over Rounds I through XII of the REDC.

Round	Total Number of Priority Projects	Total Amount of Priority Project Awards	Total Project Cost	Ratio of Award Amounts to Total Project Cost
Round I	16	\$23,152,698	\$106,750,568	1:4.61
Round II	10	\$4,217,812	\$9,785,239	1:2.32
Round III	8	\$4,449,769	\$55,775,955	1:12.53
Round IV	7	\$5,595,493	\$44,483,366	1:7.95
Round V	16	\$12,222,000	\$117,684,620	1:9.63
Round VI	21	\$8,426,379	\$104,436,767	1:12.39
Round VII	13	\$6,862,365	\$37,852,317	1:5.52
Round VIII	9	\$7,794,182	\$84,968,241	1:10.9
Round IX	10	\$5,482,000	\$55,796,916	1:10.18
Round XI	15	\$13,834,888	\$228,760,158	1:16.54
Round XII	18	\$13,276,932	\$100,955,810	1:7.6
Total	143	\$105,314,518	\$947,249,957	1:8.99

Project data is updated through October 2023. For additional analysis and full appendix of all projects, please visit <https://regionalcouncils.ny.gov/western-new-york> to view the Project Tracking Dashboard.

MAPPED STATUS OF PAST PRIORITY PROJECTS

- Project is complete
- Project contract not yet executed
- Project is on schedule
- Project concerns need to be resolved
- Project is progressing more slowly than anticipated
- Project canceled or funding declined















Overview of Previously Funded CFA Projects

New York State agencies work with the WNY REDC to fund projects that improve our urban core and town and village centers, protect and enhance our waterways while making them more accessible, promote and protect our tourism assets, plan for a more sustainable and resilient region, and much more.

SUMMARY STATUS OF ALL PAST PROJECTS

With 86% of all CFA projects complete or on schedule (a rate slightly higher than in 2019/pre-pandemic), CFAs are another example of the action and implementation in WNY. The CFA process helped WNY retain nearly 17,800 jobs and create nearly 5,200 new ones. These jobs are attributed to the 1,011 total projects endorsed through the WNY REDC and awarded through state agencies in the 11 CFA rounds.

Status	Round I	Round II	Round III	Round IV	Round V	Round VI	Round VII	Round VIII	Round IX	Round XI	Round XII	Total
	79	50	69	61	96	79	56	45	31	5		571
	3	4	8	11	26	20	41	64	73	112	42	404
	1	1	-	-	-	-	3	-	4	-	-	9
	-	-	1	-	-	-	3	4	3	1	9	21
	-	-	2	1	-	-	1	2	-	-	-	6
	26	11	15	8	13	12	14	11	6	2	-	118
Total	109	66	95	81	135	111	118	126	117	120	51	1129

-  Project is complete
-  Project concerns yet executed
-  Project is on schedule
-  Project contract not need to be resolved
-  Project is progressing more slowly than anticipated
-  Project canceled or funding declined

LEVERAGE OF STATE INVESTMENT IN ALL CFA PROJECTS

Round	Total # of Awards	Total Amount of All CFA Awards	Total Project Cost	Ratio of Award Amount to Total Project Cost
Round I	83	\$51,341,593	\$277,115,697	1:5.4
Round II	55	\$17,133,697	\$128,441,897	1:7.5
Round III	80	\$26,988,444	\$220,123,400	1:8.16
Round IV	73	\$22,354,081	\$95,701,886	1:4.28
Round V	122	\$38,930,363	\$466,522,493	1:11.98
Round VI	99	\$28,160,573	\$201,871,862	1:7.17
Round VII	104	\$36,704,493	\$159,368,287	1:4.34
Round VIII	115	\$50,868,842	\$229,143,068	1:4.5
Round IX	111	\$55,057,346	\$289,035,035	1:5.25
Round XI	118	\$75,328,908	\$569,638,862	1:7.56
Round XII	51	\$23,152,075	\$123,935,468	1:5.35
Total	1011	\$426,020,414	\$2,760,897,954	1:6.48

JOB CREATION IN ALL CFA PROJECTS

The table below lists the total number of permanent jobs retained and created through the CFA.

Round	Projected Jobs Created	Projected Jobs Retained	Total
Round I	408	1101	1509
Round II	446	669	1115
Round III	843	1083	1926
Round IV	896	776	1672
Round V	762	2876	3638
Round VI	250	175	425
Round VII	233	1354	1587
Round VIII	283	1842	2125
Round IX	291	2299	2590
Round XI	726	5364	6090
Round XII	55	252	307
Total	5193	17791	22984

An aerial photograph of the Niagara Falls area. In the upper left, the white water of the falls is visible, cascading over a rocky ledge. A bridge spans the river just below the falls. The surrounding landscape is a mix of dense green trees, manicured lawns, and various buildings. A prominent white, multi-story building with a flat roof is in the center-right. To its left is a tall, brown brick building. Further back, a yellow building with many windows is visible. The foreground shows a winding path along the riverbank, with several cars parked or driving. The overall scene is a blend of natural beauty and urban development.

PART TWO

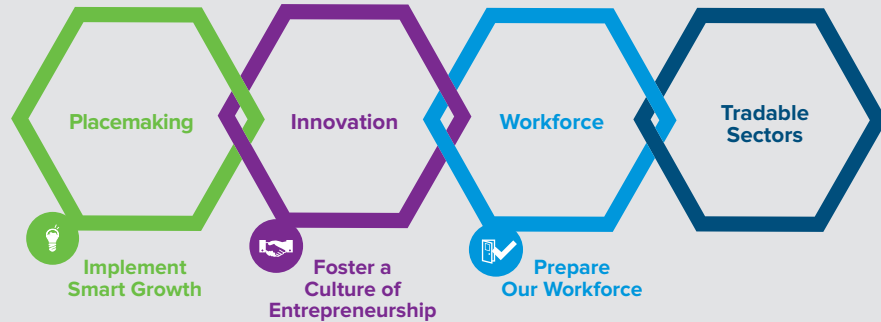
Regional Strategic Plan Update and Participation

Regional Strategic Plan Update

WNY VISION STATEMENT

Western New York will become a more prosperous, sustainable and equitable region through strategic and coordinated public/private investments in our diverse people, unique places, innovative ideas and high-growth industries.

New York State drives economic growth by making investments that build on four strategic pillars.



EMERGING THEMES

- 1 Partnership Building Maximizes Impact.**
- 2 Organizational Capacity Building Helps Move Capital Funds into Our Communities.**
- 3 Population Growth isn't Enough.**
- 4 Sustainability is an Important Lens for Our Three Economic Drivers.**

Western New York's local strategies directly align with New York State's core economic development strategies.

ECONOMIC DRIVERS



IMPLEMENT SMART GROWTH

GOAL: Revitalize our region to attract and accommodate a skilled workforce, entrepreneurs and visitors.

STRATEGIES:

- Catalyze private investment in our downtowns, village centers and walkable commercial corridors.
- Support revitalization of community anchors, waterfront areas and tourism assets.
- Invest in infrastructure and resources that connect our region, its people to jobs and training, and its assets and attractions.
- Coordinate investments with existing planning and local capacity to maximize sustainability.



FOSTER A CULTURE OF ENTREPRENEURSHIP

GOAL: Cultivate and strengthen all entrepreneurs in all stages of firm growth.

STRATEGIES:

- Grow and connect supports for all entrepreneurs.
- Build a more diverse and consistent entrepreneurial pipeline.
- Foster and promote a regional culture of entrepreneurship.
- Innovate existing ventures to promote competitiveness and growth.



PREPARE OUR WORKFORCE

GOAL: Build an inclusive workforce that meets the needs of job seekers and creates a reliable and inclusive talent pipeline for employers.

STRATEGIES:

- Focus on the right training.
- Diversify the workforce.
- Fuel the talent pipeline.
- Strengthen our regional workforce ecosystem.

TRADABLE SECTORS

Together, five industry sectors—Professional Services, Health Care, Retail, Tourism, and Manufacturing — account for two out of every three jobs in WNY, and most make up a larger share of the WNY economy than the US overall. These sectors represent regional strengths that WNY could capitalize on with strategic economic and workforce development.



Community-Based Real Estate Development Training 2023 Graduation

Emerging Themes

Certain themes that cut across our economic drivers emerged in recent years and were reinforced in our work group sessions. These themes respond to the unique challenges seen in recent years such as disruptions to the region's economy resulting from the COVID-19 pandemic, which changed the way we work and had measurable impacts on our business community. It also responds to the influx of federal, state and local dollars and the demand for innovative, effective ways to stimulate economic development. These themes build on existing principles, but reflect on lessons learned over the past decade to take project implementation to the next level. We are a different region than we were 12 years ago—more diverse, more resilient, and united. These overarching themes reflect a region with greater understanding of the challenges we face and better, more coordinated solutions.

PARTNERSHIP BUILDING MAXIMIZES IMPACT

Our region is beginning to invest in a much more coordinated, collaborative, and strategic way and is building unique partnerships and programs across geographies. The state is co-investing in these large-scale, multi-faceted projects that aggregate federal, state, local and philanthropic resources for the greatest leverage. Local intermediaries have a role in connecting the dots and helping to build and implement programs, while assessing/reporting, problem solving and ensuring resources are getting to the community. This more holistic approach to economic development is designed to strengthen the ecosystem and build community wealth through multiple pathways. The following are examples of these comprehensive, community-driven public/private economic development strategies:

- **East Side Avenues** is a unique community-driven public/private partnership that provides capital and organizational supports to transformational projects in targeted areas along four East Side commercial corridors. New York State initially invested \$65M in capital that supports small business improvements, invests in key mixed-use properties, promotes historic preservation and reinvigorates fundamental East Buffalo anchors. To strengthen the work of local nonprofit organizations to implement this work, local foundations and corporations invested more than \$8M in capacity building funds.

- **Regional Revitalization Partnership (RRP)** is a multi-year \$300M collaborative initiative between the Ralph C. Wilson, Jr. Foundation (RCWJF), ESD, local municipalities and other private philanthropic partners. Building upon and accelerating collaborative, community-driven work that is already underway, this public/private initiative co-invests in three interconnected geographic areas (Buffalo's East Side and the cities of Niagara Falls and Rochester) to create a comprehensive, community-driven economic development strategy around investments that focus on small businesses development, placemaking and workforce development. RRP is an outgrowth of East Side Avenues.

- The **WNY REDC** created broad coalitions of stakeholders to submit multimillion-dollar proposals to the **U.S. Economic Development Agency (EDA)'s American Rescue Plan** programs. The region's **Build Back Better Regional Challenge** application,

which proposed scaling up existing advanced manufacturing strategies, was one of 60 communities (out of 529 applicants) awarded \$500,000 in Phase 1, and was ultimately awarded \$25M in Phase 2 (1 of 21 communities) for projects that spark innovation, advance inclusive workforce development and develop infrastructure.

- **The Western New York Manufacturing and Tech Workforce Coalition** (the Coalition) is a strategic, coordinated, ecosystem-based approach to workforce development that maximizes job growth, expands career opportunities for the underserved and leverages federal, state and local dollars. This strategy is unique in that it was built by aligning trainers, industry, intermediaries, pipeline developers and community-based organizations (CBOs) around a shared vision and coordinating their roles and projects to support ecosystem building and workforce improvements. The coalition seeks a total of \$35.75M in funding from City of Buffalo American Rescue Plan (ARPA) grants, ESD's Office of Strategic Workforce Development's (OSWD) grants and philanthropy to implement 10 interconnected projects that will build the manufacturing and tech workforce in WNY through 12 partners over the next three years.

ORGANIZATIONAL CAPACITY BUILDING HELPS MOVE CAPITAL FUNDS INTO OUR COMMUNITIES

If we want to see community-driven, large-scale capital projects implemented, especially in our most vulnerable communities, we need to ensure our community-based nonprofits are scaling up and increasing their capacity to take on these important projects. Capacity building is multi-faceted. It includes a multi-year funding commitment, operating support, evaluation to assess an organization's starting point and ongoing needs, and technical assistance to address deficiencies and scale up. Funding community-based nonprofits to increase their capacity in areas like operations, governance, board development, fundraising, marketing and succession planning; and to hire permanent and dedicated staff to build and carry out strategic action and master plans, manage consultants and implement high-impact actions associated with capital improvements sets the stage for current and future success in implementing large-scale capital projects. Increased capacity and sustainability of community-based organizations ensures that projects engage with and are led by community members, and are sustainable in the long-term.

POPULATION GROWTH ISN'T ENOUGH

In our 2011 strategic plan and subsequent progress reports, there was an emphasis on reversing WNY's slow steady decline of its population base since 1970, driven by a decline in residents in their 20s and 30s and a failure to attract other young in-migrants. Due in large part to many of the strategies included in the original report such as creating a built environment that promotes a quality of life desired by young adults, improving the region's image, and attracting knowledge-based companies and jobs attractive to young adults, we are proud to report that since 2010, the regional population increased for the first time in decades, growing by 1%, with young adults age 20-34, our target population, growing by 8%. The regional population and workforce are becoming more diverse as POC and the foreign-born populations experienced considerable growth since 2010. We need to continue to grow the population, but that's not all. Today, while the regional population grew slightly since 2010, the size of WNY's labor force is down significantly. We are realizing that attracting and retaining population isn't enough. Rather our strategies today have evolved to move more of the existing and future population into the labor force through skills training, supportive services, ecosystem building, targeted marketing and K-12 pipeline development—both to create successful entrepreneurs and to fill higher paying jobs in target sectors.

SUSTAINABILITY IS AN IMPORTANT LENS FOR OUR THREE ECONOMIC DRIVERS

Sustainability means creating communities, economies and environments that allow current and future generations to thrive. Sustainability projects that promote environmental, social and economic health, by their very nature, create resiliency so that communities can more effectively rebound from crises such as the COVID-19 pandemic. New York's Climate Leadership and Community Protection Act (CLCPA), one of the most ambitious climate laws in the world, requires New York to achieve 100% zero-emission electricity by 2040 and, reduce emissions at least 85% below 1990 levels by 2050. The CLCPA affects every sector of the economy, and has the potential to be a huge job creator. As the state implements the CLCPA to reduce our carbon footprint, make our communities more resilient and adapt to a changing climate, the WNY REDC will continue to use a sustainability lens to evaluate projects.

We will continue to work with municipalities to encourage smart growth planning efforts that produce the spatial efficiency needed to grow our economy and manage the long-term costs of roads, utilities and other public infrastructure while allowing us to protect farmland, forests and natural land. We will continue to fund projects that concentrate development in existing urban centers and villages; redevelop brownfields for job creation; protect farmland, watersheds and natural areas; elevate alternative modes of travel—walking, cycling and public transit; and update aging building stock to address energy efficiency needs and move toward electrification of our building systems and net-zero building design, including investments to WNY's electrical grid to support these efforts.

The development of renewable energy—part of what is known as the “blue/green” economy—not only responds to stated clean energy goals, but also increased demand to develop renewable energy projects that help create local community jobs, income and wealth. There is opportunity to train workers for clean energy jobs in manufacturing, installation and maintenance of renewable energy and efficiency technology. Universities need to tap research and development resources on renewable energy production, distribution, storage and conservation toward creation of a “green” energy industrial sector. And we need to promote the development of renewable energy manufacturing through an expansion of the industrial supply chain of materials and products made in WNY.

Climate change is one of the most pressing challenges across the globe and in WNY, but it also presents opportunities. Compared to other regions, WNY is projected to have lower risks of extreme heat and drought. The region's relatively moderate climate and abundant freshwater access may attract individuals displaced by climate impacts in the future. This regional opportunity to serve as a climate haven has the potential to spur population growth and economic development, but also presents significant challenges. Working collaboratively as a region to invest in sustainability, workforce, and economic development can help us capitalize on the potential opportunity.



Implement Smart Growth

2011 Strategies

Invest in infrastructure on smart growth principles.

Invest in downtowns, villages, neighborhoods and brownfields.

Protect water resources, waterfront, and habitats.

2023 Strategies Refined

Catalyze private investment in our downtowns, village centers and walkable commercial corridors.

Support revitalization of community anchors, waterfront areas and tourism assets.

Invest in infrastructure and resources that connect our region, its people to jobs and training, and its assets and attractions.

Coordinate investments with existing planning and local capacity to maximize sustainability.

