

Southern Tier Central

Comprehensive Economic Development Strategy Update

March 2018

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Overview: This is the second annual update of the 2016 CEDS. This update will serve as the second progress report for the ongoing EDD activities of Southern Tier Central Regional Planning and Development Board. This document will identify and analyze trends in the region. STC staff and the Regional Economic Development Policy & Strategy Committee worked diligently through 2017 to promote broad and asset-based economic development in the Southern Tier to take advantage of our existing utility infrastructure, pro-business environment, and transportation assets (multiple interstates, railways, and a growing airport). The Southern Tier Central region has a history of innovation in manufacturing and strong dedication to corporate civics and employee loyalty. Despite uncertainty of federal policies, the STC region is moving toward parity with the nation in unemployment and wages. Unemployment has fallen significantly in the last 5 years according to StatsAmerica. In the last year (since 2016), wages have risen by \$27/week to reach \$942/ week or \$48,984 per year (according to NYS DOL QCEW for Q2 2017). Education and workforce initiatives are preparing the way for the next generations of employees in the region and beyond.

Economic Conditions were generally stable across the region through 2017, with several interesting “green shoots” which may lead to increased growth and steady employment in 2018. Governments and companies through the Southern Tier were recipients of significant and transformational grant awards from New York State. Development of the tourism industry is having broad based effects throughout the community.

Ongoing NYS economic barriers like high property taxes, demographic trends, and high energy costs have limited development across Upstate NY. In particular, demographic concerns are paramount to the future of the region. Factors affecting economic performance in the region (workforce issues, state laws, and state taxes) are discussed regularly by local governments and development organizations. Recent studies show that additional training is needed to ready the workforce for looming baby boomer retirement. Chemung Schuyler Steuben (CSS) Workforce NY is in contact with major employers to provide training as needed to their workers to facilitate employment and skill training for residents seeking employment.

Large Private Sector Employers: Corning Incorporated remains the largest employer in the area, with more than 5,400 employees in Steuben and Chemung counties. Healthcare providers like Arnot health, (2,300), Schuyler Hospital (435), Guthrie (300), St. James Mercy (298), and Ira Davenport/Arnot (295) comprise the next largest group of employers. Rail manufacturing companies like Alstom (650) and CAF (476) are the backbone of the region’s transportation cluster, and the primary drivers of additional supply-chain companies in the area. Advanced manufacturing firms like Gunlocke (722), World Kitchen (520), Hilliard (500), Hardinge (400), Siemens (360), and Kennedy Valve (332) are succeeding in the region; these firms support a diverse manufacturing ecosystem. The region also hosts value added food producers: Upstate Niagara (250) and DeMets (261). Large retailers like Wegmans and Walmart round out the list of major employers. These employers have longstanding relationships in the community and are a part of the civic fabric of the area. These advanced manufacturing employers are largely responsible for in-migration, attracting international employees, and driving local economic trends in the region. The local economy (wages, real-estate prices, employment rates) are closely tied to the economic prospects of these large firms. Many of these large, high-tech employers are able to draw employees from a broad work shed, and/or incentivize employees to move into the region.

Housing: There is a notable shortage of move-in ready single family homes in the \$150,000-\$300,000 range. The existing real estate options tend to be: old and inexpensive with significant renovation costs, unknown quality, and long construction time-frames; multi-family properties; or custom built new homes. The housing shortage has the greatest impact on the highest demand sections of the workforce: scientific, medical, engineering, and management professionals.

Economic Conditions in the STC Region

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Workforce Pressure: By 2020, the region will be halfway through the wave of baby boomers retiring, and millennials will have fully entered the workforce, which will mitigate the effects of the ‘Silver Tsunami’. Attracting employees from outside the area and providing the necessary skills training inside the region are two actions necessary to stabilize the region’s declining workforce. STC’s board agrees that workforce solutions must go back through early childhood education and into families raising children so each new generation of young adults is ready to enter the workforce.

The I-86 Workforce committee and Steuben, Schuyler, and Chemung counties are in the process of developing a workforce strategy to 1) identify gaps in the workforce based on demographic and employment trends, 2) to increase the access of employers to qualified workers, and 3) increase the capacity of the local workforce to meet the needs of employers. This workforce initiative is an innovative public-private process, with private sector representation from all three counties. Through this study, systems analysis and proposed changes are ongoing.

Workforce development is the top CFA priority identified by NYS. Grant funds in the CFA amounting to \$175 million will be made available this year, and the I-86 workforce development study will make our region better prepared to submit workforce dev. projects for the 2018 cycle.

The baby boomer retirement, brain drain, and young people Not in Education, Employment, or Training (NEET’s) are continued workforce trends which limit the labor force in STC’s region, even though many employment opportunities exist. The Silver Tsunami of retiring baby boomers is re-shaping employment trends within companies and within the region. It is possible that retiring baby boomers won’t leave the workforce entirely; there may be a strong move toward part-time employment among workers aged 60+ (depending on their health, financial, and social needs). Automation like self driving cars, programmed machining technology, and computerized medical analysis may prove beneficial in this community to mitigate the impact of retiring boomers. The retirement of workers aged 54 to 72 presents an opportunity to slightly increase wages to attract new hires while employers can still benefit from a decrease in total labor costs. As employment opportunities in this community increase (due to retirements), there is potential to attract qualified professional employees to the area. Possible solutions to increase the labor pool through increased workforce participation include: develop the talent pipeline internally to align the workforce with target industry clusters, prioritize migration of working age adults (young people in search of employment, manageable cost of living, and exceptionally high quality of life), and raise wages until all necessary positions are filled. Automation and part time employment in the 60-75 year old group may ease ongoing workforce concerns in the 20 year time horizon.

Steuben County, New York	Chemung County, New York	Schuyler County, New York
Population (1 yr and over): 97,432	Population (1 yr and over): 87,213	Population (1 yr and over): 18,235
Movers from a different state: 1,178	Movers from a different state: 1,468	Movers from a different state: 140
Movers to a different state: 2,099	Movers to a different state: 1,836	Movers to a different state: 149
Movers from a different county, same state: 2,609	Movers from a different county, same state: 2,888	Movers from a different county, same state: 691
Movers to a different county, same state: 2,243	Movers to a different county, same state: 2,912	Movers to a different county, same state: 841
Movers from abroad: 179	Movers from abroad: 261	Movers from abroad: 46

Unfortunately, the STC region does not compare well against national migration trends. According to Census migration data from 2011-2015, the region had a net loss of 1298 people to other states (the rate of loss accelerated from last year), a gain of 192 people from other counties in NY (vs last year’s net loss of 523 people to other counties in NY) and a gain of 486 movers from abroad (an increase of 35 over last year). Steuben County enjoyed net migration of 366 people from other NY counties, vs outmigration from Schuyler and Chemung to other counties. **Outmigration of older adults is more common than in migration of young workers. Demographic pressures facing this region are the biggest current challenge.** The recently retired are more likely to leave this region for lower cost communities (like the Carolinas) and young job seekers are likely to migrate near major cities with greater employment potential and higher wages.

Economic Conditions in the STC Region

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Quality of Life: The region's quality of life remains exceptionally high. Residents find this area a safe and affordable place to raise a family. Unfortunately, the high quality of life alone is not enough to attract young families and workers to the region, particularly since there isn't any regional group devoted to promoting the region's quality of life and employment opportunities to a potential workforce. A campaign to attract young talent from 'big cities' could be the most effective way of resolving the workforce shortage; all communities in the region would benefit from increased in-migration. Community development in the region should focus on improvement in the following areas:

- Millennials and Gen Y want walkable urban communities, places with civic character, high quality of life, access to great school districts, social gatherings, and places with active community events.
- Higher percentages of the elderly will reside in the region and need additional assistance and care.
- Baby boomers will retire in the region and some will want to age in place.

Economic Resilience: Economic resilience is linked to well-maintained infrastructure, local energy production, a strong transportation network, diverse companies, and local governments that are ready to assist in an emergency. The economic resilience of a region hinges on the ability of individual businesses to sustain their operations after an economic or environmental disruption and also the ability of regional economies to adapt to changing conditions. Smaller companies are a responsive and fundamental component of a resilient regional economy. The economy of Chemung, Schuyler, and Steuben counties is slightly more diverse and resilient than other economies in upstate NY. Manufacturing employment is higher in this region than in many other upstate regions.

The regional economy has a generally stable balance between the public and private sector. Slight increases in public/not-for-profit employment is a contributing factor of economic stability in the region. Some of the largest not-for-profit, educational, medical, and governmental organizations are: Arnot Health, Guthrie healthcare system, local school districts, Corning Community College (ccc), Elmira College, three county governments, 76 municipalities, as well as several NY State departments and offices. As employers, these governments, healthcare organizations, and educators are insulated against rapid economic shifts. These employers provide a strong economic buffer for the region during times of national economic stress or poor economic conditions. Existing employment in education and health sectors ("Eds and Meds") is both a driving economic force and a source of economic backstop in this post-recession economy; with particularly notable construction spending in 2017.

