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Regional Economic
Development Councils

2020 Economic Recovery Strategy: **WESTERN NEW YORK**



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PART ONE

Executive Summary

WNY will focus recovery and resiliency efforts in three main ways, building upon existing programs already underway and creating new programs when needed:



WNY has to fully embrace and immerse itself in technology to prosper in a post-COVID economy.

New technology investments will impact all aspects of the region such as public broadband and tools for remote work/remote learning, providing opportunities for reskilling and upskilling unemployed and underemployed workers, smart cities tools, and new opportunities for startups and entrepreneurship.



We must commit to investing in those most affected by the pandemic.

Our communities of color have borne the brunt of COVID-19's spread and its economic wake and must be our primary focus. We must ensure access to new technology and training, increased representation in all industry sectors, establish opportunities and pathways for new business ventures, and encourage placemaking investments in all neighborhoods.

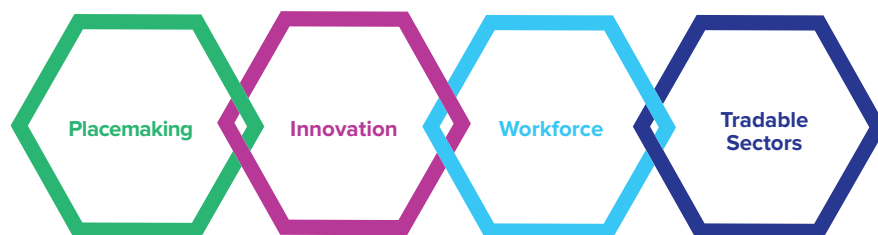


Our businesses will need our help to become more resilient.

Disruptions to the region's economy resulting from the COVID-19 pandemic had measurable impacts on the business community. In order to fully recover we will need to establish new programs and provide resources that provide technical support needed to help achieve a skilled and inclusive workforce, establish clear plans for succession, and understand the need for and how to innovate their businesses in a way that allows them to remain sustainable in the face of future crises.

Our four pillars are still relevant and we will stay the course while adjusting to the new economy.

New York State drives economic growth by investing in **placemaking, **innovation**, our **workforce** and **tradable sectors**.**



PLACEMAKING STILL NEEDED, BUT MUST ACCOMMODATE NEW REALITIES

In a world where social distancing is the new normal, our public spaces and built environment are more important than ever and we must fully address new needs created by the COVID-19 pandemic. First and foremost, the right infrastructure—including high-speed broadband access for all—is critical in this remote access world. New, more flexible models for facilitating work, school, childcare, and networking, must all be implemented in an inclusive, diverse manner. “Public square” places will continue to be important for respite, provided that measures to promote safe use are incorporated, and we must incorporate these amenities into all neighborhoods.

In addition, realities of the pandemic could even open new opportunities for use of legacy buildings for city-to-city remote working and collaboration, so we must be open to new smart growth opportunities.

INNOVATION IS CRITICALLY NEEDED MORE THAN EVER

Crisis elevates the need for innovative solutions. The COVID-19 pandemic quickly taught us about our vulnerabilities regarding technology—from insufficient broadband infrastructure, to adapting to online communication platforms, and challenges involved in working and schooling from home.

Investing in innovation also means ensuring businesses are able to adapt to changing norms and embrace the use of new innovation—employing new digital and media tools, incorporating automation into business functions, and making necessary physical investments to adapt to new ways of doing business.

WORKFORCE DEVELOPMENT WILL HAVE TO EXPAND AND BROADEN

Building a future workforce to fill jobs—through training new workers, upskilling and reskilling current workers, and attracting talent to the region—is still a critical need for the region. However, the pandemic revealed new needs and opportunities.

Technology training across all tradable sectors is required. We must provide the skilled labor for employers with current and projected openings by better training the workforce, and diversify it through inclusion of underrepresented populations across all sectors. Existing training facilities and programs had to adapt in the midst of the pandemic to remote and hybrid systems; these measures could potentially open opportunities to expand their reach after the pandemic. In addition, if properly facilitated and promoted, the region’s unique assets provide an opportunity to help attract workforce talent, both for traditional and remote working.

TRADEABLE SECTORS ARE STILL VITAL INDUSTRIES

WNY’s key economic sectors still provide the greatest promise to power a comeback, but each will require additional and targeted help. Advanced manufacturing will need a more coordinated approach at the state and regional level to bolster emerging models to generate skilled workers, facilitate succession, and promote diversity and inclusion. Tourism entities need to pivot to find better ways to promote WNY virtually and find new ways to access and use the region’s attractions in a manner that allows social distancing when necessary. New focus has to be placed on regional agriculture to stem real and perceived food shortages during such crises. In addition, improvements are needed in our front-line health and life sciences sector to best coordinate systems for public health information, testing, and safety protocols.

In turn, the pandemic uncovered opportunities for new endeavors in these sectors, such as filling regional supply gaps locally for medical products that had been produced abroad.

PART TWO

Overview of Covid-19 Related Impacts

This section presents an in-depth look at the impacts of COVID-19 on key economic metrics, target industries, businesses and workers in Western New York.



Within a single month, COVID-19 changed how we work, learn and play, where we travel, and how we purchase and communicate. It's not surprising that this virus also disrupted key regional economic indicators in very substantial, unprecedented ways. Between March and April of this year, employment in the region fell by nearly 90,000 and more than 87,000 Western New Yorkers became unemployed, as firms temporarily shut down, scaled back, laid off, and furloughed workers.

While the regional economy is slowly rebounding and some jobs have returned, the region remains far from where we were this time last year. Employment in June 2020 was down by 51,000, an 8% decline from June 2019. COVID-19 essentially wiped out nearly a decade of job gains, as job losses are more than double the 17,700 jobs the region added between 2011 and 2019.

An unprecedented number of residents are unemployed. As of June 2020, 88,000 were out of work. This is 13.4% of the labor force. It's also three times the number of unemployed workers the region had in June 2019. This year's number includes an unknown number of gig workers who are now eligible for unemployment assistance.

With the addition of gig workers to regional labor force numbers, the region's labor force is 2% larger (up by 10,200 workers), compared to June 2019. This growth in the regional labor force comes after several consecutive years of decline, and it's contrary to statewide trends, which suggest that COVID-19 may have hastened the retirement of some older workers concerned about health and workplace safety.

KEY ECONOMIC METRICS BY THE NUMBERS

CHANGE 2019-2020

Employment

2019> 2020
621,600 570,600

-8% DECREASE
IN WNY 

-51,000 EMPLOYED

CHANGE 2019-2020

Unemployed

2019> 2020
26,800 88,000

228% INCREASE
IN WNY 

+61,200 UNEMPLOYED

CHANGE 2019-2020

Unemployment Rate

2019> 2020
4.1% 13.4%

+9.3% PERCENTAGE
POINT INCREASE 

CHANGE 2019-2020

Labor Force

2019> 2020
648,400 658,600

2% INCREASE
IN WNY 

+10,200 IN THE
LABOR FORCE

Source: NYS Department of Labor, Local Area Unemployment Statistics (LAUS), Western New York Region, 2019-2020.

TRENDS IN UNEMPLOYMENT AND EMPLOYMENT

COVID-19 swelled unemployment and decreased employment to levels this region has not seen in at least the last 30 years of reported NYS Department of Labor monthly employment and unemployment numbers.

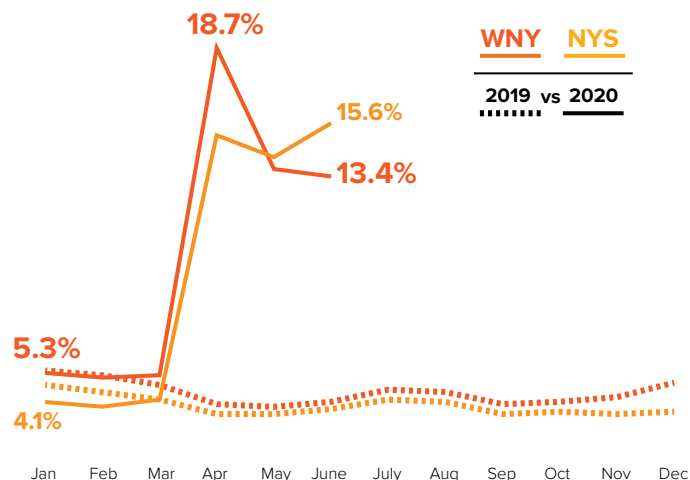
In April 2020, one month after COVID-19 was declared a global pandemic, the rate of unemployment in Western New York rose to 18.7%. Nearly one in five workers across the region was out of work, a proportion that is three times higher than it was at the same time last year. The rate of unemployment in Western New York exceeded the statewide rate, as non-essential businesses across the region and state ceased in-person operations and services, resulting in staff being laid off and furloughed.

