The Tompkins County Economic Development Strategy 2.0 (2020-2024) serves as a review and update of the 2015-2020 strategy. While there has been much progress made toward the original goals, the goals and objectives established in the original strategy continue to provide a solid framework to guide our aspirations and efforts for economic development in Tompkins County.

The Tompkins County Economic Development Strategy is intended to compliment the County’s Comprehensive Plan and other County and Economic Development Collaborative member agency initiatives. This update does not intend to duplicate those efforts and references others’ work as it is relevant.

**Process**

The foundation of this review was a series of interviews with members of the Economic Development Collaborative and other key participants in implementation of the ED Strategy objectives. This includes representatives from agencies associated with economic development, workforce development, planning, and local municipal governments.

In approaching this update, we asked the following four questions:

- Are the Values still relevant?
- Are the overarching goals and objectives still relevant or should anything be added?
- Are the strategies and tactics reflective of our approach economic development?
- What accomplishments have been achieved?

A new value, as well as new objectives and tactics were added. These are not radically new ideas, but elevate issues deserving increased attention since 2015. A progress report was added to the appendix.
# TABLE OF CONTENTS

INTRODUCTION ............................................................................................................................................ 3-5

VISION .......................................................................................................................................................... 6

VALUES .......................................................................................................................................................... 6

ECONOMIC DEVELOPMENT GOALS ........................................................................................................... 7-18

GOAL A: Strategically Invest in Community Infrastructure to Attract Private Investment that Leverages Existing Infrastructure and Promotes Infill in Identified Development Focus Areas 7-10
  • Objectives .............................................................................................................................................. 8-10

GOAL B: Develop a Labor Market in which the Aspirations and Qualifications of the Workforce are Aligned with Employment Opportunities .......................................................................................... 11-13
  • Objectives .............................................................................................................................................. 11-13

GOAL C: Strengthen, Expand and Diversify Key Traded Sectors to Foster Job Creation .................... 13-18
  • Objectives .............................................................................................................................................. 16-18

ECONOMIC DEVELOPMENT STRATEGIES .................................................................................................. 19-21

STRATEGY 1: Develop an Integrated and Proactive Approach to Community-wide Economic Development Leadership ........................................................................................................... 19-20
  • Tactics ................................................................................................................................................... 20

STRATEGY 2: Conduct an Economic Development Effort that Offers a Comprehensive Set of Outstanding Programs that Effectively Meet Needs of Customers ........................................................................... 21
  • Tactics ................................................................................................................................................... 21

IMPLEMENTATION .......................................................................................................................................... 22

CONCLUSION ................................................................................................................................................. 22-23

APPENDICES .................................................................................................................................................. 24-54

  APPENDIX A 2015 to 2019 Progress Report .............................................................................................. 24-30
  APPENDIX B 2019 Update of Economic Data - Household Wellbeing .......................................................... 31-34
  APPENDIX C 2019 Update of Economic Data - Labor Market ........................................................................ 35-42
  APPENDIX D 2019 Update of Economic Data - Economy and Key Sector .................................................... 43-50
  APPENDIX E Economic Development Collaborative and Other Partner Agencies .................................... 51-53
  APPENDIX F Implementing Economic Development .................................................................................... 54
  APPENDIX G Acronyms and Definitions. ......................................................................................................... 54
INTRODUCTION

Tompkins County is a unique place offering a vibrant small city and engaged rural towns in a superb natural setting that includes three of New York State’s six gorge parks. The Ithaca area appeared in over 20 national “Top 10” rankings from 2015 to 2019\(^1\). The skilled workforce, high quality employment opportunities, rich cultural resources, diverse retail establishments and restaurants, and the local food and beverage renaissance all contribute to making Tompkins County a great place to live, work, play and grow a business.

In 2019, Tompkins County was home to over 2,600 businesses and about 65,000\(^2\) jobs. The top five private employers are Cornell University, Ithaca College, BorgWarner Morse TEC Automotive, Cayuga Medical Center, and Wegmans supermarket. Technology-driven manufacturers and service firms create an exciting entrepreneurial environment. A range of professional, business and hospitality service providers contribute to the healthy business climate.

The Tompkins County Economic Development Strategy 2.0 – 2020 to 2024 presents our goals for sustainable growth and our strategies for economic progress.

Tompkins County Economy

Tompkins County has an unusual economy in Upstate New York. Communities in the County are dominated by the academic calendars of Cornell University, Ithaca College and TC3. About 45% of jobs, including students who work on campus, are concentrated in the education service sector, as compared to about 12% in the surrounding six-county region. While manufacturing plays an important role in Tompkins County creating about 6% of jobs, in the surrounding region manufacturing remains the strongest sector, generating about 15% of jobs. Tompkins County has a growing high tech sector, with particular strengths in research and development, and computer systems design (software), producing over 7% of the County’s jobs\(^3\).

Due to the predominance of the education and technology-related sectors, Tompkins County employers require higher levels of education and skills than the surrounding region, whose private sector economies are more dependent on basic-skilled and medium-skilled industries. This elevates the need for great basic education as well as post-secondary training, creating a workforce that can capitalize on these career opportunities.

The Tompkins County economy has grown steadily from about 17,000 private sector jobs in 1960 to 65,000 in 2018. During the same period, the local economy experienced significant restructuring. In 1962, manufacturing peaked providing 6,200 jobs, which was 36% of all private sector jobs. In 2018, there were 3,200 manufacturing jobs, about 6% of all private sector jobs. By 2018, service-providing jobs had grown to 93% of jobs, including 51,700 private sector jobs and 8,600 public sector jobs, which includes about 3,400 public school employees. Starting with the GI Bill after World War II, fueled by the Baby Boomers in the mid 1960s and accelerating into the 1980s, higher education grew into the dominant local sector.

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\(^1\) http://www.visitithaca.com/about-ithaca-tompkins-county/top-10s.html  
\(^2\) This figure includes the approximately 14,000 workers who are not covered by unemployment insurance; primarily college students who work on-campus; also including, but not limited to contract workers in construction, healthcare, real estate, and other professional services. Note: due to a significant recalibration of NYS DOL data, this and other jobs data in this report cannot be compared to the jobs data in the 2015 Tompkins County Economic Development Strategy.  
\(^3\) High Tech employment estimated by Chmura Economics & Analytics’ JobsEQ 2.0.
By 2018, higher education accounted for about 45% of private sector jobs, and 40% of all jobs. In 2018, health services made up about 12.5% of private sector jobs. Scientific and technology services, transportation, professional services, and other business and personal services made up about 20% of service-producing jobs. An interesting anomaly is that over the past five decades, while most sectors have changed dramatically, consumer-oriented service jobs - such as retail, food service, and hospitality – have remained steady providing a total of about 16% of private sector jobs.