Through 2017, local business investment and construction spending was significant. The expansion of several companies (Micatu, Alstom, and Corning), large infrastructure projects like the Elmira Airport Expansion, and the strength of the health and education sectors has left the regional economy in a strong position. These companies/sectors are well positioned for growth in the future.

Development of the region's energy generation capacity is another route toward increased economic resilience. The unique opportunities for development and redevelopment to utilize natural gas, solar, and wind resources to generate power will strengthen the local economy. Up to 300 MW of solar capacity is in the permitting stages across the region. There are also natural gas based power generation possibilities (due to the existing infrastructure, facilities, and proximity to pipelines).

Demographic Resilience: The Silver Tsunami of baby boomer retirements has reached this region. Roughly 14% of the population is expected to retire in the next 10 years (nearly 30,000 residents). However, the birthrate has been steady in this region and more than 27,000 people will reach age 20 by 2025. In total, the workforce is expected to shrink by about 2,037 (not including migration). Some job openings created by the silver tsunami will have qualified applicants from within the workforce and many of the retirees' positions won't be replaced (due to right-sizing and automation within firms) or the positions may become part-time to retain the retirees while providing the desired quality of life in 'retirement'. Adapting to the retirement of baby boomers over the next 20 years will be a process that employers can mitigate with adequate job training.

Recent Planning Efforts:

There have been several significant planning efforts in the region which informed the development of this CEDS update. The NYS Regional Economic Development Council Strategy, annual updates to the strategy, and the Upstate Revitalization Initiative proposal. Elmira’s Comprehensive plan process is complete and the City of Elmira won a \$1 million poverty reduction award from the Empire State Poverty Reduction Initiative; development of that project is ongoing. The Village of Watkins Glen won NYS’s \$10,000,000 Downtown Revitalization Initiative completion. The City of Corning Economic Development Strategy project is underway. The ongoing I-86 Corridor Project set priorities for development around I-86 in Steuben and Chemung counties; the I-86 workforce development sub-committee is finalizing a workforce plan with their consultant team. Project Seneca, which originally started as a waterfront redevelopment plan, has expanded to become the core of a county-wide economic development strategy. Several significant Schuyler County projects are now included in the \$200-\$300 million, multi-year Project Seneca.

Within STC’s office, the Planning in Water’s Way project is beginning. This project will allow communities and businesses to evaluate their own flood risk, and utilize preliminary cost estimates for flood mitigation to calculate their own cost-benefit analysis of flood mitigation. Businesses that are impacted by flooding are the ones most able to improve their own resilience against future flood events. The Painted Post and Riverside draft Comprehensive plans were completed in 2017, with final review and adoption expected in 2018; zoning law updates for both communities will be completed by September 2018. The Village of Addison is collecting public survey responses to update their comprehensive plan. STC is beginning a climate smart communities plan for the Town of Big Flats. STC staff just completed the Steuben County Transportation Plan, with recommendations to improve the use and efficiency of public transportation in the county.

Cluster Analysis:

A cluster analysis of the STC region using the EDA approved Innovation Data Browser from statsamerica.org indicates several major clusters in this three county area. In addition, the I-86 Innovation Corridor Committee developed an industry cluster plan which identified several sub-clusters and one major cluster “Advanced Transportation Products, Components, and System Controls”. The EDPSC is committed to advancing these clusters under the regional pillars of

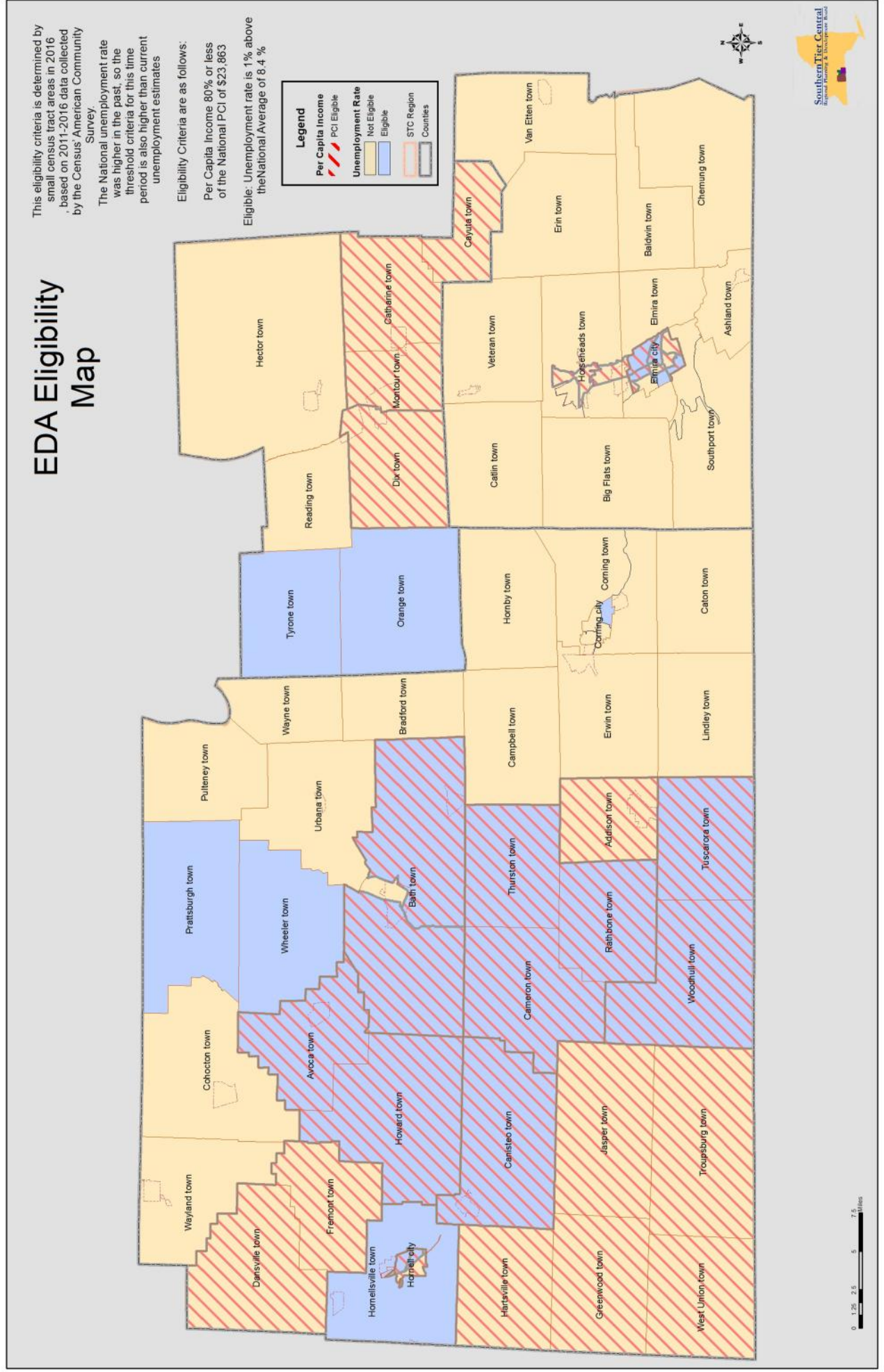
- 1) vibrant communities,
- 2) business development,
- 3) talent attraction and workforce development, and
- 4) infrastructure development.

Top 10 I-86 Innovation Corridor Clusters from the I-86 Industry Cluster Plan
Clay Product and Refractory Manufacturing
Dairy Product Manufacturing
Glass and Glass Product Manufacturing
Navigational Measuring, Electro medical, Control Instruments Manufacturing
Colleges, Universities, and Professional Schools
Other General Purpose Machinery Manufacturing
Semiconductor and other Electrical Component manufacturing
Office Furniture
Industrial Machine Manufacturing
Other Residential Care Facilities

Top 10 STC Region Clusters by employment, wages, or LQ
Biomedical/Biotechnical (Life Sciences)
Manufacturing Supercluster (metal, transportation, and electrical)
Advanced Materials
Defense and Security
Energy (Fossil and Renewable)
Arts, Entertainment, Rec. and Visitors
Agribusiness, Food Processing & Tech.
Chemicals & Chemical Based Products
Forest and Wood Products
Glass and Ceramics

EDA Public Works Eligibility:

STC staff provided demographic, wage, and employment data upon request to users throughout the region. In early 2018, STC staff evaluated and mapped EDA grant eligibility on the municipal level. More than half of our sub-county areas, 29 of our 51 towns and 3 Cities are eligible, based on the latest data by census tract. Seven (7) of our 18 villages are eligible and all three cities in the region could be eligible (in whole or in part), by census tract. Within the three county area, census tracts representing 37 municipalities are eligible for EDA grant funds under unemployment or PCI criteria. Use this map for additional detail.