Unemployment rates in Western New York fell five percentage points between April and June, as regional employment levels increased by more than 42,000 during May and June of this year. This improvement was supported by a gradual, phased reopening of the economy that began in Western New York with Phase 1 on May 19. By the end of June, Western New York completed Phase 3, which allowed the reopening of businesses that provide personal care services and indoor dining.

By the end of June, as Western New York headed into Phase 4 and the reopening of selected entertainment services and other sectors, employment levels were still 51,000 short of where they were in June 2019. The rate of unemployment was 13.4% in June 2020, a number that continued to exceed anything the region experienced during the previous 30 years, even during the Great Recession.

MONTHLY UNEMPLOYMENT RATES, 2019 vs 2020

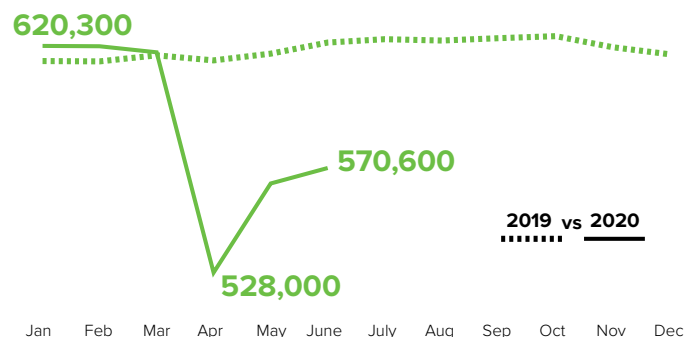
Unemployment rates in WNY are three times higher than they were last summer. Unemployment rates are improving slightly faster in WNY than they are across NYS as a whole.



Source: NYS Department of Labor, Local Area Unemployment Statistics (LAUS), 2019-2020

MONTHLY EMPLOYMENT IN WNY, 2019 vs 2020

Over 42,000 workers returned to work in WNY between May and June 2020, but employment levels remain 51,000 jobs short of where they were one year ago.



Source: NYS Department of Labor, Local Area Unemployment Statistics (LAUS), 2019-2020

INDUSTRY IMPACTS

Most industry sectors in Western New York were impacted by COVID-19, but not all industry sectors were hit equally hard. Some were disproportionately affected, particularly those dependent on travel, consumer spending, public gatherings, and the provision of in-person services curtailed during the pandemic.

Across NYS, the ten industries shown on the chart were hit hardest, in terms of layoffs and furloughs that led to unemployment claims. Over 2.3 million unemployment claims were filed by workers in these ten hardest hit industries between March 8 (the week COVID-19 was declared a global pandemic) and July 25 of this year. Hospitality (accommodations and food services), Retail Trade, and Healthcare and Social Assistance accounted for over half of these unemployment claims.

Seven out of the 10 hardest hit industry sectors across the state reflect WNY REDC target industry sectors, including Advanced Manufacturing, Bi-National Logistics, Energy, Professional Services, and Tourism.

The economic toll of the COVID-19 pandemic on travel and tourism will be a particular challenge for Western New York. Tourism accounts for a greater share of jobs, firms and wages in Western New York compared to NYS. The regional economy is also more dependent on visitor spending than almost any other region across Upstate. Although visitor spending in WNY was at a five-year high in 2019, it was substantially reduced this year by COVID-19, which led to restrictions on non-essential travel, global travel bans, and the closure of the US-Canada border.

Across hardest hit industries, the COVID-19 pandemic takes a toll on lower-income jobs paying an annual wage of \$40,000 or less. These jobs are important because they offer a stepping stone to career pathways in regional target industries for young adults and those with limited education beyond high school. Regionally, the hospitality industry (accommodation and food services) accounts for over 40% of lower-income jobs lost due to COVID-19, as of July 19. Over 20,000 additional low-income jobs were lost in Healthcare and Social Assistance, Retail Trade, and Other Services.

UNEMPLOYMENT CLAIMS IN NYS AND LOW-INCOME JOBS LOST IN WNY DUE TO COVID-19, HARDEST HIT INDUSTRIES, JULY, 2020

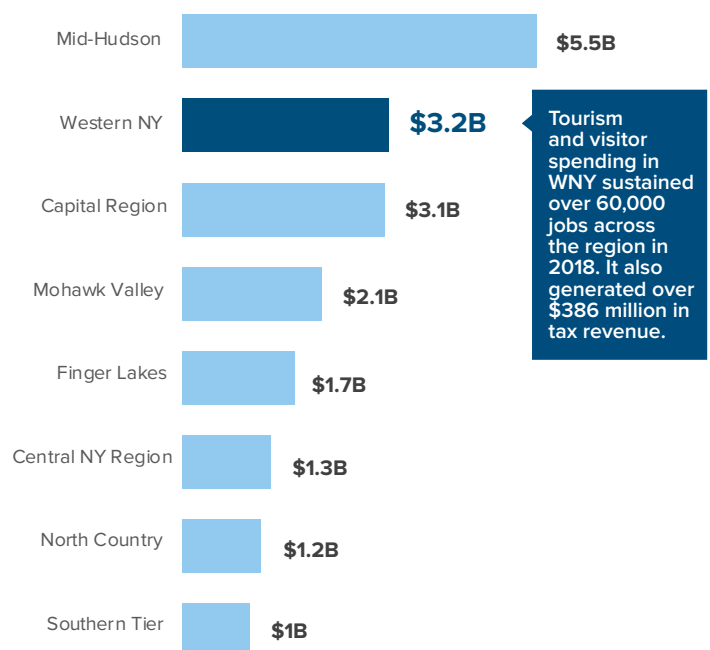
Industry	NYS Unemployment Claims	Low Income Jobs Lost in WNY
Accommodation and Food Services*	463,176	26,350
Health Care and Social Assistance*	361,345	6,646
Retail Trade	352,388	8,536
Administrative and Support Services*	256,337	4,762
Construction\Utilities*	218,598	2,562
Manufacturing*	149,976	3,159
Other Services	147,855	6,152
Transportation and Warehousing*	140,657	3,417
Educational Services	121,187	1,944
Professional, Scientific, & Tech. Svcs*	113,851	988

* WNY REDC Target Industry Sector

Source: NYS DOL, Weekly unemployment Claims, July, 2020. March 8 – July 25, 2020; Urban Institute, Where Low-Income Jobs are Being Lost to COVID-19, Census Tract data, July, 2020.

VISITOR SPENDING BY REGION, 2018

With nearly 20 million visitors annually, WNY is more dependent on tourism and visitor spending than most upstate regions.



Data Source: Visitor spending is from Tourism Economics annual reports. Visitation projections are from Longwoods International, U.S. Department of Commerce and Tourism Economics.

HARDEST HIT WORKERS

Many of the industries hit hardest by the pandemic are more likely to employ people of color, young adults, and those without a college degree. About nine out of ten low-income jobs lost in WNY due to COVID-19 were in the region's hardest hit industries. These industries include 76% of all WNY workers, and an even higher share of workers who are people of color (79%), Hispanic (80%), and African American (81%). People of color are overrepresented in six hard hit industries, while eight of these industries have a relatively high share of workers without college degrees.

The economic impacts of COVID-19 are not evenly spread geographically. This map shows the number of low-income jobs lost due to COVID-19 as a percentage of all jobs held in neighborhoods across WNY to illustrate the relative severity of economic impacts on local communities. Low-income job loss has the largest impact where residents with low-incomes working in hard hit industries are concentrated. In neighborhoods of color, or census tracts where over half of residents are people of color, low-income jobs lost to COVID-19 represent 16% of all jobs, compared to 11% in predominantly white neighborhoods.

Many jobs lost to COVID-19 may not be coming back, so workers will be searching for sustainable, higher paying careers and may look to acquire new skills and credentials. Workforce development that equips workers with skills needed for jobs in high growth and critical sectors can fill hiring gaps for employers and give vulnerable households long-term financial security. Meanwhile, focusing investments in the neighborhoods most adversely affected by the pandemic can foster shared economic prosperity that benefits all communities.