Western New York sprawled as its population declined. This resulted in a deteriorating urban core and traditional commercial corridors, escalating infrastructure costs with a shrinking tax base, and a growing imbalance between where people live and traditional centers of employment. While we have made tremendous progress using our existing strategies to combat sprawl and revitalize communities and waterfronts, challenges still persist. While staying true to our initial intent, in 2023 we seek greater connections, collaboration and capacity building to combat the effects of sprawl.

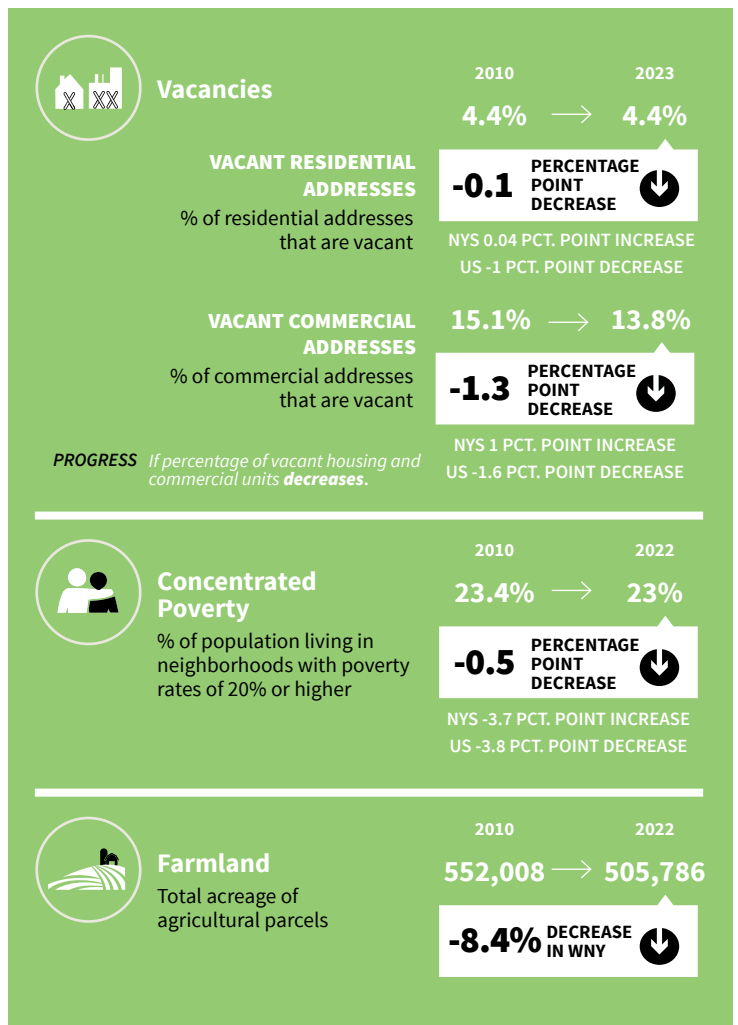


Areas with low vacancy are a sign of intact neighborhoods with high quality of life and prosperous regional economies. As of 2023, the residential vacancy rate of 4.4% in WNY—relatively unchanged since 2010—is now more than double that of the state and nation (2.1%). Meanwhile, although commercial vacancy is down by 1.3 percentage points compared to 2019, it is still higher than both NYS (10.6%) and the US (8.9%). Vacancy rates are much higher in some parts of the region. For instance, the vacancy rate in East Buffalo is 16% for commercial addresses and 12% for residences. In Niagara Falls, the residential vacancy rate is 14%, while nearly a quarter (24%) of commercial addresses lie vacant.

Living in areas of concentrated poverty can limit quality of life and economic opportunities for all residents. The percentage of the population that lives in areas of concentrated poverty, or census tracts where 20% or more of people live in poverty, fell by about half a percentage point from 2010 to 2021. However, a higher share of WNY's population lives in concentrated poverty neighborhoods than across the State (21%) and nation (24%). Areas of concentrated poverty persist in East Buffalo and Niagara Falls; pockets in cities like Jamestown, Lockport and Olean; the Tuscarora, Cattaraugus, and Allegany American nations; and other rural communities.

Overall, the total acreage of farmland in WNY declined by 8% from 2010 to 2022, based on the area of tax parcels classified as agricultural land. This represents a loss of over 46,000 acres—more than 72 square miles. The region lost some farmland over the last decade, but the pace of farmland loss is actually decreasing compared to previous decades, based on figures from the USDA Agricultural Census. Most of this farmland loss occurred in outlying rural areas, particularly in rural parts of Erie and Niagara counties, where many former agricultural lots are now classified as vacant land, or have been converted to residential use or repurposed as solar fields. However, this metric does not necessarily capture all areas used for food production—only parcels classified as agricultural for tax assessment purposes. More urban farms, community gardens, indoor cultivators and other innovative growing operations launched over the last decade.

The region has a long history of industrial growth, and also environmental contamination due to its industrial legacy. Over the past decade plus, the region made significant progress in cleaning up brownfields, or lands that are contaminated or potentially contaminated by former uses. From 2011 to 2023, the region remediated over 1,120 acres, or more than 1.75 square miles of brownfields through the brownfield cleanup program. More sites have been remediated under other programs, such as the US EPA Superfunds program.



NOTE: Percentage point change numbers may not equal difference of WNY figures shown due to rounding.

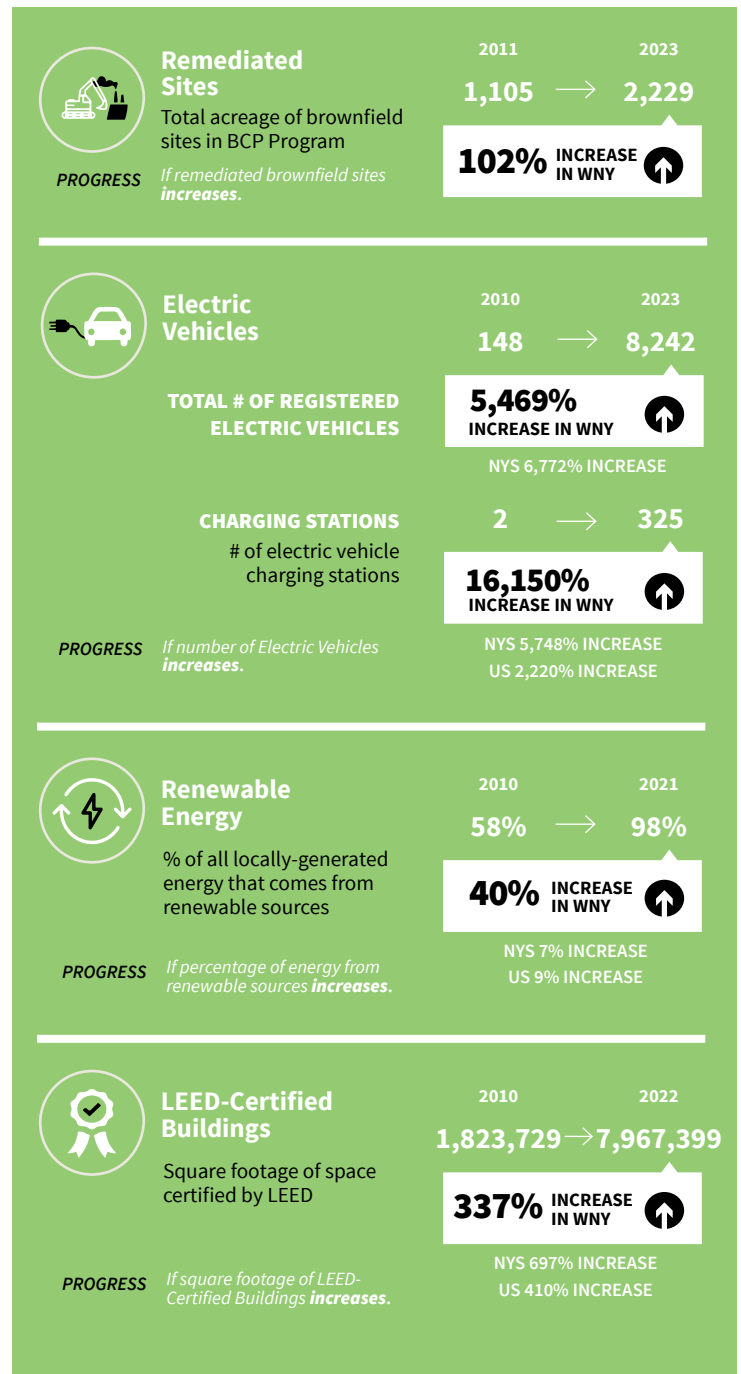


Some of these have been put back into use as natural or recreational sites, or for commercial and residential purposes. These areas present an opportunity to grow our economy, improve our environment and enhance quality of life for WNY residents.

As of 2021, nearly all (98%) of the energy generated in the region is produced by renewable, non-fossil fuel sources. This is up by forty percentage points since 2010. This change is largely due to the decommissioning of major fossil fuel burning energy plants, such as the Huntley plant in Tonawanda, and the AES coal burning facility in Somerset. The vast majority of renewable energy generated in WNY (95%) comes in the form of hydroelectric power produced at the Niagara Power project. There were also increases in wind and solar power over the past decade. In 2010, there was no solar power from power plants in the region, but the region generated over 55,500 megawatt-hours of solar energy in 2021. Meanwhile, WNY generated nearly 49,000 megawatt-hours of wind energy in 2021—nearly ten times as much as in 2010. The access to inexpensive, renewable, and abundant energy remains an asset for industry and homeowners in our region that can help grow the economy and enhance quality of life.

The region is making substantial progress in improving the energy efficiency of buildings. Since 2010, we have added over 6.1 million square feet of LEED-certified building space, equaling about 141 acres and a 337% increase over 2010 figures. While this increase is not as substantial as that experienced by NYS (+697%) and US (+410%), it represents a strong regional commitment to energy efficiency and is a sign of the innovative adaptive reuse and infill projects that occurred over the past decade. Continuing this work to enhance energy efficiency in the buildings we construct and renovate is important to growing the regional economy, and can help the region both mitigate and adapt to the impacts of climate change.

Working group members stressed the ongoing need for data to make informed strategic decisions about how to support the region's economic growth. They emphasized that regional data can mask changes that are happening in smaller geographies.



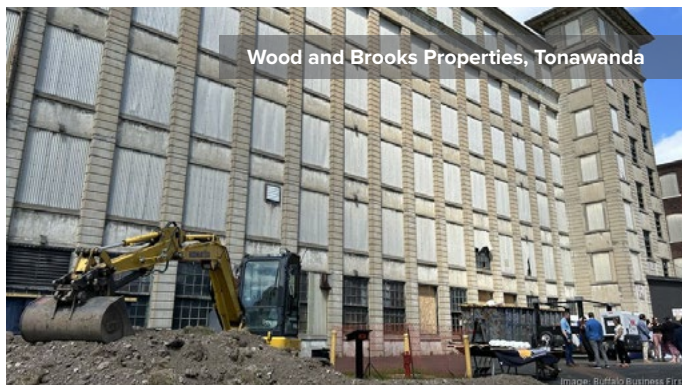
Data Sources

Residential and Commercial Vacancy Rates: HUD Aggregated USPS Administrative Data On Address Vacancies, March, 2010 and March, 2023; **Farms:** NYS Tax Parcel Data, 2010 and 2022; Agricultural parcels are selected by property class code (100-199); **Remediated Sites:** NYS DEC, Environmental Remediated Sites, August, 2023; **Electric Vehicles:** NYS DOT Vehicle Registrations, August, 2023; **EV Charging Stations:** NYSERDA Alternative Fueling Stations, August, 2023; **Renewable Energy:** US Department of Energy, Energy Information Administration, Form EIA-923 Plant Generation Data, 2010-2021; **LEED-Certified Buildings:** US Green Building Council, 2023.



GOAL

Revitalize our region to attract and accommodate a skilled workforce, entrepreneurs and visitors.



Wood and Brooks Properties, Tonawanda



Niagara Falls Gorge

CATALYZE PRIVATE INVESTMENT IN OUR DOWNTOWNS, VILLAGE CENTERS AND WALKABLE COMMERCIAL CORRIDORS.

In all five counties, WNY has a variety of traditional downtowns and walkable commercial corridors in its cities, towns and villages. These downtowns and commercial corridors typically follow a pattern of compact, mixed-use, high-density development that can accommodate a variety of uses including housing; are anchored by natural and built community assets; maintain historic building stock; and enjoy walkable, pedestrian-friendly set-backs and heights that create unique environments with historic character and a strong sense of place. Often they are public transit accessible and connected to in-need neighborhoods.

Decades of sprawling development patterns resulted in disinvestment in these downtowns. While investing in downtowns, village centers, and commercial corridors has been a WNY REDC strategy since day one, these places were hit hard during the COVID-19 pandemic and continue to be affected by disruptions in the region's commercial real estate market caused by the rapid transition to remote work. Another challenge is speculative investors who leave their properties vacant in anticipation of government investment. Solutions to sprawl will need to address unique and varying community challenges, as well as connect residents and communities with an overarching regional vision for smart growth that is meaningful to diverse communities across the region.

We aspire to return these places to the primary economic drivers and employment centers they once were—helping to grow the municipal tax base and enabling strong local services. By embracing unique neighborhood character, preserving historic buildings, providing small business support, fostering mixed-use private investment and encouraging walkable sustainable infrastructure, we will combat the effects of costly inefficient land use. Instead we will create accessible job centers, foster business opportunities for entrepreneurs, provide services and amenities to residents and visitors, attract and retain a talented workforce, and establish crucial connections between anchor assets and residential neighborhoods while promoting regional tourism.



SUPPORT REVITALIZATION OF COMMUNITY ANCHORS, WATERFRONT AREAS AND TOURISM ASSETS.

WNY is defined by its unique geographic location on the international border with Canada, and at the confluence of two Great Lakes. It's known for its incomparable art and architecture, core urban centers and quaint villages, rich history as a center of manufacturing and pioneer of innovation, significant cultural and historical resources, ethnic enclaves and natural assets. Throughout our region's downtowns and village centers there are well-established anchor institutions that tie neighborhoods together, contribute to a sense of place and connect residents and visitors to our region's rich history while forging new experiences relevant to the current generation. Anchors create new opportunity for entrepreneurship, enhance tourism offerings, create stronger neighborhood connections and expand the possibilities for community programming. These anchors and assets are often strategically located along or nearby commercial corridors and waterways and can spur vibrancy around them. Investments in both capital, organizational support and capacity building ensure important community anchors remain accessible, safe and relevant. Creating stronger connections between community anchors through a cohesive strategy that considers seasonality, marketing, targeted investment and wayfinding measures could also be effective.

Our greatest asset and anchor by far is our significant freshwater resources located in all five counties. Many of our region's most prominent tourism destinations, historical sites, cultural institutions and natural spaces are along a navigable waterway. Placemaking in the past decade has largely focused on reconnecting and increasing citizen access to the waterfront, putting former industrial land (often located near water resources) back to productive use, and protecting natural resources and waterways. But there is more to be done. We will continue to improve connections between our waterfronts, downtowns and residential neighborhoods, and facilitate greater active and passive recreational use to spur tourism and enhance quality of life.



INVEST IN INFRASTRUCTURE AND RESOURCES THAT CONNECT OUR REGION, ITS PEOPLE TO JOBS AND TRAINING, AND ITS ASSETS AND ATTRACTIONS.

The longstanding challenges and costs of sprawl persist and place stress on our region. Focusing investment near existing infrastructure to better connect people with jobs is one of the region's biggest needs. One example is developing shovel-ready, light-industrial sites on former brownfields, close to where people live, to provide jobs and attract and retain major employers.

Work group members described how transportation remains a key challenge across the region. Residents in rural, suburban and urban areas need affordable, flexible transportation to access jobs, training, services and community resources like the waterfront. It is also essential for supporting tourism growth and addressing other regional challenges, from hard-to-fill jobs to climate change and sprawl. They also expressed interest in understanding how transportation options and walkability have changed over the past decade to support access to services. Stakeholders not only expressed a need for an enhanced and expanded public transportation network, but also support for Transit Oriented Development—redevelopment projects, including housing, that encourage density and growth along existing public transportation corridors—like the LaSalle Station project in Buffalo. But public transit is only one piece of the puzzle in our diverse region with varying challenges. Complete Streets, Smart Cities technology, better wayfinding systems, a strong regional trail system and other infrastructure that promote walkability and multimodal mobility are key to placemaking. In city, town and village centers across the region where state roads are part of downtowns, we should align local planning efforts with Department of Transportation-led infrastructure improvements. Developing a more holistic regional strategy for ongoing maintenance to existing infrastructure including greenways and trails was also recommended.