Vital Projects

Project Name / Sponsor	Location	Project Cost	Jobs	Category	Flood Mitigation
Project Seneca Regional Waterfront Revitalization – Villages of Watkins Glen and Montour Falls	Watkins Glen and Montour Falls	\$200,000,000		Infrastructure	High/ Opportunities
Infrastructure improvements to support job creation	City of Corning	\$172,000,000	250	Infrastructure	Levee Protected
North American Hub for Advanced Rail Transit Manufacturing - City of Hornell IDA	City of Hornell	\$63,150,000	250	Business Development / Ec. Dev. / Job Training	High
ELM Airport Tower Upgrades	Town of Big Flats	\$800,000		Transportation	High
Redevelopment of Guthrie/Corning Hospital Site – City of Corning/Guthrie Medical/Steuben County IDA - Phase II	City of Corning	\$40,000,000		Infrastructure / Economic Development	Levee Protected
Family Life Network Expansion	Town of Erwin	\$30,000,000	40	Economic Development / Asset Based Development	Levee Protected
Corning City Wastewater Upgrade	City of Corning	\$25,000,000		Infrastructure/ Economic Development	Levee Protected
Monterey Shock Incarceration Facility Redevelopment- Schuyler County IDA	Town of Orange	\$10,000,000	50	Bus. Dev./ Asset Based	Low
Lake Street Historic District Redevelopment – STEG	City of Elmira	\$9,000,000		Asset Based Ec. Dev.	Levee Protected
Northside Blodgett School Housing Development- City of Corning/Arbor Housing & Development	City of Corning	\$5,100,000		Economic Development	Levee Protected
Elmira Refresh: Lake Erie College of Osteopathic Medicine- Chemung County	City of Elmira	\$15,000,000	17	Health/ Economic Development	Levee Protected
Phillips Electronics Redevelopment – Steuben Co. IDA	Town of Bath	5000000		Economic Development	Low
Elmira Refresh: First Arena Improvements/Downtown Revitalization Project – Chemung County IDA	City of Elmira	\$5,000,000		Asset Based Economic Development	Levee Protected
Wayland Business Park: Buildout- Steuben County IDA	Town of Wayland	\$2,000,000	50	Business Development/ Infrastructure / Ec. Dev.	Medium
Airport Corporate Park South: Buildout – STEG/Chemung County IDA	Town of Big Flats	\$1,600,000	500	Infrastructure/ Economic Development	Low
Implementation of City of Corning Housing Strategy - Three Rivers/ Arbor Housing / City of Corning	City of Corning	\$1,199,999		Ec. Dev./ Comm. Planning	Levee Protected
Elmira Neighborhood Revitalization	City of Elmira	\$5,000,000	25	Ec. Dev./ Comm. Planning	Levee Protected

Regionally Significant

Project Name / Sponsor	Location	Project Cost	Jobs	Category	Flood Mitigation
Wind & Solar Energy Development – IDA’s	Regional	\$200,000,000	10+	Energy Technology	TBD
STN Last Mile– Southern Tier Network/Others	Regional	\$50,000,000		Infrastructure/ Tech./ Ec. Dev.	Low
Regional Neighborhood Revitalization and Housing Strategy	Regional	\$10,000,000		Workforce Support	Varies
Advance I-86 Innovation Corridor Workforce Development and Talent Attraction Strategy	Regional	\$9,000,000	200+	Workforce	NA
Career Literacy – STC, STE, STW	Regional	\$900,000		Workforce	NA
Regional Phase 1 Levee Studies	Regional	\$600,000	1,000+	Economic Development	Beneficial
STN Business Technology Outreach Project - STEG	Regional			Technology	NA

All projects in green are vital

Project Name / Sponsor	Location	Project Cost	Jobs	Category	Flood Mitigation
Infrastructure Improvements to Support Job Creation	City of Corning	\$172,000,000	250	Infrastructure	Levee Protected
Project Seneca: Regional Wastewater Treatment – Villages of Watkins Glen and Montour Falls	Watkins Glen and Montour Falls	\$30,000,000	2	Infrastructure	Medium
Corning City Wastewater Upgrade	City of Corning	\$25,000,000		Infrastructure	Levee Protected
Chemung County Sewer District #1 Plant Upgrade - STEG	Chemung County	\$8,000,000		Infrastructure / Ec. Dev.	High
Odessa Wastewater Infrastructure – Village of Odessa	Village of Odessa	\$3,000,000		Infrastructure	Low
Burdett Wastewater Infrastructure – Village of Burdett	Village of Burdett	\$4,600,000		Infrastructure	Low
Steuben Co. Landfill Leachate Consolidation	Town of Bath	\$4,000,000		Infrastructure	Low
Waste Water Treatment Plant Upgrades- Town of Erwin -	Town of Erwin	\$3,405,105	1300	Infrastructure / Ec. Dev.	Levee Protected
Corning Inflow and Infiltration Waste Water Project – City of Corning	City of Corning	\$2,100,000		Infrastructure	Levee Protected
Hammondsport Sewer Project	V. of Hammondsport	\$1,500,000		Infrastructure	Medium
Prattsburgh Hamlet Sewer	Town of Prattsburgh	\$1,000,000		Infrastructure	Medium
Elm St. Sewer - City of Hornell	City of Hornell	\$600,000		Infrastructure / Ec. Dev.	Levee Protected
Regional Water & Sewer Study- Chemung County	Chemung County	\$250,000		Planning	N/A
Route 21 Sewer Extension – City of Hornell	City of Hornell		12	Infrastructure / Ec. Dev.	Low
Dix Waste Water and Drinking Water System Completion - Town of Dix	Town of Dix	\$1,300,000	1.8	Infrastructure / Ec. Dev.	Low
Urbana/Pleasant Valley Water Extension -Town of Urbana	Town of Urbana	\$8,000,000		Infrastructure / Ec. Dev.	Medium
Bath/Kanona Water Service -Town of Bath	Town of Bath	\$6,000,000		Infrastructure / Ec. Dev.	High
Water Filtration Plant - City of Hornell	City of Hornell	\$4,500,000		Infrastructure / Ec. Dev.	Low
Fourth New Well – Town of Erwin	Town of Erwin	\$2,800,000	2500	Infrastructure / Ec. Dev.	Medium
Corning Water Flow Improvement – City of Corning	City of Corning	\$2,700,000		Infrastructure	Low
New Well Rt. 417 Southern Tier Logistics - T. Erwin IDA	Town of Erwin	\$2,600,000		Infrastructure	High
Town Center Expansion -- Town of Erwin IDA	Town of Erwin	\$2,000,000		Infrastructure	Levee Protected
Fourth New Well – Town of Hornell	City of Hornell	\$1,596,000	25	Infrastructure / Ec. Dev.	Low
EPIC Infrastructure / Conifer - Town of Erwin IDA	Town of Erwin	\$1,500,000		Infrastructure	Low
Water System Improvements – Village of Addison	Village of Addison	\$1,356,000		Infrastructure	Medium
Overbrook Road Water Storage Tank Replacement - Town of Erwin	Town of Erwin	\$400,000		Infrastructure	Low
Drinking Well Protection – City of Hornell	Town of Hornellsville	\$150,000		Infrastructure	Medium
Town of Reading Water Retrofit and Expansion Study	Town of Reading	\$100,000		Infrastructure / planning	N/A
Chemung Sub-Station Upgrade – STEG	Ashland and Chemung	\$6,000,000		Infrastructure	
Gas Line Extension in the Town of Orange	Town of Orange	\$2,000,000	20	Infrastructure / Ec. Dev.	
Storm Water Outflow Improvements - City of Corning	City of Corning	\$1,800,000		Infrastructure	Beneficial