Hardest Hit Industries	% Women	% People of Color	% 25-34	% HS or less
Accommodation and Food Services*	55%	47%	26%	48%
Health Care and Social Assistance*	77%	51%	23%	38%
Retail Trade	50%	41%	24%	45%
Administrative and Support Services*	41%	41%	20%	41%
Construction\Utilities*	15%	32%	22%	45%
Manufacturing*	25%	28%	19%	45%
Other Services	55%	41%	20%	41%
Transportation and Warehousing*	32%	53%	19%	46%
Educational Services	66%	30%	19%	29%
Professional, Scientific, & Tech. Svcs*	53%	33%	32%	27%
WNY Avg., All Sectors	51%	40%	23%	38%

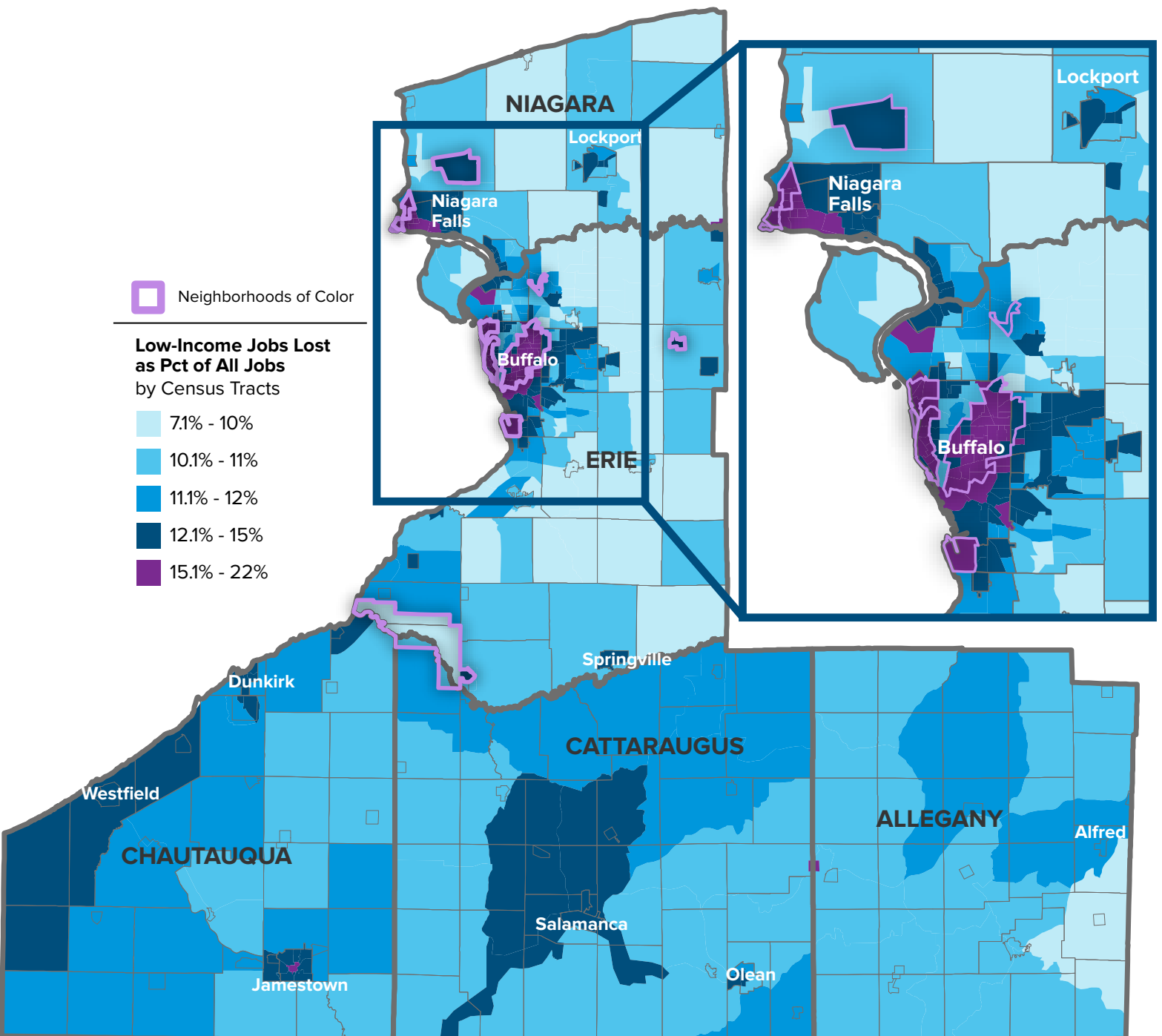
WORKER CHARACTERISTICS OF INDUSTRIES HIT HARDEST BY COVID-19, WNY, 2019

Higher than the WNY average for all industries.

* WNY REDC Target Industry Sector

Source: US Census Bureau, Quarterly Workforce indicators, 2019. Retrieved August, 2020. Percentages are based on annual average of quarterly figures. % Women based on data from Q1-Q3, as data on gender was unavailable for Q4 2019. Other metrics based on all four quarters of 2019.

**LOW-INCOME JOBS LOST TO
COVID-19 BY CENSUS TRACT AND
NEIGHBORHOODS OF COLOR IN WNY,
JULY, 2020**



Notes: Neighborhoods of color are tracts where over 50% of the population are people of color.

Source: Urban Institute, Where Low-Income Jobs are Being Lost to COVID-19, Census Tract data, July, 2020. Numbers reflect estimates of net job loss; US Census American Community Survey, 5-year estimates, 2014-2018.

INSIGHTS FROM BUSINESSES

A survey of businesses conducted by Buffalo Niagara Partnership in April 2020 sheds light on ways businesses in Western New York adapted to the economic downturn and adjusted their operations in response to various new circumstances created by the COVID-19 pandemic. These circumstances included supply chain disruptions, changes in consumer demand, canceled events, temporary business closures, partial re-openings, and a shift to a remote working environment.

Nearly all businesses surveyed reported some type of financial impact of COVID-19 on their operations. Over nine in ten (93%) reported a reduction in revenues. Close to a third anticipate revenues in 2020 will be more than 50% lower than in 2019. Only 7% of businesses reported an increase in revenues. Tech companies and those in manufacturing were more likely than others to report revenue increases.

Some businesses adapted by exploring new revenue streams, new pricing structures, and the creation of new products. For every one company in WNY that reported stable or increasing revenues, thirteen face a decline in revenues this year. The continued, longer-term decline in revenue and sales is a top concern for most businesses.

With a reduction in sales and other revenues, many businesses had to cut costs. Nearly half said they reduced staff through layoffs and furloughs. Over a quarter reduced employee hours, and over ten percent reported cutting wages and salaries of workers on the payroll. The majority of companies implemented a hiring freeze. Four percent of businesses reported fully closing their business. Sole proprietors—the smallest businesses in the region—were disproportionately impacted. Nearly 10% closed, compared to about 4% of all businesses surveyed.

Looking to the future, business leaders in Western New York were not overly optimistic that a return to normal would happen soon or at all. A slight majority of businesses said they are postponing investment decisions until later this year or next, or indefinitely. About a quarter of business leaders (23%) indicated that they have not postponed investments, but anticipate that they may need to do so.

INSIGHTS FROM BUFFALO NIAGARA PARTNERSHIP'S SURVEY OF BUSINESSES, MAY 2020

Business Survival

4% Fully closed/no longer working as a sole proprietor

Revenues

93% Experiencing a decline in revenues through 2020

7% Experiencing no change or increase in revenues through 2020

Expense & Operational Management

51% Reducing variable costs

43% Reducing fixed costs

37% Exploring new revenue sources/pricing structures

15% Creating new products

Staff

42% Reducing staff headcounts

28% Reducing staff hours

12% Reducing staff wages or salaries

66% Hiring freeze (all roles or all but essential/replacement hires)

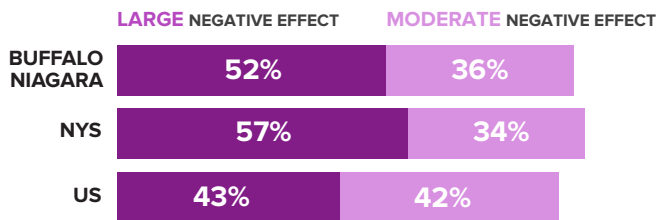
24% Concerned about economic impacts of COVID-19 on people of color, immigrants and low-wage workers

Future Investments

59% Postponing an investment decision indefinitely or until later 2020/2021

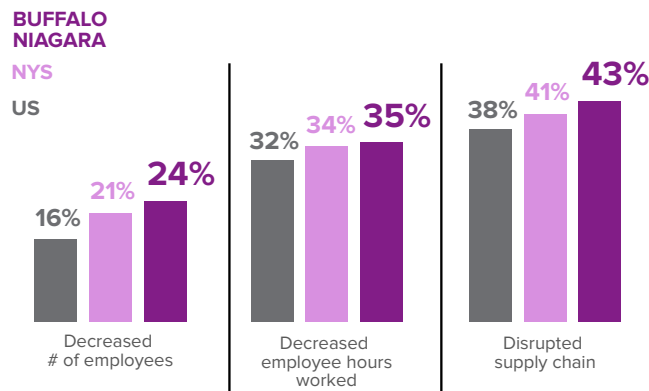
Notes: More than 1,600 businesses completed the survey. 93% were located in Erie and Niagara Counties.
Data Source: Buffalo Niagara Partnership, WNY COVID-19 Business Impact Survey, 2020,
<https://www.thepartnership.org/bnpbusinesslink/impactsurvey/>

% OF SMALL BUSINESSES REPORTING NEGATIVE IMPACTS DUE TO COVID-19, MAY-JUNE, 2020



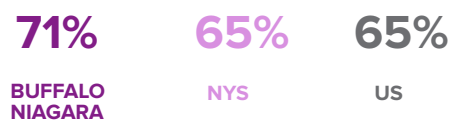
Data Source: US Census Bureau, Small Business Pulse Survey, April 26 to June 27, 2020.

