

REGENERATION

Improving connections
to address key issues
in the Genesee-Finger Lakes Region



July 2011

GENESEE TRANSPORTATION COUNCIL

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Overview

Regeneration

Regeneration is the process of renewal, restoration, and growth. It reflects the ongoing transformation of the Genesee-Finger Lakes Region:

- A global epicenter of mass production from the 1880s to the 1980s is transitioning into a leading edge hub for advanced manufacturing.
- A world-class area for primary agricultural production and dairying since the early-1800s is becoming a center for food processing, agricultural research, and agritourism.
- A renowned collection of colleges, universities, and small businesses is evolving into a hot bed for emerging industries, such as imaging, medical care, and telecommunications.

· An economy once dominated by local banks, department stores, and factories is now one of the great export-oriented regions of the country.

In other words, our region reflects our tradition of innovation and reinvention. While the region is not experiencing rapid population growth, it is full of people with a “can-do” attitude — and is quietly attracting even more.

The changes over the past few decades have been breathtaking and sometimes unsettling. The one constant amidst the change is perhaps the hardest to quantify: To live here is to enjoy a privileged quality of life.

Our Region in a World of Regions

The Genesee-Finger Lakes Region appears to have

weathered the deepest recession since the Great Depression better than most areas of the country.

Our region has learned to manage uncertainty and adversity, such as the tightening of credit for homeowners and businesses, a retrenching construction market, and cutbacks in spending from beleaguered consumers and businesses.

The recession will end and growth will resume. But our region, like the rest of the nation, will face a new set of challenges in the future.

Global economic growth is concentrating in a relatively small number of dynamic regions. These regions are characterized by innovation; entrepreneurship; an abundance of skilled workers; transportation and communications



connectivity; political and cultural ties to the global marketplace; a focus on sustainable development; and a high quality of life for people of all ages.

Productive agriculture and manufacturing placed the Genesee-Finger Lakes Region on the global stage long before the nine counties thought of themselves as a region. But to succeed in this era of rapid change, our region must compete on a global scale, not only in specific industries but as one of the world's best places to live, work, learn, and play.

Now, more than ever, the competitiveness of the world makes it imperative that our leaders think and act regionally.

Our region is poised for great success, but whether success is achieved depends on our

ability to work together in new ways.

Improving Regional Connections

In May 2010, the Genesee Transportation Council began convening representatives of the nine counties and other regional stakeholders around a straightforward and vital question: How can the Genesee-Finger Lakes Region improve its position in the global economy and its already high quality of life?

The intention was not to add a layer to local legislation and decision making, but to suggest a mechanism for better informing independent local decisions and strengthening the connections among them.

This report offers an assessment of our region

and recommendations for continuing to address our challenges together.

Compare to Compete

In the past, our region competed with other regions in Upstate New York and, later, with regions in the Southeastern U.S.

Today, we compete at a national and global level.

The eight regions compared in this report, like the Genesee-Finger Lakes Region, are diverse with changing economies. All are complex, encompassing a core city, many smaller urban centers, new and historic suburbs, and extensive rural areas.

Four are similar in size to our region's population of 1.2 million: Grand Rapids, Louisville, Providence, and Raleigh.



Four others are competitors in key industries: Omaha (agriculture and food processing), St. Louis (medicine and biotechnology), Tucson (optics and imaging), and Wichita (advanced manufacturing).

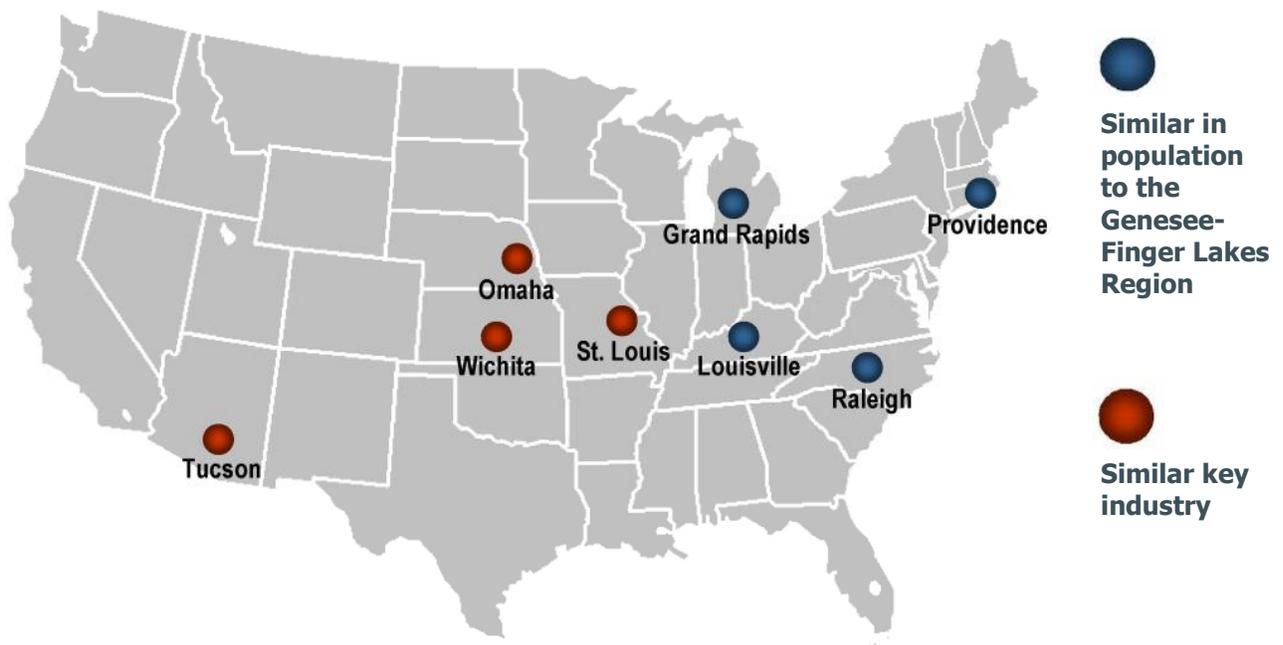
These regions can help indicate the types of resources our region will have to develop if it is to compete at a global level.

Increasingly, the Genesee–Finger Lakes Region competes

with other regions worldwide.

Dynamic global regions of similar population include Bhopal, India; Dublin, Ireland; Hsinchu, Taiwan; Lyon, France; and Ottawa, Canada.

Table 1—Comparison Regions





Who We Are

The Genesee-Finger Lakes region comprises nine counties — Genesee, Livingston, Monroe, Ontario, Orleans, Seneca, Wayne, Wyoming, and Yates — with the combined and complementary assets necessary to compete on a global scale.

Located in the center of Upstate New York, our region is defined by its exceptional land and water resources. It blends North American and international cultures, urban and rural lifestyles, and traditional and emerging industries.

The region's population growth rate since 1980 is the highest in Upstate New York, but slightly lower than the entire state when New York City and Long Island are included.

Despite the modest overall growth, our population is continuously changing as people are born, die, move to the area, and move away. Childbirth in the region remains high by historic standards, and deaths are increasing as the population ages. The out-migration of college educated adults is at the national average.

In-migration is low compared to much of the nation, and this, more than anything, accounts for our relatively slow rate of population growth.

But those moving into the region are younger, well-educated professionals relocating for employment, family, or lifestyle.

In 2008, for example, about 16,000 individuals moved into the region from a different state or country.

Of residents who moved to the region from out-of-state or abroad in 2008,

82.5%

are below the age of 35;

47.5%

have a bachelor's degree or higher



The median age of those moving in was 22.6, compared to the region's current median age of 38. Over 47 percent of our new residents had a Bachelor's degree or higher.

We are younger than we might think, but aging steadily. About 45 percent of our population is under the age of 35, slightly below the national average of 47 percent.

The fastest growing segment of the region's population is seniors. However, we may be aging more slowly than the rest of the country. The number of persons in the region 65 years of age or older is expected to increase by 44 percent over the next 25 years, much less than

the projected 116 percent increase for the nation as a whole.

As baby boomers in our region retire, they prefer to "age in place", or stay in the same community in which they raised their children, even the same house. About 95 percent of our seniors still reside in the region five years after their retirement.

The Genesee-Finger Lakes Region is the most diverse racially and ethnically in Upstate New York. The fastest growing segment of the population since 2000 is Latinos, followed by African-Americans. Recent immigrants come from just about all nationalities, ethnicities, and ancestries.

Since 1980, the region's population grew

8.1%

or more than twice as much as Upstate's 3.7% increase, but slightly less than the 10.4% growth for the state as a whole.