Project Name / Sponsor	Location	Project Cost	Jobs	Category	Flood Mitigation
Watkins Glen First Street and Gateway Parking Garage Project – SCOPED/Village of Watkins Glen	Village of Watkins Glen	\$75,000,000		Community Facilities/ Economic Development	Low
Elmira Arterial-Northern Section Clemens Center Pkwy. - NYSDOT	Chemung County	\$60,000,000		Infrastructure/ Economic Development	High
Center at Horseheads Access Road - STEG	Town and Village Horseheads	\$25,000,000		Infrastructure/Economic Development /Transportation	High
Railroad Track Improvements for passenger excursions - SCOPED	Village of Watkins Glen	\$8,000,000	6	Infrastructure/Economic Development	High
Pedestrian Safety and ADA Infrastructure Improvements - Montour Falls (sidewalks & stairs)	V.of Watkins Glen/ V. of Montour Falls	\$5,000,000		Infrastructure	Low
Pedestrian Safety and ADA Infrastructure Improvements - Corning & Riverside (sidewalks)	V.of Riverside/ C. of Corning	\$5,000,000		Infrastructure	Low
Montour Falls Business Park- Buildout	V. of Montour Falls	\$5,000,000		Infrastructure	Levee Protected
Lake Street Bridge & TAP Projects -City of Elmira	City of Elmira	\$4,500,000		Infrastructure/ Transportation	High
Project Seneca: Watkins Glen Northern Gateway – SCOPED/Village of Watkins Glen	Village of Watkins Glen	\$4,000,000	5	Infrastructure/ Transportation	Low
Project Seneca: Watkins Glen Waterfront Pathway – Village of Watkins Glen	Village of Watkins Glen	\$3,725,000		Community Facilities / Asset Based Economic Development	Opportunities
Airport Improvements- Town of Erwin IDA	Town of Erwin	\$2,889,000	13		High
Lake Street Bridge - City of Elmira	City of Elmira	\$2,000,000		Infrastructure	High
Bridge Replacement - City of Hornell	City of Hornell	\$1,700,000		Infrastructure/ Transportation	High
Town Center Road – Town of Erwin	Town of Erwin	\$1,500,000	250	Transportation	Levee Protected
Centertown Parking Garage Improvements -C. of Elmira	City of Elmira	\$1,000,000		Infrastructure/ Transportation	Levee Protected
ELM Airport Tower Upgrade	Town of Big Flats	\$800,000		Transportation	High
Replace Main Street - City of Hornell	City of Hornell	\$750,000		Transportation/ Ec. Dev.	Levee Protected
Scott Road Bridge Replacement - Town of Erwin	Town of Erwin	\$605,000		Transportation	High
Franklin Street Improvements (Between 5th and 9th Street) - Village of Watkins Glen	Village of Watkins Glen	\$500,000		Community Facilities/Economic Development	Low
Airport Helicopter Hanger - Town of Erwin IDA	Town of Erwin	\$448,000		Transportation	High
Airport Lighting Upgrades - Town of Erwin IDA	Town of Erwin	\$400,000		Transportation	Medium
Montour Falls Main Street Improvements – Village of Montour Falls	Village of Montour Falls	\$300,000		Economic Development	Levee Protected
Watkins Glen 2nd & 3rd Street Alley & Parking Lot Improvements – Village of Watkins Glen	Village of Watkins Glen	\$200,000		Transportation/Community Facilities/asset Based Ec. Dev.	Low
V. Horseheads Circulation Study - Chemung Co.	V. / T. Horseheads	\$100,000		Transportation / Planning	Medium
Airport Fuel Farm Upgrades - Town of Erwin IDA	Town of Erwin	\$50,000		Transportaion	High

Project Name / Sponsor	Location	Project Cost	Jobs	Category	Flood Mitigation
Project Seneca Regional Waterfront Revitalization – Villages of Watkins Glen and Montour Falls	V. of Watkins Glen and Montour Falls	\$200,000,000	150	Infrastructure	High/ Opportunities
Redevelopment of Guthrie/Corning Hospital Site – City of Corning/Guthrie Medical/Steuben county IDA - Phase II	City of Corning	\$40,000,000		Infrastructure / Community Planning / Economic Development	Levee Protected
Arnot Mall Repurposing - STEG	Town of Big Flats	\$40,000,000	80	Economic Development	Low
Family Life Network Expansion - Town of Erwin IDA	Town of Erwin	\$30,000,000	40	Asset Based Ec. Development	Levee Protected
Federal Building Redevelopment Project – City of Elmira	City of Elmira	\$35,000,000		Economic Development	Levee Protected
Lamphear Court Phase II	City of Corning	\$23,000,000		Community Development	Levee Protected
Development of the West Water Street Site (former Dresser Rand Foundary)	V. of Painted Post	\$16,000,000	50	Asset Based Ec. Development	Levee Protected
Elmira Refresh: Lake Erie College of Osteopathic Medicine- Chemung County	City of Elmira	\$15,000,000	17	Health/ Economic Development	Levee Protected
CCC STEAM Innovation Center	Town of Corning	\$15,000,000	15	Infrastructure / Workforce	Low
St. Vincents Redevelopment	City of Corning	\$15,000,000	10	Ec. Dev. / Workforce Support	Levee Protected
Redevelop 109-111 North Franklin with Mixed Uses	V. of Watkins Glen	\$13,000,000	10	Economic Development	Low
New Mixed Income Housing and Childcare Center	V. of Watkins Glen	\$11,000,000	5	Ec. Dev. / Workforce Support	
Hammondsport/Urbana Waterfront Development – Town of Urbana	H.port / Urbana	\$10,000,000		Asset Based Ec. Dev.	High/ Opportunities
Monterey Shock Incarceration Facility Redevelopment-	Town of Orange	\$10,000,000	50	Asset Based Ec. Dev.	Low
Glen Curtiss Memorial School Improvement Project – Steuben County IDA	V. of Hammondsport	\$10,000,000	50	Asset Based Ec. Dev.	Low
Lake Street Historic District Redevelopment – STEG	City of Elmira	\$9,000,000		Asset Based Ec. Dev.	Levee Protected
Siemens Facility Upgrades- Steuben County IDA	V. of Painted Post	\$7,000,000		Economic Development	Levee Protected
Northside Blodgett School Housing Development- C. of Corning/Steuben Co. IDA	City of Corning	\$5,100,000		Economic Development	Levee Protected
Elmira Refresh: First Arena Improvements/Downtown Revitalization Project – Chemung County IDA	City of Elmira	\$5,000,000		Asset Based Ec. Dev.	Levee Protected
Phillips Electronics Redevelopment – Steuben Co. IDA	Town of Bath	\$5,000,000		Economic Development	Low
Star-Gazette Building Reinvestment - City of Elmira	City of Elmira	\$5,000,000		Asset Based Ec. Dev.	Levee Protected
Steuben County IDA Industrial Park – Steuben County IDA	Town of Bath	\$3,000,000	50	Infrastructure / Ec. Dev.	Medium
MAS Redevelopment of the Lindley Presho School	Town of Lindley	\$2,500,000	12	Economic Development	High
Air Easements - City of Hornell	City of Hornell	\$2,525,000		Transportation	Low
Chemung South Business Park – STEG	Town of Chemung	\$2,000,000		Infrastructure	
Wayland Business Park – Steuben County IDA	Town of Wayland	\$2,000,000	50	Infrastructure / Ec. Dev.	Medium
Project Seneca: Montour Falls RV Park Expansion, CVT extension with bridge at Village Marina – Montour Falls	V. of Montour Falls	\$2,000,000		Community Facilities/ Asset Based Economic Development	High
Third Street Restoration Project (CCFL Building) - City of Corning	City of Corning	\$1,500,000		Asset Based Ec. Dev.	Low
'Bulkhead' Area Redevelopment - Town of Southport	Town of Southport	\$1,000,000		Asset Based Ec. Dev.	Levee Protected
Clements Square Redevelopment - City of Elmira	City of Elmira	\$1,000,000		Asset Based Ec. Dev.	Levee Protected
Redevelop Captain Bill's Port of Seneca Lake Cruise Terminal	V. of Watkins Glen	\$1,000,000		Asset Based Ec. Dev.	High
Finger Lakes Boating Museum Capital - FLBM	V. of Hammondsport	\$300,000		Asset Based Ec. Dev.	Low
Rail to Trail - Town of Urbana	Urbana/V. Hport	TBD		Community Facilities	Low
Rehabilitation of 118-122 and 124-126 Lake Street for mixed-use development	City of Elmira			Economic Development	Levee Protected
Small Business Growth Program	Chemung County			Economic Development	NA
Wind & Solar Energy Development – Steuben County IDA	Several in Steuben		10	Energy Infrastructure / Ec. Dev.	TBD