Olean Area Farmers Market



Nash Lofts



Burrous Building, Wellsville



Village of Lancaster

COORDINATE INVESTMENTS WITH EXISTING PLANNING AND LOCAL CAPACITY TO MAXIMIZE SUSTAINABILITY.

One of the greatest achievements of the WNY REDC since its inception is the increase in partnerships and collaboration in a region that was historically siloed. By working together toward common goals, our projects become stronger, generate greater impacts and attract more resources. In a region with such diverse communities, working together and thinking collectively on smart growth principles is still a need. Stakeholders expressed a need for better regional coordination and collaboration so that local projects support regional smart growth planning efforts and initiatives. Greater collaboration and peer learning will also build off existing momentum, leverage additional resources and avoid duplicative efforts. There was also a desire to rally around larger-scale projects that are implementable and have the opportunity to be catalytic regionwide, but are not quite finished or fully funded.

Planning and capacity building are key to sustaining investments over the long-term. Locally, capital investments should also be coordinated with entities and organizations that offer capacity to plan for, implement and sustain them. In recent years government entities and nonprofits have been effective in providing

customized technical assistance and education to small municipalities on sustainability, resiliency and smart growth measures they can implement locally. Collaborative groups, Business, Community and Tourism Improvement Districts, public/private partnerships, local colleges/universities, capacity building nonprofits, and others can all play a role in helping projects succeed. Tailoring funding opportunities and increasing customized capacity building is especially true for underrepresented organizations.

As always, communities, especially under-represented groups, need to continue to be engaged, informed and included so they understand projects and the benefits they can offer. Informing and educating the public about projects that change the built environment is important, as communities are often reluctant to change. Better coordination, collaboration and public engagement will help our region work toward common goals and fully implement, complete and sustain investments.



Continuing the Momentum

State resources through the Buffalo Regional Innovation Cluster, Downtown Revitalization Initiative, historic preservation and new markets tax credits, the Regional Revitalization Partnership, Empire State Development Priority Project funds, and other state agency funding are leveraging federal, local and private funds and revitalizing our cities, towns, villages and waterfronts to connect people with jobs and attract a talented workforce through recent projects like these:



Central Terminal, Buffalo



Michigan Street African American Heritage Corridor

On **Buffalo's East Side**, a combined \$180M RRP investment scales up New York State's initial \$65M community-driven investment in capital that supports small business improvements, invests in key mixed-use properties, promotes historic preservation and reinvigorates fundamental East Side anchors. Supporting East Side entrepreneurs, the **Broadway Market** will be reestablished as a viable and vibrant public shopping hub and attractive regional destination. Restoring the iconic **Central Terminal** will increase community access and create a year-round, neighborhood anchor. These investments in Broadway-Fillmore are leveraging the \$10M awarded to this neighborhood in DRI Round 5. Investments in **Martin Luther King Jr. Park** ensure this important key community anchor is an accessible, safe and active park that trains and employs East Side residents. **The Commercial Building Stabilization Fund & East Side Commercial Districts Program** are grant programs generating wealth for small business and building owners, combating vacancies, stabilizing at-risk historic buildings and revitalizing commercial corridors. Through **Community-Based Real Estate Development Training**, building owners are trained in commercial real estate development to ensure buildings are redeveloped for and by East Side residents. The **Michigan Street African American Heritage Corridor** is becoming a unified international tourism destination. The recently completed Priority Project **Nash Lofts** (formerly Broadway-Michigan Mixed Use Redevelopment) functions as a gateway into the Michigan Street African American Corridor. The \$6M



rehabilitation project includes 18 new apartments, 8,000 square feet of available commercial space, parking, and office space for the Buffalo Branch of the NAACP. Through these initiatives, 88 small businesses and community anchors to date were awarded funds on the East Side.

Current and prior state investments in **Niagara Falls** have sought to boost the City's economy via the tourism industry in select geographic areas. Millions in improvements were made to **Niagara Falls State Park** that provide world-class amenities and facilities to match the world-famous natural wonder, while preserving the park's natural and historic setting. Major infrastructure projects—like the removal of key segments of limited-access expressways along the **Upper Niagara River** and the **Niagara Gorge** rim—are reconnecting people to the waterfront and allowing expansion of public outdoor recreational offerings. In downtown Niagara Falls, USA Niagara worked for nearly two decades to expand quality lodging, increase street-level retail offerings, restore Old Falls Street and improve walkability on other key downtown streets, spurring millions in private investment and enhancing the quality of the visitor experience. The **Aquarium of Niagara**, named an ESD priority project, continues to add attractions and amenities. **North Main Street**, named a \$10M NYS Downtown Revitalization Initiative (DRI) winner in Round 4, is leveraging the expressway removal to return North Main Street to a strong business district. Construction is also underway on Priority Project **The Kashmir Museum**, which is housed in a 97-year-old abandoned church on the National Register of Historic Places, in the heart of downtown Niagara Falls.

Today, a combined \$40M RRP investment in Niagara Falls builds upon a community-driven planning process and invests in commercial corridors to fully engage its residents in revitalization and ensure an economically sustainable outlook for the future. RRP funds support food entrepreneurship and agritourism in Niagara County, anchored around the city's historic **City Market** and **Pine Avenue**. A program to restore, highlight and promote various heritage and community anchor facilities, such as **Oakwood Cemetery** and **Niagara Arts and Cultural Center (NACC)**, connected to key corridors in Niagara Falls will maximize visitor spending and increase revenues for local businesses



Aquarium of Niagara



Upper Rapids Observation Rendering



Niagara Arts and Cultural Center



near the State Park. A circular observation deck at **305 Buffalo Avenue** and the new **Hydraulic Canal Plaza** are returning underutilized property back to productive use and reconnecting neighborhoods to the waterfront. A **small business assistance program** in targeted commercial districts will revitalize business districts and generate wealth for small business owners.

Our recent DRI and New York Forward (NYF) winners epitomize smart growth principles in villages and small cities. Our Round 6 DRI winner, the **City of Dunkirk**, is finalizing projects that leverage recent investments and continue to activate the waterfront and harbor to create new recreational experiences and extend visitor stays, while reactivating Central Avenue storefronts with new businesses and creating a stronger connection between the waterfront and Central Avenue. Early successes such as ESD Priority Project **Dunkirk Seawall & Lake Front Redevelopment**, which reconstructed the 70-ft seawall making the beaches accessible for the first time, paved the way for Dunkirk's DRI success.

NYF winner, the **Village of Wellsville**, seeks to maintain its small-town charm while creating an accessible, vibrant, contemporary, revitalized commercial district that will facilitate the movement of workers, residents, students and visitors to Main Street and along the Genesee River. The revitalization of the **Burrous Building**—a long-vacant landmark in downtown Wellsville, helped catalyze economic growth in downtown Wellsville and led to their NYF award. This \$10.3M adaptive reuse ESD Priority Project includes 16 affordable housing units for adults 55 and up, as well as 5,800 square feet of ground floor commercial space.



Village of Wellsville

NYF winner, the **Village of Lancaster**, envisions a vibrant village center that retains its traditional historic character, community anchors and walkability while encouraging and supporting enhanced economic development, health and wellness for residents and visitors, environmentally friendly infrastructure and practices, multimodal transportation options and affordable housing. Other village centers such as in **Springville** are utilizing ESD Priority Project funding to revamp their downtowns. **Springville Center for the Arts** completed final construction at 5 East Main Street, which transformed a collapsed and abandoned building into the **Springville Arts Café**—a restaurant and community performance space with Artists in Residence program.

DRI winner in Round 5, the **City of North Tonawanda**, announced their 14 transformation projects in late 2022. Situated at the confluence of the Niagara River and the Erie Canal, North Tonawanda's projects—including a mixed-use building renovation at **122 Webster Street** and expansion of the **Riviera Theatre**—will enhance waterfront access and public spaces; improve streetscape walkability and connectivity; expand arts and cultural opportunities; and expand business and housing opportunities along Webster Street, the city's main commercial corridor, and extending to Tonawanda Island and Oliver Street.



Arts Café, Springville



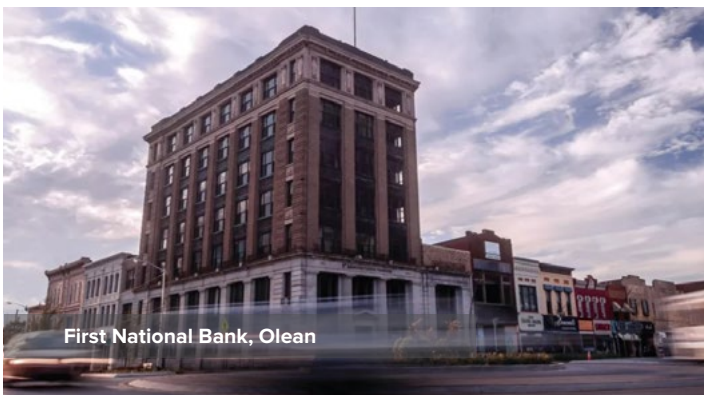
City of North Tonawanda



Past DRI winners are announcing groundbreakings and completion of catalytic projects that leverage additional state, local and private funds. In **Olean**, a \$12.5M restoration and redevelopment of the seven-story **1915 First National Bank building** (formerly Manufacturers Hanover), which has been vacant for nearly 30 years, and adjacent two-story former **Siegel's Shoe Store** building is bringing housing, commercial space, event and art spaces and office space to the heart of downtown Olean. In 2021, the **Walkable Olean Phase II project** (named an ESD Priority Project) was completed. The nearly \$1.5M project quiets traffic and encourages safe pedestrian travel in the City's downtown area, bolstering the local economy by providing easier access to businesses. The public works project extended the previously completed Walkable Olean initiative, which renovated North Union Street from State Street to Main Street. Looking ahead, the **Olean Town Center Mall Redevelopment**, also named an ESD Priority Project, will renovate and reuse the underutilized mall into a mixed-use development, filling a void for much-needed affordable senior housing, as well as retail and commercial opportunities.

A renewed commitment to revitalize **Jamestown** in the past decade led to key investments downtown, including the **National Comedy Center**, several major mixed-use buildings, and completed Priority Project **Jamestown Public Piazza**, which creates a pedestrian-friendly area on 2nd Street that adds to the walkability of the city, better connecting the National Comedy Center, Chadakoin River and Northwest Arena. These initiatives primed Jamestown to be the Round 1 DRI winner, with projects that focus on redevelopment of historic buildings, the riverfront, and streetscape improvements including a newly completed road diet and bike lanes along Washington Street.

An important community anchor, the **Historic Palace Theatre** reopened in **Lockport**—a round 3 DRI winner. Other historic building rehab projects in design and construction include the **Spaulding Mill Building**, and Western New York Incubator Network (WIN) member **Harrison Place**, as well as complete street improvements to **Pine Street**.



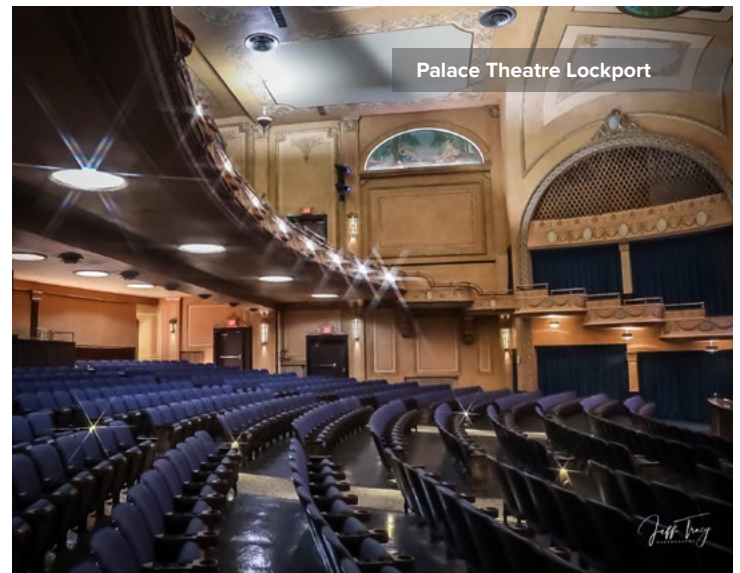
First National Bank, Olean



Downtown Olean



National Comedy Center, Jamestown



Palace Theatre Lockport



In the **Town of Tonawanda**, the nearly 13-acre former **Wood and Brooks Co.** piano key factory will be transformed into 55 market-rate apartments, co-working offices for contractors and a vocational training facility. Named an ESD Priority Project, the \$20M project will bring new activity to a long-vacant site, while creating a new living option in an industrial part of Tonawanda adjacent to Buffalo's Riverside residential neighborhood.

The next phase of **Cars Sharing Main Street**—a years long effort by the **City of Buffalo** to reverse the failed urban-renewal initiative to create a downtown pedestrian mall along the Main Street spine in downtown Buffalo—is about to begin. This phase from Mohawk to Church streets is a critical stretch of the downtown core, including Main Place Mall, M&T Bank headquarters at 1 M&T Plaza, the Brisbane Building and Lafayette Square. Bringing back cars alongside the rail lines and pedestrians in the 500, 600 and 700 blocks, as well as Lower Main Street below Exchange Street, has spurred new life into the downtown core with new businesses and residential housing.

In June, Governor Kathy Hochul announced the substantial completion of the **Buffalo AKG Art Museum**, one of the foremost modern and contemporary art museums in the world. The \$195M expansion, restoration and renovation project includes the dramatic new three-story Jeffrey E. Gundlach building, in addition to the restoration of two other historic buildings on the campus (formerly known as Albright-Knox Art Gallery). AKG is projected to increase visitation by more than 30 percent and attract at least 160,000 visitors per year. It is estimated that the region could experience a sustained economic benefit of an additional \$34M per year as a result of the increased tourism.

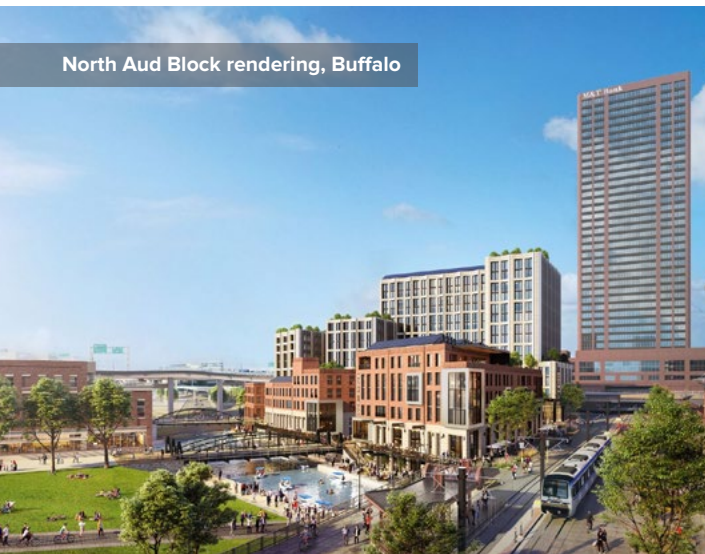
A \$87.5M project to reuse and reactivate the former **Delaware, Lackawanna and Western (DL&W) train shed** is underway. The train shed will be a new commercial activity center on the Buffalo River waterfront with a new Metro Rail station. This will enhance public access to some of the region's most popular attractions in the Canalside and Cobblestone Districts—including skywalk connections to the Key Bank Center—which have transformed from blighted landscapes into premier waterfront destinations over the past decade.