% OF SMALL BUSINESSES IMPACTED BY COVID-19, MAY-JUNE 2020



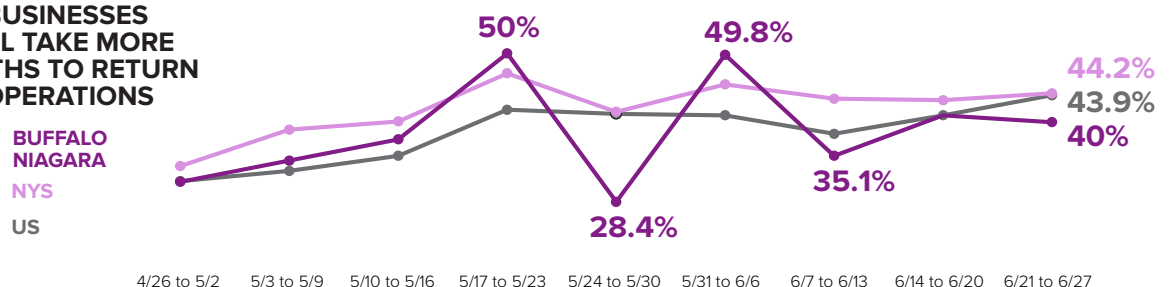
Data Source: US Census Bureau, Small Business Pulse Survey, April 26 to June 27, 2020.

% OF SMALL BUSINESSES RECEIVING PPP LOANS, MAY-JUNE 2020



Data Source: US Census Bureau, Small Business Pulse Survey, April 26 to June 27, 2020.

% OF SMALL BUSINESSES SAYING IT WILL TAKE MORE THAN 6 MONTHS TO RETURN TO NORMAL OPERATIONS



Data Source: US Census Bureau, Small Business Pulse Survey, April 26 to June 27, 2020.

The economic impacts of COVID-19 are particularly severe for small businesses, but some parts of the country are harder hit. To understand these impacts, the US Census conducted a weekly survey of businesses with under 500 employees for every week ending in May and June. The economic impacts of COVID-19 have since shifted, but during this time, small businesses in Buffalo Niagara were more likely to be negatively impacted than the US overall.

Most Buffalo Niagara small businesses lost revenues due to COVID-19. Over the nine weeks of surveying, an average of 63% of local small businesses reported revenue declines from the prior week, a higher share than both the US (55%) and NYS (60%). Declining revenues can result in missed payments and lost jobs. About 8% of local small firms missed loan payments and 22% missed other bills, like rent and utilities, compared to 17% for the US overall. Small firms in Buffalo Niagara were also more likely to cut jobs, employee hours, and feel disruptions in their supply chains than those across the US and NYS as a whole.

Businesses in Buffalo Niagara were more likely to receive federal assistance since the pandemic started. The Paycheck Protection Program (PPP) was the most common assistance. Over the nine weeks of surveying, an average of 71% of Buffalo Niagara small businesses received PPP loans, compared to 65% in NYS and the US.

The survey also asked how long small businesses felt it would take to return to normal business levels. Small firms in Buffalo Niagara were more likely than those across the US to say it would take longer than six months for their business to get back to normal through mid-May. But from then through June, local small businesses generally grew more optimistic while those across the country became more likely to suggest it would take over six months to return to normal.

PART THREE

Needs and Shortfalls of Regional Economy

Evaluation of Challenges and Needs with Immediate, Intermediate and Long-Term Priority Actions

Economic challenges experienced in Western New York as a result of the COVID-19 pandemic are not unique to this region, though with the mixture of urban and rural settings within the five counties (Erie, Niagara, Chautauqua, Cattaraugus, and Allegany) there is a wide range of issues that will need to be addressed to ensure the region as a whole is able to rebound and rebuild. Some of these existed prior to COVID-19 and were only exacerbated in a very strained economy. Others are a product of the pandemic and will require taking a step back to determine how we rebuild in a more resilient way.

In addition to shutdowns and changes in the way businesses operate, the pandemic also highlighted racial disparities, issues of unequal compensation and workplace safety facing essential and gig workers, inadequate services and infrastructure, and safety concerns that should continue to be at the forefront of discussions in creating a stronger and more vibrant WNY.

In WNY, we believe we can revamp our economy best by continuing and accelerating the state's economic development efforts which focus on placemaking, innovation, workforce, and tradable sectors. This strategy, developed in 2011 when WNY was still recovering from the recession and a half century of economic decline, helped WNY and NYS achieve great progress over the past 10 years. Doubling down will keep us focused on our main objective: jobs.

We invest in **places** to help us attract a workforce. The importance of public places and smart growth are even more evident now, given they provide respite and opportunities for recreation, but also to ensure proximity to resources for all. We invest in **innovation** because it helps companies compete and create jobs. Innovation is going to touch every aspect of our post-pandemic world, as we must retool and rethink many of our normal business and social practices. Our **workforce** needs are changing as well, and we will need to ensure that our residents attain the know-how—through upskilling and/or reskilling—to both address the new demand and take full advantage of opportunities coming out of the pandemic. Each of our **tradable sectors** is being impacted in its own unique way. While there may be idea sharing opportunities across sectors, we will also need industry-specific plans for rebuilding, so they can continue providing and creating jobs in the region.

WNY will continue to use this four-pillar framework to shape its work and provide a measured path toward recovery that will keep WNY a viable and sustainable place for business.

This approach aligns with New York State's and is structured around the interconnected core pillars of: **placemaking**, **innovation**, **workforce** and **tradable sectors**.

Now, more than ever, strategic investment is needed in order to catalyze economic recovery and build resilience.



PLACEMAKING



Strategic investments in placemaking throughout WNY helped revitalize downtowns in the region's cities, towns and villages; created infill development projects and encouraged transit-oriented development; activated waterfronts and improved streetscaping; and created vibrant, mixed-use neighborhoods. The pandemic further highlighted inequality and its impact on health and well-being, and those areas that may continue to lag behind.

As we look to continue focusing investment near existing infrastructure and creating communities that are places that attract a talented workforce, we will also expand thinking to include other post-pandemic resilient efforts. Municipalities must design and implement placemaking efforts that create strong, resilient communities through data-driven decision making, best practices research, public engagement, and other strategies. Investments must be made in underserved neighborhoods to ensure equitable access to greenspace, and that streetscapes are safe and welcoming in order to promote walkability and business activity. Public infrastructure must be improved to ensure equitable technology access for all communities, as well as encourage smart cities investments.

Communities have the opportunity to reinvent what their public spaces can do. New spaces for outdoor dining and theater, places to host art exhibitions, and reclaiming space for pocket parks has helped renew the quality of life for residents even in the middle of a pandemic. Being more creative in our reimagining of public spaces will be key to short-term recovery and will also drive communities to be more attractive in the long-term. At the same time, we must ensure that development is equitable, and we are improving public spaces without gentrifying communities.

We have seen that underserved communities are being hit harder by the pandemic. These populations often include essential workers without ability to work remotely who live in food deserts that require them to travel further, often using public transportation, to get basic necessities. The shelter-in-place experience has been vastly different for those who have yards and terraces for outdoor access, those who have easy access to public communal space, and those who are left without those assets. We have to be smarter about development and continue to encourage smart growth principles—both in our urban and populated areas, but also in our villages and smaller towns.



The WNY REDC will encourage adhering to these principles and work with municipalities on more resilient placemaking in ways that include:

- Making public infrastructure investments, such as smart cities infrastructure and broadband, so people in all communities have the resources they need to live, work, learn and play, and maintain public health and safety. Infrastructure projects can also help generate workforce activity in this industry.
- Keeping up with the emerging technologies in smart cities developments post pandemic such as heatmaps of crowds, disinfecting drones, and using robots or other technologies to enforce and encourage social distancing. These technologies should be examined by collaborations between city planners, technology firms, and residents to ensure these additions best-serve all community members.
- Rethinking underutilized spaces that may emerge with more regular telecommuting and less vehicular traffic in ways that can improve experiences, and encourage better access across all modes of

transportation as well as using “lighter, quicker, cheaper” initiatives to test different uses of “excess” transportation infrastructure.