Project Name / Sponsor	Location	Project Cost	Jobs	Category	Flood Mitigation
Pool Study and Facility Replacement-5 year plan	City of Corning	\$4,000,000		Community Facilities	Levee Protected
Southport Community Recreation Center – Town of Southport	Town of Southport	\$3,500,000		Asset Based Development/ Community Facilities	Levee Protected
Refresh Elmira: Mark Twain Riverfront Park Renaissance Project – City of Elmira	City of Elmira	\$2,000,000		Asset Based Development / Community Facilities	Levee Protected
Chemung River Valley Trail Network - Chemung County	Chemung County	\$2,000,000		Asset Based Economic Development	Opportunities
Lake Street/Arbor Housing - City of Elmira	City of Elmira	\$2,000,000		Asset Based Development	Levee Protected
Dunn Field Municipal Stadium Improvements	City of Elmira	\$1,800,000		Community Facilities	Levee Protected
Implementation of City of Corning Housing Strategy	City of Corning	\$1,000,000		Economic Development	Levee Protected
Project Seneca: Montour Falls – Aunt Sarah’s Falls Visitors Center/Parking/Trails – V. of Montour Falls	Village of Montour Falls	\$1,000,000		Community Facilities / Asset Based Economic Development	Medium
Civic Center Plaza Building- Library – Three Rivers Development	City of Corning	\$750,000		Community Facilities	Levee Protected
Levee Certification - Town of Erwin IDA	Town of Erwin	\$500,000		Infrastructure	Beneficial
Trail - City of Hornell	City of Hornell	\$380,000		Community Facilities	Low
Maintenance Building - City of Hornell Airport	City of Hornell	\$275,000		Transportation/ Economic Development	Low
Hannover Square Circulation Study - Chemung County	Village of Horseheads	\$250,000		Transportation/ Economic Development	Medium
Human Services Complex Conversion to Solar Energy - Schuyler County	Village of Montour Falls	\$200,000		Energy/ Infrastructure	Levee Protected
Greenway Trail and Sidewalk System – Town of Erwin	Town of Erwin	\$177,575		Facilities/ Infrastructure/ Transportation	Opportunities
Marketing Utilization of Broadband for Economic Development - SCOPED	Schuyler County	\$100,000		Economic Development	NA
Queen Catharine Marsh Master Plan Project – SCOPED/Schuyler County/Village of Montour Falls	Schuyler County	\$100,000		Community Facilities	Opportunities
Refinement of Project Seneca Conceptual Plan - SCOPED	W. Glen, Montour Falls, and Schuyler Co.	\$100,000	10	Infrastructure/ Asset Based Eco. Development	Opportunities
Fire Academy Economic Impact Study - SCOPED	Village of Montour Falls	\$50,000		Asset Based Economic Development	NA
Implementation of County Economic Development Plan – Steuben County IDA	Multiple municipalities in Steuben County			Business Development / Economic Development	

Project Name / Sponsor	Location	Project Cost	Jobs	Category	Flood Mitigation
North American Hub for Advanced Rail Transit Manufacturing - City of Hornell IDA	City of Hornell	\$63,150,000	250	Business Development / Economic Development / Job Training	High
Infrastructure Improvements to South Yard - City of Hornell IDA	City of Hornell	\$15,150,000	200	Transportation/ Economic Development/ Environmental Assets	High
Center for Technology Infusion	TBD	\$5,000,000	80	Technology/ Economic Development	TBD
Steuben County IDA Bath/Hammondsport Rail Line Restoration – Steuben County IDA	Multiple municipalities in Steuben County	\$5,000,000	25	Infrastructure / Economic Development	Medium
Last Mile Broadband Connectivity in Schuyler Co.	Villages of Burdett and Odessa	\$1,000,000		Telecommunications / Infrastructure	Low
Norfolk Southern/B&H Interchange Track	Town of Erwin	\$1,000,000		Ec. Dev./ Infrastructure	High
Broadband Capability – City of Hornell	City of Hornell			Business & Economic Development / Infrastructure	Low

Tech. & Advanced Manufacturing

Project Name / Sponsor	Location	Project Cost	Jobs	Category	Flood Mitigation
Shared Production Facility for Food and Beverage Manufacturing - SCOPED	Schuyler County Business Park	\$10,000,000	75	Economic Development	Low
Golden Age Cheese Expansion	Woodhull	\$6,000,000	25	Economic Development	High
Agricultural implementation Plan – Steuben County/Steuben County IDA	Multiple areas in Steuben County	\$3,750,000	70	Asset Based Economic Development	Opportunities
Food Enterprise Center- Steuben County IDA	Steuben County	\$1,500,000	TBD	Asset Based Economic Development	TBD
Upgrade Pleasant Valley Wine Company Pressing Plant – Steuben County IDA	Village of Hammondsport	\$1,000,000	10	Economic Development / Infrastructure	Medium

Quantifying CEDS Performance

March 2018

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As much as possible the performance measures from the 2016 CEDS are focused on measurable results and expected impacts; each of these performance measures outlines a clear statements of the expected result and benefit. These measures will allow for significant trend analysis which will be included in this annual CEDS update. The measures are challenging for the region but should be attainable. As these measures are utilized from 2016 through 2019, STC will be better able to estimate future performance. This is STC's second goal based performance report, in accordance with EDA's new CEDS guidelines. The suggested measures in this CEDS are impacted by state and national trends and regulations (construction trends in NYS and the NYS Smart Growth legislation). Any changes, positive or negative, in these evaluation measures will not be solely attributable to STC's activities.

CEDS Goal	STC Performance Goal
Innovation in Cooperation	Leverage competitive advantages: higher education institutions
Partner with CCC on the Strategy Committee as a member. Connect with Cornell U. & Binghamton U. for new ideas and young employees. Work with 4 local governments to apply for infrastructure improvements. Work with 1 local government on shared services	STC has reached out to partner with CCC on EDPS Committee. Have posted job openings to BU. Partnered with Pratt on a local project. Worked on 1 ARC infrastructure grant application. Educated several local governments on shared services via planning school.
Innovation in Governance	Use a collaborative approach with EDA, ARC, NYS and other partners
Work with 2 local governments on NYS required smart growth reviews. Work with 4 local governments to consider land use regulations Work with 2 local governments to implement land use regulations. Work with 4 local govts. and business leaders to understand flood risks	NYS Smart growth review was completed for the T. Big Flats and T. Dix. STC has provided land use assistance to at least 9 communities in the last year, 2-3 communities have implemented land use changes. STC received grant funding to improve economic resilience to flood risk in the I-86 Innovation Corridor. Cooperation with STREDEC and I-86 Corridor is ongoing through several EDPS members.
Transform the Food and Agriculture Industry	Protect the resources and natural beauty of the region
Act as a local clearinghouse in green site design, passive solar design, small scale energy production, sustainability, "new" agriculture, and environmental awareness; partner with institutions and businesses that are ag. leaders. Assist with 1 agriculture/food ARC application. Educate local officials on the connections between tax revenue and land use	STC assisted with 3 ag. /food ARC applications. Tax revenue/ land use was included in several local education sessions.
Next Generation Technology and Advanced Manufacturing	Increase prosperity of workforce
Work with regional organizations to promote this region's quality of life, job opportunities, and civic environment to attract and retain skilled employees. Work to achieve parity with the U.S.	STC staff promoted the region's quality of life in ARC applications. STC's ARC funded activities work to achieve parity with the US, particularly collaboration toward workforce development ARC projects.
Economic Development Backbone	Develop strong industry clusters, businesses, and entrepreneurship
Provide annual data updates in Q2 Assist IDA's, the Chambers of Commerce, and planners by providing any necessary data or GIS analysis Assist with EDA grant applications as needed	This CEDS update includes the required data. STC has provided census and DOL data, whenever requested (about 5 times this year). STC continues to promote EDA public works grant funds for job creating projects.

Economic Development Policy & Strategy Committee Activities

March 2018

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Economic Development Policy & Strategy Committee Activities:

The Economic Development & Policy Committee met in October 2017 to review ARC infrastructure and workforce applications. The EDPC recommended the projects to the STC board. All applications were sent to NYS for review. NYS is in the process of reviewing and recommending the projects to ARC for final review and approval. Strategy committee members were contacted by email several times during the last 12 months for their comments on the ARC applications, suggestions for local government classes, grant opportunities, their potential future projects for inclusion in the CEDS, and possible EDA projects for the coming year. The committee members have provided insight to ensure that the annual CEDS progress update will have regional significance. STC's staff, the Economic Development Policy Committee, and the STC board will continue to focus on implementing the recommendations of the 2016 5-year CEDS.

STC staff have reported on EDA activities and on the CEDS update to the STC board and the EDPSC; several times between 2017 and March 2018, particularly the visit from Ed Hummel and the implications for possible EDA/ARC applications. The EDPSC and Board members provided significant feedback at the March Committee meeting, and recommended CEDS update adoption at the May Board meeting.

EDA applications:

Project Seneca is a Southern Tier REDEC and STC CEDS priority project to build a new inter-municipal wastewater treatment plant and re-develop the lakefront property currently used by the existing wastewater treatment facility. STC Staff and the EDPS Committee expects a decommission and deconstruction EDA grant application for Project Seneca to be submitted in the next 6 months.

STC staff continues to report on the completed EDA projects and to work with the IDA's to develop another EDA grant application. There is a possibility of another significant rail project in the Hornell, NY area.

Economic Development Policy & Strategy Committee Members:

Chair: Tom Tranter, Jr.