95%

of our seniors "age in place" in the region when they retire.



Economy

A Resilient Economy

The Genesee-Finger Lakes Region's gross domestic product of \$45.7 billion is larger than that of about half the countries in the world. The region's per capita gross domestic product, at \$43,345, would rank second among the G-20 nations — ahead of France, Germany, and Japan, and behind only the United States as a whole.

Since the start of the new millennium, the region's gross domestic product has grown at an average annual rate of 3.4 percent. Between 2000 and 2009, the region's per capita personal income also grew 3.4 percent per year, or equal to the national rate of income growth.

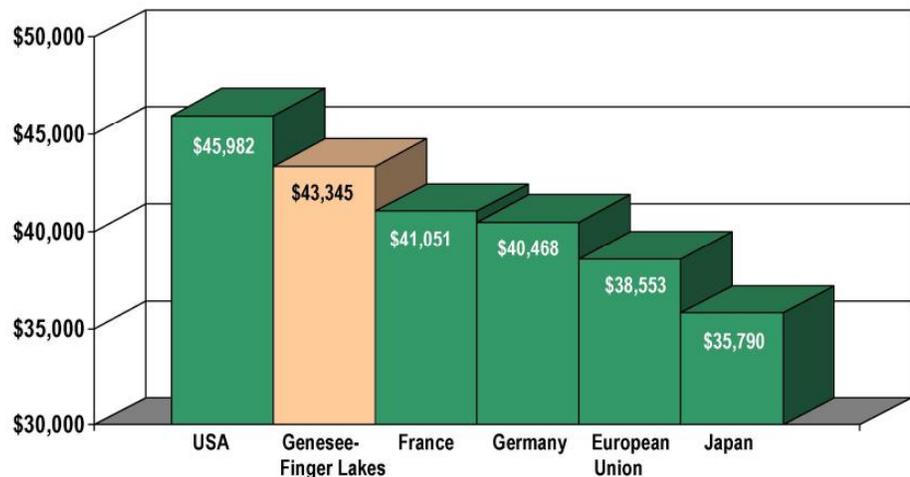
As measured by the economic "gold standard" of full-time, nonfarm, private-sector jobs, the region's economic

downturn continued after the official end of a national recession in 2001 and dipped further during the 2008 recession. The region generally shed these kinds of jobs throughout the past decade.

But if the number of "prime" jobs decreased, how can we explain the region's growth in productivity, as measured by GDP, and growth in personal income that kept pace with the rest of the nation?

Our Global Position

Table 2—
Gross Domestic Product Per Capita, 2008





The region's payroll is much more than private, nonfarm jobs. Total employment is a mix of full- and part-time jobs in the private sector, including farming, and the public sector, including local military personnel. Despite the national economic uncertainty, total employment in the region has changed only slightly since 2001. Stable overall employment throughout the region accounts for income and productivity growth.

But has this growth enabled

the region to become more globally competitive and to improve the quality of life of all residents?

Individuals and families clearly struggle when they change jobs involuntarily. Newer jobs may not provide the earnings necessary to support sustained increases in quality of life, even forcing people to work two part-time jobs to try to equal one full-time job.

From 2001 to 2009, average wages per job grew nearly 21 percent, rising to about

\$42,000 per job, and keeping pace with inflation. Nationally, average wages grew by seven percent after inflation to \$45,831. The region's earning power remains in the middle of that of comparable regions.

The relocation of workers across industries in the region appears to be permanent as our economy undergoes extensive structural change. But it's a measure of the resilience of our economy that jobs are still being created during such restructuring.

Table 3—Total Regional Full-time and Part-time Employment, 2001 and 2009

	GENESEE		LIVINGSTON		MONROE		ONTARIO		ORLEANS		SENECA		WAYNE		WYOMING		YATES		G-FL REGION	
	2001	2009	2001	2009	2001	2009	2001	2009	2001	2009	2001	2009	2001	2009	2001	2009	2001	2009	2001	2009
FARM EMPLOYMENT	1,087	1,042	1,172	1,144	936	838	1,409	1,321	977	989	837	710	1,717	1,552	1,704	1,375	911	1,048	10,750	10,019
PRIVATE NONFARM EMPLOYMENT	23,209	23,402	19,559	21,283	426,963	417,909	52,825	54,989	8,875	10,061	11,491	12,395	27,580	27,277	11,308	11,329	6,560	7,029	588,370	585,674
GOVERNMENT/GOVERNMENT ENTERPRISES	5,646	6,199	7,323	7,111	49,751	50,064	8,725	8,637	4,575	4,374	2,578	3,292	7,682	8,398	4,480	4,497	1,236	1,344	91,996	93,916
TOTAL EMPLOYMENT	29,942	30,643	28,054	29,538	477,650	468,811	62,959	64,947	14,427	15,424	14,906	16,397	36,979	37,227	17,492	17,201	8,707	9,421	691,116	689,609



The region is ahead of much of the nation in diversifying into the emerging industries that may propel us toward global economic leadership in the coming decades. Jobs in educational and health services sectors show persistent growth as manufacturing payrolls shrink. Professional and business services jobs — management

of companies, computer systems design, and temporary help services — are also slowly but steadily increasing. Even within the standard employment categories, shifts are occurring. Manufacturing processes and technologies in the region, for example, are rapidly advancing to reduce costs, improve quality, and

shorten product development and production times. The region’s traditional agriculture and food processing cluster now includes an important and growing agricultural biotechnology (agriculture and life sciences) component, which is frequently connected to nascent “green” businesses.

Table 4—Regional Mix of Nonfarm Jobs

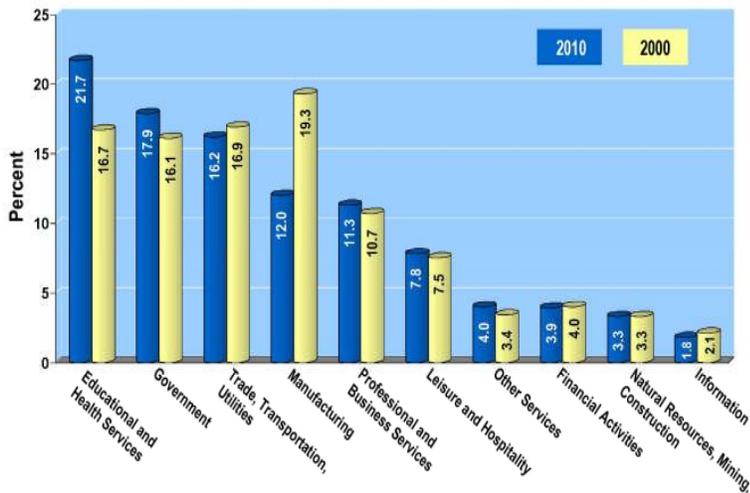
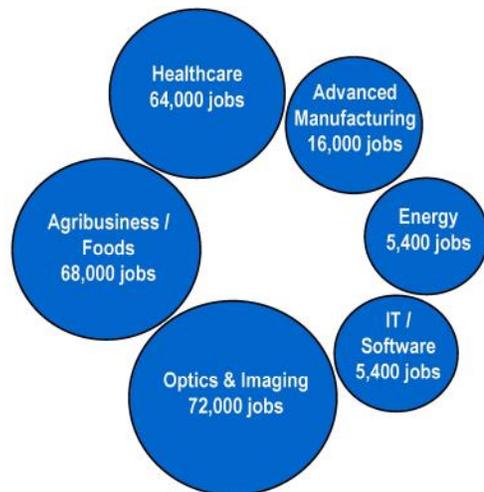


Table 5—Employment Clusters, 2010





Investing in Future Industries

Many recent industry successes can be tied to the region's academic institutions and research centers, which have captured a growing stream of research and

development funding over the last several years.