A decade of progress to transform **Buffalo's waterfront**, restoring 21 historic acres at Canalside and 200 acres on Buffalo's Outer Harbor, has resulted in more than \$300M in new development and over 1,000 annual events. Construction of the **Canalside Gateway Building** and **North Aud Block** will transform the last of the state-owned parcels at Canalside into a mix of commercial, retail and residential uses in several buildings. This will reflect portions of the original 19th century street grid while also adapting and incorporating 21st century infrastructure and amenities. On the outer harbor, investments in placemaking efforts at **Wilkeson Pointe**, **Buffalo Harbor State Park** and **Bell Slip** will provide permanent amenities and recreational activities. A new **Buffalo Riverwalk** will consist of a system of universally accessible and elevated walkways, fishing piers and dock level promenades along the Buffalo River and Kelly Island shoreline, connecting Canalside and the Outer Harbor through a unique experience. In 2022, the City of Buffalo and the Ralph Wilson Park Conservancy broke ground on **Ralph C. Wilson, Jr. Centennial Park** ("Ralph Wilson Park"), a 99-acre, world-class park located on Buffalo's waterfront. Rooted in the guidance of "Imagine LaSalle," the community-driven visioning process for the former LaSalle Park, Ralph Wilson Park will undergo a \$110M transformation into one of the most beautiful and inclusive public spaces in the country, serving nearby residents and visitors from across the region and beyond.

North Aud Block rendering, Buffalo



The 1,000-acre former **Bethlehem Steel site** is being transformed into the newly named **Renaissance Commerce Park**, a modern industrial park that will attract new and growing companies. The project includes acquisition and public infrastructure to make the property shovel-ready for development including extension of the Erie County Shoreline Trail. Erie County purchased and remediated nearly 150 acres of vacant brownfield land; removed and relocated rail tracks along Route 5 that block property access; opened 6,500-feet of the newest section of the Shoreline Trail; and constructed the first-ever public road (Dona Street) to allow for improved public and business access. Renaissance Commerce Park is home to TMP Technologies and Uniland Development. NYS has invested a total of \$12,780,000 through ESD, including being named a Priority Project.



Buffalo Outer Harbor



Ralph C. Wilson, Jr. Centennial Park Rendering



Foster a Culture of Entrepreneurship

2011 Strategies

Foster and support entrepreneurs.

Fund entrepreneurs.

2023 Strategies Refined

Grow and connect supports for all entrepreneurs.

Build a more diverse and consistent entrepreneurial pipeline.

Foster and promote a regional culture of entrepreneurship.

Innovate existing ventures to promote competitiveness and growth.

To combat out-migration, limited venture capital activity and weak small business growth, our original plan focused on investments that catalyzed innovation to spur high-growth entrepreneurial activity. While still important and relevant, we expanded our region's definition of entrepreneurship to include all types of businesses, from microenterprises to startups with high growth potential, to more established small and mid-sized companies. We also expanded our strategy in 2023 to focus on a more connected and accessible support system for all entrepreneurs; a more inclusive, diverse and young entrepreneurial pipeline; company birth, attraction and retention through innovation; and creating a region ready to take risks to become more attractive to startups.

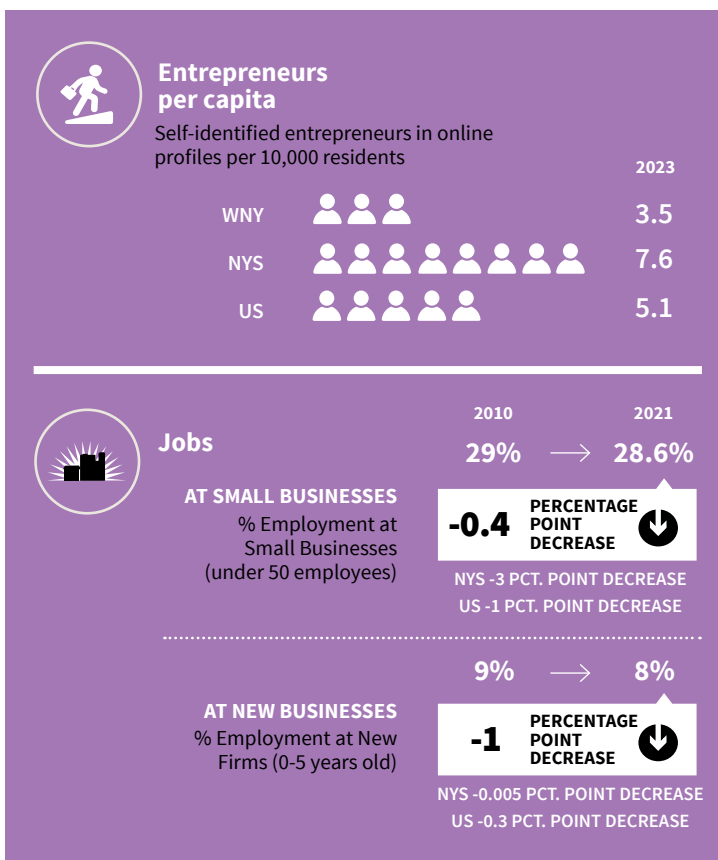
Entrepreneurship is a key driver of the economy. WNY has a rich history of innovation, but currently the region lags other metros in indicators of entrepreneurship. WNY has 490 individuals who identify as entrepreneurs or innovators in their online profiles. This is 3.5 for every 10,000 residents, which lags NYS and the US. If the region had the same rate of entrepreneurs per capita as the nation overall, we would have over 720 entrepreneurs (+47%).

Promoting small and new businesses is essential to regional entrepreneurship. Small businesses with under 50 employees make up 29% of all jobs in WNY. This is down slightly from 2010, but not as much as across the State (-3%) and the US (-1%) from 2010 to 2021. About 8% of jobs in WNY exist at young firms no more than 5 years old, which is down from 9% in 2010 and is now less than NYS and the US (both at 10%).

The educational background of workers at new businesses can be another indicator of regional entrepreneurship. While the rate of individuals at new businesses who have a bachelor's degree has grown more than the nation, WNY—with 20% of jobs at new businesses held by someone with a bachelor's or more—lags the US (23%) and NYS overall (28%).

Colleges and universities can spur entrepreneurship and innovation through research and development (R&D). R&D expenditures in WNY increased 20% since 2010 to \$432M in 2021. This lagged NYS and the US (53% and 47%, respectively), and fell short of the rate of inflation between 2010 and 2021, which was 28%.

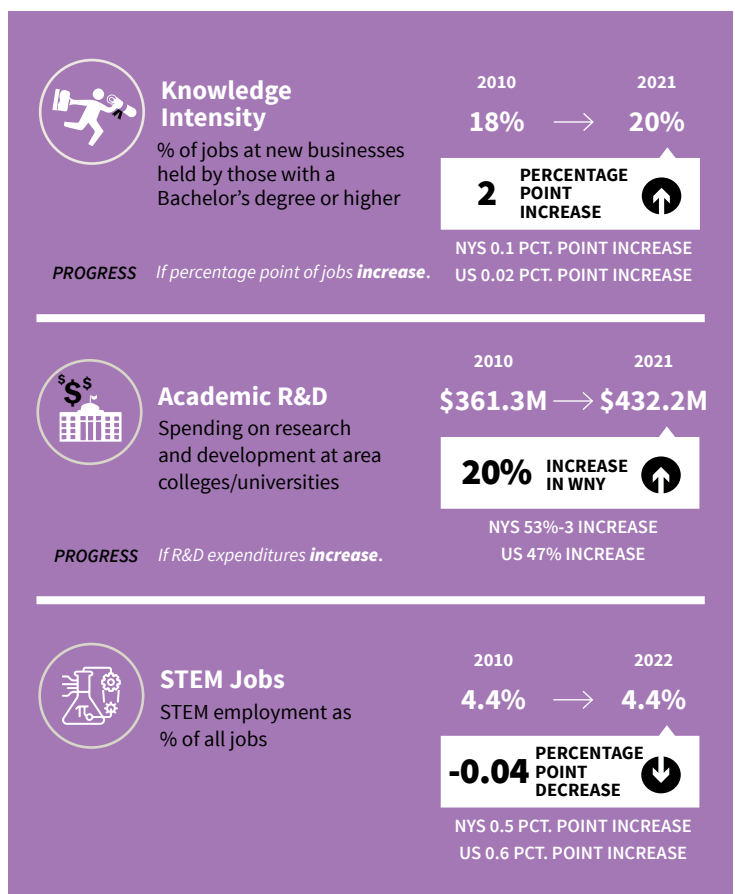
STEM jobs pay more and are projected to grow by double digits across the nation, but job growth has been stagnant in WNY. As more businesses and industries adopt new technologies and require more talent with high-tech skills, WNY will need to train, retain and attract these workers to foster economic growth.



NOTE: Percentage point change numbers may not equal difference of WNY figures shown due to rounding.

Data Sources

Employment at small and new businesses, Knowledge Intensity: US Census, Quarterly Workforce Indicators, 2010 and 2021; **Academic R&D:** National Science Foundation, Research & Development Expenditures, 2021; **STEM-intensive employment:** US BLS Employment Statistics in STEM Occupations, 2010 and 2022; **Entrepreneurs per capita:** Lightcast, Profile Analytics, 2023; US Census, ACS, 2021.



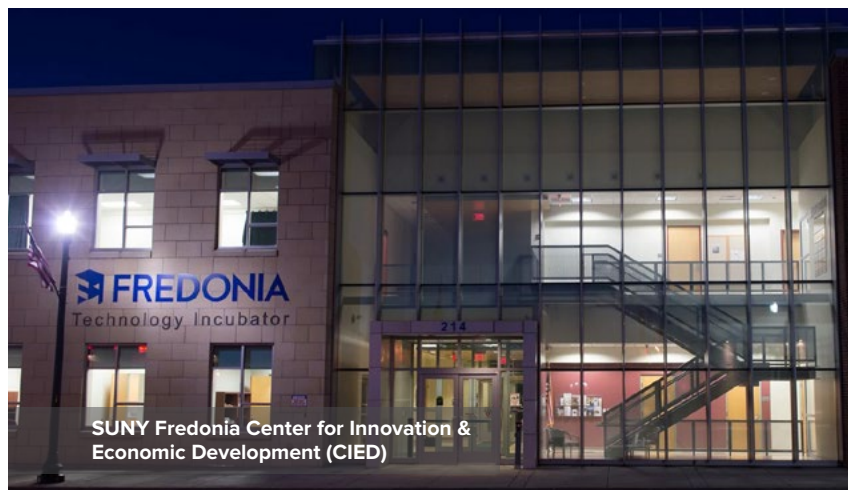


GOAL

Cultivate and strengthen all entrepreneurs in all stages of firm growth.

GROW THE SUPPORT SYSTEM FOR ALL ENTREPRENEURS AND MAKE IT MORE NAVIGABLE BY COORDINATING SERVICES ACROSS ORGANIZATIONS AND STREAMLINING PROCESSES.

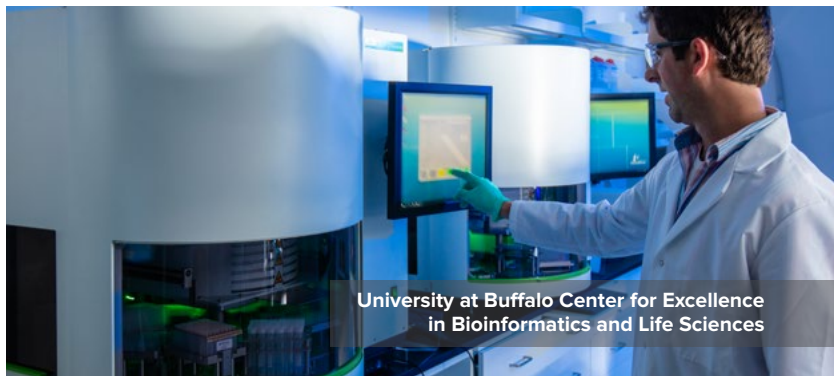
Since our original strategic plan, regional leaders have been generating more high-growth startup enterprises through programs that facilitate applied R&D, increase business expertise and support, grow funding, create access to incubators and specialized equipment, and train a talented workforce. For microenterprises, programs that focus on foundational business skills, technical assistance and targeted business support, access to funding through avenues like Community Development Financial Institutions (CDFIs), and space to grow are prioritized. The result is a more robust entrepreneurial ecosystem, but still has gaps in services, includes redundancies, and is difficult to understand and access, especially for underrepresented populations. While we will continue to develop much-needed services and funding for all entrepreneurs in all stages of growth, we also aspire to create a more coordinated and accessible network to seamlessly serve a greater and more diverse population. Stakeholders mentioned that entrepreneurs needed to see themselves inside this often-daunting ecosystem of support. They were supportive of a continuum of support approach that includes tailored solutions and individualized pathways. They also encouraged mentorship matchmaking, funding that works with business' timelines, safety nets to help people get started, and encouraging more cross-pollination throughout the ecosystem through programming and networking opportunities that foster



interaction and commonalities between different entrepreneurship groups—from high growth startups to microenterprises. This involves funding for greater involvement and growth from entrepreneurship support organizations (ESOs) to act as intermediaries and not only provide overall coordination of organizations and services, but also act as “navigators” to lead existing and aspiring entrepreneurs to the services they need.

CULTIVATE ENTREPRENEURSHIP AMONG THE REGION'S GROWING POPULATION SEGMENTS (YOUNG ADULTS, POC, AND FOREIGN BORN); AND BUILD A PIPELINE OF NEXT GENERATION ENTREPRENEURS BY ENGAGING K-12 STUDENTS IN ENTREPRENEURSHIP AWARENESS AND EDUCATION.

There is entrepreneurial spirit in the region's growing population segments. This strategy is all about intentionally building a more diverse and consistent entrepreneurial pipeline now and into the future. Small businesses owned by New Americans and POC anchor neighborhoods with locally driven economic activity. They create jobs and upward mobility while helping build and maintain a positive, unique neighborhood identity. However, businesses owned by POC are more vulnerable to market downturns and disruptions, historically lack access to capital, and were disproportionately impacted by the COVID-19 pandemic. The implications of a stalled or failing business reverberate throughout a community. With commercial districts relying on fewer businesses, communities are unable to develop vibrancy and density of activity, which are critical to the reversal of urban decline.



Recent surveys and focus groups by the Exchange at Beverly Gray and the RCWJF pertaining to the state of Buffalo's small business ecosystem found that POC are more likely to be unaware of or receive very little entrepreneurial or small business support, and needed capacity building, mentorships, business and product offerings, access to funding and financial services, technical expertise (e.g. legal, marketing, accounting), and commercial real estate. Work group solutions focused on increasing targeted outreach to POC and New Americans to bring greater awareness of the region's offerings and how to access them; one-on-one support such as business guides, resource navigators, and mentors to provide individualized assistance and guide entrepreneurs to needed supports; and streamlining Minority and Women-Owned Business Enterprise (MWBE) Certifications.

Reaching untapped pools of entrepreneurs is only one piece of the pipeline puzzle. Supports to inspire and encourage the next generation of entrepreneurs is also found to be insufficient. Our region recognizes the need to build the entrepreneurial pipeline at younger ages, and in the long-term looks to increase partnerships with local public school administration and school boards and develop best practices to integrate entrepreneurial skills into the curriculum that begins as early as elementary school. In the short-term, we need a more grassroots solution that involves partnerships with afterschool programs, community centers, religious institutions and New Americans centers. By building stronger K-12 programs such as those that encourage creativity and problem solving, business acumen and skill-building; supports to navigate and connect with the startup ecosystem; and mentorships, we can promote and foster entrepreneurship as an approachable, viable, family-sustaining career opportunity for the next generation, and build a pipeline of new enterprises ready to contribute to a vibrant and sustainable economy.



FOSTER AND PROMOTE A REGIONAL CULTURE OF ENTREPRENEURSHIP THAT PROMOTES RISK-TAKING, INVESTMENT AND BUSINESS FORMATION.

This strategy seeks to increase funding—from venture capital to CDFIs to public resources—for all types of entrepreneurs and to create a less risk averse environment encouraging of new and experimental ventures that could learn from failure. The region currently lacks breadth and depth in the entrepreneurial ecosystem, with limited venture capital investments and funding options, and limited human capital, in terms of local startups, ESOs, and entrepreneurs-in-residence (EIRs).

Fostering a culture of regional entrepreneurship is a complex and long-term task, but it can be accomplished largely by supporting and coordinating other strategies of this plan. Work group members noted how the region's strength in attracting global talent through colleges and universities is undermined by a lack of infrastructure to keep this talent in the region. They suggested promoting sustainable development and placemaking to create places that have a critical mass of business, and startup activity to promote the exchange of ideas and innovations. Stakeholders suggested expanding incubator and commercial space opportunities in local communities and higher education institutions. Expanding investments and funding opportunities to promote entrepreneurship in strategic industry clusters that leverage regional competitive advantages and reinforce one another can also facilitate a productive entrepreneurial culture and attract venture capital, startups and entrepreneurs.