- Assessing opportunities for new uses of office space, buildings, or other types of current workplaces that may vacate as a result of changing workforce practices, business closings, or deferring of projects.
- Prioritizing the implementation of Complete Streets in communities throughout the region, prioritizing walkability and safer cycling as alternates to driving, and using green infrastructure.
- Encouraging members of the community to come together in addressing these issues. Urban planning experts should be engaging with neighborhood residents, businesses, economic development partners, and community not-for-profits to work together on creating an identity of a place that reimagines a better future and ensures no one is left behind.

WORKFORCE



In recent years, the WNY region experienced overall job growth and prior to the pandemic was experiencing a record-low unemployment rate of roughly 4%. Workforce efforts were focused largely around ensuring the region's workers had the proper skills to meet the needs of growing sectors while attempting to increase participation by the region's historically most underrepresented populations by addressing barriers to economic self-sufficiency.

We are now seeing an unemployment rate nearing 14% and a staggering number of workers out of the workforce through furloughs or layoffs. In addition, the pandemic has highlighted the disparities in the workforce. Many residents from lower-income communities were essential workers who risked their health to work jobs that would continue to provide groceries, deliver takeout food, provide transportation, and perform other basic services for the community. Workplace safety and proper personal protective equipment for all workers is a necessity going forward.

Already a priority in New York State, we need to continue to address the demand for and make investments in adequate childcare. The existing supply of childcare providers was already much lower than the demand in WNY prior to the pandemic, and now faces the additional challenges caused by disruptions to schools and the workplace. In a time where in-person school may be uncertain or when use of older family members to help with childcare is not suggested, essential workers and those not working from home must have the resources available to return to their jobs.

We must also pay attention to the compensation and level of support provided to workers. Gig workers, for example, are watching their work opportunities dwindle while they do not qualify for government assistance, healthcare benefits, or other incentives. As the economy starts to reopen, there is more competition for their services, often at lower fees, which provides an ongoing struggle for them to make ends meet.



As we look to resume these workforce efforts, many of the principles for programs before the pandemic are still valid: providing training in key sectors to address looming retirement cliffs, reducing geographic and socioeconomic isolation from jobs, and working with private companies to establish training, skills certifications and industry job ladders for new and existing workers. In addition, as part of the WNY economic recovery efforts we will seek to:

- Improve the quality of technology sector training opportunities to provide employees with greater skills to help them adapt to changing workplace dynamics, as well as enhance the tech workforce in WNY to attract new companies.
- Provide greater opportunities for upskilling and reskilling of the workforce—providing programs for existing workers to advance and also retraining of the newly unemployed whose businesses may not reopen or who seek more stable employment in a traditional workplace.
- Rethink where training opportunities take place to ensure they are physically accessible, and also encourage reuse of office buildings or facilities that may become vacated as a result of post-pandemic shifts in real estate demand.
- Encourage and develop alternative methods for job training, including using virtual, remote, and inventive training approaches to adapt to new social distancing norms and ensure we have the broadband infrastructure to support the growing needs.
- Promote and embrace an inclusive culture for workforce across all sectors to create a welcoming community, especially as we target tech and remote workers where social interactions may be more limited.
- Identify and communicate opportunities in new and emerging sectors; for example, as workplaces shift to higher numbers of remote workers, WNY could be considered an attractive place for a remote workforce given its lower cost of living relative to other locations (such as San Francisco, Washington, D.C., or other millennial hubs). A work group focused on this effort has identified ways to focus on this strategy in the following table.



STRATEGY

CHALLENGE

Build a pilot program with an identified target market and goals to attract remote workers.

Coordinating Western New York's branding and promotion so that it is tailored to the motivations of the talent the region hopes to attract including WNY's accessibility, affordability, and quality of life assets. To do this, the regional brand must clearly focus on strengths, acknowledge drawbacks, and emphasize the overall value of the region when compared to other places.

Build an ecosystem that encourages and embraces an inclusive culture and creates a sense of community for tech and remote-work talent.

When working remotely, workers may feel isolated from others in their field, or from people who still work on-site. Intentional spaces and resources for remote workers to network, communicate, and build community overcomes that isolation and helps new talent feel connected to people with similar professional lives. This culture must be inclusive of Black, Latinx, and immigrant communities so opportunities for employment, leadership, and entrepreneurship are equitable.

Invest in core infrastructure to support the foundational needs of remote workers.

Remote workers face unique challenges and have specific needs to support working from home. Investments in infrastructure are critical to both enabling quality remote work opportunities and to creating a community with the amenities for which remote workers look.

Leverage regional partnerships in the five counties of WNY.

Across the five-county region, employers, government entities, organizations, and institutions have an enormous wealth of knowledge and programs that could be helpful in informing a cohesive and collaborative strategy for talent and company attraction. Focusing on partnerships between these groups will be essential.

PRIORITY ACTIONS

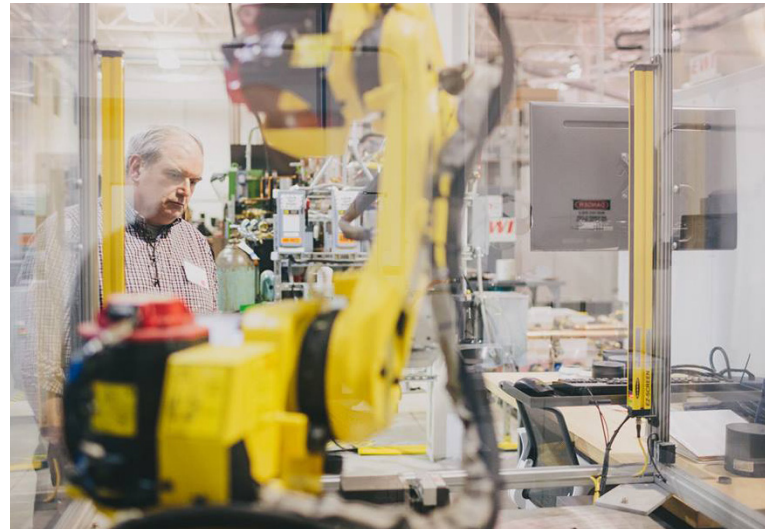
	Immediate Term	Intermediate Term	Long Term
Clearly identify and define the target market of remote workers which the region hopes to attract, understand what their needs and wants are, and set goals for the pilot program.	✓		
Develop a list of the region's strengths and weaknesses and position it against the target market. Promote perceived weaknesses as positives to refute the negative reputation.	✓		
Identify programs and assets of other locations that are hubs of remote workers to better understand their motivations, perceptions, and needs.		✓	
Develop quantifiable objectives that define successful movement forward, and identify benchmarks against which success can be measured.	✓		
Survey newcomers to better understand the experiences of talent that recently moved to the region.	✓		
Develop digital resources and tools to enable remote workers to connect to services, other remote workers, and colleagues and employers in their field in the region.		✓	
Look at programs and strategies through the lens of diversity and inclusion to develop an inclusive, diverse workforce that is welcoming to all and creates opportunities for upward and lateral mobility.	✓		
Organize events and meetups (when safe) for the community to collaborate and connect with each other to create a welcoming environment for newcomers.		✓	
Take advantage of the region's underutilized buildings or vacancies that may emerge from COVID-19 related closures to create new or expanded physical spaces where remote workers can congregate and network outside their homes, such as in co-working spaces and tech hubs.		✓	
Encourage smart growth developments for remote offices and new remote worker housing options, building on the density of the region's cities, towns, and villages, and reducing suburban sprawl.			✓
Identify how objectives and strategies of talent attraction and other work groups align to reach mutually beneficial outcomes, including the exploration of recruitment strategies for targeted companies with remote workers.	✓		
Collaborate with private entities across the region who are already working on some of these strategies, such as businesses creating tech hubs and co-working spaces.		✓	
Work with alumni and leadership from the region's many higher education institutions to leverage their influence in promoting the region to local students and colleagues across the country.		✓	

TRADABLE SECTORS



Targeting investments and growth of the WNY region's most tradable sectors (advanced manufacturing, health and life sciences, tourism, and agriculture) allowed for a focused development strategy that leverages the region's legacy, strengths and best prospects for success. These industries provided higher-paying jobs and are some of the most resilient in the region, providing steady benefits for residents and our economy.

None of these sectors is immune to the economic downturn created by the pausing of our economy necessary to curb the spread of the pandemic. Even in an industry like manufacturing where about 70% of companies were still operating during NYS on PAUSE, they were working at a reduced capacity. The disruptions to both the global and domestic supply chains are causing delays in the production of goods and, as a result, reduced output will result in a Gross Regional Impact of over \$550 million per month. With different areas of the world and the country seeing an influx of COVID-19 cases at different times, the cycle is continuous and unpredictable, and thus creates an equally unpredictable recovery for manufacturing companies. With a drop in revenues, manufacturers



will need to cut their labor costs and could result in further layoffs and furloughs in the region. Refocusing strategies to help manufacturers retool and add capacity for the production of high-need, in-demand products will help NYS and the US increase domestic production.