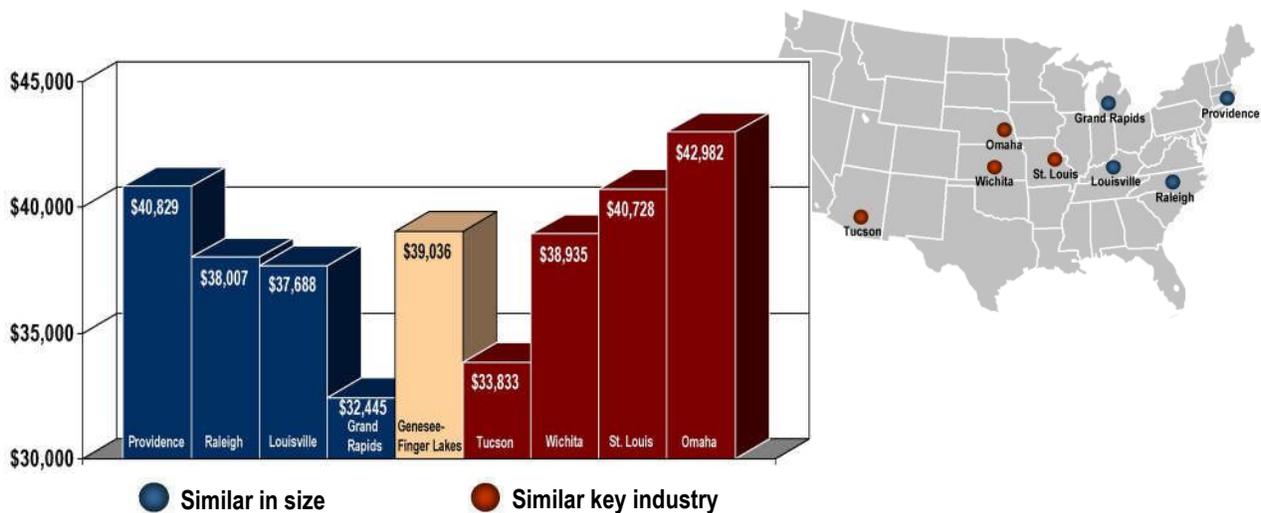
Total government-funded research and development expenditures in regional academic institutions topped \$304 million in 2008, a steady 5 percent per year increase since 2000. The Genesee-

Finger Lakes Region is well above the state and nation in R&D value per worker.

Commercialization of technology and spin-off ventures are emerging from this support for public research. Thirty-three diverse firms in the Genesee-Finger Lakes Region attracted

Our National Position

Table 6—Regional Comparison: Per Capita Personal Income, 2009





\$120 million from private venture capital firms between 2005 and 2008, primarily in start-up, early stage, and later stages of business development. This does not include venture capital provided directly by the state or by “angel” investors.

The region’s small share of total state venture capital funding — 2.5 percent — does not match its immense resources and enterprising talent. As a result, the Genesee-Finger Lakes Region

is likely losing some of the entrepreneurial momentum building in its research and development activities.

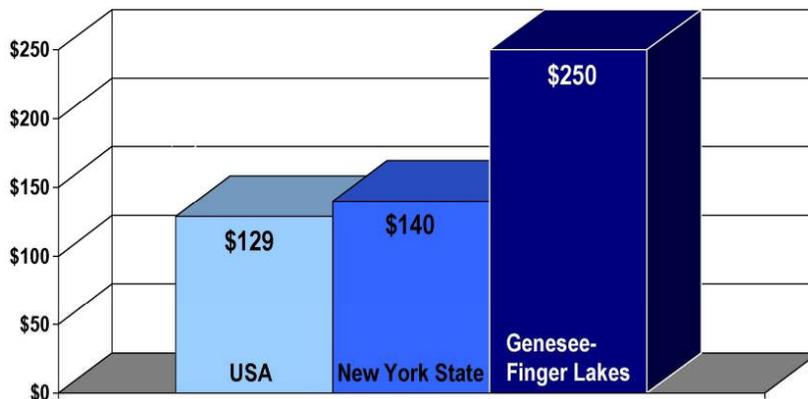
Moving Forward

On a global scale, the Genesee-Finger Lakes Region is probably not as competitive as it could be. Some advanced industries are gaining traction, others have less pull in global markets than those of other comparable regions. Many of these regions are working

Table 8—NYS Venture Capital Investments, 2005-2008

REGION	AMOUNT INVESTED (\$M)	% of Total
NYC	4,343	88.8
Genesee-Finger Lakes	120	2.5
Long Island	111	2.3
Buffalo	111	2.3
Ithaca	75	1.5
Albany	63	1.3
North Region	54	1.1
Other	12	0.2
Syracuse	5	0.1
TOTAL	4,893	100

Table 7—Academic R&D Per Capita, 2008



very hard to create diverse employment bases, advanced industry sectors with high-skill, high-wage jobs, and dynamic, innovative business clusters able to compete in the global marketplace.



Average earnings per job in our region are comparable to other regions of similar size, but remain behind the national average.

Over the last decade or so, the Genesee-Finger Lakes Region has come a long way toward building true economic leadership. Regional and subregional organizations now exist to promote overall economic development, enhance specific clusters, and attract operational capital.

But opportunities remain to move forward.

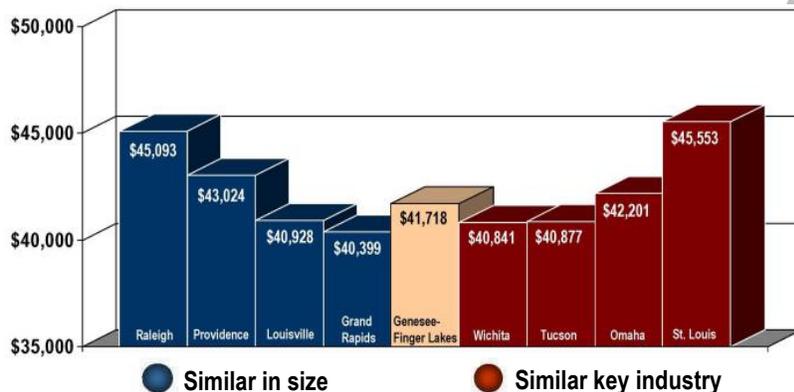
The region has the basis to compete, including cutting-edge industries, recognized academic institutions, high-caliber healthcare resources, and adequate transportation and communications infrastructure.

But it does not always have the organization to leverage these assets, and has yet to gain critical mass in some key

advanced industries. To truly engage in this fast globalizing economy, regional leaders must work together more consistently, effectively, and sustainably to encourage further diversification, support new businesses, and create jobs that provide meaningful benefits, competitive earnings, and opportunities for success. Doing so will advance our global competitiveness and yield quality of life benefits shared by all in the region.

Our National Position

Table 9—Regional Comparison: Average Wage Per Job, 2009





Talent

Our Finest Asset

People are the region’s most critical asset. The knowledge and skills of all residents — whether students, job-seekers, working families, or retired seniors — explain the Genesee-Finger Lakes Region’s tradition of creativity, ingenuity, and innovation.

Lifelong learning opportunities prepare students to be future citizens of this region, the

nation, and the world. Our educational system is increasingly critical for the region to compete in and benefit from the new global, innovation-based economy.

The United States has the world’s most well-educated population, as 27.5 percent of all residents over the age 25 have a postsecondary degree. The Genesee-Finger Lakes Region is slightly ahead of the U.S. average — 29.1 percent

of the region’s adults have at least a Bachelor’s degree — and considerably ahead of every major world economy. The region, through a combination of home-grown talent and the workers it attracts from other regions, is maintaining its lead over the rest of the country on measures of educational attainment. However, China and India have the world’s largest populations and the world’s largest educational