Tompkins County is a regional employment center. While job growth has been at about 10% or more per decade, population growth has been much slower. The result is that in 2014, about 15,000 people commuted into the County daily to come to work. Thus, housing and transportation are both critical factors for the County’s economic vitality.

Tompkins County has a relatively stable and moderately growing economy. Its quality of life, prepared workforce and health of its sectors provide strong underpinnings as we face challenges and seek greater vitality and opportunity going forward.

*(See Appendices for more detailed information about the County’s demographics and economy.)*

**What is Economic Development?**

Economic development is a partnership among local governments, community institutions and the private sector to increase quality job opportunities for local people and strengthen the tax base.

**The primary means of achieving economic development are through:**

- **Public and community investments in infrastructure, workforce and amenities to attract private sector investment**
- **Development of the labor market’s skills and the workforce system to increase local people’s ability to secure employment and develop meaningful careers**
- **Resources that help businesses start, stay and thrive in Tompkins County, targeted to businesses that primarily sell their products and services outside the County**

To engage successfully in economic development, the partners must marshal their resources and market themselves to gain competitive advantage and build a thriving and sustainable economy.

*2014 is most recent data available.*
Overview of the Economic Development Strategy

The 2015 ED Strategy used a planning horizon of ten years and was intended to guide economic development activities over the five-year period of 2015 to 2020. The ED Strategy 2.0 adjusts the original strategy to guide the five year period from 2020 to 2024. While a long-range plan of this nature provides focus and guidance, the world and economy can change substantially year to year. Thus, implementation of the strategy needs to be responsive and flexible. Periodic assessment of economic conditions and evaluation of progress will help fine tune implementation.

The components of the Strategy are:

**Vision** which provides the big picture of what the Tompkins County community aspires to achieve through economic development.

**Values** statement which guides behaviors and decisions during the process of achieving the vision.

**Goals** which provide general milestones that are needed to attain the vision, and objectives provide more specific and time-sensitive targets.

**Strategies** and tactics which provide the approach for attaining the objectives and goals.
Tompkins County Economic Development Strategy 2.0 (2020-2024)

VISION 2025

Tompkins County is an inclusive economy where every person can attain skills leading to fulfilling careers. The vibrant, diversified economy supports career path opportunities and a wide array of community resources, benefiting individuals across all income levels. All persons who work full time can achieve a livable income. The sustainable economy and high quality of life are mutually supportive and accessible to all residents. Our region offers a competitive business climate where companies make connections and thrive in a vibrant marketplace. Innovative ideas, entrepreneurs and resources combine to create a dynamic and thriving business community. Municipalities welcome and foster business investments. Infrastructure – water and sewer, transportation, energy and broadband – supports those investments in planned development focus areas. The expanding base of successful companies creates demand for workers and lifts wages. This positive business climate creates an environment for successful economic development.

There is a high level of leadership and collaboration among economic development, community development, business, higher education, and civic leaders to achieve this vision and maintain its vibrancy. Hallmarks of success include:

- A diverse and growing economy that offers good paying jobs, career development and investment opportunities
- Safe, healthy communities with vibrant cultural resources
- A thriving region reflecting commitments to investing locally and protecting the natural environment
- An outstanding international reputation where people want to live, work, play, visit, and invest.

VALUES

Economic Development in Tompkins County should:

CREATE INCLUSIVE PROSPERITY for the diverse local workforce that provides meaningful, quality employment opportunities with career paths and a livable income.

SUPPORT SUSTAINED ECONOMIC VITALITY by strengthening businesses and industry sectors that are primed for growth into the future.

LEVERAGE INNOVATION in products and production technologies to drive economic growth.

RETAIN WEALTH LOCALLY through investment in people, infrastructure and business development, supporting both locally owned businesses and locally managed businesses that invest in their workforce and the local community.

ENHANCE QUALITY OF LIFE to enhance the business climate and to retain and attract workforce. Quality of life includes vibrant community centers and neighborhoods, strong schools – both public and private, rich cultural resources, preservation and integration of natural resources, and an abundance of recreational opportunities.

BE COLLABORATIVE AND TRANSPARENT, leveraging scarce resources through partnerships, developing robust solutions through stakeholder engagement, and fostering effectiveness through evaluation and accountability.

NEW 2020 VALUE

PROMOTE THE ENERGY TRANSITION to renewable energy resources by supporting the electrification of transportation, building, and industrial energy demand, and the increase of energy efficiency.
GOALS

There are three overarching goals for economic development in Tompkins County:

GOAL A
Strategically invest in community infrastructure to attract private investment that leverages existing infrastructure and promotes infill in identified development focus areas.

GOAL B
Develop a labor market in which the aspirations and qualifications of the workforce are aligned with employment opportunities.

GOAL C
Strengthen, expand and diversify key sectors to foster job creation.

These are common economic development goals for many communities. The specific objectives described below reflect the particular history and aspirations of Tompkins County. Infrastructure such as water and sewer, energy, broadband, roads, and an airport are often taken for granted in the 21st century. Yet, business and community leadership are constantly engaged in the planning and maintenance of these critical resources that support local investment and quality of life. Similarly, on the face of it, the availability of well-ranked public education systems and the presence of public and private higher education would appear to provide for a prepared workforce. Yet Tompkins County, like most places in America, faces gaps between workforce skills and the demands of available jobs and career opportunities.

Economic sectors grow and decline, or can change quickly in the competitive, global economy. Leaders, workers and community-based organizations can easily fall behind on understanding what these sectors need to remain strong and vital. Accurate and timely responses to private sector needs drive a healthy economy and the ensuing benefits to individual households and the community.

The following pages provide up-to-date information to help decision makers – whether job seekers or businesses or community leaders – understand these fundamental goals for economic development and identify specific objectives for our economic development efforts. These are stepping stones to achieve our vision for the economy.

GOAL A
Strategically invest in community infrastructure to attract private investment that leverages existing infrastructure and promotes infill in identified development focus areas.

Community infrastructure is a broad arena of investments that undergird the development of the economy. This includes physical infrastructure such as roads, water, sewer, energy, internet access, and transportation systems. Community Infrastructure also includes the local government policies and procedures that guide and support regional planning and real estate investment. Another critical foundation to economic development is the availability of affordable housing particularly for lower to middle-income workforce.