Parallel to increasing funding opportunities, we need to strategically market the region as a hub of innovation and entrepreneurship by promoting entrepreneurship opportunities, emerging industry trends, the region's legacy of innovation, and unique assets that make WNY a great place to live and work, while changing our perception of risk tolerance. Stakeholders recommended large-scale marketing campaigns; strategies to retain college graduates and international students in tech and tech-enabled industries; and increasing applied R&D for goods and services with commercialization potential. Bringing together investors, entrepreneurs and subject matter experts to learn from the failures and successes of each other was suggested as beneficial. These efforts would require working with major companies, institutions, ESOs and policy makers to promote investments and strategize how to foster entrepreneurship.

INNOVATE EXISTING VENTURES TO PROMOTE COMPETITIVENESS AND GROWTH.

Existing companies are the backbone of our economy and retaining and growing them is as important to our economy as generating new startups. This strategy provides opportunities for small and mid-sized companies to grow and remain in WNY through innovation. The strategy seeks to build upon the region's unique specializations in industries like materials processing, chemicals and health technology and capitalize on our area's strong but underutilized materials-sciences R&D infrastructure. Supply chain disruptions from the pandemic and other global challenges have caused companies to rethink where they source and manufacture goods, and this could create opportunities for local companies to reshore industries and manufacturing back to the US. Access to applied research and scaled testing facilities for new product/process development, adoption of more effective operational processes to drive greater resource efficiency and improve productivity, and export assistance to grow the market are all ways companies can innovate and grow jobs in our region. Another way to retain companies in our region is through succession planning. We need to not only better connect traditional businesses to succession planning, but also connect retiring business owners with trusted acquisitional entrepreneurs through peer-group interaction and matchingmaking buyers and sellers. Promoting these opportunities through events, public awareness campaigns and online resources can help connect acquisitional entrepreneurs and other potential investors with business owners to retain local companies and the jobs they create.



Continuing the Momentum

The region is rebounding from decades of native out-migration, minimal startup funding and poor net small business growth. State-funded programs like these are helping to drive innovation and entrepreneurship:

Operated by EWI, the member-based—**Buffalo Manufacturing Works (BMW)**—creates an ecosystem to help local manufacturers identify, test and implement technologies to create a competitive advantage for their products; expand into new markets; boost productivity; and stimulate innovation and growth for the region's manufacturing sector. Among the many offerings at BMW is Shift, a program specifically designed to assist small to mid-sized manufacturers with identifying technologies to help them innovate and compete effectively. Since opening in 2015, BMW initiated or completed more than 482 funded projects for 155 companies, representing over \$198M in economic impact. Membership grew to 45 companies across various industries and company sizes.

A division of the Office of Research and Economic Development—**University at Buffalo Business & Entrepreneur Partnerships (BEP)**—builds bridges between academia and industry, helping to commercialize new technology and providing students with opportunities for experiential learning and employment. BEP works to create a seamless and nurturing entrepreneurial ecosystem in WNY through technology licensing, incubation facilities and programs, educational workshops, mentoring, seed grant funding, and investment pitch opportunities. In 2017, UB was awarded a \$32M NYS grant dedicated to the movement of innovations from labs, classrooms and clinics to the marketplace by connecting entrepreneurs to resources through a new **Innovation Hub** initiative—currently supporting 31 active startups. Operated by BEP, the Innovation Hub is made up of entrepreneurial programming, outreach and expertise support; proof-of-concept and pre-seed funding (UB Cultivator); and an Incubator at the **Center of Excellence in Bioinformatics and Life Sciences** on the downtown campus to house spinout businesses.



Buffalo Manufacturing Works



University at Buffalo Business & Entrepreneur Partnerships



43North is an accelerator that hosts an annual startup competition to attract and retain high-growth companies in Buffalo. The competition is designed to systematically generate new business ventures in WNY, support early-stage firm growth and attract additional venture funding to the region. With \$5M in cash prizes available annually, 43North attracts some of the best startups from around the globe to Buffalo. 43North has awarded sixty companies with investments since 2014. In total, 43North invested \$42,912,020 in these startups. The sixty companies also leveraged an additional \$938.2M from other investors. Every \$1 invested by 43North helped companies leverage an additional \$22 in investments.

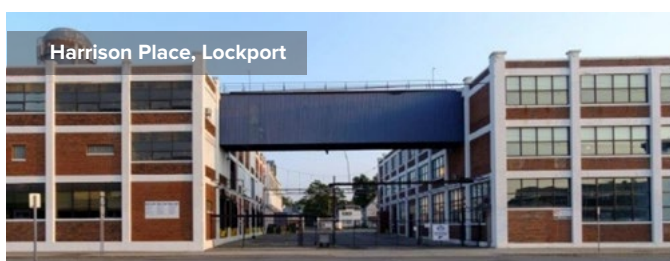


Named an early ESD Priority Project, **Launch NY** is a venture development organization aimed at identifying, supporting and investing in high-growth, high-impact companies to catalyze the entrepreneurial ecosystem in Upstate New York. Located in Buffalo, Launch NY provides pro-bono individualized coaching through more than two dozen Entrepreneurs-in-Residence—augmented by the National Mentor Network of more than 2,000 businesses and technical experts—with a goal of helping startups become investment-ready. To fund startups, Launch NY operates the Investor Network, Limited Partner Fund, Nonprofit Seed Fund and Founders Go Big diversity and inclusion program. Launch NY has served 1,525+ companies, created 4,950+ jobs, raised \$1.7B in funds, completed 10,000+ hours of pro bono mentoring, invested \$6.2M in capital and has a portfolio of 90 companies.





Western New York Incubator Network (WIN) is a collaborative effort of incubators and entrepreneurial service providers from Allegany, Cattaraugus, Chautauqua, Erie and Niagara Counties, working together to expand entrepreneurial services, help startups and grow wealth in the region. Managed by BEP, WIN connects startups to UB's vast resources, including student talent, faculty expertise, entrepreneurial support programs and world class facilities. WIN helps incubator ventures grow quickly, achieve greater profitability and become more attractive to investors by sharing best practices, providing networking and mentoring opportunities, and offering education and financial resources to better assist incubator client companies. WIN currently includes 43North (Buffalo, NY), BNMC Beecher Innovation Center (Buffalo, NY), SUNY Fredonia Center for Innovation & Economic Development (CIED) (Dunkirk, NY), Harrison Place (Lockport, NY), IncubatorWorks (Alfred, NY), Launch NY (Virtual Incubator), Olean Business Incubator (Olean, NY), TReC (Niagara Falls, NY), UB NYS Center of Excellence in Bioinformatics & Life Sciences (Buffalo, NY), UB Technology Incubator (Amherst, NY), and Z80 Incubator Labs (Buffalo, NY).



The Exchange at Beverly Gray and **The Foundry** are two community-based nonprofit business and entrepreneur service organizations serving Buffalo's East Side and beyond. They recently collaborated on a new initiative designed to strengthen the small business ecosystem and is centered on aligning critical resources while making them easily accessible/navigable for small businesses. It will serve as a one-stop program customized to fit business owners' specific needs; will focus on supporting small business growth and developing future entrepreneurs; and will help build generational wealth along with the regional economy.





On Buffalo's West Side, the **West Side Bazaar**, operated by Westminster Economic Development Initiative, is a one-of-a-kind small business incubator for food and retail vendors that sell quality authentic products from all around the world, supporting entrepreneurs on their path to becoming successful business owners. The Bazaar serves women, minorities, refugees, immigrants and others who do not qualify for support from traditional banking and financial institutions by providing microloans and technical business assistance. NYS invested in the \$11.5M project to create a new and significantly expanded West Side Bazaar at 1432 Niagara Street, which will provide space for 24 restaurant, retail and professional services businesses, test and rental kitchens for independent chefs, classrooms, event space and seating for 200+ patrons at the 16,000 square foot facility.



Initiatives like **Open4** have taken an ecosystem-building approach by investing in local CDFIs and support organizations for small businesses and entrepreneurs. As this initiative sunsets, one outcome is **WNY Be In Business Resource Navigator**, where Erie County, the Amherst Chamber of Commerce and several partners embarked on a collaborative effort to bring resource providers and business services organizations under one virtual roof, so that entrepreneurs can access the support they need and achieve their small business goals.





Prepare Our Workforce

2011 Strategies

Develop and cultivate the WNY talent pool including workers with advancement potential, underemployed, unemployed, and special populations.

Engage students, parents, educators and businesses in the P-12 system to build awareness.

2023 Strategies Refined

Focus on the right training.

Diversify the workforce.

Fuel the talent pipeline.

Strengthen our regional workforce ecosystem.

For the last decade, WNY sought to prepare unemployed and underemployed populations for high-demand, higher paying jobs with career advancement potential to address retirement cliffs and support target industry sectors ripe for growth. Tracking indicators, learning from best practices and adapting to a changing work environment—especially following the COVID-19 pandemic—led us to refine our strategies to become more intentional about what constitutes effective training, to better understand and strengthen partnerships among all parts of the workforce ecosystem, and to build the most diverse workforce through supportive services and inclusionary programs and policies. Our talent attraction strategy has expanded beyond K-12, and is more inclusive of college graduates, international students and expats to build a more robust pipeline.

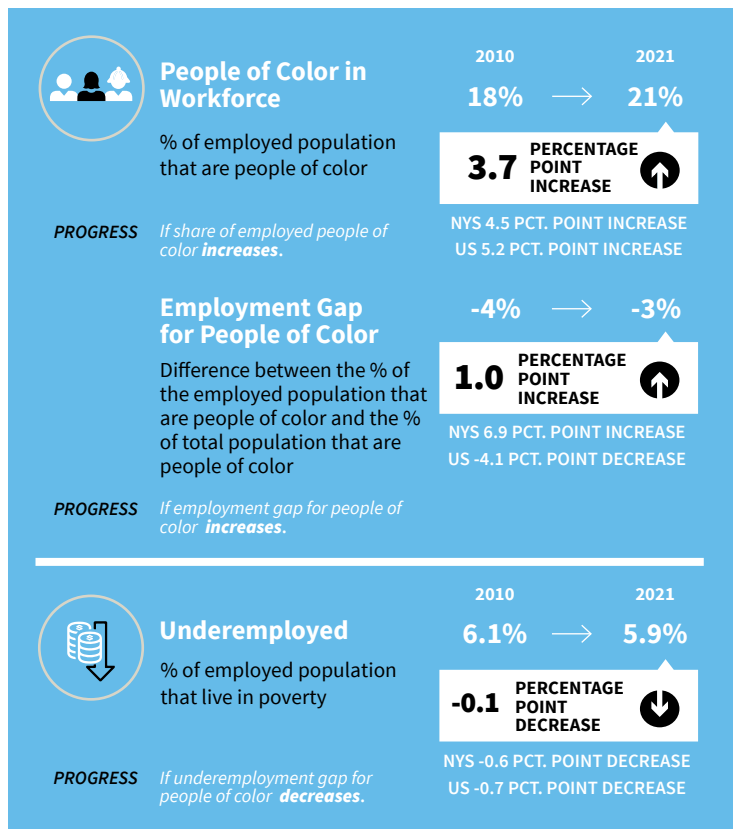
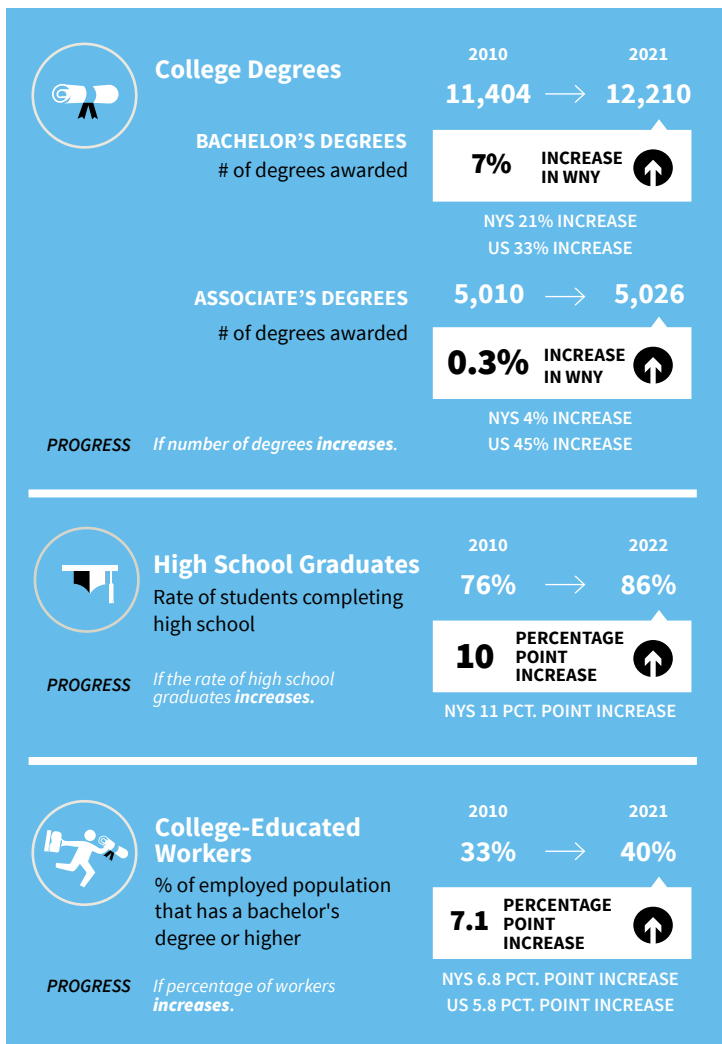


Workforce development is essential to economic development in WNY, where a robust job market generated over 190,000 job postings in 2022 with new opportunities for skilled workers. The median posting time was 29 days, suggesting it took employers nearly a month to fill these positions. The median advertised annual salary was \$41,600, which is more than \$4,000 less than the national average and more than \$10,000 less than the statewide average. The strong job market is a positive sign for economic development, but the number of postings and comparatively lower salaries makes it difficult for many employers to fill jobs, and could hasten a shift to automation in some industries like manufacturing.

College graduates and high school students are both vital sources of future talent for hiring employers. In 2021, the region produced over 17,000 new graduates

with two- and four-year degrees, an increase from 2010. In 2022, high schools across the region produced more than 12,600 graduates, a significant increase from previous years, reflective of investments in K-12 education that have significantly improved graduation rates across both the region and state.

While the proportion of workers with a bachelor's degree or more has been growing over the last decade, degree-holders continue to account for less than half of the regional workforce. This trend underscores the need to both retain college graduates and provide post-secondary training and non-traditional training pathways for individuals to fill jobs that don't require a degree. The past emphasis on pursuing a four-year degree at all costs has led to thin talent pipelines and labor shortages in the skilled trades and other important regional industry sectors such as manufacturing and agriculture.



NOTE: Percentage point change numbers may not equal difference of WNY figures shown due to rounding.

Data Sources

Degrees: National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS), 2010 and 2021; **High School Graduation Rate:** NYS Education Department, School Report Cards, 2010 and 2022; **All Other Workforce Metrics:** US Census, American Community Survey, 5-year estimates, 2010 and 2021.

A strong regional economy should enable everyone to participate in the labor force. However, in WNY, labor force participation rates vary widely by age, race/ethnicity, education and foreign-born status. Participation rates are highest for those with the most education and training and lowest for foreign-born individuals (68%), POC (65%), and those with the least amount of education (51%). While participation rates notably increased for those with a bachelor's degree, they remained stagnant for many other groups, suggesting persistent barriers to work and training.

In addition to those who are out of the labor force, there is also a large population of residents who are underemployed. More than 39,400 adults across WNY are employed but live in poverty. They represent 5.9% of employed workers, a percentage that has declined only slightly since 2010. These are individuals who would potentially benefit from upskilling that leads to upward career mobility.



While the percentage of POC in the workforce in WNY increased by 4 percentage points since 2010, this growth lags behind state and national trends. Additionally, there is still an employment gap for POC in WNY. If the percentage of POC in the workforce reflected their percentage in the overall population, we would have a more diverse workforce and a larger pool of applicants for hiring employers to draw from.