BOARD APPOINTMENTS:

Ted Bennett, private sector
Ernest Hartman, labor representative
Timothy O'Hearn, public official
Randy Reid, private sector
Tom Santulli, public official

Vice Chair: James Johnson, Steuben County IDA
Kathryn Bartholomew, envi. rep.
Dennis Fagan, private sector
Robert Nichols, private sector
Randy Olthof, private sector
Mark Ryckman, public official
Jack Wheeler, public official

OTHER APPOINTMENTS:

County Economic Development
Agencies

Michael Krusen, Chemung, STEG
Judy McKinney Cherry, Schuyler - SCOPED
James Johnson, Steuben IDA
James Griffin, Hornell IDA

County Planning Departments

Nicolette Wagoner Chemung
Kristin VanHorn, Schuyler
Amy Dlugos, Steuben

CSS Workforce Development
Empire State Development
Planning

Daniel Porter
Joseph Roman
Steve Dennis, City of Corning Planner
Bill Boland, City of Corning Mayor
George Miner
Betsey Hale

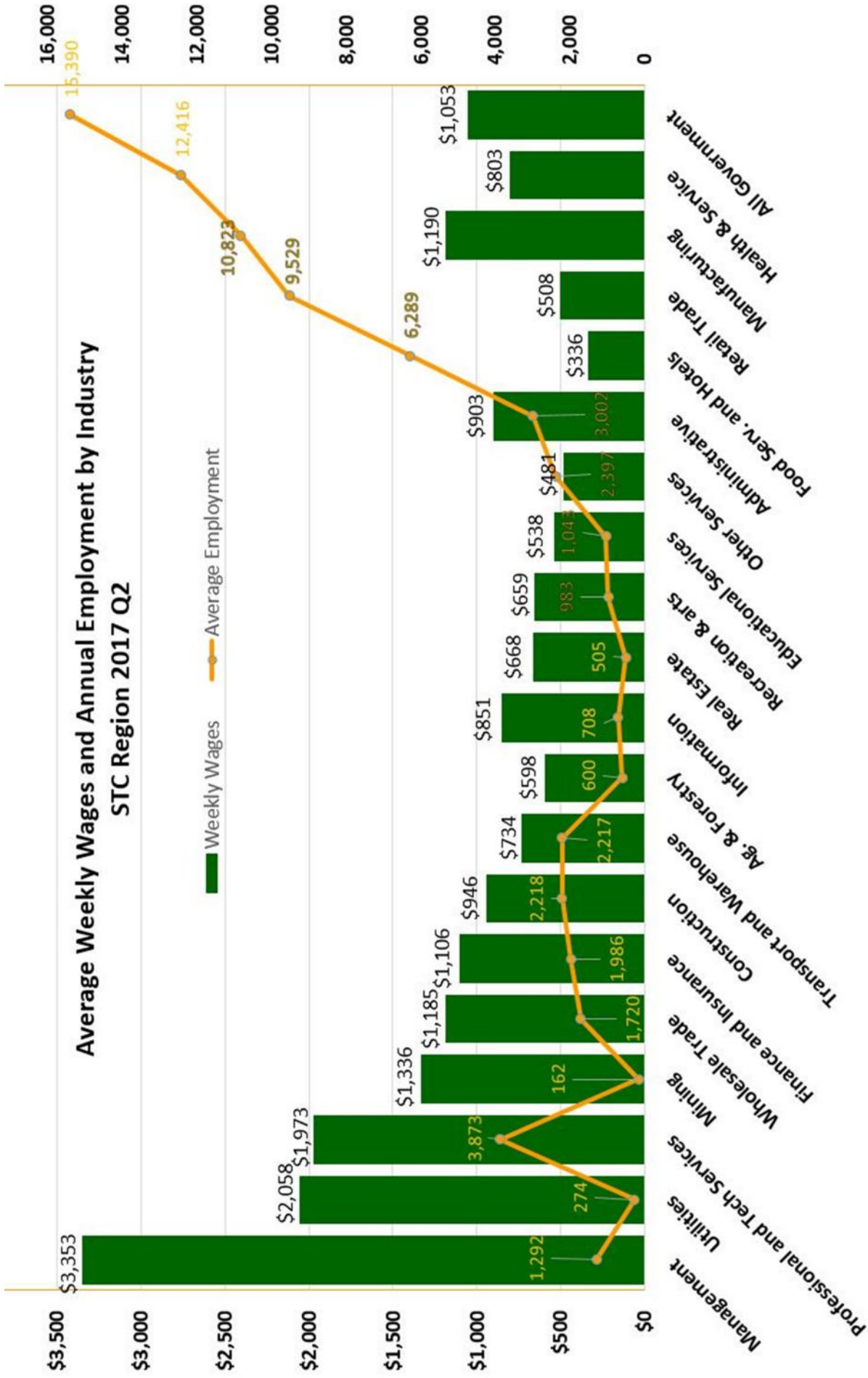
REDEC
Three Rivers

Regional Economic Profile For the 2018 CEDS Update

Applicants and Openings for February 2018

OCCUPATIONAL CATEGORY	APPLICANTS	OPENINGS	RATIO OF APPLICANTS TO OPENINGS
Management	239	83	3:1
Business and Financial Operations	92	43	2:1
Computer and Mathematical	114	100	1:1
Architecture and Engineering	91	183	1:2
Life, Physical, and Social Science	34	28	1:1
Community and Social Services	97	63	2:1
Legal	12	3	4:1
Education, Training, and Library	58	5	12:1
Arts, Design, Entertainment, Sports, and Media	51	16	3:1
Healthcare Practitioner and Technical	52	95	1:2
Healthcare Support	133	49	3:1
Protective Service	69	5	14:1
Food Preparation and Serving Related	706	35	20:1
Building and Grounds Cleaning and Maintenance	372	6	62:1
Personal Care, Personal Service, and Gaming	131	29	5:1
Sales and Related	570	189	3:1
Office, Clerical and Secretarial	1,058	142	7:1
Farming, Fishing, and Forestry	42	5	8:1
Construction and Extraction	597	105	6:1
Installation, Maintenance, and Repair	295	33	9:1
Production	1,165	79	15:1
Transportation and Material Moving	843	171	5:1

Average Weekly Wages and Annual Employment by Industry
STC Region 2017 Q2



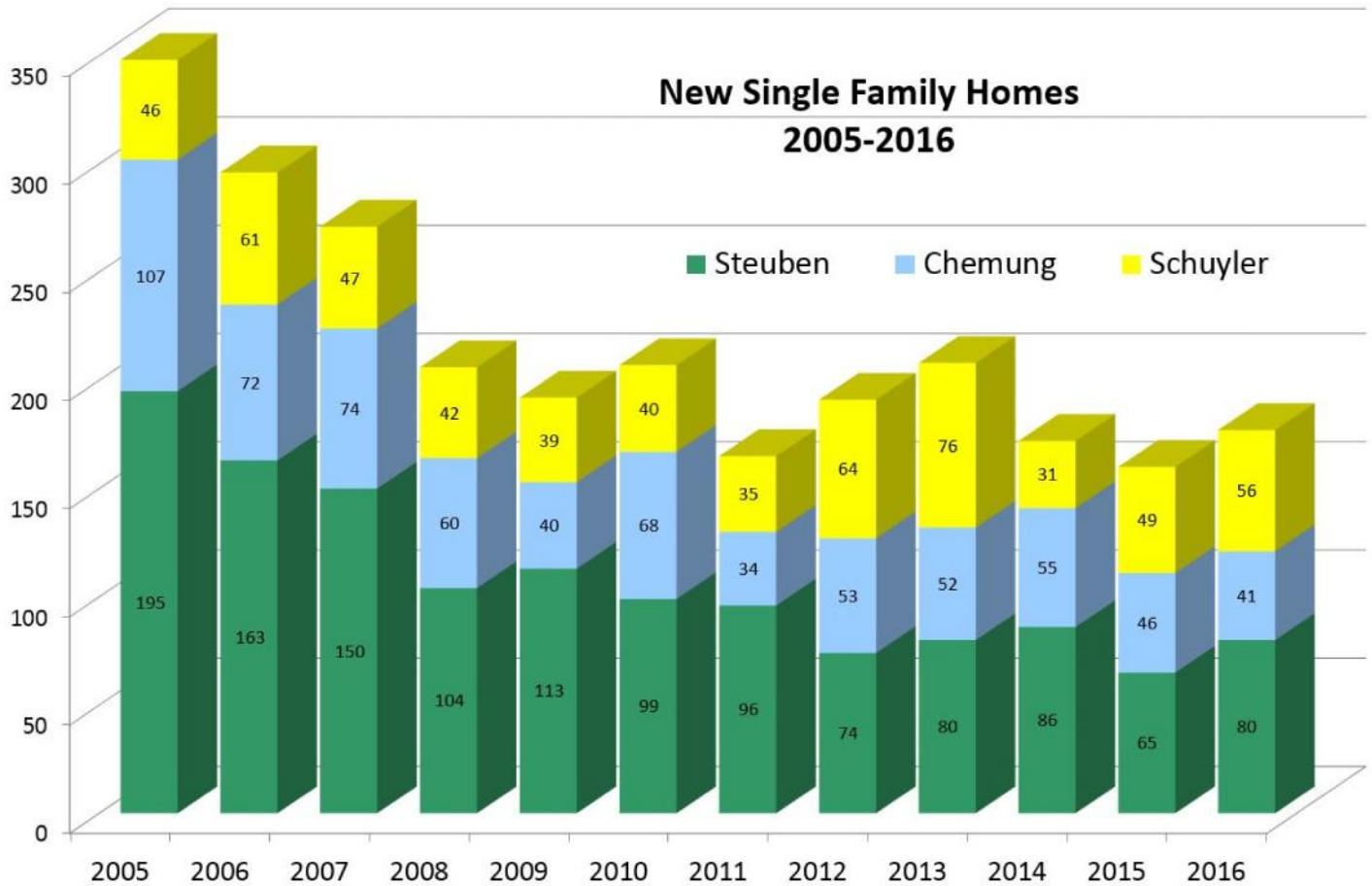
CHEMUNG MAJOR EMPLOYERS	EMPLOYEES
Access Midstream	100
Anchor Glass Container	280
Arnot Health	2,300
CAF USA	476
Cameron Manufacturing and Design	195
Chemung Canal Trust	300
Corning Incorporated	225
Cutler-Hammer	325
CVS Distribution Center	535
Dalrymple Gravel and Contracting	200
DeMet's Candy Company	261
DePuy Synthes	400
Eaton Electrical	260
Elcor Health Services	250
Elmira College	352
Elmira Savings Bank	125
Emhart Glass	115
General Revenue Corporation	211
Guthrie Health Care	150
Hardinge Inc.	400
Hilliard Corporation	500
Hunt Engineers	100
F.M. Howell & Company	225
Kennedy Valve (McWane Inc.)	332
NYSEG	175
Schlumberger	51
Southern Tier Custom Fabricators	131
Swift Glass	100
Tops Markets	200
Travelers Insurance	125
Trayer Products	120
Verizon	175
Vulcraft of NY, Inc.	264
Walmart	225
Wegmans	160