District development is investment in planned, multi-use centers for living, working and playing be they in a town center, a revitalized industrial site, or a prime waterfront location. While the public or private sector leadership may provide the vision for revitalization and development of great places, the public sector has a large role in facilitating the development process to ensure the public interest is met through zoning, site planning and permitting procedures.
Active and attractive commercial centers are important for all sectors of the economy. For example, higher education benefits from a lively college town, the young adult workforce seeks social gathering spots, households and businesses need convenient services and shopping in the urbanized area and in rural villages and hamlets. Integrating businesses into this fabric and creating appropriate districts for specialized sectors is fundamental to economic development. The County has a variety of commercial and industrial districts. They need periodic investment and revitalization.

Several areas of Tompkins County are critical to the economic success of the County including Downtown Ithaca, the business parks and industrial sites proximate to Ithaca Tompkins Regional Airport, Cornell’s Campus on East Hill, and South Hill, including Ithaca College, the South Hill Business Campus and the Emerson (Chainworks) site. To support economic development, municipalities, developers, businesses and economic development stakeholders need reliable energy resources for these areas. By 2019, most of the Town of Lansing was under a natural gas moratorium due to insufficient capacity in existing distribution lines. Some customers in the County have also encountered unreliable power grid service. There have also been parts of downtown Ithaca without adequate infrastructure for new developments, resulting in time delays for expensive upgrades.

The lack of access to high speed internet service and cellular networks has become a critical issue affecting about 10% of the County’s households and businesses that are in rural areas.

Investments in community infrastructure and district development should align with the principles of the County’s Development Focus Areas Strategy. Development should leverage existing infrastructure and emphasize efficiency through infill, increased density, and other Smart Growth approaches.

Objective 1: Improve and expand community infrastructure including utilities, transportation, and workforce housing

1.1. Target development to Development Focus Areas. While the presence of water and sewer infrastructure and transportation routes exist in these areas, planning and development of reliable and sufficient energy infrastructure are also critical in these areas to support development that creates jobs. (See Objective 4.1-4.4 for more on energy infrastructure.)

1.2. Ground Transportation: Support implementation of the Ithaca Tompkins County Transportation Council’s 2035 Long Range Transportation Plan (2014). Transportation options increase workforce mobility and access to work, as well as increase affordability and improve quality of life in Tompkins County.

1.3. Sustain High Quality Air Service: Provide cost effective, efficient and reliable air service into the future. The Ithaca Tompkins Regional Airport provides critical infrastructure to our key sectors, especially Higher Education, Manufacturing and High Tech industries. The airport is their gateway to the world. It is a small airport facing big challenges in the next four years. Challenges include airline industry mergers, transition to larger aircraft with fewer flights, and a continued highly competitive airline industry.

1.4. Housing: Increasing housing supply to meet demand is critical to economic development. Particular needs are units affordable to households below and up to the median income. However, housing development across the spectrum of prices and types is needed to alleviate tight vacancy rates.
Planned activities 2020 to 2024

- Utilities: The 2020 Water and Sewer study will update the 2010 study with progress in implementing municipal system improvements and include a 10-year facility plan to guide coordination of shared services; complete College Avenue utility and streetscape improvements
- Ground Transportation: The Ithaca-Tompkins County Transportation Council’s 2040 Long Range Transportation Plan will provide vision and guidance for improvements to transportation infrastructure and mobility. Additional guidance will come from studies targeting specific questions such as parking, transportation corridors, and bus service
- Air Service: Attract service to a new hub
- Workforce Housing: The County’s Housing Strategy provides guidance for encouraging new housing development, affordable housing, zoning and municipal processes, as well as improving existing housing conditions, and fair access to housing

Objective 2: Refine Land Use and Municipal Development

2.1. Implement the County’s Development Focus Area Strategy to encourage development in nodes with infrastructure. Municipalities should assure that zoning supports optimal use of infrastructure in these nodes and provides opportunities for development that fit community character and vision.

2.2. Continue to improve municipal regulation, permitting and inspection processes to facilitate private investment. Objectives are transparency of requirements and efficient scheduling for the processes.

2.3. Achieve the highest quality private sector investments. Municipal policies should attract developers’ best-quality investments in business and housing development by creating a hospitable welcome, providing guidance, and facilitating a respectful process throughout the project’s permitting process.

Planned activities 2020 to 2024

- Development Focus Areas: The County’s 2019 Municipal Housing Affordability Matching Fund programs helps municipalities with zoning and infrastructure planning in service of developing affordable housing in Development Focus Areas
- Municipal Regulation: Dryden will prepare a Comprehensive Plan; the Downtown Ithaca 2030 Strategic Plan will be released
- Achieve Highest Quality Investments: City of Ithaca will implement software to manage and improve the development review process

Objective 3: Support Major Development Projects and Districts such as the Emerson/Chainworks District, the Ithaca waterfront, and other complex projects in rural and urbanized areas

3.1. Municipal planning and development approval processes as well as economic development incentives and technical assistance need to collaborate to guide and support the development process. Steps that need support are market analysis, environmental studies, zoning and site plan reviews, assembling the financing, and so on.

Planned activities 2020 to 2024

Support Major Development Projects

» Continue Investment in Key Development Focus Areas: Ithaca waterfront; Collegetown; East Hill Village; Chain Works District; residential development in Varna; mixed use development at King Road and 96B; Inlet Valley; Lansing Town Center
GOALS (continued)

» Continue to implement policies such as the CIITAP in support of major development projects

» The 2030 Downtown Strategy will provide guidance for a new Downtown Innovation District

» Further growth in development focus areas including downtown Ithaca, East Hill Village, Chain Works district, Waterfront District, Varna, and Lansing Town Center are expected

Objective 4: Achieve progress toward the County’s housing and economic development goals in a manner compatible with the County’s goal of reducing greenhouse gas emissions at least 80% by 2050.

4.1. Proactively plan for changes in energy demand and provision of stable energy infrastructure as Tompkins County experiences continued growth and reinvestment.

4.2. Improve the energy performance of buildings and foster innovations to the energy production, transmission and distribution systems.

4.3. The energy transition from primarily fossil fuels to climate-neutral energy sources will likely present challenges and perceived conflicts as it evolves. Developing energy-specific planning and economic development tools will support efforts to achieve this objective. For example, the County’s Energy Roadmap (due for completion in 2015) will help guide both near-term and long-term actions needed to provide a secure energy future while achieving substantial GHG reductions.

4.4. Encourage and support business opportunities related to the energy transition and guided by the County’s Energy Road Map, such as innovations in energy production, distribution and building-performance.