Our Global Position

Table 10—
Percent Population
with Bachelor’s
Degree or Higher,
2008

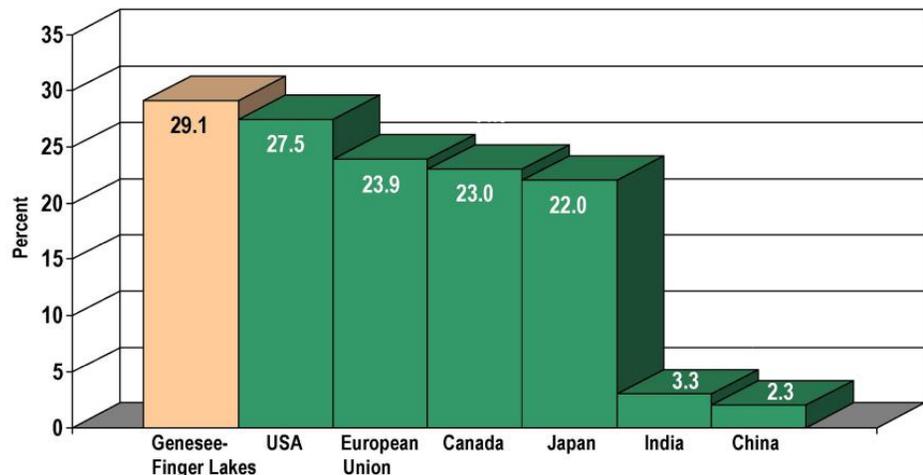
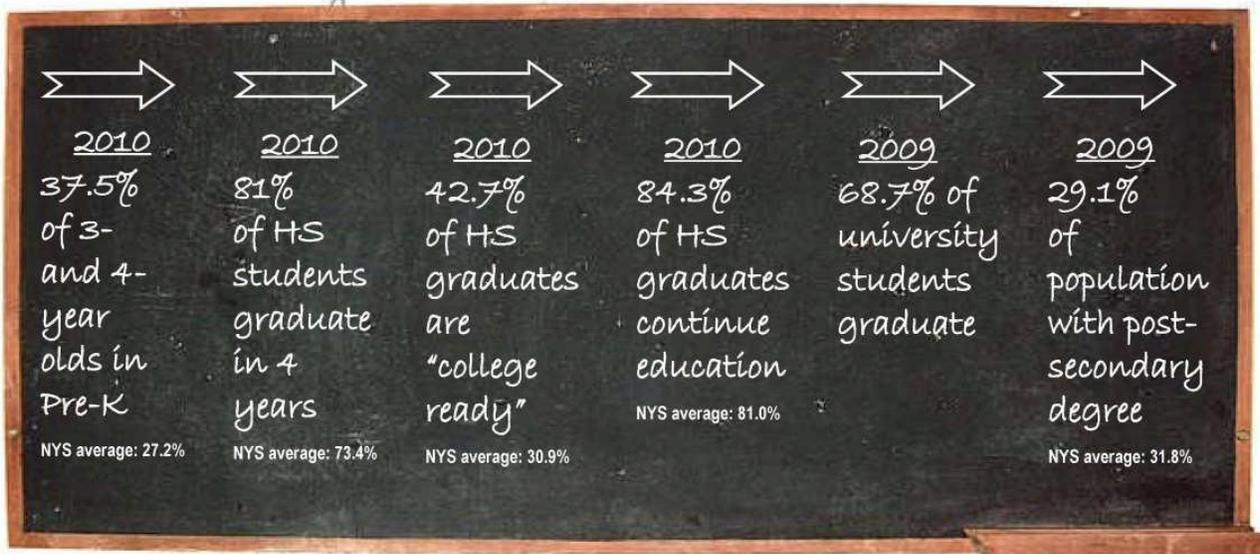


Table 11—The Genesee-Finger Lakes Region’s Education Pipeline



systems and are poised to graduate millions of skilled college students in coming years — placing the region’s global standing at risk.

Over the past couple of decades, New York State has worked to develop an interconnected system of educational services — from pre-kindergarten through college — that provides opportunities for youth through all stages of development. While the state provides an overarching governance structure, local decisions are crucial to the quality of education that a person receives.

In our region, generally, educational institutions today offer more choices for residents of all ages to develop practical skills and expand the horizons of their knowledge than ever before. Region-wide, workforce

training programs have retooled to meet the evolving needs of businesses. And performance measurements are in place to understand where progress is being made and where challenges remain. Clearly, the Genesee-Finger Lakes Region is strengthening its educational system, but this system is not yet without achievement gaps, and students of different backgrounds — urban, suburban, and rural — often have different outcomes.

Giving Kids a Head Start: Early Childhood Education

Starting out, 35.7 percent of the 3- and 4-year-old children in the region participate in voluntary pre-kindergarten programs operated by local school districts and are exposed to reading and writing at an early age. This

is better than the statewide pre-K participation rate of 27.2 percent. As a result, a very significant number of our children enter kindergarten classrooms for the first time ready to learn.

As they move through grade school, some of our children

Table 12—Percent Regional College Ready High School Students, 2010; and Adults with Post-Secondary Degrees, 2009

County	% "College Ready" High School Graduates	% Adults Age 25+ with Bachelor's Degree or Higher
Genesee	46.7	18.1
Livingston	48.7	22.2
Monroe	48.4	34.4
Ontario	49.1	29.8
Orleans	35.4	14.4
Seneca	32.3	18.5
Wayne	41.9	21.4
Wyoming	38.8	14.3
Yates	31.7	10.9
REGION	42.7	29.1
NYS	30.9	31.8
USA	n/a	27.5



are challenged in hands-on science labs or are able to enhance their computer skills. For others, mentoring connections with regional businesses showcase potential careers and help connect the everyday school experiences to future dreams. Yet others fall behind in math, reading, and writing and may not be supported by qualified instructors or innovative programs.

Preparing for Work or Higher Education: High School

Of the nation's 500 top-performing high schools in 2010, as rated by *Newsweek* magazine, 63 are in New York State. And of the state's top high schools, 10 are located in the Genesee-Finger Lakes Region, a proportion double the region's share of state high school enrollment.

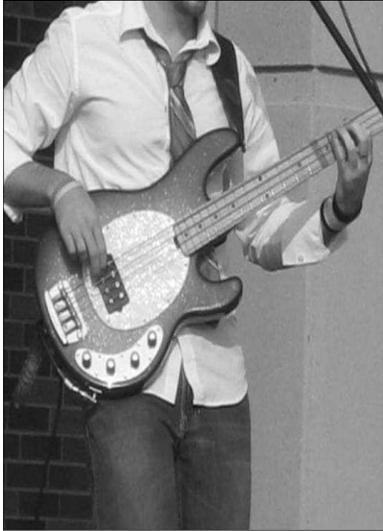
The region's students, in general, consistently perform above the state average in many important areas. About 81 percent of all high school students in the region graduate in four years, and nearly 43 percent graduate with advanced regents diplomas. Over 84 percent of graduates go to college. All of these rates exceed the performance of the state as a whole.

One of the most important statistics is the number of high school graduates who are college-ready, as measured by a series of standardized state tests. According to this metric, 42.7 percent of the region's high school graduates have the knowledge, skills, and behaviors to complete a college course of study successfully, compared to 30.9 percent statewide. However, African-American high school students in the region achieve

college-readiness at a 9.2 percent rate and Latino students at a 9.4 rate, less than the state averages of 12.8 percent and 14.9 percent, respectively. In general, urban and rural students perform less-well than suburban students. These differences illuminate the challenges that still exist in the region's high schools.

Not all students go to college. Over 8 percent of high school graduates — about 1,200 young people — enter the workforce and another 700 join the military each year. About 1,250 high school graduates also complete career and technical education programs sponsored by their school districts each year.

About half of the public school districts in the region have dual enrollment partnerships with community colleges, allowing eligible 11th



and 12th grade high school students to take college-level classes ahead of graduation. These early opportunities, and others such as the region's International Baccalaureate programs, career academies, experiential learning programs, and magnet schools, also help students prepare for further education or the workplace.

Children cannot be expected to learn without quality teachers. Yet, just 11.4 percent of all instructional staff in the region have a master's degree and 30 additional hours of graduate study or a doctoral degree, far below the statewide average of 36 percent.

Providing College Opportunities: Higher Education

In 2010, over 74 percent of the region's graduating high school students continued onto higher education within the state's network of community colleges (41.2 percent), universities (31.6 percent), and technical schools (1.3 percent). Another 10 percent went to out-of-state institutions of higher learning. The region's college continuation rate of 84.3 percent in 2010 is well ahead of the national average of 68.1 percent.

The Genesee-Finger Lakes Region is home to some of the best technical education centers and adult education programs in their fields — particularly through its community colleges — and these resources are essential to lifelong learning, on-demand worker retraining programs, and career building opportunities for students. Over 20,000 individuals

advance their skills each year through noncredit courses at the region's community colleges.

Our colleges and universities are preparing the region's future workforce and graduating students with the skills and motivation to succeed. The Genesee-Finger Lakes Region's honor roll of educational institutions includes top-ranked public and private colleges and universities, as well as a host of specialized institutions that enhance the region's strengths in areas ranging from engineering to medicine to the arts. These regional assets leverage existing strengths in industry, spur creativity and entrepreneurship, and provide communities with cultural focal points. Many are well-known nationally within their respective fields, and, as a group, have established the Genesee-Finger Lakes Region



as a world class center of higher education.

Supporting Today's Businesses, and Tomorrow's

A third of all post-secondary degrees (associate through doctorate) awarded in the Genesee-Finger Lakes Region in 2009 were in the sciences, technology, engineering, and mathematics. This share is above the historic U.S. average of about 17 percent and the New York State average of 24 percent, demonstrating the strengths of regional higher education institutions in many of these areas.

As our region looks toward the future, the sciences are increasingly crucial to emerging industries and global competitiveness. Educational institutions also provide for the region's broad professional

workforce and are the nurturing ground of future creative artists, entrepreneurs, and leaders in all fields. To fill the workforce needs of growing specialties, such as health care, tool and die making, green technologies, and engineering, regional leaders are diligently trying to create and enhance connections between businesses in these areas and schools. More partnerships, in and out of the classroom, could encourage budding talent and create opportunities for students to stay and work within the region.