The data underscores the importance of worker retention and talent development. Over the next decade, more than 118,000 workers across industries are projected to reach typical retirement age and could potentially leave the workforce. Advanced manufacturing and agriculture could be the most impacted, as nearly a third of their workforce is age 55+ and older workers outnumber younger workers. Building a pipeline of younger workers will be essential to supporting industry growth.







Labor Force Participation Rate

Labor Force participation rate by age, 2010-2021


Age Groups	2010	2021	PERCENTAGE POINT CHANGE IN WNY
16-24 YEARS	74%	74%	0.05 
			NYS 0.9 PCT. PT. INCREASE US 0.2 PCT. PT. INCREASE
25-34 YEARS	84%	84%	0.2 
			NYS 2 PCT. PT. INCREASE US 1 PCT. PT. INCREASE

Labor Force participation rate by Race/Ethnicity, Ages 16-64

Race/Ethnicity	2010	2021	PERCENTAGE POINT CHANGE IN WNY
People of color	62%	65%	3.0 
			NYS 2.0 PCT. PT. INCREASE US 2.0 PCT. PT. INCREASE
Black	62%	65%	3.0 
			NYS 1.0 PCT. PT. INCREASE US 2.0 PCT. PT. INCREASE
Hispanic	61%	66%	5.5 
			NYS 2.0 PCT. PT. INCREASE US 1.0 PCT. PT. INCREASE
White	77%	77%	0.1 
			NYS 1.0 PCT. PT. INCREASE US -0.2 PCT. PT. DECREASE




Labor Force Participation Rate for Foreign-Born Population

	2010	2021	PERCENTAGE POINT CHANGE
	69%	68%	-1.0 
			NYS 1.0 PCT PT INCREASE US 1.0 PCT PT INCREASE

PROGRESS If participation rate *increases*.



Labor Force Participation Rate for Population 25-64 with Less Than High School Diploma

	2010	2021	PERCENTAGE POINT CHANGE
	51%	51%	-0.6 
			NYS -0.4 PCT PT DECREASE US -0.4 PCT PT DECREASE

PROGRESS If participation rate *increases*.



GOAL

Build an inclusive workforce that meets the needs of job seekers and creates a reliable and inclusive talent pipeline for employers.

FOCUS ON TRAINING THAT LEADS TO HIGH-DEMAND, HIGHER-PAYING JOBS WITH CAREER ADVANCEMENT POTENTIAL FOR IN-DEMAND INDUSTRIES.

While our regional workforce ecosystem has 200+ training providers, we still have persistent poverty, unemployment and underemployment, and a growing number of job postings in hard-to-fill positions without the labor force to meet the demand. In an ever-evolving workforce landscape, there is a disconnect between what trainers are providing and what employees need to sustain their workforce. This strategy focuses on building the capacity of existing workforce trainers to deliver high-quality education to trainees, and ramping up best practice models that create new industry-driven training opportunities focused on in-demand skills and credentials that lead to higher-paying jobs with career pathways in target industry sectors. Engagement with stakeholder groups emphasized that a four-year degree isn't the only pathway to success. Instead, recommendations focused on greater collaboration with industry to develop programs that provide transferrable skills, short-term training, micro credentials, industry certifications, OSHA 10 training, and stackable credits and badges that lead to higher paying roles and career ladder opportunities for entry-level and mid-skill workers in target industry sectors. Programs must lead to living wage jobs, and better connect the pathways and opportunities as people progress over the years. “Work & Learn” programs such as internships, job shadowing, apprenticeships, on-the-job training and mentoring were also emphasized. System improvements would enable consistent mechanisms for employers to provide feedback on in-demand skills in a standardized manner to



inform training, and ensure training is brought to the community in a timely manner that leads to real time employment opportunities. Work group members also wanted to streamline state funding resources to be more flexible and efficient, and to avoid duplicative services and confusion for employers and trainers.

Workplaces were seen as having an important role in developing their talent internally—investing in career development and advancement in-house and in partnership with area trainers. Work group members recommended participation in Employer Resource Networks and investing in long-term workforce planning, especially for small and mid-sized businesses who may not have capacity to meaningfully engage trainers. Looking ahead, employers should proactively seek tech and AI advancement that may make training more accessible and equitable.



DIVERSIFY THE WORKFORCE THROUGH GREATER ACCESS TO TRAINING, JOBS AND CAREER ADVANCEMENT.

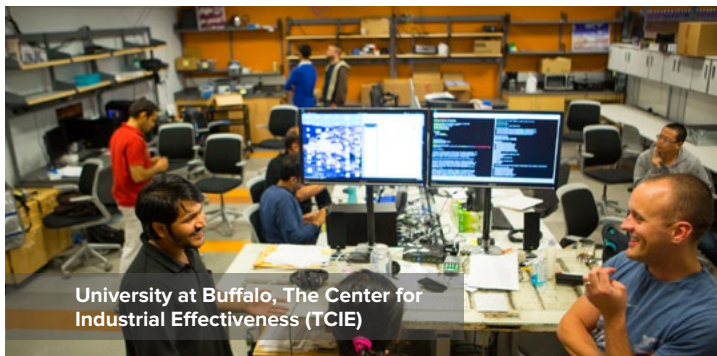
There is a clear lack of diversity in the workforce with significant under-representation of POC and New Americans across in-demand and higher-paying industries and occupations. This strategy ensures that all workers of all skill levels, socioeconomic groups, racial and ethnic groups, gender identities and expressions, and geographies have opportunities to participate and progress in the labor force. Through creative partnerships with community-based organizations and intentional training program design, we can provide supportive services such as childcare, asynchronous online programming and virtual reality (VR) training, transportation supports, career coaching, soft/success skills, free or reduced-price programming, workforce readiness skills, digital access and digital literacy support, remedial academic support, stipends for training participants, and IT fundamentals that remove many of the barriers that individuals often face to training, work and career advancement. We need to prioritize outreach to underserved populations to better connect with service providers.

But wraparound services aren't the only solution. Stakeholders noted benefit cliffs and loss of medical insurance coverage when switching jobs are real barriers to workplace mobility that require policy or programmatic solutions. Balancing work with caregiving responsibilities can be difficult and lead to some people leaving the workforce. Stakeholders also expressed that employers need to create workplace cultures to support diverse candidates and prevent worker turnover. Highlighting and learning from best practices and employers of choice in inclusive workplaces, and providing supervisor training will help existing employees feel supported and advance in their careers. Innovation provides another opportunity to diversify the workforce. Cobots, AI and other automation may make certain skilled labor positions more attainable.



FUEL THE TALENT PIPELINE THROUGH GREATER AWARENESS AND PROMOTION OF THE REGION'S CAREER OPPORTUNITIES, AND THROUGH INTENTIONAL TALENT ATTRACTION AND RETENTION MEASURES.

Our labor force is rapidly shrinking and retirement cliffs continue to loom in some key target industries. This threatens our region's ability to retain employers. However, there are challenges to retaining young workers. Working group members mentioned how high school students are often unaware of the good-paying jobs and career pathways that exist, especially in the skilled trades, as third-level education at all costs was pushed for many years. Other emerging graduates think they need to leave the region to get a good job in fields like tech. Our region recognizes the need to build the pipeline at younger ages (before students reach high school). This requires an increase in partnerships with local public school administration to develop best practices, such as coding and tech curriculum that begins as early as elementary school; hands-on career exploration in collaboration with youth service agencies as early as middle school; greater career counseling; hands-on pre-apprenticeship training that leads to registered apprenticeship opportunities; and internships to expose and introduce K-12 students, especially those in underserved communities, to high-demand career pathways. Work group members pointed to P-TECH models that include required course work to graduate, integrate hands on career-focused training and include technical certificate/degree credit; Dream It Do It which is a pipeline to manufacturing jobs that leverages badging opportunities and connectivity between employers and students in middle and high schools; and TRiO and other state student support programs which allow for microcredentials in the first year of college to help students with employment if they don't complete their degrees.



To meet these demands and keep the regional economy growing, the region also needs to grow its labor pool by retaining college graduates through increased opportunities for internships; creating more robust career services departments at local colleges and universities that are better connected to each other and industry; and improving networking and “education on opportunity” events for students to understand what the region has to offer. Sharing internship best practices with employers will help create internships that engage and attract students and retain them into full-time employment.

The region’s colleges and universities are a magnet for international talent. An increase in H-1B application approvals will help international students remain in our region, but many employers are not familiar with the employment process for foreign-born residents. Employers need education on the H-1B visa process, the cost and how to navigate it.

Expats and new residents are also an underutilized talent pool. Marketing, online tools, direct-focused concierge programs and residencies are all examples of recruitment best practices. Employers will also need to play a role. With demand at an all-time high, companies need to become more attractive to qualified workers through higher wages, flexible schedules and competitive benefits.



STRENGTHEN OUR REGIONAL WORKFORCE ECOSYSTEM.

Our regional workforce ecosystem is robust—made up of industry, organized labor, higher education, K-12 and adult basic education, community-based workforce trainers, workforce development boards, and government—all working to assist the unemployed/underemployed and fill jobs. Strengthening partnerships between these groups and better coordination, collaboration and problem-solving across the ecosystem will build and grow capacity and avoid duplication of efforts. For example, our strategy seeks to build a more effective and reliable process for employers to offer input on the skills and knowledge they need, identify training gaps, and take a more active role in curriculum development, work & learn models and training-to-job placement. Government entities and community- and neighborhood-based organizations with proven track records, trust and outstanding abilities for outreach, recruitment and wraparound services can help to reach the unemployed, underemployed and underrepresented populations and provide solutions to the barriers they face. There is also a role for dedicated intermediaries that work across sectors and connect the dots between trainers, employers, service providers, job seekers and funders. Intermediaries can convene, connect and facilitate collaboration; work with the Department of Labor to collect, analyze and share data to incentivize further collaboration and highlight collective impact; share success stories to leverage additional resources; and strategically support programs that build an inclusive talent pipeline.



Continuing the Momentum

For the last decade, WNY worked to prepare an appropriately skilled workforce to meet labor needs while addressing the barriers to economic self-sufficiency for the region's unemployed and underemployed populations. Regionwide, state funding has supported the following recent programs and projects including:

WNY Manufacturing and Tech Workforce Coalition

is working around a shared vision of growing and retaining a talent pipeline to meet the needs of manufacturing and tech employers, while expanding opportunity into good-paying career pathways for more residents. This holistic approach to workforce development is designed to strengthen the entire ecosystem; scale up industry-driven training programs that connect job seekers with employers, career paths and supportive services; expand best practice models; and build a strong workforce pipeline for years to come. A coordinated, collaborative, strategic approach will maximize impact and leverage federal, state and local dollars. With commitments from industry, and partnerships with the public, private and philanthropic sectors, the Coalition supports and strengthens 12 members representing non-profit trainers, community colleges, universities, apprenticeship training, K-12 career programs, workforce development organizations and intermediaries, industry, and community-based organizations; and interconnected programs that will build the manufacturing and tech workforce in WNY.



Manufacturers Association of the Southern Tier

Northland Workforce Training Center (NWTC)

is WNY's signature workforce investment. Opened in 2018, the 100,000 square foot facility serves as an anchor asset for the Northland Corridor. So far, it provided 932 individuals with an opportunity to overcome personal and societal barriers by facilitating training for in-demand careers in the advanced manufacturing and energy sectors that offer family-sustainable wages. NWTC's current in-industry placement rate for employment is 82.5% with an average starting salary of \$40,560. Recent additions and expansions include youth summer programs, industry customized trainings and the future Clean Energy Experience Center and Emerging Technologies Lab.



Northland Workforce Training Center



Workforce Development Challenge (WDC) awarded more than \$5.6M to 12 nonprofit organizations, bolstering workforce training programs that aid underserved populations in health and life sciences, agriculture, technology, clean energy, advanced manufacturing and tourism—making sure the region’s workforce pipeline is being responsive to industry demand. Grantees such as **Jamestown Community College** are providing new short-term advanced manufacturing training. **Goodwill’s Goodskills Career Builder** is a workforce readiness program, while **Community Missions of Niagara Frontier, Inc.** is expanding its parole reentry program to include training in tourism and hospitality occupations. In October, Governor Kathy Hochul announced the groundbreaking for **People United for Sustainable Housing’s (PUSH)** new 2,500-square-foot Sustainability Workforce Training Center in Buffalo. WDC funding will help create the region’s first green jobs training facility, furthering PUSH Buffalo’s mission to help meet climate and energy standards while also increasing access to clean energy-related job training and opportunities for underserved communities.

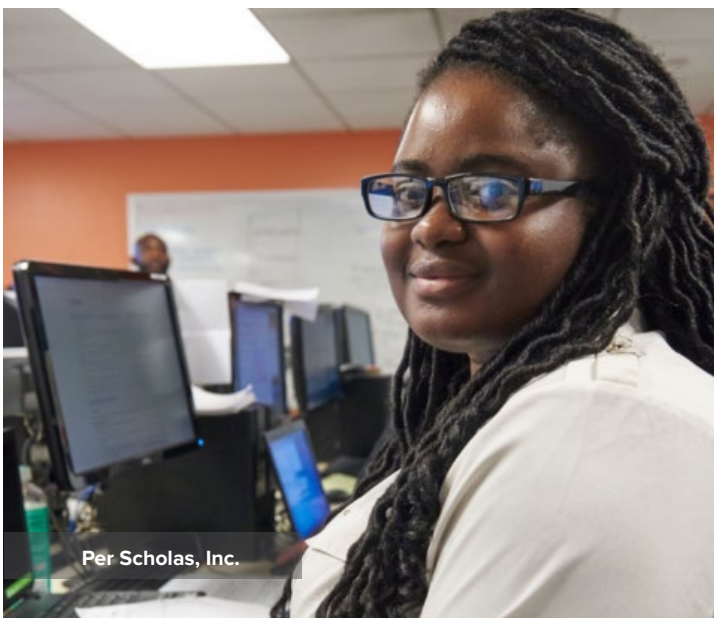


TechBuffalo is a nonprofit organization with the mission of creating a sustainable, inclusive and accessible technology community for WNY by improving the region’s ability to retain, attract and foster technology talent. TechBuffalo coordinates with community organizations to identify candidates for training opportunities; builds programs for students with pathways directly into careers; engages with industry to understand what roles are available and what skills and knowledge are needed to fulfill those roles; and brings educational partners together to understand what programs exist in the community.



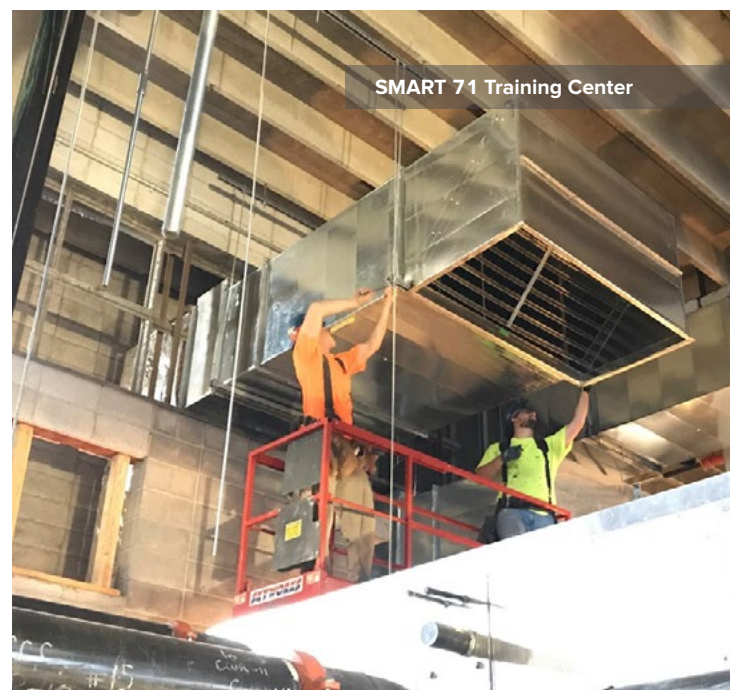


Say Yes Buffalo provides a postsecondary tuition promise and comprehensive supports for students in Buffalo public and charter schools to increase high school and postsecondary completion rates, and achieve professional employment. More than 7,000 scholarships have been awarded, totaling \$29M. Buffalo Public School graduation rates rose from 49% to 79% since the arrival of the nonprofit in 2011. NYS recently made a \$10M investment into the Say Yes endowment fund to ensure that thousands more students have similar opportunities for decades to come. Say Yes's apprenticeship program provides wraparound services and emphasizes careers in advanced manufacturing and tech—fitting within a larger movement to give high school graduates more options than a traditional college education.