Planned activities 2020 to 2024

Achieve Development While Reducing GHG Emissions

» The City and Town of Ithaca will implement a Green Energy Code Supplement

» TCAD and the County will continue to market and support incentive programs that help developers and industry reduce their GHG emissions, for example adopting an Enhanced Energy Incentive for the Industrial Development Agency, and NYSERDA programs targeted to commercial and industrial projects

» City of Ithaca will create an Energy Action Plan and hire a Sustainability Manager to implement their Green New Deal

NEW 2020 OBJECTIVE

Objective 5: Expand access to high speed internet and cellular networks in unserved rural areas of the County. The lack of access in rural areas has critical impacts on the performance of school children, businesses, and emergency responders. Strategic activities to forward this objective include:

5.1 Define the scope of broadband and cellular service needed to serve residents in Tompkins County. (The County’s 2012 report on broadband internet access could provide a base for this analysis.)

5.2 Explore innovative service models such as the Town of Dryden’s exploration of providing municipal broadband.

5.3 Participate in regional initiatives such as those of the Southern Tier Regional Planning and Development Board.
GOALS (continued)

GOAL B
Develop a labor market in which the aspirations and qualifications of the workforce are aligned with employment opportunities

Workforce development is a critical economic development activity. Both basic-skilled workers and workers with specific occupational skill sets are fundamental for the local economy to succeed. Current challenges arise from two sources. The workplace is demanding greater skills, and demographic shifts are demanding innovative education and training programs.

In the workplace, technology has replaced many low-skilled jobs that used to provide family-supporting incomes and benefits. Today’s “basic-skilled” jobs tend to be in service occupations, working with the public. Thus, they require communication skills, ability to make decisions, teamwork skills, and high levels of integrity. Traditionally blue collar jobs in manufacturing, maintenance, or healthcare support occupations now require computer skills and ability to follow complex management or regulatory protocols.

Changing demographics require continuing change in the delivery of education and training. According to the US Census and Woods and Poole projections, the workforce-age population in Tompkins County was 85% white, and primarily native-born in 2000. By 2010 that figure had dropped to 79% and by 2020 it is projected to drop to 75%. At the same time, the primarily white baby-boomer cohort, which is highly educated, will be well into a retirement surge. Equity in educational achievement remains a challenge for minority populations nationally and locally. New approaches to prepare these diverse populations in career-readiness are required.

The workforce development system needs to increase service capacity to meet this dual pressure of demand for greater skills at a time when delivering basic education faces greater challenges. Addressing this challenge will require additional funding. The need is imperative. Without a skilled workforce, the businesses creating the best job opportunities will relocate or never start up in Tompkins County. The better prepared that Tompkins County residents are, the more likely they are to be hired by local businesses and find quality career opportunities.

The primary focus of the workforce development system is connecting local employers and the local labor market. However, a number of key occupations require specialized training and experience. Those occupations, such as professors, medical specialists, and technology or management professionals are often recruited from regional or even national labor markets. Therefore, Goal B and its objectives encompass key industry positions that require broader recruitment efforts as well as the local labor market. The Tompkins County Workforce Strategy (2010) set out the Workforce Investment Board’s detailed approach to achieve its mission:

The Economic Development Strategy identifies specific objectives that increase alignment between workforce development and economic development partners to support the work toward that mission.

Objective 1: Improve access to better labor market information for employed workers, job seekers and the emerging workforce so they can: make more informed decisions about career development choices and opportunities; better align their skill development to employer needs; access qualifications and training programs.

1.1. Improve the quality of labor information and better tailor it to customers at the One Stop Career Center so that job-seekers can make more informed decisions about their career. Examples are current information on demand occupations and local employers’ needs.

1.2. Increase systematic connections with area high schools to facilitate increased distribution of local labor market information to guidance counselors and teachers.

1.3. Improve labor market, career, and training information on the TCAD and WIB websites.

Planned activities 2020 to 2024
In 2020, the Workforce Development Board will expand staff resources and be able to support increased targeted communication of labor market information to young people, their parents, people not currently active in the labor force, adults looking to change careers, and students attending college in Tompkins County.

Objective 2: Foster greater engagement of employers in workforce development efforts to improve information sharing of employers’ workforce requirements and needs so the community is better informed; increase employer engagement in K-12 education; inspire employers to strengthen career development through their hiring and on the job training practices

2.1. Improve local understanding of employers’ current workforce needs. Share that information with job-seekers and the broader community. Annual focus groups, one each for three different sectors may contribute to this objective.

2.2. Increase employer engagement in K-12 education. Expanding the reach of the WIB/School Administrators/Youth Employment Council Collaborative will facilitate this objective.

2.3. Improve on-the-job career development within individual businesses and sectors. Employer focus groups from a given sector can contribute best practices and collaborative ideas on how to improve career path development. Engage lead employers with highly developed human resource capabilities to train and mentor other area employers on how to strengthen internal career development efforts.

Planned activities 2020 to 2024
In 2020, TCAD will expand business-facing workforce development staff helping businesses access existing resources, collaborate with stakeholders to develop targeted training and workforce pipeline programs, and analyze and present labor information to business stakeholders.

Objective 3: Strengthen the Workforce Development System

3.1. Continue to improve the alignment of education, economic development and workforce development providers.

3.2. Nurture and innovate the workforce system to support rewarding career pathways and fulfilling engagement of human capital over the next ten years of major economic and demographic change.

3.3. Strengthen the outcomes-based orientation of workforce program providers to optimize use of scarce workforce development resources.

3.4. Implement the 2014 federal Workforce Innovation and Opportunity Act (WIOA) to increase career path development for young adults. WIOA goes into effect in 2015 replacing the Workforce Investment Act of 1998. WIOA includes a focus on improved outreach to disconnected youth, 18 to 24 years of age. WIOA places a priority on out-of-school youth, targeting career pathways, drop out recovery and education and training that leads to a diploma or post-secondary
credential. It also prioritizes work-based learning activities and provides significant funding for youth stipends and youth wages.

**Planned activities 2020 to 2024**

Building on the TST BOCES Precision Machining program and the 2019 listening sessions, TC3 will expand its micro-credentialing programs to improve the match between employer demand and workforce skills. Example micro-credentials will be in civil engineering, electronics technology, and machining. Develop training to meet the City of Ithaca’s New Green Deal objectives

**NEW 2020 OBJECTIVE**

Objective 4: Address the workforce shortages caused by the wave of retiring Baby Boomers. To fully engage the labor market, workforce development should focus on youth, people with disabilities, diverse underrepresented populations, discouraged workers, and people needing childcare. To succeed in this competitive labor market, the public and private sectors should coordinate their efforts through a variety of approaches including:

4.1. Employer engagement strategies that explicitly include people with disabilities in their hiring programs and their culture.

4.2. Social inclusion strategies that target underrepresented populations to increase equity and access to all types of jobs. Strategies involve coordinated work by multiple agencies to address a range of social needs. Needs include education, health, housing, childcare, transportation, cultural understanding and anti-discrimination. Involvement of representatives of disadvantaged groups in the design and delivery of such programming increases empowerment.