Competing on Talent

Currently, 29 percent of the region's population has completed post-secondary education, placing the Genesee-Finger Lakes Region slightly above the national average and ahead of most comparable regions. These

Percent of degrees awarded in STEM* areas in the Genesee-Finger Lakes Region in 2009:

32%

*** science, technology, engineering, and mathematics**

16,000

Working-poor families in region in 2009



regions, like the Genesee-Finger Lakes Region, are striving to produce, retain, or attract talent with advanced degrees and enter the ranks of the world's most innovative economies. It's sobering to note that the most successful American regions, such as Denver, San Diego, Washington-Baltimore, and the San Francisco-San Jose area, are all much larger than the Genesee-Finger Lakes Region and its peers.

While the Genesee-Finger Lakes Region compares favorably with the world's advanced economies in terms of its educated workforce, this competitive advantage is slipping relative to fast advancing nations, particularly in training the highly-skilled, next-generation workforce that will form the basis of global industry in the future. As a community, the region must work together to provide quality jobs and lifestyle

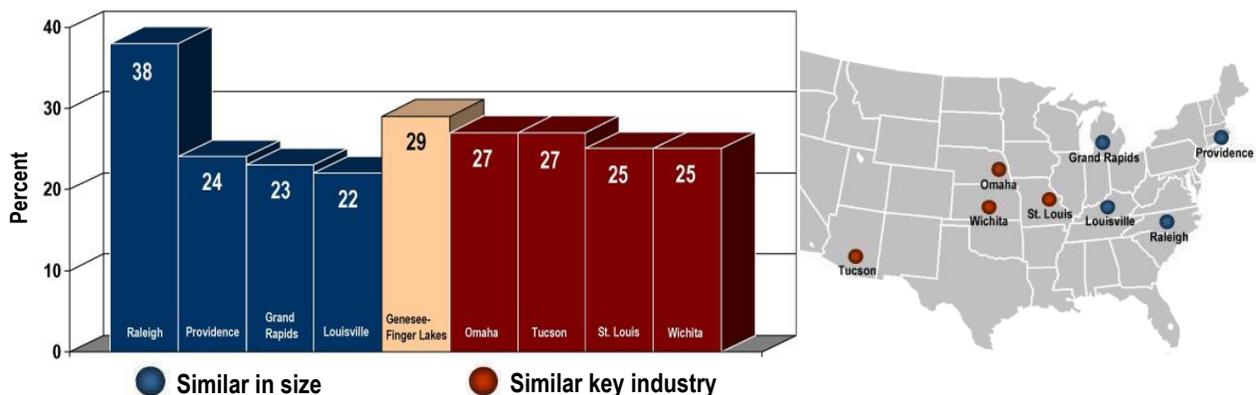
destinations to retain industrious post-secondary graduates, or risk exporting homegrown talent not only to larger American regions but also to the rest of the world.

Meeting the Needs of All Residents

The Genesee-Finger Lakes Region's businesses are diversifying and transitioning, but many of the new jobs

Our National Position

Table 13—Regional Comparison: Percent Population Ages 25+ with Bachelor's Degree or Higher, 2009





being created are not providing the level of earnings necessary to support all residents. From 2001 to 2009, average earnings kept pace with inflation, rising to \$42,000 per job. However, the region is beginning to fall behind comparable regions, and is not catching up to the earning power of the nation as a whole.

About 30 percent of homeowners and 50 percent of renters in the region have household ownership or rental costs greater than the accepted standard of 30 percent of monthly household income, making it tough for some families to get by. These residents are paying more than can be reasonably expected for shelter and the desired access to jobs, schools, and communities that often comes with it.

The rising cost of living and

relatively stagnant wages may contribute to hardships in the region, as more than five percent of all families in our region are living below poverty, even with at least one working family member. Currently, there are nearly 16,000 working poor families in the region at risk of being left behind. Racial, ethnic, and gender barriers to economic opportunity still exist and homelessness and poverty still persist.

Moving Forward

Partnerships are linking businesses, researchers, workforce development and economic development organizations, and regional colleges and universities. Colleges and universities, in turn, are strengthening meaningful relationships with high schools.

The region's P-20 education

system has few parallels nationwide, particularly in terms of high school graduation and college participation rates. Educators, policymakers, and other stakeholders are wrestling with the question of how to hold our schools and our teachers, much like our students, to higher standards and greater performance in order to gain an edge in the future global economy.

But the linkages from early childhood education to university graduation are not yet seamless, and regional leaders can do more to build a truly coordinated system of education. The combined resources of the region can help ensure educational opportunities for an increasing number of students while improving in key areas where the Genesee-Finger Lakes Region is still catching up to the nation and the world.



Places

Our Legacy

Our region's name derives from its major water resources: the Genesee River, which flows into Lake Ontario, and the Finger Lakes. Near these waterways lie the communities in which we live.

Stewardship of the Genesee-Finger Lakes Region's natural and built environments is an economic and social imperative. Our natural areas are connected to, not only the communities in which we live, but also our competitive position in agriculture and tourism, as well as our emerging leadership in biotechnology. Similarly, encouraging a variety of distinctive places to live and work is critical to meeting the needs of our changing population and economy.

Our region's legacy of environmental protection is mixed. In some areas, such as protecting watersheds, ensuring water quality, and providing public access to waterfronts, the region advanced its environmental stewardship long before "being green" was in vogue. In other areas, such as linking land use planning with transportation planning so that people have alternatives to the car, much work remains to be done.

Protecting Natural Areas

One measure of a region's commitment to the environment is the percent of land and water areas protected for current and future generations. More than 60 percent of the Genesee-Finger Lakes

Region's land area is under federal, state, local, or private management, as agricultural districts, public parklands, state forests, or wildlife management zones. Such conservation of regional natural areas provides valuable services, such as sustaining agricultural practices, protecting groundwater recharge areas, expanding recreational possibilities, and containing the cost of government services by providing a buffer to urban growth.

Protecting our ecosystems requires a regional vision that connects natural systems and human communities. For example, water quality in the region meets high standards and is generally better than the state and nation, yet every county in the region



has a river, lake, or stream on the state’s list of impaired waterways, and most of these waterways are used for recreational purposes.

Similarly, maintaining a heritage of agriculture and rural character is important to the way of life of residents in much of the region, yet the

region’s agricultural industry faces increasing challenges from development pressure, uncertain labor supply, and global competition.

Table 14—Resource Use in the Genesee-Finger Lakes Region



DOMESTIC WATER CONSUMPTION
(gallons per day, per capita, 2005)

NON-RECYCLED WASTE GENERATED
(pounds per day, per resident, 2010)

ELECTRICAL USE
(kwh per year, per household, 2007)

GASOLINE CONSUMPTION
(gallons per vehicle, per year, 2007)

GFL.....136
NYS.....228
USA.....299

GFL.....3.2
NYS.....5.1
USA.....4.6

GFL.....4,850
NYS.....6,882
USA.....11,480

GFL.....588
NYS.....499
USA.....583



Creating Thriving Communities

The Genesee-Finger Lakes Region is home to diverse built environments, including established cities and villages, newer neighborhood developments, and country and rural habitats. Despite this diversity of choice, the population of suburban areas continues to be the region's fastest growing, as it has been since the 1960s. The percentage of residents living within the region's cities and villages totaled 34 percent in 2010, a proportion that has declined 1.5 percent from 2000.

Over the past 20 years, the number of acres of land developed in the region increased about 40 percent, while the population increased 4 percent. As each new acre is developed at low densities,

pressures on critical lands can be expected to increase in many parts of the region, as will challenges to personal mobility.

Linking the Genesee-Finger Lakes Region's diverse centers to each other, and to the rest of the state, nation, and world, is key to providing better connectivity and greater choices for moving people and goods. The region is overwhelmingly dependent on cars and trucks, and residents are driving more often. Daily vehicle miles traveled in the region increased approximately 40 percent from 2001 to 2009. On a per capita basis, residents drive over 6,100 miles a year.

Seniors are the region's fastest growing demographic group. While many seniors will have no difficulty getting

from place to place, an increasing number will need assistance to travel. Personal mobility is also a growing concern for youth, single parents, the unemployed, low-income workers, the disabled, those who do not drive or own a car, and those for whom transportation costs are a burden.

A great challenge for our region is ensuring the ability of everyone to travel conveniently where he or she needs to go in a reasonable amount of time.