The tourism industry, which usually provides \$3 billion annually to the WNY economy, will need a high level of assistance and investment in recovery, and recovery will likely be slow. Travel restrictions and new health protocols which have businesses operating at reduced capacity made recovery even more gradual than previously expected. The industry also remains one of the most vulnerable to any future shutdowns as new waves occur. Demand also remains contingent on the economic and health crises, as unemployment means less disposable income and the health crisis impacts travel behavior. Developing measured and strategic investment programs for tourism businesses will help tourism recover, rebuild destinations, encourage innovation and investment, and rethink the tourism sector.

The agriculture industry, while essential, also experienced considerable disruptions during the pandemic and has some challenges going forward. Labor challenges on farms affected the ability to plant and harvest crops. Ability to travel to the US and obtain relevant visas has been a slow process and living conditions of migrant farm workers raised health and safety questions. Supply chain disruptions were also experienced, as well as difficulty with logistics and delivering crops which left farms and processors with excess product that resulted in economic loss.

WNY REDC work groups did a deep dive into these industry sectors to identify priority strategies and actions for recovery and resiliency, listed in the following tables.



STRATEGY

CHALLENGE

Re-build the manufacturing workforce pipeline.

In an industry that was already threatened by hard-to-fill-positions, an aging workforce and a looming retirement cliff, COVID-19 intensified the need for a strong, highly skilled advanced manufacturing workforce pipeline.

Foster innovation in manufacturing to stabilize and promote growth.

COVID-19 slowed down innovation at a time that it's more important than ever for traditional companies to innovate to survive.

Plan for future leadership in manufacturing

Succession planning and creating new ownership and leadership opportunities is critical. Nearly half of manufacturing companies plan to transition ownership/leadership in the near future. Owners with no succession plans in the current environment may walk away rather than fight through the current difficulties and transition to a new owner.

Focus on coordinating efforts within the manufacturing sector.

Manufacturing recovery efforts are disjointed at the regional and state level.

PRIORITY ACTIONS

	Immediate Term	Intermediate Term	Long Term
Promote skilled trade jobs that are in demand across the region in K-12 education.			✓
Expand workforce development efforts in secondary and post-secondary education and certificate training.		✓	
Target newly unemployed and people of color to reskill, upskill, and promote career opportunities while filling immediate and long-term employment needs	✓		
Develop and encourage short term training programs, and expand on-the-job training opportunities that can be used to upskill incumbent workers, creating more pipeline opportunities and improving job retention.		✓	
Encourage the development, piloting, and expansion of flexible, innovative apprenticeship models, like employer-trainer partnerships for small-medium enterprises.		✓	
Expedite educational pathways, continuing training during summer months and holiday breaks not observed by non-scholastic entities.	✓		
Establish and expand technical assistance initiatives, tools and resources to aid businesses' resiliency efforts and help traditional companies transition their business models and marketing to more innovative practices. Adapt to changes during recovery and to best practices moving forward.		✓	
Assist companies with integration of new technology, cybersecurity, automated processes, and planning for expansion of product lines. Encourage opportunities to produce high-grade medical equipment for reshoring manufacturing in NYS.	✓		
Fully support Manufacturing Extension Partnerships (MEPs) in the state which provide value to the manufacturing sector to manage costs, improve processes, and identify new opportunities.			✓
Explore the creation of a public-sector/private-equity entity to purchase manufacturing companies to retain economic activity and jobs in WNY, and diversity and inclusion leadership.		✓	
Promote risk management and business continuity strategy planning.		✓	
Promote diversity and inclusion in ownership by providing equity investing partnerships, working with lending institutions, identifying candidates for succession, or other programs to promote women and minority ownership in small and medium enterprises within five years.		✓	
Collaborate on an industry-driven regional plan for the sector with specific strategies for different types/sizes of businesses.		✓	
Promote awareness, educate, and communicate to drive company compliance with new health and safety guidelines to prevent disruptions due to illness in the short term.	✓		
Increase collaboration regionally for sourcing materials, including through integration with Manufacturing Extension Partnerships (MEPs).			✓

**STRATEGY****CHALLENGE**

Build the next generation of farmers through workforce development training programs that offer specialized technical knowledge, farming skills, and mentorships for those entering the industry.

Agriculture faces a looming retirement cliff that could threaten long-term sustainability. Many farms do not have that next generation family farmer to take over ownership. There is not enough workforce training geared toward the direct regional needs of the agriculture sector.

Keep supply chains strong by addressing gaps, shortages and bottlenecks.

Disruptions in logistics caused shortages of food supply while farms had plenty of product that could be brought to market, leaving food and dairy farms with excess crop.

Provide clear, accurate, and transparent information on health and safety as it relates to farm workers, farm owners, and food consumers.

As the harvest season ramps up, health and safety of farms and farm workers is of vital importance, as is maintaining public confidence in the safety of food produced here.

Work towards greater equity, inclusion and diversity in agriculture through programs that support urban farms, diversity of farmers, and distribution of agricultural products to communities of color.

Communities of color have been hardest hit by COVID-19, yet diversity and inclusion in agriculture is lacking.

PRIORITY ACTIONS

	Immediate Term	Intermediate Term	Long Term
Create a farming apprenticeship program that provides hand-on learning and transfers knowledge from current farmers to newer workers.			✓
Provide access to equity and technical assistance programs to grow the next generation of farmers, and provide tools to start ups.		✓	
Build diversity and inclusion programs into existing and new programs to emphasize farmers of color and women in the sector.		✓	
Expand public education around the spectrum of opportunities in workforce—from technical, hands-on work, to business development and ownership—and connect curricula at community colleges more directly to regional industry needs.		✓	
Understand the interconnectivity of this sector. Connect the dots between producers, processors, warehousing and distributors. and build better communications within the ecosystem.		✓	
Focus economic development efforts on warehousing shortages, cold storage, and other industry gaps. For example, explore the feasibility of a new USDA-certified meat processing facility in the region.			✓
Work with local grocers and stores to source and sell more local crops and consider how coordinating entities might be part of a solution.		✓	
Ensure straightforward information is provided to workers from out-of-state about the mask mandate, social distancing protocols, and other safety measures.	✓		
Address questions and common misperceptions related to testing, risk, false positives, and food safety.	✓		
Emphasize worker safety and the steps being taken to protect workers and local food production.	✓		
Increase messaging on food safety, advising that COVID-19 cannot be transmitted through food and ensuring consumer confidence.	✓		
Dedicate funding and other resources to underrepresented groups and communities of color to start farms, grow these businesses and cultivate diverse leaders within this sector.		✓	
Explore programs that are being implemented in communities of color across the United States to learn how WNY could help individuals and communities of color start farms.		✓	
Create a program focused on the next generation of farmers, training, land access, and technical assistance for startups, with an emphasis on racial, ethnic and gender equity.			✓

**STRATEGY****CHALLENGE**

Increase the number of tourists in our region by marketing WNY as a safe travel destination for intrastate travelers and those from nearby states.

Although visitor spending in WNY was at a five-year high in 2019, it was substantially reduced this year by COVID-19, which led to restrictions on non-essential travel, as well as closures and visitor limitations at popular tourist destinations and cultural organizations.

Rethink the physical and virtual landscape so that people can visit the region's attractions and businesses safely.

The tourism industry has been particularly hard-hit and recovery will be slow as demand is contingent on the economic and health crises; unemployment means less disposable income; and capacity restrictions and new health protocols have businesses operating at reduced capacity with reduced revenues. The industry is also particularly vulnerable to future shutdowns as new waves occur.

Establish technical assistance initiatives and resources to aid the industry with resiliency.

As uncertainty in how long the pandemic will last causes longer-term implications for the tourism economy, rethink tourism for the future to build a stronger, more sustainable, and more resilient tourism economy.