4.3. A branding strategy so Tompkins County is known as a best place to work. Imagine if a large number of local employers attained “best place to work” status, creating a community-wide culture where employees felt genuinely appreciated and were provided ongoing skills development, where leaders emphasized mentoring over management, and where workplaces consistently offered flexibility for work-life balance. This would drive retention of local youth and college graduates, and attraction of recruits with specialized skills.

**Planned activities 2020 to 2024**

Create a public relations campaign promoting people with disabilities in the workplace

**GOAL C**

**Strengthen, expand and diversify key traded sectors to foster job creation**

The primary metrics for evaluating economic development are jobs, income and investment. Economic development efforts aimed at employers and industry sectors focus on sectors that do not compete locally and that obtain much of their income from sales outside the County, often from national or even international markets. These sectors generate wealth through trade and are often referred to as “traded” sectors. “Local” sectors provide goods and services to local residents.

The County’s key sectors for economic development are those among the traded sectors. Local sector businesses that provide critical services or meet unfulfilled community needs may also be targets of economic development resources.

The total gross output of the Tompkins County economy is about $9 billion. That is divided nearly evenly between local and traded sectors. Education
GOALS (continued)

Services and the Visitors and Tourism sectors are defined as “traded” sectors because the funds to purchase those goods and services come from outside the County. Education is the largest sector, comprised primarily of Cornell University and Ithaca College. The next largest sector is Manufacturing and High Tech. This includes manufacture of conventional and High Tech products as well as tech-enabled service producers. Goods manufactured in Tompkins County include automotive and machine parts, electronics, food and beverages, and innovative materials. Tech-enabled services include scientific and technical research, computer systems/software design, and analysis and testing of materials for industry. Mining primarily extracts salt, as well as sand and gravel. Agriculture primarily exports dairy as well as fruits, vegetables, field crops, and other animal production.

Real Estate, Government (including public education), and Health and Social Services are the three largest local sectors in terms of gross output, each generating over $500 million. The Real Estate sector reflects large investments in rental properties particularly housing for students. The relatively large Local Accommodations and Food Service sector is also driven by the student population.

Health and Social Services is a large and growing sector for employment. Several organizations that are headquartered in Tompkins County, including the Cayuga Medical Center and Racker Centers provide high level professional services and administration for local and regional customers. Regional reach contributes directly to the vitality of the local economy by generating careers with good income, and the high quality of services contributes to the overall quality of life in the region.

Source: IMPLAN

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6 Sources include: IMPLAN’s 2009 data set for Tompkins County, NY. The Manufacturing and High Tech sector includes conventional, advanced and high tech manufacturing as well as High Tech Services. (TCAD defines the High Tech Services sector to include industries from the Information sector and the Professional, Scientific and Technical Services sector.) The Visitors and Tourism sector is not a defined sector since it draws from Accommodations, Food and Beverage, Retail, Entertainment, and Transportation sectors. Therefore, the V&T sector was assembled from relevant IMPLAN industries. To build the V&T sector, TCAD referred to the Tourism Economics 2012 report for the Finger Lakes region of New York. Using its distribution of visitor spending, portions of relevant industries were aggregated to create the V&T sector.
The Key Sectors Bubble Chart shows the size of employment and projected employment growth for the six key sectors. Software, Mobile and Tech-Led Services is a gazelle industry, relatively small but growing quickly. Higher Education is clearly the largest employer; as such even slow growth has significant positive impact on the economy. Manufacturing is a moderate sized industry with above average wages facing significant global challenges to growth in the US. Agriculture, Food and Beverage, and Visitors and Tourism are all smaller sectors with below average wages and limited growth expectations. Of these, Food and Beverage has the most potential to be a gazelle with strong growth in the next five years.

The objectives for fostering job creation are essentially objectives for six key sectors. Higher Education as the dominant economic sector is critical to the overall health and wellbeing of the County’s economy. Strengthening and diversifying the economy by expanding other traded sectors is also critical, creating diverse career opportunities for local residents and newcomers, and creating a vibrant business community that can sustain itself over time. The six objectives target these key sectors and identify desired outcomes for each sector.
Objective 1: Higher Education

Higher Education is driven by Cornell University and Ithaca College. TC3 is the local community college. During and in the wake of the recession (2009 to 2014), JobsEQ reported that Higher Education contracted their employment by 1.1% annually losing 855 jobs over the 5 years. Higher Education employment grew at a rate of 1.3% from 2015 to 2019 adding 900 jobs. From 2020 to 2024, Higher Education will likely be the greatest job-creating sector adding about 65 new jobs annually plus over 1,400 replacement hires annually.

Higher Education faces turbulent changes ahead. Competition, funding structures, teaching methodologies, the wave of Baby Boom generation retirements, and institutional geography are all anticipated to present significant challenges. Economic Development may be able to directly support the institutions of higher education as they change and grow. However, economic development may best provide indirect support by creating a thriving economic environment that supports higher education’s mission.

1.1. Provide economic development that supports technology commercialization by students and staff, including tech startups that generate IP licensing revenues for Cornell

1.2. Provide workforce development that improves skills of entry level workers for Higher Education’s local hiring

1.3. Support a diversified and growing economy that creates job opportunities for life-partners of Higher Education recruits

1.4. Support downtown revitalization and other quality of life projects that make it easier to attract students, faculty, and other key staff positions

1.5. Maintain and improve air service for the Ithaca Tompkins Regional Airport.

Objective 2: Manufacturing

Tompkins County’s Manufacturing strengths are in automotive, electronics, and measuring devices. The objective is to stem the decline of manufacturing jobs, reinvigorating mature producers and spurring the growth of startups. Innovation is important for both high tech and conventional products. According to JobsEQ, from 2014 to 2019 the County’s manufacturing jobs declined at an average rate of -2.4% annually, dropping 275 jobs. This compared to US increase of 1% and New York rate of decline of -0.5% annually. JobsEQ projects a continuing loss at the slightly lower rate of -1.5%. From 2015 to 2019, the number of establishments in Tompkins County decreased by 6 firms, from 101 to 95.