Throughout the nation, compact built environments are enjoying a renaissance as more people desire to live, work, and play within a single community. Industries also benefit from clustered activity centers that attract professionals and encourage knowledge sharing. People in



compact areas can be served more efficiently by a variety of transit modes, including walking, bicycling, and public busses. Between 2000 and 2010, average weekday transit ridership in the region increased 20 percent, largely in response to rising gas prices and lower bus fares. Even so, only 2.6 percent of commuters in Monroe County, 1.9 percent in the five-county metro area, and fewer than

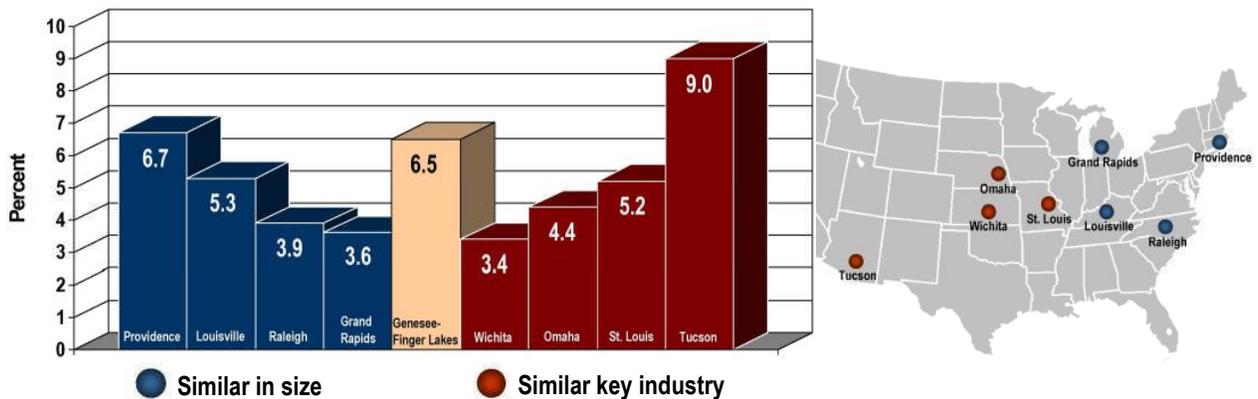
0.5 percent in other counties, use public transportation to get to work. This is far behind many larger, thriving regions in transit use.

Providing transportation alternatives to the car is a national challenge, and the Genesee-Finger Lakes Region is no better or worse than the comparison regions in this document. However, a major factor in the future growth

and competitiveness of mid-size regional economies will be the ability to provide meaningful transportation choice and to increase personal mobility. Advanced regional economies depend on the availability of transportation systems that can accommodate the needs of residents, visitors, and businesses.

Our National Position

Table 15—Percent of People Who Get to Work by Other Means than Personal Car or Truck, 2009





Personal Physical Well Being

The Genesee-Finger Lakes Region’s healthcare institutions are world-class assets, though access to healthcare poses problems for some residents. In 2009,

88.3 percent of the region’s adults reported having some type of health insurance, slightly above the state and national averages.

Personal health status and quality of life are related. Healthy individuals have more lifestyle options and,

generally, fewer medical expenses. One measure of a person’s — and the region’s — physical well being is behavioral risk factors. Minimizing risk can shape all phases of life, from a healthy birth to dignified aging.

Table 16—Physical Well Being

AT BIRTH:

7.2 percent of the children born between 2006 and 2008 weighed less than 5.5 pounds. This is considered a significant indicator of both the care received by the mother and the child’s future health. The proportion of low birth weight children born in the region is one percent less than both the state and the national averages.



PERCENT LOW WEIGHT BIRTHS, 2006-2008

GFL.....	7.2
NYS.....	8.2
USA.....	8.2

IN ADOLESCENCE:

about 30 percent of public grade school students were considered at risk of becoming, or already, obese in 2009. This is slightly less than the state and national averages, but still affects nearly one third of the region’s youth. The health habits of teenagers today directly influence their future as productive and involved adults.



PERCENT OVERWEIGHT OR OBESE GRADE SCHOOL CHILDREN, 2009

GFL.....	30.0
NYS.....	32.9
USA.....	33.0

AS ADULTS:

81.5 percent of adults over 18 engaged in routine physical exercise in 2009, better than the state and nation. Moderate exercise is proven to reduce the risk of heart disease, diabetes, osteoporosis, depression, and other health conditions of adults.



PERCENT ADULTS WHO ENGAGE IN REGULAR LEISURE TIME PHYSICAL ACTIVITY, 2009

GFL.....	81.5
NYS.....	73.6
USA.....	76.2

LATER IN LIFE:

7.6 percent of residents 65 years and over had incomes below the federal poverty level in 2009, an indicator of vulnerability within the aging population. This proportion is above the region’s 2000 poverty rate for seniors of 6.8 percent, but remains several percentage points lower than the state and nation.



PERCENT SENIORS LIVING BELOW POVERTY LEVEL, 2009

GFL.....	7.6
NYS.....	11.8
USA.....	9.8



A Sense of Community

The social ties that bind people together in the region are a key aspect of quality of life. The Genesee-Finger Lakes Region's residents are politically and civically involved. The region's voter turnout regularly exceeds that of the state and nation. Over 62 percent of the region's residents voted in the 2008 presidential election, for example, compared with 57 percent for the nation and 51 percent for New York State.

Residents also volunteer more frequently than the nation. In 2006, 31 percent of adult residents volunteered at least 12 times during the year at their local homeless shelter, place of worship, neighborhood association, or other charitable group. This is higher than the

national average of 23 percent.

The Genesee-Finger Lakes Region also supports a vibrant cultural community, home to approximately 600 arts and recreational non-profit organizations — or five for every 10,000 residents — a measure of the capacity of this sector to provide further amenities in the region.

Moving Forward

The Genesee-Finger Lakes Region is endowed with an overall abundance of natural and community assets.

Our region has seen returns from long-standing commitments to land and water preservation, recycling and resource conservation, and public health and prevention. Our future environmental legacy depends on coordinating regionally ongoing

environmental management initiatives and working together to address the next generation of environmental challenges, such as linking land use planning and transportation planning.

Opportunities abound for the region's leaders to advance environmental stewardship as a competitive advantage. The region can use its diverse communities and vast natural areas as "living laboratories" for conducting university research, demonstrating best practices, and implementing new place-based solutions for a sustainable future.

To compete at this level, the Genesee-Finger Lakes Region must establish broad regional goals by which to gauge progress. Existing cooperative programs and relationships are a solid foundation on which a regional legacy of sustainability can be built.



Telling Our Story

A Desirable Place to Live (or Not)

If we accept that the Genesee-Finger Lakes Region operates in national and international marketplaces, then it follows that we have to distinguish ourselves in those markets. Successful businesses and talented individuals can — and do — choose where to locate.

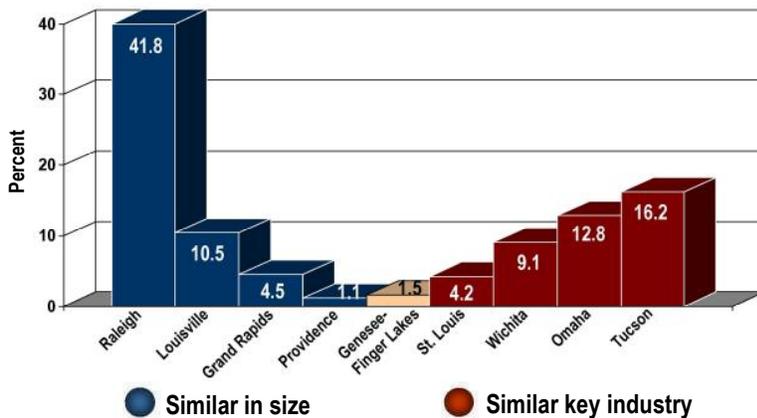
Regions recognized as having desirable and distinctive characteristics, be they economic, cultural, environmental, or lifestyle, attract the most businesses and people.