STEBEN MAJOR EMPLOYERS	EMPLOYEES
Absolut Care at Three Rivers	150
Alstom	650-700
Arc of Steuben	337
Bath Veterans Administration	745
Corning Center	150
Corning Credit Union	245
Corning Hospital	660
Corning Incorporated	5,400
Crowley Foods/HP Hood	115
Dresser-Rand/Siemens	470
Gunlocke Co., Inc.	722
Guthrie Medical Group, P.C.	300
Ira Davenport Hospital/Arnot Health	295
Mercury Aircraft	175
Pathways	429
Sitel	295
St. James Mercy Hospital	300
Upstate Niagara	250
Wegmans	460
World Kitchen	520

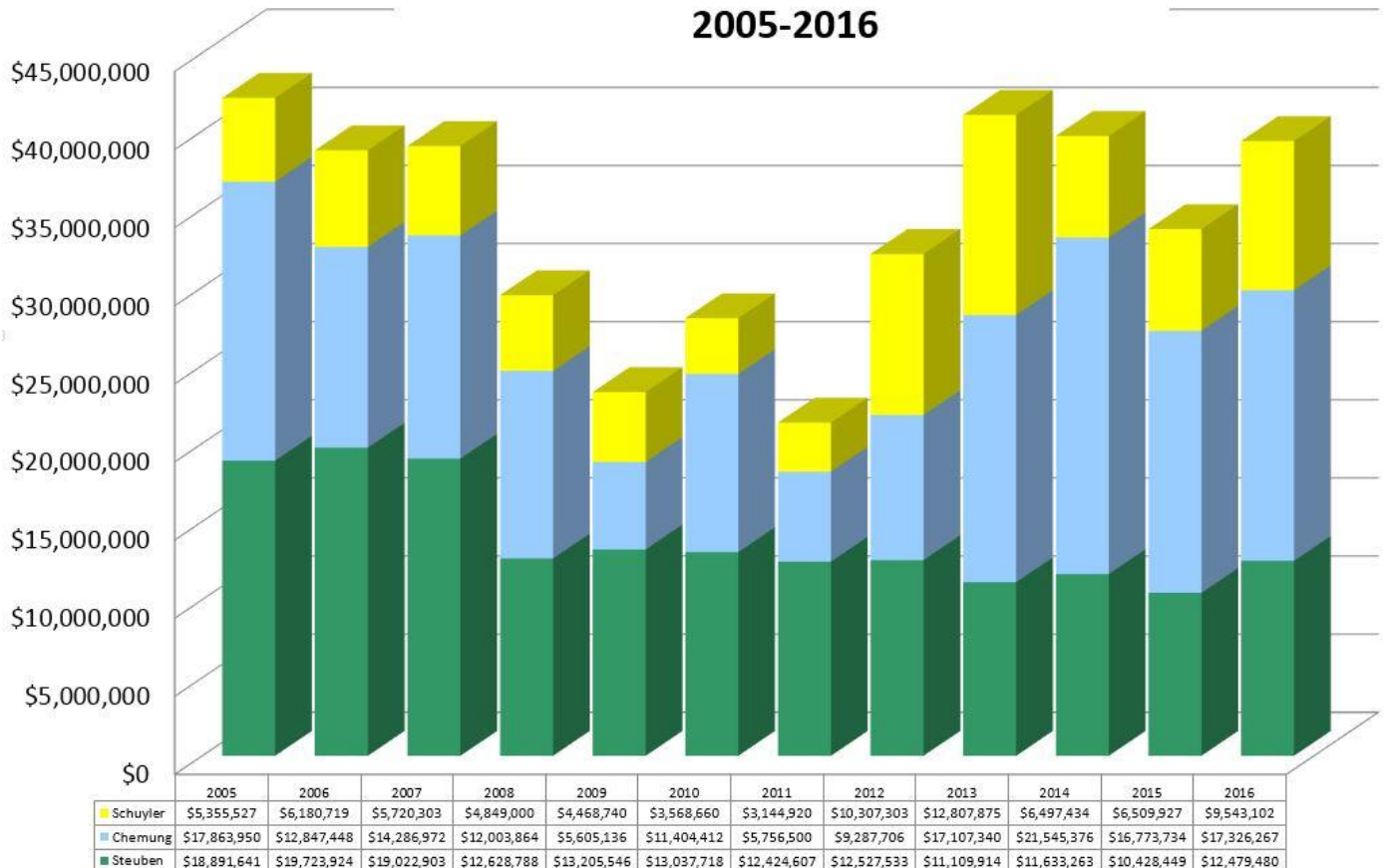
SCHUYLER MAJOR PRIVATE EMPLOYERS	EMPLOYEES
BMS Manufacturing	37
Cargill	119
Glen Harbor Hotel	128
Hazlitt 1852 Vineyards, Inc.	33
Parmenter Inc.	91
Schuyler County Chapter, NYSARC, Inc.	138
Schuyler Hospital	321
US Salt	151
Wagner Hardwoods	116
Walmart	243
Watkins Glen International	86
Wine and Glass Tours (Seneca Harbor Station)	146