2.1. Reduce loss of jobs to zero for average job creation from 2020 through 2024

2.2. Raise Manufacturing job growth to 0.5% annually by 2024

2.3. Continue growing high tech manufacturing startups. Add five to seven new establishments between 2020 and 2024.

Objective 3: Software, Mobile, and Tech-enabled Service Companies

Software, mobile, and tech-enabled service companies fall under the NAICS code industries of 5415 Computer Systems Design and Related Services and 5417 Scientific Research and Development Services. According to JobsEQ data, in 2019, these industries had a combined average wage of $82,500 and employed about 600 people in the County. From 2014 to 2018, the number of establishments grew from 57 to 63. Employment growth was flat.
3.1. Increase the growth rate to the US average of 2.8%, or about 15 jobs per year creating 75 jobs from 2020 to 2024

3.2. Continue company formation growing 5 to 10 new establishments between 2020 and 2024.

Objective 4: Food/Beverage Manufacturing and Distribution

Between 2014 and 2019, The County’s Food and Beverage Manufacturing sector experienced employment growth at an annual rate of 4%, adding an average of 12 jobs annually. This was impressive growth for a relatively small sector with about 321 jobs in 2019. The sector also grew from 18 to 22 establishments. Growth was supported by the regional strength of the alcoholic beverage industry: wineries, distilleries and breweries. While JobsEQ forecasts a decline in this industry based on national and regional trends, the local food and beverage sector has several mature companies as well as startups that appear poised for continued active growth.

4.1. Food and Beverage Manufacturing is a small sector and it is undersized for this scale of economy. Aim to grow an additional 60 jobs by 2024, a 4% average annual growth rate.

4.2. Grow five new companies by 2024 bringing the total from 22 to 27 establishments.

Objective 5: Visitors and Tourism

The Visitors and Tourism sector includes the accommodations industry and portions of the food service, retail, travel and entertainment industries. During the five year period 2014 to 2018 (most recent available data from Tourism Economics), spending grew at about 5% annually. In 2018, visitor spending was about $227 MM. While there are many day-trippers to the County, visiting downtown, parks and attractions like the Farmers Market, overnight stays drive the job growth and spending for this sector. Visitors affiliated with Cornell University and Ithaca College generate about 35% of the room nights in Tompkins County. Over the past ten years, the mix of travelers has shifted to include significantly more families with children and leisure travelers.

The County’s new 2021 to 2027 Strategic Tourism Plan lays out 15 goals for protecting and continuing to grow existing tourism types, tapping into the community’s unique assets to grow new tourism focus areas such as outdoor recreation and lake access, and continuing to build a strong tourism foundation on existing strengths including agicultural tourism and arts and cultural heritage tourism. This new plan will guide the development of the Tourism sector going forward. At the same time, the key objective from the 2015 ED Strategy remains relevant:

5.1. Increased mid-week stays would help stabilize and maximize hospitality employment with a goal of high occupancy rates at hotels, seven-day-per-week for at least 10 months per year. (The target is 300 additional mid-week room nights per week.) This level of operation would support development of staff professionalism with increased salaries and career paths. Development of a conference facility with flexible space, ideally with the capacity to host groups up to 500, is an important consideration in achieving that goal. This is a long-term goal for 2025.

Objective 6: Agriculture

The major agricultural product of Tompkins County is milk, representing 64% of the $65 million market value of agricultural production in 2017. From 2012 to 2017, the value of dairy production increased slightly while other crop and livestock production contracted slightly. From 2012 to 2017, the Census of Agriculture for Tompkins County reports that the number of farms dropped 6% from 558 to 523 and
the land in farming remained flat at about 91,000 acres.

From 2014 to 2019, the Agriculture, Fishing and Forestry sector (which is primarily Agriculture) increased employment at an annual growth rate of 1.0%, adding about 8 jobs per year. At the same time, employment expanded at a rate of 1.2% in New York State, and 0.1% in the US.

In 2017, over 96% of farm operators were non-Hispanic white, 31% of operators were 65 or older, and only 10% were under 35. The majority of farmers operate small “lifestyle” farms, and have other income sources.

The County’s Agricultural and Farmland Protection Plan (2014) identified strategies for supporting agriculture in five areas: economic development, policies, agricultural awareness, environmental quality, and future farmers/workforce. Economic development objectives for Agriculture include:

6.1. Build a robust local food system, with year-round production for local and regional consumption, expanded retail and wholesale marketing opportunities, and new value-added agricultural products. This objective requires both successful business development and expansion of farms.

6.2. Identify the common infrastructure needs and services to enable farms to expand production, such as: common washing, grading, packing and storage facilities that are food safety (GAPS) certified; common processing and freezing equipment; marketing and distribution coordination; and other such facilities and services that enable producers to expand farm operations. Leverage existing resources when possible.

6.3. Increase agricultural and culinary tourism with a focus on farm and food enterprises.

6.4. Succession planning: Transition farms and farmland from one generation to the next and expand the pool of young farmers through business training and guidance on acquiring land and infrastructure.

Planned activities 2020 to 2024 for the Key Sectors

- Manufacturing and Technology sectors: increase financing and investment resources, and increase incubation and technical assistance services to support growth of companies as well
- Visitors and Tourism sector: move the Conference Center project forward to completion; strategically develop the waterfront to increase lake access; expand focus on welcoming international travelers; implement the way-finding signage program; use the 2021 to 2027 Tourism Strategy to guide activities
- Agriculture sector: training new farmers and succession planning are priority activities
- Develop a character-based lending program coupled with training and technical assistance – partnership between the City, SBDC and Alternatives Impact.
- Create City of Ithaca economic development strategy
Overview
There are two overarching strategies for economic development in Tompkins County:

STRATEGY 1
Develop an integrated and proactive approach to community-wide economic development leadership

STRATEGY 2
Conduct an excellent economic development effort that offers a comprehensive set of outstanding programs

The 2006 ED Strategy called for the creation of the Economic Development Collaborative to formalize the existing loose network of development agencies to:
• Engage in a common economic development mission for the County
• Address complex and multi-dimensional development goals that are larger than any single agency’s purview
• Bring additional resources to the County to achieve its goals and mission
• Elevate participating agencies’ achievements by engaging the Collaborative’s resources to complement efforts.

The ED Collaborative has had a number of successes. One example is supporting the creation of the Community Housing Affordability Program. Another is the initiation of the County-wide Inter-Municipal Water and Sewer Feasibility Study. The ED Collaborative contributes to the excellence of local economic development efforts and to integrating policy decisions with the nuts and bolts of implementation.

The 2015 ED Strategy seeks to build on those successes by engaging business and local government leadership in comprehensive understanding of economic development issues and advocacy for economic development priorities within the framework of the community’s long-term goals. Leadership is essential to improving economic opportunity while protecting the region’s quality of life.

The 2015 ED Strategy also reinforces the importance of excellence in economic development programs and highlights the particular need to increase the support of workforce development programs.

STRATEGY 1
Develop an integrated and proactive approach to community-wide economic development leadership

Achieving the ED Strategy’s goals and objectives will require broad effort and many action steps. Overarching all activities – providing guidance, clarity and inspiration – will be leadership. That leadership will come from public sector elected officials and staff, from private sector leaders, and the leadership of agencies with economic development missions. Ideally, the leadership from these sectors should find common ground for promoting economic development with consistent messaging.