Per Scholas, Inc. will launch operations in WNY in 2024. Per Scholas is a national nonprofit, founded and based in the South Bronx, that drives positive and proven social change in 22 communities across the country. Through technology training and professional development, Per Scholas prepares unemployed or underemployed adults for successful careers as IT professionals, and creates on-ramps for businesses that need them. To date, they have trained more than 20,000 individuals across the US. 80% of Per Scholas graduates launch their careers one year after completion of a 3-4 month training course, earning 3x the wages they earned pre-training. Training is supplemented by career coaching, leadership and communication skills development, and two years of alumni services post-graduation.

Named an ESD Priority Project, in 2021 the local union of International Association of Sheet Metal, Air Rail and Transportation Workers (SMART) opened their **SMART 71 Training Center** on Buffalo's East Side. The nearly \$1.3M project cleaned up and reused a former brownfield site to merge three separate properties into one state-of-art facility that offers apprenticeship training in construction, sheet metal production and other fabricating industries, while relying on clean energy throughout its lifetime.





PUSH Buffalo's Sustainability Workforce Training Center Rendering

Participation

As part of the participation process in developing our region's 2023 updated strategic plan, stakeholder meetings provided knowledge and insights only those working in the region can provide. This engagement ensured strategies were developed early in the planning process, and had support at multiple levels. Groups were diverse, made up of economic development, industry, workforce development, academia, nonprofit and public sector partners. At stakeholder engagement meetings, we shared current economic conditions of the region and strategic economic development opportunities, discussed the data as it relates to the existing REDC strategies, and gathered feedback about priorities and key regional projects that align with the data.

Public Outreach and Engagement

Our Public Outreach and Engagement process began in August 2023 with a meeting of the full WNY REDC. At that meeting, the WNY REDC reviewed the proposed timeline and updated strategic plan approach, were briefed on the stakeholder engagement plan, and were presented with research and analysis on the Challenge topic. Workforce development strategies for New Americans was unanimously adopted as the Challenge topic at this meeting.

Three work groups representative of the WNY REDC's three economic drivers (smart growth/placemaking, entrepreneurship and workforce) met twice over Zoom during September and October to inform plan development. Work group participation drew on the extensive network of public, nonprofit and private sector partners across the five counties of WNY, within and outside of the Council. In assembling work groups, a priority was placed on inclusive representation (geography, race/ethnicity, etc.) and involvement in key tradable sectors. Work group members also helped inform the Challenge topic. As a follow up to meetings, presentations and comments were distributed, and work group members reviewed and provided comments/feedback on draft materials.

To further inform the Challenge topic, resettlement agencies and other key stakeholders were surveyed in late-September. The online survey was used to understand agencies' caseload, capacity, partnerships and the workforce needs of New Americans in WNY. In October, we brought representatives from these groups together to understand current capacity, future projections and trends, unmet needs of incoming refugees, and ideas for potential solutions and projects for the competition.

Our region benefited from recent economic development research and data-driven projects in just the past two years alone. Some of these include Strategies for Building Buffalo Niagara's Tech Workforce (2022), Buffalo Niagara Labor Market Study (2022), Regional Revitalization Partnership (2022), The Western New York Manufacturing and Tech Workforce Coalition (2023), WNY's 2021-2022 EDA Good Jobs and Build Back Better grant applications, 2022 Regional Workforce Inventory, and past annual WNY REDC progress reports. These reports engaged stakeholders, held listening sessions and focus groups, and used survey data. This information was used to gather additional public knowledge and insight for the updated plan in addition to specific plan stakeholder engagement.

The WNY REDC continued to be engaged in and informed about the planning process at the October 2023 Council meeting. The final draft of the report was reviewed by the Council in November. The final plan was presented to and adopted by the Council at the WNY REDC meeting on November 30, 2023.

Work Groups



Smart Growth WORK GROUP

Review data of key trends and offer feedback, identify challenges facing the region related to development patterns, highlight momentum and existing regional/local initiatives that are advancing our region, develop strategies that address regional challenges and build on momentum related to smart growth/placemaking.

Terry Alford, *Michigan Street African American Heritage Corridor Commission*

Deanna Alterio Brennen, *Niagara County Community College Small Business Development Center*

Paul Brown, *Buffalo Building & Construction Trades*

Sara Capen, *Niagara Falls National Heritage Area*

Michael Casale, *Niagara County Center for Economic Development*

Kevin Forma, *City of Niagara Falls*

Mark Geise, *Chautauqua County*

Jamie Hamann-Burney, *Buffalo Niagara Medical Campus*

Lisa Hicks, *City of Buffalo*

Patrick Kaler, *Visit Buffalo Niagara*

Andrea Klyczek, *Niagara County Center for Economic Development*

Brendan Mehaffy, *City of Buffalo*

Brandye Merriweather, *Buffalo Urban Development Corporation*

Crystal Middleton, *City of Buffalo*

Brendan Seney, *Go Bike Buffalo*

Stephanie Simeon, *Heart of the City Neighborhoods*

Anthony Vilardo, *USA Niagara*

Hailey Whitney, *City of Buffalo*



Entrepreneurship WORK GROUP

Review data of key trends and offer feedback, identify challenges facing the region related to innovation and entrepreneurship, highlight momentum and existing regional/local initiatives that are advancing our region, develop strategies that address regional challenges and build on momentum related to entrepreneurship.

Nadia Abdallah, *Launch NY*

Henry Cialone, *Buffalo Manufacturing Works*

Juweria Dahir, *Buffalo Niagara Medical Campus*

Dr. Rosa Gonzalez, *R Gonzalez Consulting Inc./SUNY Erie*

Megan McNally, *The Foundry*

Chris Schoepflin, *Main Light Strategies*

Michael Ulbrich, *Midland Machinery*

Tamara Zantell, *The Foundry*



Workforce WORK GROUP

Review data of key trends and offer feedback, identify challenges facing the region related to workforce, highlight momentum and existing regional/local initiatives that are advancing our region, develop strategies that address regional challenges and build on momentum related to workforce development and talent attraction.

Peter Ahrens, *Dream It Do It - Manufacturers Association of the Southern Tier and Buffalo Niagara Manufacturing Alliance*

Lindsay Batrowny, *Goodwill of WNY*

Gina Burkhardt, *Buffalo Center for Arts and Technology (BCAT)*

John Crawford, *Junior Achievement of WNY*

Holger Ekanger, *Jamestown Community College*

Jennifer Flagg, *University at Buffalo Center for Industrial Effectiveness (TCIE)*

Kate Geise, *Chautauqua Works (Chautauqua Workforce Development Board)*

Alycia Ivancie, *Junior Achievement of WNY*

John Kelly, *Related Companies*

Rob Leteste, *Invest Buffalo Niagara*

Brenda W. McDuffie, *Chair, Erie County Industrial Development Agency*

Jason Miller, *Cattaraugus-Allegany Workforce Development Board*

Randi Murphy, *Goodwill of WNY*

Stephanie Peete, *Say Yes Buffalo*

Denise Raymond-Dibiasi, *SUNY Erie*

Bonnie Rice, *Niagara County Workforce Development Board*

Cameron Smith, *TechBuffalo*

Sarah Tanbakuchi, *TechBuffalo*

Todd Trantum, *Dream It Do It - Manufacturers Association of the Southern Tier and Buffalo Niagara Manufacturing Alliance*

Stephen Tucker, *Northland Workforce Training Center*

Christine Whipkey, *Trocaire College*

Michael Zakel, *Ljungstrom*



Workforce Development for New Americans WORK GROUP

Review data and key trends on refugees and immigrants in WNY, offer feedback on what it means for our region, understand current capacity and future projections, hear about unmet workforce needs of incoming refugees and offer ideas for potential solutions and projects for the competition.

Christine Carr-Barmasse, *Mission Ignite*

Noel De La Rosa, *Journey's End Refugee Services, Inc.*

Larry Donalson, *Buffalo Educational Opportunity Center*

Dixie Farr, *Buffalo Employment and Training Center*

Amy Mazur, *Literacy Buffalo Niagara*

Randi Murphy, *Goodwill of WNY*

Tianna Porter, *Buffalo Employment and Training Center*

Ahmad Yousufzai, *Journey's End Refugee Services, Inc.*

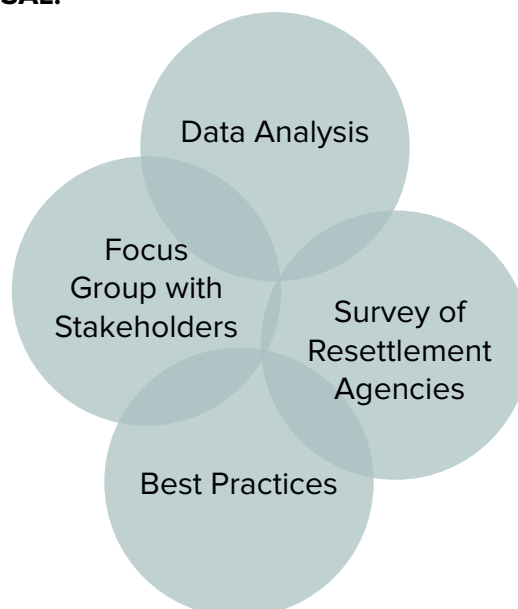
PART THREE

Challenge Competition Proposal

With an influx of immigrants and refugees, WNY has an opportunity to strengthen the regional workforce and spur additional economic development.

Workforce development in WNY has become an increasingly important topic and pressing regional challenge. With our region's influx of New Americans in recent years, our competition idea focuses on strengthening the workforce for refugees and immigrants, spurring new business growth, and leveraging global talent to support target industries and regional economic development. Our challenge topic focuses on strengthening partnerships and the ecosystem that work with immigrant and refugee populations; increasing access to education and job training; creating career ladder opportunities; alleviating common barriers to training and placement such as English proficiency, transportation and poverty; and retaining international talent from our colleges and universities. A holistic approach to better preparing New Americans for work in the regional economy is pivotal to support hiring needs across regional target industries.

WHAT WENT INTO WNY'S CHALLENGE PROPOSAL:



The Regional Context

More than 81,600 refugees and immigrants live in WNY. More than 29,700 arrived in the country since 2010. While 85% are concentrated in Buffalo, Lackawanna and neighboring inner-ring suburbs, refugees and immigrants can be found across the five-county region in small and large urban areas, suburbs, and rural locations.

From 2010 to 2021, WNY's foreign-born population increased by 17%, while the native-born population remained the same. If not for the increase in the foreign-born population, WNY's total population would not have grown at all from 2010 to 2021.

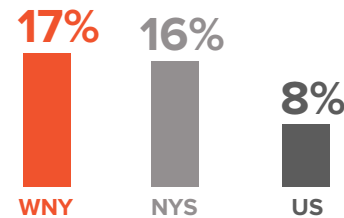
Growth in WNY outpaces statewide and national trends. From 2010 to 2021, the foreign-born population increased more in WNY (+17%) than the US (+16%) and NYS (+8%).

These newcomers are an important source of potential workers for hiring employers. Many are also entrepreneurs. Over time, refugees and immigrants are more likely to be self-employed, creating jobs for themselves and others in the regional economy. Among those who have been in the country over 20 years, one out of 12 is self-employed.

There was resounding agreement among leaders and stakeholders across the region to focus this competition on workforce development because it is an increasingly important topic and pressing regional challenge. Back in June 2010, there were 8 unemployed persons per job opening. Today there is less than one, leaving many employers struggling to find qualified candidates to maintain operations, never mind ramp up and expand.

Refugees and immigrants have been an important source of regional population growth and a valuable addition to the labor force.

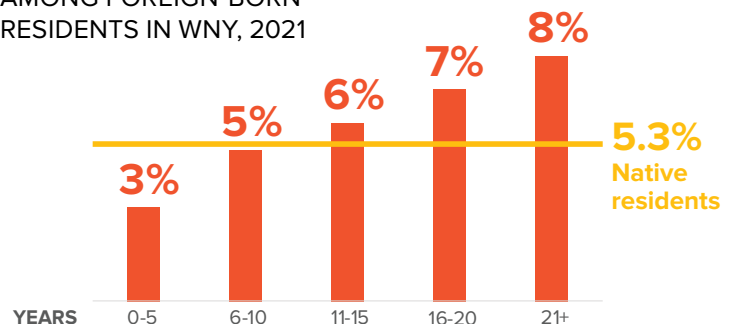
CHANGE IN FOREIGN-BORN POPULATION, 2010 to 2021



Source: US Census, American Community Survey, 2011 and 2021.

Over time, New Americans are more likely to be self-employed, spurring business creation and new jobs in the regional economy.

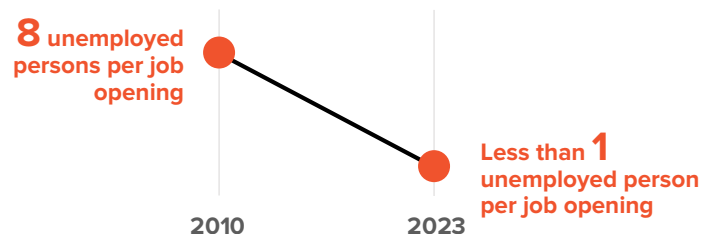
RATE OF SELF-EMPLOYMENT AMONG FOREIGN-BORN RESIDENTS IN WNY, 2021



Source: ACS - 5 year (2017-2021). Rate includes all residents ages 18+

Workforce development is more important than ever, as the talent shortage in WNY is worse than it was in 2010.

THE TALENT SHORTAGE IN WNY IS DRASTICALLY WORSE THAN IT WAS IN 2010.



Source: NYSDOL LAUS, June 2010 and June 2023; Lightcast Job Postings, May-June 2010 and May-June 2023.

The Challenges

Many immigrants and refugees in WNY are highly educated and are more likely than residents to have 4+ years of college. However, many face barriers to employment such as English proficiency, credentials from their native country that don't transfer, or the need for more specific training for existing jobs in the region. Others will need basic education and job training to fully participate in the regional workforce.

Without job training, many New Americans can get caught in a cycle of lower-paying work or unemployment. Among those who have been in the country up to 10 years, 30% are unemployed with no recent work experience over the past 5 years. For those who work, many are in occupations where the average wage is less than \$40,000 per year—close to \$20,000 less than the regional annual average.

Many refugees and immigrants face barriers to both training and employment. More than 14,200 adults have limited English proficiency. Foreign-born individuals who work are 50% more likely to rely on alternative ways of getting to work, such as public transportation. Those who are not citizens are twice as likely to live in poverty and need assistance with basic needs to be successful in job training or employment.

LANGUAGE BARRIERS, TRANSPORTATION CHALLENGES, LACK OF TRAINING AND LIMITED DIGITAL SKILLS CAN BE BARRIERS TO TRAINING AND EMPLOYMENT.

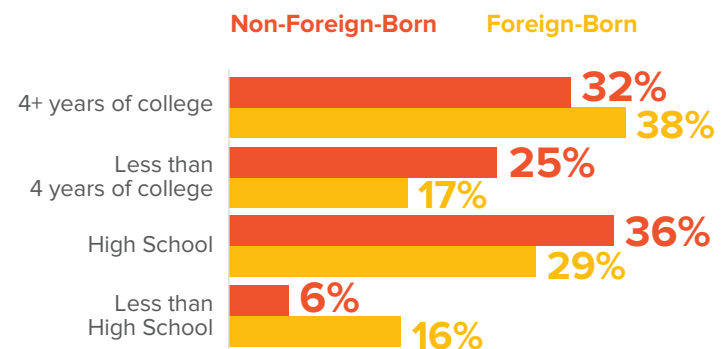
More than 14,200 foreign-born adults ages 18 to 64 have limited English proficiency, making it difficult for them to understand job postings, prepare a resume or communicate their qualifications.

Foreign-born individuals in WNY who work are 50% more likely to rely on alternative ways of getting to work, limiting their access to training and higher-paid employment.

Foreign-born residents in WNY who are not US citizens are more than twice as likely to live in poverty.

While many immigrants in WNY are highly educated, thousands need additional education and job training to fully participate in the workforce.