Data collected in 2017 and 2018 by SCIDA, STEG, and SCOPEd

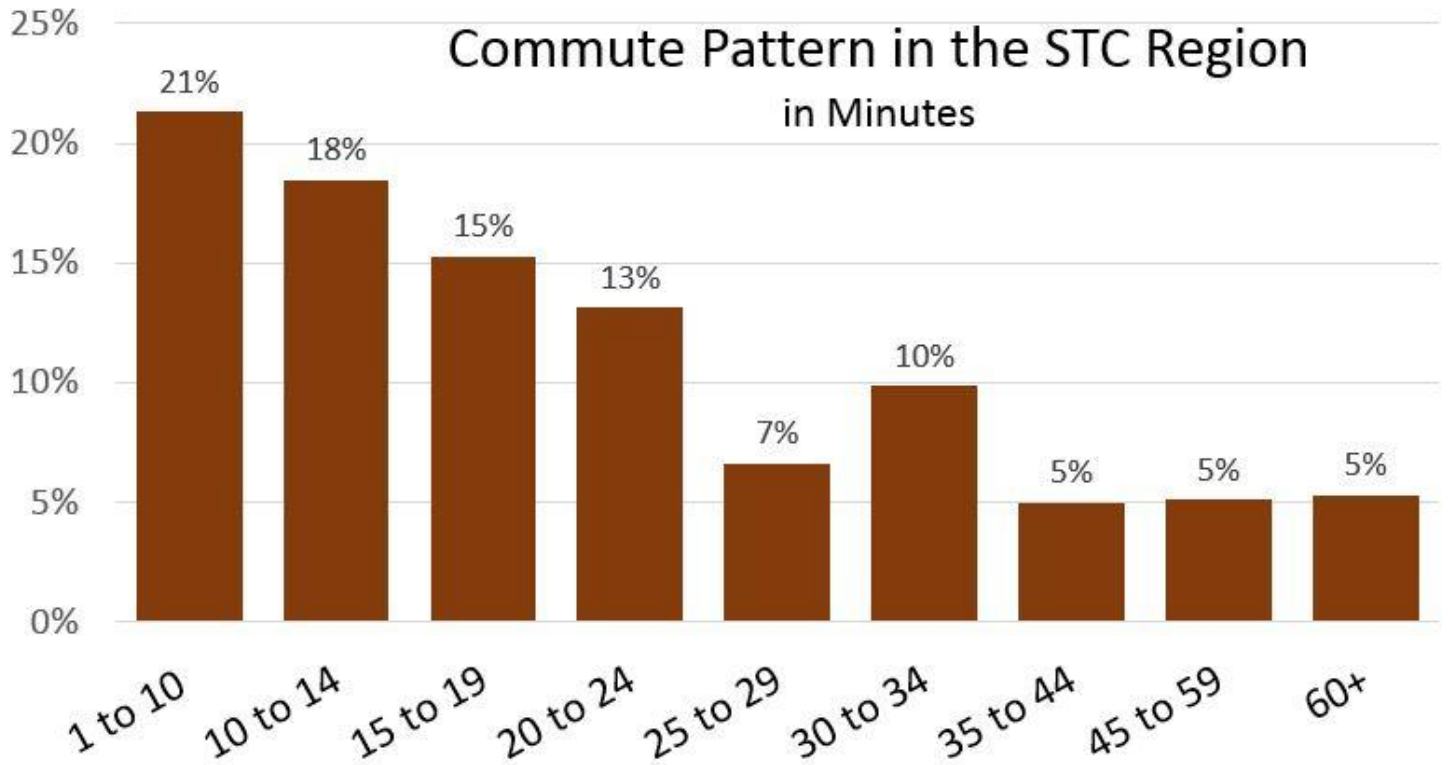
New Housing Units



Construction Value of Single Family Homes 2005-2016

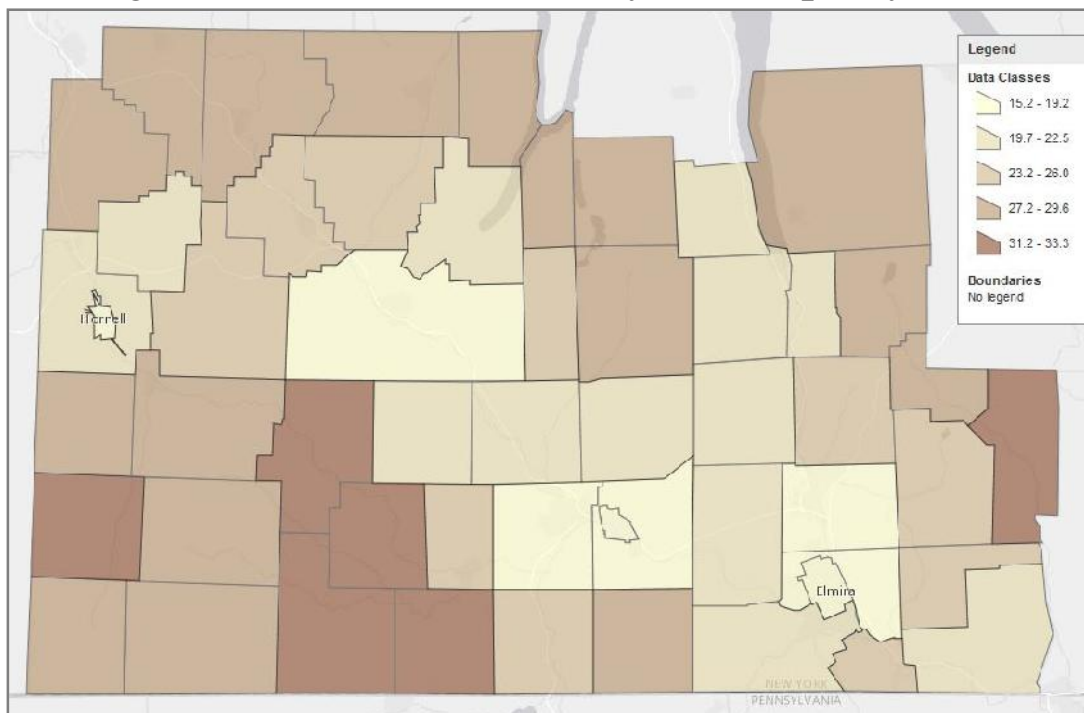


Transportation & Travel



U.S. Census, 2016 5-year ACS

Average Commute in Minutes by Municipality

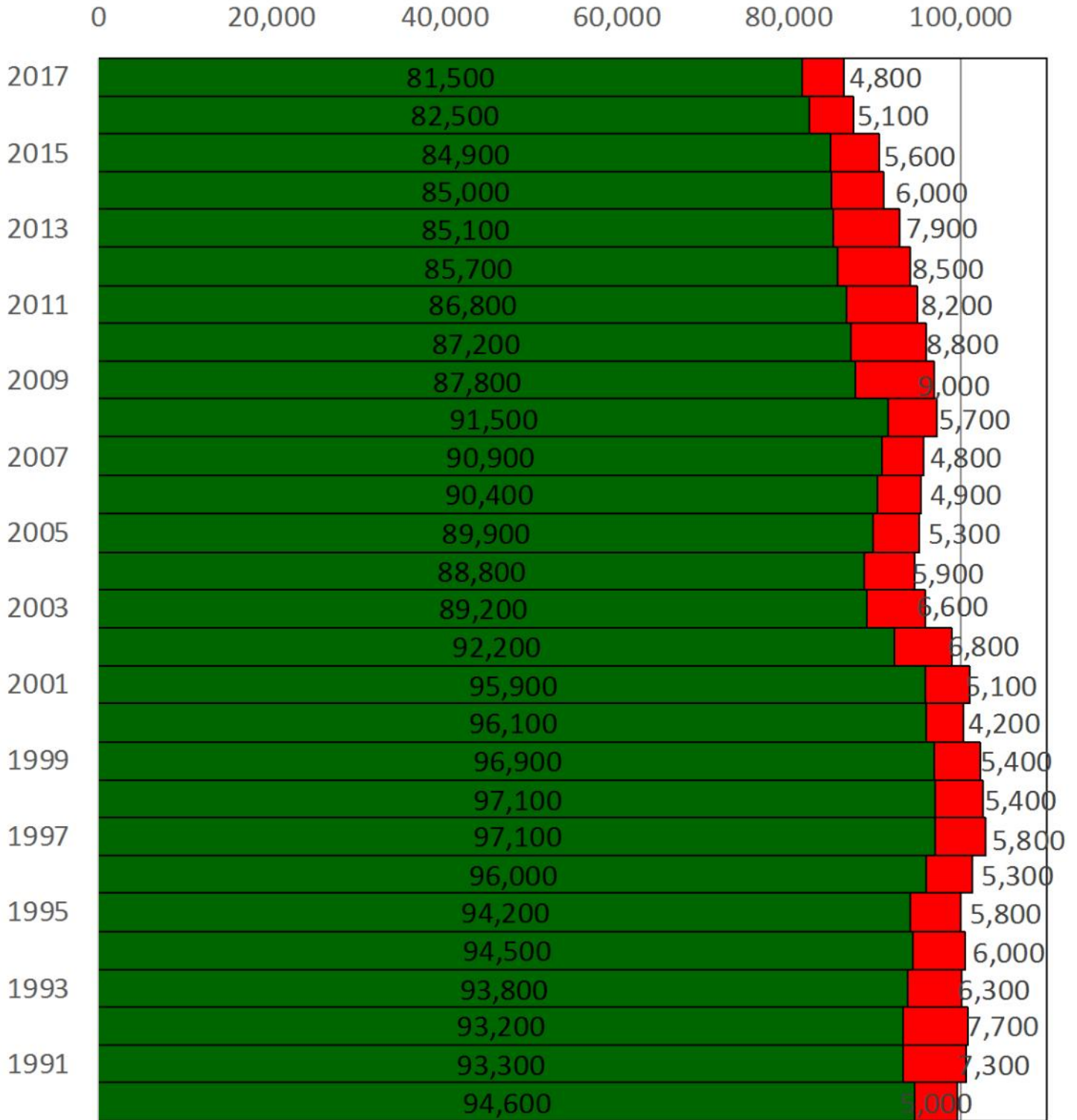


U.S. Census, 2016 5-year ACS

Workforce Totals

Chemung, Schuyler, Steuben Counties

■ EMPLOYED ■ UNEMPLOYED



Source: NYS DOL LAUS

For additional information, contact:
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 Economic Development Coordinator
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 Phone: (607) 962-5092

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