The path to creating economic opportunity through the creation of good jobs and improved quality of life is not straightforward. Near-term priorities may find themselves at odds with each other, even when there is agreement on long-term goals. Activities seen as working toward a long-range vision may generate near-term winners and losers and negative unintended consequences. Thus, it is a challenging time for leaders to formulate policies and take action.

In this complex environment, leadership needs respectful processes and good, dependable information to guide decisions and undergird communications. Leaders need to be transparent, comprehensive and rigorous with their analysis of
projects and programs – to guard against project failures that are driven by wishful thinking; to make changes that will be equitable in placing burdens upon citizens or businesses; to keep an eye on the long-range goals even as near-term approaches to reach those goals require patient, systematic transitions.

In these times of limited resources in both the public and private sectors, leaders should work collaboratively to leverage resources and to streamline processes in order to conserve resources and maximize the benefits of investments and programs. At the same time, we must recognize that other communities also strive to grow and attract economic development investment. In this competitive environment, leadership plays a strong role in assuring our success.

The following tactics shape the leadership strategy:

**Tactic A**
Local government and agency leadership should strive to create a transparent and welcoming environment for development projects. Private businesses and developers are critical partners in generating revitalization, investment and job creation. Together, local government, agency and business leadership can optimize the development process through efficient and effective discussions and procedures that target investments to achieve mutual goals. Certainly, this process is dynamic and requires discourse and planning, particularly for complex projects. Leadership should lead the way in providing a well-governed, well-informed, reliable and consistent process for development.

**Tactic B**
Leadership should set priorities for implementation of the ED Strategy. To ensure implementation, leadership must secure funding, guide a fair and informed implementation process, and evaluate implementation to maximize return on investment. Local government and agency leadership should assure that investments in infrastructure and a ready workforce are prioritized, as those elements are critical to attracting the private sector investments that create job opportunities and real estate investments. Leadership must also be nimble, ready to take advantage of emerging opportunities.

**Tactic C**
Leadership should work together to explore and then articulate policy positions on local, state and federal issues that are critical to economic development. While these efforts have been made in the past, local leaders need to be more proactive, coordinated and engaged in creating these positions. Positions should be conveyed via consistent communication to target audiences. Particular attention should be focused on goals of the ED Strategy such as creating good entry-level jobs.

**Tactic D**
Members of the Economic Development Collaborative should work together to implement the ED Strategy in a collaborative, responsive, well-informed and creative manner. The ED Collaborative should engage other public and private sector leaders, at the local, regional, state and federal levels as needed to achieve the ED Goals.

**Tactic E**
Economic development leadership should communicate the value of economic development programs – explaining the role of economic development; answering questions about the economic development vision and how it is being achieved; demonstrating creation of good paying jobs, diversification of the economy and increasing tax base.
STRATEGIES (continued)

STRATEGY 2
Conduct an economic development effort that offers a comprehensive set of outstanding programs that effectively meet needs of customers

Tompkins County’s economic development resources feature a number of strengths. We have better than average access to financial resources, from revolving loan funds to venture capital. We have skilled private developers, and we have an established collaborative approach, engaging thirteen agencies in economic development.

We are not without challenges to economic development. There are infrastructure issues such as energy supply and airport service. There is a clear need to expand workforce development resources. Also, fragmentation of local government that controls land-use, development and permitting processes presents challenges to businesses and real estate developers.

Investing in the following tactics will continue to improve local economic development efforts:

Tactic A
Deliver conventional economic development programs that offer incentives, technical assistance, and mentorship. Continuously work to improve program offerings to respond to changing demands, increase effectiveness of programs, and coordinate offerings among economic development partners. Use measurement, monitoring and analysis to evaluate effectiveness of programs.

Tactic B
Devote additional resources to workforce development. For example, create consortiums of employers with similar needs to identify and respond to employee training needs with an emphasis on entry level and mid level training.

Tactic C
Foster a dynamic entrepreneurship ecosystem that is rich in resources. Focus on providing resources – mentorship, referrals, financial investments – to entrepreneurs and startups with strategic reasons to stay in Tompkins County and the potential to generate quality jobs and career opportunities. Build on research and development assets to expand the innovation economy. Support connectivity to the New York City metro area and global export markets. We can create the infrastructure and ecosystem; the market will pick the companies that will succeed.

Tactic D
Continue to create economic development programs that respond to specific opportunities such as workforce training targeted to manufacturing, an incubator targeted to life sciences, financial resources targeted to pre-revenue companies.

NEW 2020 TACTIC

Tactic E
Expand resources to assist entrepreneurs involved in research and development, and commercialization of new technologies to start high growth technology companies. Strategic activities include: expanding local funding resources for early-stage, high-growth companies; developing specialized real estate options targeted to early stage companies that are graduating from local business incubators, such as lab space and co-location spaces; coordinating local economic development resources with regional, industry-cluster development initiatives; strengthening the entrepreneurship ecosystem.
TCAD will take the lead on implementing the strategies, spearheading specific activities and encouraging or catalyzing others. The ED Collaborative will contribute to the excellence of local economic development efforts and to integrating policy decisions with the nuts and bolts of projects and programs. Furthermore, full implementation depends on business and local government leaders engaging in economic development issues and advocacy. Leadership is essential to improving the region’s economic opportunity.

By setting out clear objectives, the ED Strategy provides a guide for the County’s economic development efforts and aims to optimize the return on public and private investments. Evaluation will be used to adjust implementation activities and to keep the community informed on progress and changing economic challenges. The Strategy’s values will foster and strengthen this region’s core qualities and support the vision for a thriving and inclusive economy.

Tompkins County aspires to be an inclusive economy in which every person can attain skills leading to quality jobs and fulfilling careers. We aspire to create a dynamic and thriving business community. We aspire to have a high level of leadership and collaboration among economic development, community development, business, higher education, and civic leaders to build on current strengths, face challenges and develop a community with abundant economic opportunity.

Communities in Upstate faced significant decline over the past five decades. Decline continues to hobble many of our neighbors and regional competition to succeed is strong. Though Tompkins County has seen slow growth through those challenging times, it is essential to take decisive action in our urban and rural areas to reach our aspirations.

We need to invest strategically in physical infrastructure and in municipal development processes. Efficient delivery of these services is fundamental to achieving our economic development goals. The public sector expresses its vision for development through its investments and policies. When that vision is clearly communicated, the private sector is attracted to make good quality investments that fit the community’s character and goals. If the public sector does not communicate a clear vision, growth may occur in less appropriate locations, and expensive, inefficient public review processes may take value out of the proposed projects.