EDUCATIONAL ATTAINMENT IN WNY, 2021



Source: ACS, 2021 (5-yr) via IPUMS. Data reflects residents ages 25+.

Without skills and job training, recent arrivals can get trapped in poverty, unable to transition from unemployment and poverty.

TOP 10 OCCUPATIONS OF RECENT IMMIGRANTS IN WNY

1. Postsecondary Teachers
2. Managers in Marketing
3. Chefs and Cooks
4. First-Line Supervisors of Sales Workers
5. Cashiers
6. Health Aides
7. Customer Service Representatives
8. Personal Care Aides
9. Laborers
10. Janitors

Average Wage is less than \$40,000

30% of adults in WNY arriving from abroad over the past 10 years are unemployed with no work experience over the last 5 years.

In addition to the refugees and immigrants who call WNY their home, the region's colleges and universities are a magnet for global talent. With over 6,700 international students in 2022, UB ranked #25 in the nation for international student enrollment.

In Niagara County, Niagara University ranked #26 among master's level colleges across the nation. Yet we could do a better job retaining our global talent. Too many leave the region after they graduate. In 2022, Buffalo ranked #149 among cities for H-1B application approvals. Top employers who sponsor individuals on a visa include M&T Bank, HSBC, SUNY Research Foundation, CannonDesign, Roswell Park Comprehensive Cancer Center, UBMD and ACV Auctions.

Global Talent Attraction

#25 - University at Buffalo

For **international student enrollment** (6,723) among doctoral universities in the US.

#25 - Niagara University

For **international student enrollment** (787) among master's colleges and universities in the US.

Global Talent Retention

#149 - Buffalo

For **new and continuing H-1B visa approvals for international workers** among cities in the US.

Source: University rankings are from Open Doors Report on International Education Exchange, 2022/22. Institutional types reflect Carnegie Classification of Institutions of Higher Education. Master's colleges and universities award at least 50 master's degrees and fewer than 20 doctoral degrees. H-1B ranking is from UBRI's analysis of H-1B employer data from US Citizenship and Immigration Services, H-1B Employer Data Hub, FY2022.

The Regional Opportunity

Approximately 16,510 working age New Americans live in or near poverty across the region. That's 56% of all foreign-born residents age 18-64 who have lived in the US for 10 years or less. Although many have skills and work experience from their native country, the average annual income for New Americans in WNY is \$28,590. A stronger ecosystem would prepare more New Americans for work in the regional economy, while also helping us retain more global talent. The region's ecosystem includes resettlement agencies, literacy providers, workforce trainers, community-based organizations and government agencies who help to address the needs of refugees and immigrants. However, the system has gaps and disconnects and could be stronger in providing employer-driven training, wraparound services and talent retention.

“[We] need to rally around programs to say we are an ecosystem that won't let people fall through the cracks and focus on coordinated implementation.”

“There's no silver bullet. We need to have a plan.”

*Notes from the New American Service Provider Focus Group
Oct. 13, 2023*

The region has an ecosystem to welcome New Americans and integrate them into our economy, but it has gaps and disconnects and needs strengthening.

THE REGIONAL WORKFORCE ECOSYSTEM FOR NEW AMERICANS INCLUDES:

Resettlement Agencies

Help New Americans resettle in the US by providing services such as housing, employment assistance, language classes, cultural orientation and connection to health services.

Literacy Providers

Provide English language classes and other literacy programs to help New Americans improve their English skills.

Workforce Trainers

Provide job training and placement services to help New Americans develop the skills that hiring employers seek.

Community-based Organizations, including Legal and Community Centers

Provide a variety of social, legal and other services that New Americans need for daily living and to be successful in training and work.

Government Agencies

Offer access to a variety of services. Some municipalities have agencies that work specifically with the New American population, such as the City of Buffalo's Office of New Americans and the NYS Office for New Americans.

Source: IPUMS USA, University of Minnesota, US Census, ACS, 5-year, 2021 sample data.

Lessons from Models that Work

Regional workforce strategies for refugees, immigrants and other New Americans will build on best practices from this region and beyond. Cross-cutting themes emphasize partnerships, skills training, mentors and the importance of workplace diversity and inclusion.

Stakeholder input highlighted the importance of looking at best practices for global talent retention and learning from initiatives such as Global Detroit. Stakeholders also shared examples of local companies that support New Americans through on-site job and literacy training, transportation assistance, and other approaches. By investing in New Americans, employers can reap significant benefits, expanding the pool of talent to hire from and retaining employees who offer diverse perspectives and experiences.

WEDI West Side Bazaar

WEDI provides New Americans in Buffalo with workforce strategies such as business incubation support, English language classes, financial literacy training and job training. WEDI helped to launch nearly 50 new businesses owned by refugees, generating 180 full time jobs and \$15M in gross revenue between 2017 and 2020. These businesses created a unique dining destination in Buffalo and are projected to attract 250,000 visitors annually when expansion plans are completed. WEDI's work increased the visibility of the refugee community in Buffalo, and helped to build a more inclusive space and visitor destination on Buffalo's West Side.

<https://www.wedibuffalo.org/>



Techfugees

Founded in 2015, this global nonprofit organization empowers refugees with technology, focusing on three pillars: innovation, inclusion and insights. Techfugees orchestrates programs that help refugees integrate into the tech workforce and build a more inclusive tech industry, providing digital skills training, access to work opportunities in tech and support for entrepreneurship. Strategies include a Digital Corridor program offering a tech apprenticeship, a Digital Spark fellowship program and a tech "pathways" program for women interested in tech.

<https://techfugees.com/>



EMERGING THEMES

Partnerships between trainers, employers, CBOs and government agencies create more effective programming.

Training with essential workplace skills, including English literacy, tech skills, work readiness skills and job training.

Mentors help New Americans succeed, build social and professional networks, and navigate the workplace.

Emphasis on the importance of diversity and inclusion.

TENT Partnership for Refugees

More than 300 major companies are involved in the Tent Partnership for Refugees. This nonprofit global employer network is committed to hiring and integrating refugees into the workplace through hiring, training and mentorship. Membership is free to companies and members receive guidance, best practices, training, connection to local members and communications support. The partnership was founded by Hamdi Ulukaya, who came to the US from Turkey and founded Chobani, a best-selling yogurt brand located in Upstate New York.

<https://www.tent.org/>



Global Detroit

Global Detroit creates strategies to strengthen the region through the inclusion of New Americans. Launched in 2010, Global Detroit began by documenting the economic impacts that New Americans have in Southeast Michigan. Eleven strategic initiatives were then identified to make the region more welcoming and to drive economic impact. Today, Global Detroit strategies are focused on keeping talent in Michigan, growing entrepreneurship and supporting strong communities, and shaping policy and practice. As a result of these initiatives, global talent retention has increased, hundreds of small businesses have opened, Detroit's immigrant population has grown 8% in 4 years and Detroit was named a top 10 welcoming city in the US.

<https://globaldetroitmi.org/>



Recommended Strategies

STRATEGY 1

Strengthen connections, coordination and referrals across the ecosystem to ensure New Americans receive the support they need as they journey into work and a career.

This strategy is important because the region has the agencies and coalitions, but the ecosystem lacks coordination. Many are working in silos, making it difficult for New Americans to navigate the process.

The following action steps would support this strategy:

- Develop a unified regional strategy that identifies ecosystem resources, connections and gaps and coordinates with statewide agencies. Establish a common understanding with clear definitions to facilitate service delivery and referrals by front-line workers.
- Cultivate partnerships by resourcing a coalition that regularly convenes. Designate an intermediary focused on convening, support for programs, implementation and sustainability.
- Facilitate training for New American ambassadors, a paid role that would help bridge the gap between New Americans and the services they need, and act as a cultural bridge for employers and trainers.
- Launch a mobile one-stop opportunity hub to facilitate navigation across the ecosystem and connect New Americans with a variety of workforce services and supports.
- Develop a communications toolkit for outreach and recruitment of diverse audiences.

This strategy would leverage trainers, literacy providers, resettlement agencies, community-based organizations, school districts, government agencies and employers.

CORE PROJECTS

- New American Workforce Coalition
- Mobile Opportunity Center
- New American Ambassador Program
- Communications Toolkit

STRATEGY 2

Strategically leverage resources to bridge funding gaps and bolster the ecosystem's capacity to meet evolving needs.

The regional workforce ecosystem will have greater impact if it can readily adapt to the unique needs of New Americans, including their legal status in the US and the specific skills, experiences and backgrounds they bring to the regional workforce.

The following action steps would support this strategy:

- Establish a flexible pool of funding to fill gaps, reduce wait lists, increase capacity where it's needed and offer training to those who are waiting for authorization to work in the US.
- Expand partnerships with nonprofit and private sector workforce organizations with more flexible funding sources.
- Promote NYS Professional Pathways for High-Skilled New Americans with prior work experience.
- Advocate for policy changes that would expedite work approval for New Americans, especially those with in-demand skills and existing foreign work credentials, and expand funding for basic services.
- Regularly track and communicate ecosystem-wide outcomes and impacts, to ensure funding goals are met and funders understand the return on their investments.

The strategy would leverage workforce trainers, literacy providers, resettlement agencies, community-based organizations, school districts, government agencies, employers and philanthropy.

CORE PROJECTS

- Flexible Funding Pool
- Policy Briefs
- Regional Outcomes Tracking

STRATEGY 3

Expand training, job placement, career coaching and other wraparound services to New Americans to prepare them for success in training, work and career advancement.

New Americans face myriad challenges in becoming a part of the regional workforce and getting on a path to upward economic mobility. Core barriers to entry include long wait lists, staff and volunteer shortages, funding restrictions, and ineligibility.

A variety of actions steps would be part of this strategy including:

- Raise awareness of postsecondary training and higher education programs that can connect New Americans with higher-paying career pathways that have wraparound services and no eligibility restrictions.
- Increase capacity for digital training and literacy training, especially specific language for work in a chosen industry or occupation.
- Expand wraparound services that address the unique needs of New Americans, including applications for work authorization, child care and drivers licensing programs. Develop transportation solutions that involve employers, employer clusters and/or alternative transportation providers.
- Strengthen partnerships between training programs, local colleges and employers who are committed to diversity and inclusion.

This strategy would leverage workforce coalitions, trainers, local colleges and universities, employers, industry organizations, New American ambassadors, community-based organizations, literacy providers, resettlement agencies and government agencies.

CORE PROJECTS

- Expanded literacy training and enhanced supportive services
- New trainer partnerships

STRATEGY 4

Support businesses in cultivating welcoming, diverse and inclusive work environments with best practices and other resources.

Welcoming, diverse and inclusive work places attract and retain talent. This benefits workers, employers and the region as a whole.

There are a number of action steps that WNY would take as part of this strategy:

- Leverage business groups and intermediary organizations to bring together and connect employers who are committed to diversity and inclusion and willing to hire New Americans.
- Develop toolkits and other resources for businesses to help them promote diversity and inclusion throughout their organizations, from hiring, onboarding, upskilling, promotion and management.
- Enhance the New American ambassador role to support employers and foster worker retention.
- Raise awareness and celebrate employers who offer paid training to help workers overcome limited English proficiency, travel and other barriers, so these employers can be role models for others.
- Track return on investments to highlight how hiring and retaining New Americans can increase productivity and profitability, and build next-gen talent pipelines in industries facing retirement cliffs such as agriculture and food production.

This strategy would leverage business and industry groups, individual employers, intermediaries, New American ambassadors, local colleges and universities and business media.

CORE PROJECTS

- Expand connections with hiring employers in target industries
- Support diversity and inclusion employer champions
- New American Ambassador Workplace Program

STRATEGY 5

Raise awareness of the H-1B visa process and help employers navigate it.

WNY is a leader in attracting international students, but we lag behind in retaining global talent. Most employers are unfamiliar with the H-1B visa process which is required for international students to work in the US beyond graduation.

The following action steps would support this strategy:

- Develop and distribute informational materials about the H-1B process, its costs, benefits and timeline. This information would be distributed directly to employers, as well as through local colleges and universities.
- Create a dedicated online resource with information about the H-1B process and job postings for employers who are willing to sponsor international students and the resources to help employers navigate the process.
- Launch a communications campaign to raise awareness of opportunities to hire international students and graduates, including exceptions to the H-1B cap.
- Host workshops in partnership with local colleges and universities and/or employer organizations to educate employer organizations, offering an opportunity to ask questions and connect with employers in the region who are more familiar with the process.

The strategy would leverage local universities and colleges, business and industry groups, and government agencies.

CORE PROJECTS

- Online One-Stop Hub
- Employer Workshops
- Informational Material Development

STRATEGY 6

Expand business development and entrepreneurial programs to New Americans including access to credit and financial services.

New Americans often come to WNY with an entrepreneurial spirit and start up businesses at rates that exceed American-born citizens. This is an important trend to support because new and small businesses fuel the regional economy. There are a number of action steps that can be taken to expand business development by New Americans, including:

- Promote and expand business development programs tailored to the unique needs of New Americans including language support, mentorship and access to credit and financial services at affordable rates.
- Provide training on business planning, marketing, management and finance.
- Leverage existing networks of foreign-born business owners to support upcoming foreign-born entrepreneurs; host networking events to connect entrepreneurs and expand opportunities for New Americans, especially in underserved communities where regional placemaking efforts are concentrated, that would benefit from job growth and more services.
- Leverage community events to celebrate the business contributions and impacts of these businesses.

The strategy would leverage resources available through economic development agencies, universities and colleges, small business development centers, community-based organizations, and resettlement agencies.

CORE PROJECTS

- Entrepreneurial Training for New Americans
- Entrepreneurial Networking Events
- Celebrate Diverse Business Contributions

Implementation

WNY proposes to use \$10M to advance six interconnected strategies aimed at connecting New Americans with employers in target industries. The strategies will focus on expanding opportunities for all New Americans, including refugees, immigrants, and international students, through access to training, employment, and supportive services. Our proposal outlines a three-year implementation plan that leverages an existing \$25M investment in a regional Manufacturing and Tech Workforce Coalition.

LEVERAGE AND IMPACT

A key aspect of our proposal is its synergy with the work of the WNY Manufacturing and Tech Workforce Coalition, a 12-member partnership dedicated to strengthening the workforce ecosystem for tech and manufacturing employers, with many programs ramping up in January 2024. This alignment will allow this proposal to tap into established outreach, recruitment, training, and wraparound support programs, building out these components to reach more New Americans and ensuring New Americans have access to the resources they need to contribute to the regional economy.

We know that 16,510 New Americans age 18-64 live in poverty across the region. If just 10% receive training and get on a higher-paying career pathway, the estimated direct initial impact would be:



Sources: UBRI analysis of Lightcast industry, occupational and staffing patterns data (2022); and IPUMS USA, University of Minnesota, US Census, ACS, 5-year, 2021 sample data. Represents the total wages, output, and taxes resulting from 1,651 individuals earning the average entry-level job minus the current averages for New Americans age 18-64 living in/near poverty. New Americans are foreign-born residents who've lived in US for 10 years or less. In or near poverty includes individuals with incomes under 200% of the federal poverty line. Entry-level jobs typically do not require any work experience, training or education beyond high school. Taxes include federal, state, and local taxes.

THREE-YEAR TIMELINE

Year 1

- Establish the New American Workforce Coalition, designate an intermediary and begin convening.
- Develop detailed project plans to support a unified regional strategy.
- Develop communications strategies, outreach plans, and toolkits.
- Initiate partnerships with key stakeholders and groups.
- Enroll New Americans in industry-driven training programs with supportive services.
- Design, develop and pilot for the Mobile Opportunity Center, New American Ambassador Program and One-Stop Hub.
- Secure leverage for full project implementation.
- Develop surveys and assessment tools to track outcomes and impacts.

Year 2

- Launch the Mobile Opportunity Center.
- Distribute informational materials for international student employment; host employer workshops.
- Expand connections with hiring employers.
- Raise awareness of employer best practices.
- Deliver entrepreneurial training in multiple formats.
- Organize regular networking events for New American entrepreneurs.

Year 3

- Evaluate outcomes of training programs and supportive services for New Americans; quantify regional impact.
- Refine strategies to ramp up what's working well.
- Develop policy briefs to share knowledge and lessons learned, foster partnerships, and bring attention to impactful policy changes.
- Use coalition communication material and platforms to celebrate successes.
- Develop a sustainability plan for ongoing funding and resource allocation.

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