PRIORITY ACTIONS

	Immediate Term	Intermediate Term	Long Term
As a national model for best practices in COVID-19 response and ongoing health and safety compliance, create messaging and a regional marketing campaign around WNY as a place to “safe-vacation.”	✓		
Provide technical assistance to businesses and organizations for becoming more innovative and high tech, including updating their operating information and adapting to online and e-commerce platforms.	✓		
Capitalize on non-traditional school circumstances through the promotion of “family field trips” and teacher-led virtual field visits to regional educational destinations.	✓		
Continue to promote the region to the film industry as an accommodating and lower-density option with amenities for providing safe bubble environments.	✓		
Create and deploy digital tools for marketing, itinerary planning for short-term travel, winter and holiday planning and promotion, promoting four-season outdoor recreation, etc.	✓		
Fund capital improvements that reconfigure spaces to accommodate visitors for new uses that adapt to public health guidelines and provide temporary spaces/outdoor uses in winter months.		✓	
Look for increased building reuse opportunities or, in the interim, temporary uses to address the vacancies left behind by closed main street businesses.		✓	
Develop programs to provide general operating support to non-profits and direct assistance to hospitality businesses to replace revenue lost from core business.		✓	
Support legislation to establish Tourism Recovery/Improvement District to enhance funding models over the long term.	✓		
Support local businesses with online tools and on-call IT assistance for needs such as online booking, social media marketing, and e-commerce.	✓		
Develop a resource guide of existing local and state business support resources and enhance these providers’ ability to work with local businesses.	✓		
Provide resources and technical capacities that support business compliance with regulations to operate safely (i.e., thermal measuring equipment).		✓	
Create tools or make available 3rd-party resources like ShopWhereILive.com to bolster local business patronage.	✓		
Continue collaboration as an ongoing tool for peer-to-peer learning and technical assistance among the industry.			✓

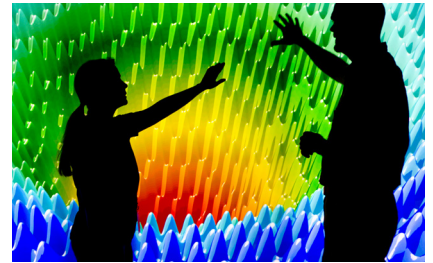
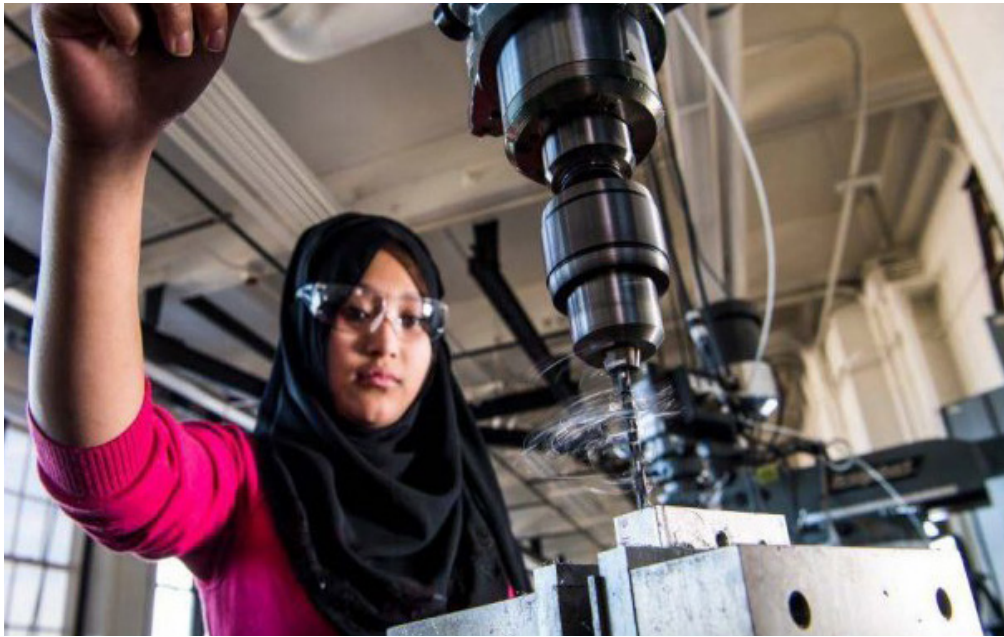
INNOVATION



Investing in an innovation strategy enabled WNY to expand its economy and become a place where entrepreneurs and startups are now looking to locate and grow their businesses. The pandemic only heightened the need for innovation to be at the forefront of all parts of the economy for the region to be able to address the global challenges we are experiencing. During the COVID-19 crisis, companies were forced to innovate to stay viable in a time of extreme uncertainty, and as they transitioned their workforce to comply with “stay-at-home” orders. Small businesses had to transition instantaneously to use curbside pickup and enhance their websites and social media with information; research and development had to undertake an entirely new subject and work to safely and thoroughly expedite their work; companies needed to communicate with and manage employees who were suddenly a remote workforce.

There is no doubt that entrepreneurial innovation will be crucial to finding solutions to new challenges brought on by the pandemic. As we emerge from the crisis, it is that innovative and entrepreneurial spirit that will create resilience in the economy and will keep the state moving forward.

Traditional companies will need help transitioning to this new way of doing business and planning for the future. We need to work together to help these evolutions in business so we don’t lose companies that have been a staple of our region. We must support small business and startup businesses in our community. And we have to make the right investments for our future.



As a region, our efforts can be focused on:

- Taking advantage of product innovations and deployments that leverage the digital age and connect newly-skilled workers to growth opportunity sectors.
- Continuing to support startup companies and small businesses through financial resources and access to support services that help a business grow smartly and resiliently.
- Seeking collaborative, creative solutions for innovations in R&D/commercialization, specifically post-COVID related, to ensure the region is thinking ahead on how to solve the global problems created by the pandemic.
- Targeting efforts for startup companies that reached a sustainable threshold just prior to the pandemic to explore ways to best preserve their operations and success.
- Developing programs and providing technical assistance for traditional companies as they rethink their business models and transition to more resilient methods. Better incorporate technology and digital platforms and re-skill/upskill workers in these technologies.

Specific policies NYS could consider to address challenges/needs

Invest in regional broadband.

While the NY Broadband program has made significant accomplishments, in light of the COVID-19 pandemic there is a need for a renewed focus in both urban and rural areas.

As more and more of our workforce is working from home, and kindergarten through college education transitioned largely to remote learning, everyone needs stable, reliable, and high-speed internet connections in order to learn and work. Stakeholders implored NYS to increase funding for the NY Broadband Program and ensure high-speed broadband connectivity is widespread in both rural and urban areas. There is also a need to increase the number of service providers to ensure that the internet service is both equitable and affordable. Currently in many areas one company controls the entire market, providing inconsistent service not capable of accommodating COVID-level demands at a price that is often beyond the means of the populations that need it most. We need to improve the level of service and level the playing field for either a major publicly-owned middle-/last-mile system, prospectively by entering into public private partnerships that fit out middle-mile access and attract more competition by multiple service providers to compete and provide better user service for lower costs.

Consider short-term “pausing” of restrictions or planned policy changes, or amendments to the regulatory environment in NYS to help businesses recover quickly and be more innovative.

As many businesses navigate unforeseen challenges due to the COVID-19 pandemic, we must be adaptive to the conditions in the business climate and consider temporary changes that could be made to rules and regulations that will prevent companies and people from seeking easier circumstances in other states. In some instances, federal, state, and local regulations are duplicative or even contradictory. Other times, regulations seem to be misaligned with certain public policy goals.

At the State level, we can review existing regulations to evaluate whether they can be relaxed or adjusted to encourage economic recovery during this crucial period.

Evaluating the agriculture sector overtime threshold. Local farms were hit hard throughout the pandemic with labor shortages. As they are adapting, they expressed concern that lowering threshold below the current allowance of 60 hours could cause a need for increasing hiring without any additional revenue as a result of the new workforce, adding to the farm’s already tight operating budget.

Improving the efficiency of Department of Motor Vehicles processes for the agriculture sector. Agriculture workers experienced a disruption in the industry because of a slowdown in logistics. Often crops could not get moved to market efficiently,

resulting in farms having to throw out product and lose money. Registering vehicles for transport has been a slow process identified by farmers. By improving this service it could help to get more trucks on the road and alleviate this delay.

Allowing Industrial Development Agencies to provide equity funding. Changing the regulations around IDAs could allow for more innovation and assistance to businesses helping them adapt to the changing environment.

Including more manufacturers on Climate Leadership and Community Protection Act (CLCPA) work groups to address concerns about higher utility costs that may arise for small to medium enterprises (SMEs) as they move to comply with the 2040 carbon neutral mandate. Adding manufacturers to the conversation early can help ensure concerns are addressed and allow for better communication back to the industry.

Review, modify, increase and promote NYS tax and other incentives in response to new challenges brought on by COVID-19.

There is an opportunity for NYS to aid businesses by adjusting its existing incentive programs and expanding programs where applicable. Workforce opportunities include:

Expanding the availability of NYS Excelsior Scholarship program to support short-term training programs and be able to be used for one and two-year certificate programs;

Establishing an incentive program that encourages companies undertaking business development projects to include and prioritize locating on-site childcare as part of their project;

Considering an opportunity for supporting training for agriculture's next generation as part of NYS farmland protection programs; and

Requiring school districts to include childcare plans in their school operations plans. The requirement was included when schools closed in March 2020 but not for reopening. As a result, an increased level of uncertainty of childcare has arisen for school-aged children.