Many studies are done each year to evaluate the desirability of places across the United States by examining a wide range of concepts. Perhaps the single

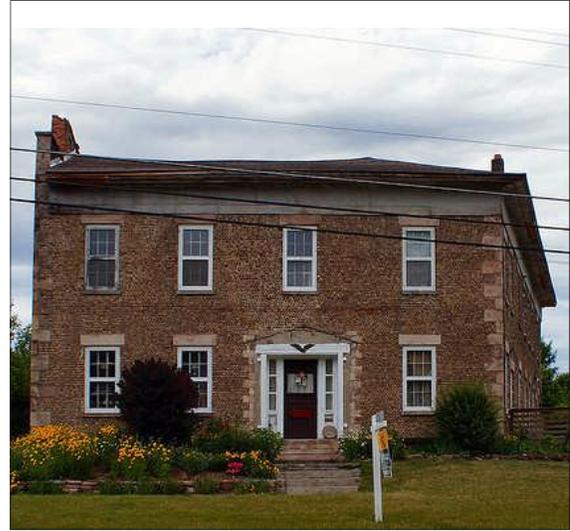
most important measure is the number of people choosing to stay, move in, or move out of a region. In essence, people vote with their feet. More to the point, relocation decisions usually take into account job availability, cost of living, educational opportunities, cultural and recreational amenities, public health and safety, weather, and the overall perception of an area as a place to start a life.

Our National Position

Table 17—Percent Regional Population Growth, 2000-2010



● Similar in size ● Similar key industry



The Genesee-Finger Lakes Region’s population growth over the past decade is modest compared to the nation as a whole and our comparison regions. Our region also ranks low in terms of international and domestic migration levels — the number of people moving into the region from elsewhere. However, data suggest that in 2009, as economic and housing market difficulties impacted other regions more severely than ours, the Genesee-Finger Lakes Region began to attract new residents from other places in the U.S. at a higher rate.

Navigating Uncertain Times

The Genesee-Finger Lakes Region already has been through a couple of hard decades of economic

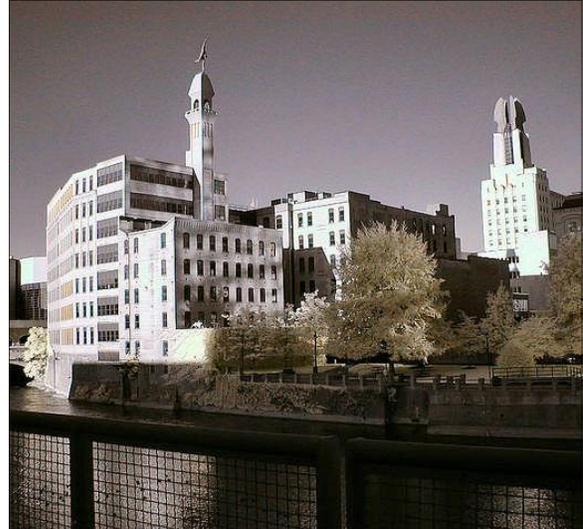
restructuring, and the current national economic downturn is proving how adept we can be at navigating uncertain times.

Networks of business organizations, educational institutions, small business development centers, and technology incubators are in place to re-tool career workers for new occupations, train recent graduates for in-demand jobs, sustain homegrown entrepreneurs, and attract and support business development for the global marketplace. Over the past 20 or so years, many organizations have been reorganized and new ones created to have a wider and greater impact on our environment, encourage creative communities, improve health outcomes, and ensure

Table 18—Percent Change in Domestic Migration

REGION	2000-2009	2008-2009
Raleigh	24.2	1.84
Tucson	8.5	0.23
Louisville	3.0	0.17
Omaha	1.0	0.16
Wichita	-1.1	0.65
St. Louis	-1.6	-0.16
<i>Genesee-Finger Lakes</i>	-2.5	0.00
Providence	-3.1	-0.42
Grand Rapids	-4.2	-0.76

the safety of residents throughout the region or in parts of the region. Listed on the back cover of this document are organizations, programs, and initiatives that demonstrate a willingness to think beyond traditional



Collaboration on improving the region's quality of life, therefore, has become essential to retaining and attracting families and jobs.

Quality of life is about people. The health, financial security, safety, involvement, and general well-being of residents contribute to the region's overall desirability. And this brings us back to our initial concern: What must we be doing now to make our region more distinctive, desirable, and competitive on a national and global scale?

Advancing Our Assets

The Genesee-Finger Lakes Region is rich in special landscapes, economic diversity, arts and cultural heritage, and population

characteristics. Many cherished assets have a narrow, local significance — a crooked tree, a painted boulder, or an obscure local custom (often celebrated with a summer festival). Moreover, we are generally proud of our past, supportive of innovation, open to inclusion, protective of our communities, and respectful of rules.

All of these assets and mindsets are critical to the quality of our lives and can be affected by regional cooperation. Our efforts to strengthen or improve these areas may be uneven, but where progress has been made over the past 20 years it most often reflects a commitment to collaboration and action. The fact that we are outperforming the nation during the current recession

may be taken as evidence that positive returns accrue to the region when public, business, and community leaders work together.

However, cooperation in the region is often driven by an instinct for survival and takes the form of efforts to save or preserve a particular asset, community, or job source. Programs and initiatives developed around regional issues with regional perspectives are relatively rare.

But cooperating to not lose ground is all too frequently another way of saying that we are content simply to be average, and this will not help the Genesee-Finger Lakes Region advance to a leading position in the nation and world.

Table 19—Genesee-Finger Lakes Region’s Brand Assets



Moving Forward

Our existing foundation for action positions the Genesee-Finger Lakes Region well for the future, but key challenges remain unaddressed or in need of further cooperation.

The highly fragmented nature of the region’s public, private, and civic sectors can be a barrier to progress. Moreover, current New York State policies, programs, and funding mechanisms seldom encourage regional communication and cooperation. As a result, there is little sense of a regional identity in most of the state’s regions and intense competition among municipalities for development. Competition may foster mistrust among local governments, discouraging business and community

leaders from leading regional initiatives if they do not have the support of public officials.

These obstacles, like winter weather and high taxes, can be mitigated or overcome by:

1. *Establishing a network of regional leaders*

Few good ideas happen without leadership, and currently there is no group to represent the region as a whole. Regional leadership should include the executives of each of the nine counties in the region and a diverse geographic and demographic mix of representatives from business and civic organizations that are willing to engage in issues which cross jurisdictional boundaries. The group would create and take ownership of a Regional Compact.

Are they really problems?

Average January temperature:

Genesee-Finger Lakes

24°

Toronto

21°

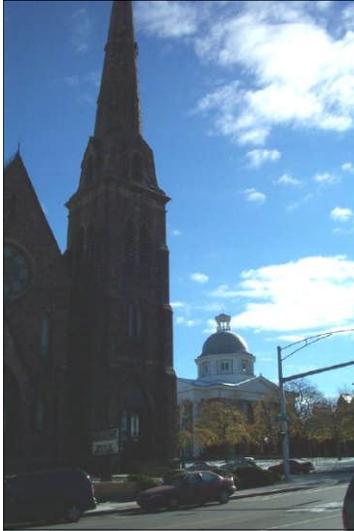
Cost of living, including taxes (national average = 100):

Genesee-Finger Lakes

83

Boston

162



2. *Creating and ratifying a Regional Compact*

A regional compact or agreement is a statement of general goals or principles to build unity around issues of regional importance, while respecting individual community identity. It could, in a very real sense, function as a regional vision and a clear indicator of what kind of region we want to be.

For our region, a compact might express a willingness to work together to create a prosperous, safe, and healthy region by:

- Encouraging active community engagement and capacity building.
- Promoting healthy lifestyles.
- Addressing issues of disadvantage in our communities.
- Addressing crime.

- Helping local communities create, maintain, and enhance a sense of place and local identity.

- Supporting a strong, resilient, and diversified economy that grows prosperity in all parts of the region.

- Conserving and managing rural areas to enhance their contributions to the regional economy and regional landscapes.

- Enhancing the interdependence of rural, urban, and suburban communities.

- Optimizing the contributions of natural environments to the region's livability, health, lifestyles, and economy.

- Protecting the region's cultural heritage, including historic places.

- Fostering a regional identity based on our assets and competitive advantages.

A formal regional compact would significantly strengthen the funding requests of organizations involved in activities which support the goals of the compact. It would also guide a Regional Problem Solving Mechanism.

3. *Developing a mechanism for community-focused regional problem solving*

Communities in the region may share the same goals, but that doesn't mean they can achieve those goals in the same way. For example, enhancing economic and community development in a rural village may require a very different approach than in an urban neighborhood. Strategies may differ even between adjacent municipalities in the same county or between neighborhoods in the same community. An organization is needed in the region to work with



communities to find solutions that advance the goals of the regional compact, but are tailored to specific, localized conditions.

Universities are performing this role in many parts of the country, including the Genesee-Finger Lakes Region. Successful university-community partnerships take many forms from student volunteerism to major changes on the part of universities that may involve the creation of new institutes or centers with new course offerings, research paths, and tenure criteria. Our region is fortunate to have many very significant university-community partnerships, most of which are focused on business development, public health, or public education. However, there are few partnerships to help communities and neighborhoods that are facing hardship or wrestling with persistent problems

plan and implement policies and initiatives that build on their assets and improve the quality of everyday life so they are not left behind.

A partnership is a two-way street, and if communities expect universities to redirect significant economic and intellectual resources to community problem solving, they must be prepared to become "living laboratories" by:

- Demonstrating a commitment to long-term change and partnership.
- Showing faculty members that there is a significant link between their work and their department's mission and the needs of the community.
- Committing to utilizing the faculty member's academic and professional expertise within all possible reason. A community can't just say "thank you" and put a study on the shelf or disregard a

new technology; it must be implemented.

- Recognizing that new knowledge is the ultimate lifeblood of universities, and that one of the goals of the university-community partnership has to be the generation of new knowledge for the academic discipline, which students and professors can disseminate without hindrances from the community.

In recent years, the Genesee-Finger Lakes Region has shown real strength by working together. While progress has been made on some key issues, other areas are still in need of improvement. The development of active regional leadership, goals to guide and evaluate the activities of supporting regional organizations, and a problem solving mechanism focusing on everyday community life could well become our greatest accomplishment.

Data Sources

Overview

- Immigration data, including number, age, income, and educational attainment, are from the American Community Survey, 2009, tables on geographical mobility B07001, B07002, B7009, B7010, B7011.
- Outmigration information on college-educated adults is from *A Brain Drain or an Insufficient Brain Gain*, Federal Reserve Bank of New York, 2007.
- Aging-in-place data are from *Retirement Migration in the 2000 Census*, AARP, 2005.
- All other demographic data are from the U.S. Census Bureau's decennial censuses.

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- The Genesee-Finger Lakes Region's gross domestic product is found in *U.S. Metro Economies 2010*, IHS Global Insights, 2011.
- International GDP data are from *World Development*

Indicators, World Bank, April 2011.

- Per capita personal incomes are from the Bureau of Economic Analysis, Regional Economic Accounts, table CA1-3.
- Total full- and part-time employment is found at the Bureau of Economic Analysis, Regional Economic Accounts, table CA25N.
- Average wage per job data are from the Bureau of Economic Analysis, Regional Economic Accounts, table CA34.
- The regional mix per job is taken from *Finger Lakes Region: Share of Total Nonfarm Jobs by Supersector, 2000 and 2010*, New York State Department of Labor, 2011.

· Economic cluster information and job totals are from *Finger Lakes Region Industry Cluster Analysis*, New York State Department of Labor, 2011.

· R&D expenditures for the Genesee-Finger Lakes Region are at ACTRochester.org, a

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- Venture capital information and data are from *Venture Capital and Seed Activity in New York State: Statistics for Upstate and Downstate 2005-2008*, Excell Partners, 2009.

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- Information on adult post-secondary degrees is from the American Community Survey, 2005-2009, (Genesee-Finger Lakes Region and U.S.); Census 2000 (other U.S. Regions); Federal Reserve Bank of Dallas, *Economic Letter*, vol. 3, no. 8, August 2008 (India and china); and Statistics Canada, *Educational Portrait of Canada, 2008* (Canada, EU, Japan).

Data Sources

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- The 2010 national college continuation rate is from the Bureau of Labor Statistics' Current Population Survey.
- Information on STEM degrees awarded annually is from *Science, Technology, Engineering (STEM) Education: Background, Federal Policies, and Legislative Action*, Congressional Research Service, 2008 (national); ACTRochester.org (state); New York State Department of Education, ORIS, *Degrees by Sector 2008-09* (regional).
- The number of persons taking noncredit courses at regional community colleges is from the individual colleges.
- Data on families in poverty are from the American Community Survey, 2005-2009, *Poverty Status in the Past 12 Months of Families*, table S1702.
- Data on household costs are from the American Community Survey, 2005-2009, *Percent of Mortgage Owners Spending 30 Percent or More of Household Income on Selected Monthly Owner Costs*, map M2513; *Percent of Renter-Occupied Units Spending 30 Percent or More of Household Income on Selected Monthly Owner Costs*, map 2515.

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- Data on the amount of land area under formal public and private management and the increase in developed land area are from the Genesee/Finger Lakes Regional Planning Council, *Finger Lakes Open Lands Conservation: A Profile of Land Use, Demographics, and Socio-Economic Data in the Genesee-Finger Lakes Region*, 2010 (data on the amount of developed land are updated with population information from the 2010 Census).
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Energy Research and Development Authority, *New York State Energy Profiles: 1993-2007*; (gasoline, national and state electrical); GeoCommons (regional electrical); New York State Department of Environmental Conservation, *Beyond Waste: A Sustainable Materials Management Strategy for New York State*, 2010 (national and state nonrecycled waste); Casella Waste Systems, Inc. (regional nonrecycled waste, estimated from Ontario County totals).

- Proportions of residents living in cities, towns, and villages are from the U.S. Censuses, 2000 and 2010.

- Daily vehicle miles traveled are from the *National Household Travel Surveys, 2001 and 2009*, Table 20.

- Average weekday transit ridership is from the Rochester Genesee Regional Transportation Authority's *Comprehensive Plans, 2003 and 2011-12*.

- Means of transportation to work data are from the American Community Survey, 2009, *Community Characteristics by Sex*, table S0801.

- Personal well being data are from the New York State Department of Health, *Community Health Indicator Profiles* (low birth weight) and *County Indicators for Tracking Public Health Priority Areas* (health insurance coverage, physical exercise); Childhood Obesity Action Network, *State Obesity Profiles 2009* (state and national obesity); University of Rochester Medical Center, *Surveillance Study for Tracking Public Health Priority Areas, 2009* (estimated regional obesity); US Census 2000 and the American Community Survey, 2005-2009, *Percent of People 65 Years and Over Below Poverty Level in the Past 12 Months*, map 1703 (seniors living in poverty).

- Information on voter and volunteer participation is from ACTRochester.org.

- The number of cultural and recreational nonprofits is estimated from various databases and phone directories.

Telling Our Story

- Regional population growth data (metro areas) are from the U.S. Census Bureau.

- Domestic migration data are from the U.S. Census Bureau, *Components of Population Change*.

- Average January temperatures are from the National Weather Service and Environment Canada.

- Cost of living comparisons are from Sperling's Best Places.

- Community responsibilities in university-community partnerships are adapted from the U.S. Department of Housing and Urban Development's Office of University Partnerships.

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23—*Extended Family*

24—*High School Football Game*

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29—*Bully Hill Wine Bottle*

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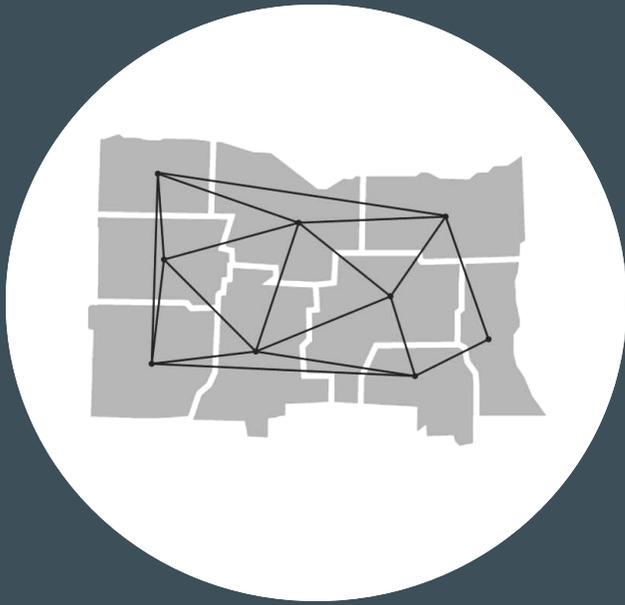
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SPECIAL RECOGNITION TO THE MANY MULTI-COUNTY ORGANIZATIONS AND INITIATIVES MAKING A DIFFERENCE IN THE GENESEE-FINGER LAKES REGION, AMONG THEM:

- Arts and Cultural Council for Greater Rochester
 - Center for Emerging and Innovative Sciences (CEIS)
 - Finger Lakes Institute
 - Finger Lakes-Lake Ontario Watershed Protection Alliance
 - Finger Lakes Regional Health Care Agency
 - Genesee/Finger Lakes Regional Planning Council
 - Genesee Land Trust
 - Genesee Transportation Council
 - GLOW Workforce Investment Board
 - Greater Rochester Enterprise
 - Rochester Area Community Foundation
- ...Your help needed to add to this list!*