Businesses are working to become more innovative and adaptive to the challenges in a post-pandemic economy. NYS can assist through:

Providing funding for businesses and venues that have to adapt their physical spaces to become more socially distant and compliant with health and safety standards;

Supporting proposed legislation in the NYS Legislature that allows for the creation of Tourism Recovery Improvement Districts;

Expanding the Grow NY program to allow participation in the Western New York region, encouraging innovation and new technologies in the agriculture sector;

Promoting low cost power incentives needed to be better promoted in this new business climate and work with small- and medium-sized manufacturers to prepare for the NYS Climate Leadership and Community Protection Act; and

Inventorying existing state incentive programs and explore how they can be modified such as for job retention incentives, providing operating support to small businesses, and providing mortgage assistance to prevent foreclosures.

Improve and provide consistency in Federal, and State and local communications regarding COVID-19 guidelines and protocols.

It is clear that information on travel advisories, regulations, and guidelines related to COVID-19 health and safety is inconsistent across local, state and federal entities, including the CDC, NYS Department of Health, and county health departments which causes great confusion for business owners and the public. Stakeholders expressed the need for wide-scale consistency in public health information, and increasing messaging—on worker safety protocols and requirements, food and product safety, testing and false negatives, and the NYS travel advisory restrictions (in particular for essential businesses). Once that is accomplished, they suggested using industry business groups as a resource to broadly communicate this information using illustrative examples on how regulations should be handled by different types of employers.

In addition, there was an overall desire for an increase in messaging on the safety of business and travel within NYS, due to the strong stance taken by Governor Cuomo. Businesses across the industries in WNY are encouraging NYS to amplify the message of how NYS is “open for business” and a “safe place for doing business” due to how proactive and careful the state was in addressing the public health crisis head-on. It was a strong recommendation to market and communicate the safety angle more, and brand ourselves accordingly.



Additional Challenges

Childcare

COVID-19 put extraordinary pressure on parents to balance work with childcare, and on childcare providers, to sustain and provide quality care through the crisis while ensuring safety. Access to high-quality, affordable childcare is essential to the region's workforce, but childcare providers have struggled to stay afloat amidst physical distancing guidelines, reduced capacity and revenue, and limited access to personal protective equipment. Moreover, the wage gap for childcare professionals limits the workforce pipeline for childcare providers, which may threaten the region's economic recovery as these jobs are more essential than ever.

Many challenges in childcare stem from systemic issues that families, particularly women, faced long before the pandemic. COVID-19 revealed the impact of child care availability on workforce participation for women, especially women of color, who are more likely to work in low-wage jobs without access to paid sick leave and other benefits. Implementing solutions to systemic issues requires collaboration between regulatory bodies, employers, providers, families, and local communities. By facilitating this dialogue, and exploring technical, financial and other supports, the REDC can help improve the childcare system in WNY and position the region for a robust, sustainable, and inclusive recovery from this health and economic crisis.

Additional Challenges

Childcare

STRATEGY	CHALLENGE
Expand access to high-quality affordable childcare.	WNY does not have enough childcare providers to meet the needs of working parents. Childcare can be the biggest expense for families, and is often unaffordable. Limited access to affordable high-quality childcare leaves parents to choose between going to work and caring for their children. Subsidies for childcare are underutilized. Investing in childcare can increase workforce participation, and encourage parents to advance careers, or grow a family.
Provide robust support for childcare providers and household caregivers to respond to and recover from the pandemic.	Many pre-existing barriers to childcare were exacerbated by COVID-19 and the crisis created new challenges for childcare providers, forcing many to close, some permanently. This puts increased strain on household caregivers and other providers trying to meet growing demand, putting them at risk with limited capacity and few resources to quickly adapt to safety protocols and guidelines.
Seek innovative solutions to develop the childcare workforce.	Childcare professionals are essential workers. This was made abundantly clear by COVID-19. However, the lower wages of these jobs lead to high turnover rates and limited pipelines for childcare providers. Jobs in childcare need to be promoted through workforce development and incentives.
Promote collaboration between employers, parents, and providers to create innovative solutions to the childcare system.	The childcare system is hard to navigate for parents and childcare providers. In NYS, childcare systems vary by county, with many different actors involved. This often leads to an uncoordinated, complicated, and inefficient network of childcare services. Increased collaboration can improve the delivery of childcare services for families and providers.
Continue to elevate childcare as a regional priority, and implement potential solutions.	Childcare is essential to economic recovery, and also a key part to creating a more equitable, inclusive, and resilient economy. COVID-19 intensified the regional need to make childcare a top priority. Meeting the needs of childcare helps accomplish regional goals and promote economic development in all communities.

PRIORITY ACTIONS

	Immediate Term	Intermediate Term	Long Term
Explore ways to increase the availability, amount, awareness, and use of childcare subsidies to make childcare more affordable to more parents, such as through expanded eligibility.	✓		
Support the development of sustainable business models for childcare that work for parents, children, providers, and childcare professionals.			✓
Promote access to childcare providers by affordable transportation options.		✓	
Employ digital tools to raise awareness of childcare providers and resources for working parents.	✓		
Investigate strategies to expand the availability of childcare beyond normal business hours for essential workers and parents with unpredictable schedules.	✓		
Focus on strategies to improve access and affordability of childcare for essential workers and others who cannot work from home.	✓		
Provide technical and financial support to help providers acquire personal protective equipment and take other steps to ensure health and safety for children, families, and childcare professionals.	✓		
Promote a wider range of youth programs and seek innovative ways to integrate childcare into the evolving educational models created by COVID-19.	✓		
Explore funding solutions, like emergency operating grants, to improve providers' financial stability.	✓		
Invest in training programs and financial assistance to fuel the pipeline for childcare professionals.		✓	
Provide technical and other assistance to promote business ownership for childcare providers.		✓	
Explore ways to address the wage gap for childcare professionals to retain and build the workforce.	✓		
Work with businesses and communities to learn about regulatory barriers and promote innovative strategies and partnerships to overcome these challenges and allocate resources effectively.	✓		
Provide technical assistance to increase understanding of safety guidelines, financial supports, and regulations among childcare providers to increase access to funding sources.	✓		
Begin conversations with providers, the NYS Office of Family and Children Services, and Local Departments of Social Services to improve data collection and streamline processes in childcare.	✓		
Raise awareness of childcare as a core principle in regional economic development.	✓		
Focus strategies on the needs of women, communities of color, children with special needs, and vulnerable groups to improve the equity and inclusivity of the region's childcare system.	✓		
Collaborate with regions across NYS to make progress toward common goals on childcare.			✓
Use the recommendations of the NYS Child Care Availability Task Force as guidance and tailor strategies for WNY.	✓		

PART FOUR

Engagement



Work Groups

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TOURISM

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Frank Strangio

Plati Niagara

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Chautauqua Institution

Public Outreach and Engagement

The 2020 Western Economic Recovery Strategy is a collaborative, industry-focused and community-driven process.

The WNY REDC met virtually on August 17th. Their work at that meeting focused on reviewing qualitative and quantitative data gathered since April on the effects of COVID-19 on our economy. This presentation included **in-depth data analysis** from the University at Buffalo Regional Institute (UBRI), a summary of the **Business Impact Survey** conducted by Buffalo Niagara Partnership in April 2020 which included over 1,800 respondents, and information gathered through ESD's **one-on-one conversations** with businesses and community members since March. Using this information, the WNY REDC was asked to identify and prioritize economic challenges and needs, and discuss policy recommendations for NYS.

To drill down deeper into some of our key enablers and core industry sectors hit hardest by the pandemic, the REDC developed **four work groups—Remote Workforce Talent Attraction, Advanced Manufacturing, Tourism and Agriculture**. Throughout the course of two weeks, these group, made up of representatives from local government, tourism, industry, higher education, the non-profit sector, and workforce development, each met twice to refine challenges and needs, and identify strategies and action steps moving forward. A **Childcare work group** also met to discuss this cross-cutting state economic priority which has become all the more severe and urgent due to COVID-19.

Findings from public conversations were incorporated into this draft and provided an outline of action steps to keep the REDC focused in the near-, mid- and long-term.

PHOTO CREDITS

Cover	Douglas Levere 2019, University at Buffalo https://ubphoto.smugmug.com/Years/2017/17054-Downtown-Buffalo-Cityscape-Medical-School-Fog/i-kGCKN6W	p. 32-33	(left to right) Athenex https://www.athenex.com/ Buffalo Manufacturing Works. Empire State Development. Douglas Levere 2019, University at Buffalo, https://ubphoto.smugmug.com/Years/2012/12146-Center-for-Computational/idbjqGnq/A Northland Workforce Training Center Summer Youth Academy.
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p. 25	(left to right) Cornell Cooperative Extension. Courtesy of Michael Ulbrich, Buffalo Manufacturing Works.		