We need to invest in our workforce and our workforce development resources from school-readiness to on-the-job-training. Human capacity, skill development and experience are critical for individuals to access quality career paths and economic opportunity. Businesses, the community and the local economy all benefit from improved
alignment between job seekers’ capabilities and employment opportunities. Challenges must be addressed for basic-skilled, entry-level positions and for specialized skill positions.

We need to strengthen, expand and diversify key industry sectors. Higher education is the region's economic engine. The other key sectors — manufacturing, technology-led services, food and beverage production, visitors and tourism, and agriculture are critical to creating new businesses, new jobs, economic diversity, and generating regional wealth. These sectors also support higher education by providing a home for technology transfer, a lively community for students and staff, and economic opportunities for the life-partners of specialized recruits. The entire Tompkins County economy, both traded and local sectors, must thrive to maintain the health of each segment. Similarly, contributions to the health of the regional Upstate economy will have positive returns to Tompkins County.

Above all these actions is leadership with the ethics to build trust and respectfully engage broad perspectives in decisions of how to achieve community goals; the knowledge to understand economic challenges and opportunities, and skillfully build achievements; the will to champion economic development policies that support the vision for a thriving and inclusive economy.
APPENDIX A
2015 to 2019 Progress Report

This report highlights selected progress and challenges toward achieving the ED Strategy’s goals.

Goal A
Strategically invest in Community Infrastructure to attract private investment that leverages existing infrastructure and promotes infill in identified development focus areas

Goal A engages all 16 local municipalities plus the County, 14 water and sewer operators, and various other public and private utility and transportation providers. Thus this is the largest section of the status report. While there have been extensive community investments in infrastructure over the past five years, this report provides select highlights.

OBJECTIVE A.1
Improve and expand community infrastructure including utilities, transportation, and workforce housing

Utilities
- Water and Sewer - Sewer Inflow and Infiltration studies, municipal water and sewer studies, and Capital Improvement Plans for water and sewer are progressing across the County. New York State’s Source Water Assessment Plan is assessing the safety and security of municipal water sources across the state to protect drinking water. The 2020 water and sewer study will provide a detailed survey of water and sewer investments from 2010 to 2020. A key challenge that emerged during the past five years was the need for greater ability to respond to both drought and flooding in the face of climate change. In 2019 the County began developing a Resiliency and Recovery Plan to address these and other issues.

- Energy Infrastructure - Over 50 MW of off-site commercial solar have been developed or are substantially in progress in Newfield, Enfield, Ulysses, Dryden and Lansing, offering residential and commercial customers to choose their energy from locally generated renewable sources. Parts of Lansing are under a natural gas moratorium and receiving funds from NYSERDA to accelerate electrification of heating demand.

Transportation
- Ground Transportation:
  - Mobility: Lime Bikes bike share, Uber and Lyft services are now available
  - The City of Ithaca adopted a scooter law
  - Key bridge work includes commencement of the new Brindley Street bridge to improve access between the west side and southwest areas of the City of Ithaca; two new major trail bridges have been funded to extend the Black Diamond Trail across the Inlet and connect the Dryden Trail across Route 13 near Route 366 in the Town of Dryden.
  - Major bicycle and pedestrian improvements have been installed or are underway on Triphammer Road, from Cayuga Heights to the Ithaca High School, from the Village of Dryden to Poets Landing, from the City of Ithaca to Ithaca College, from the City to the Cayuga Medical Center, and from the City to Lindermann Creek housing.
  - The Electric Vehicles (EV) Infrastructure Plan was completed in 2016, 11 charging stations were installed, and the EV Tompkins promotion initiative was completed
  - Way Finding: The Convention and Visitors Bureau developed a way finding signage strategy and currently seeks funding
Parked: Significant real estate development from 2015 to 2019 in downtown Ithaca and Collegetown has generated a shortage of an estimated 300 to 500 parking spaces. Parking structure repairs and continued development are projected to increase the parking challenges. Two relevant studies were initiated in 2019: a detailed parking study and a travel demand management study. In addition, a three-year Transportation Management Association pilot project for Downtown Ithaca was launched.

Trails: Large sections of the Black Diamond Trail and the Dryden Trail were completed; the County established a program to fund small grants for municipalities to make improvements to parks and trails.

Transit: TCAT released its 2018 to 2030 Strategic Plan. A key next step is relocating and expanding the size of the current TCAT facility, which was built in 1992 and is inadequate for current and future transit system demands.

Air Service: Ithaca Tompkins Regional Airport completed a $32 MM terminal expansion in 2019. Improvements include new gates, security, and customs. The airport also added daily flights to Washington DC and Charlotte NC.

Housing programs and reports:
  » County Housing Fund: from 2015 to 2019 CHF awarded $2.5 MM, supporting development of 366 affordable units, and leveraging $93.6 MM total investment; the Fund received renewed funding commitments from Cornell, the County, and the City of Ithaca in 2016
  » Municipal Housing Affordability Matching Grant Program: the County created this program in 2019 with $45,000 to support municipalities’ affordable housing efforts including zoning, infrastructure, and grant writing projects
  » Other County initiatives: 2016 Housing Needs Assessment, 2016 Housing Summit, 2017 Housing Strategy, 2018 hired a Housing Planner at the County, and the 2019 Incremental Development Alliance study and training to increase infill housing projects county-wide
  » The Chamber of Commerce study, Strategy to Expand Workforce Housing Development in Tompkins County, was completed in 2019. Its focus is on generating moderately priced housing targeted to middle-income homebuyers.

Workforce Housing

Housing construction: From 2015 to 2019, the Tompkins County Department of Planning and Sustainability reported that about 2,500 new housing units were completed. Of these, about 325 were subsidized to be affordable for low and moderate income people. Affordable housing projects were developed in Dryden, Lansing, the Town and City of Ithaca, and Newfield.

OBJECTIVE A.2
Refine Land Use and Municipal Development

Several Agriculture & Farmland Protection Plans were completed: 2015 Town of Lansing; 2016 Tompkins County; 2018 Town of Dryden

County has increased support to municipal planning efforts by continuing 239 reviews, and adding training for planning boards, quarterly planning meetings, and GIS support

Town of Ulysses completed rezoning of lakefront and agricultural zones
Town of Ithaca is prepared to adopt a form-based code
Town of Ithaca made improvements to their development permitting and inspection process by implementing software that integrates department databases and helps with tracking and communications between departments and with applicants
Town and City of Ithaca have collaborated to provide shared services to large projects that straddle the two municipalities such as the Chain Works District and the North Campus Housing project
City of Ithaca adopted a Greater Southside Neighborhood Plan, which includes economic development and workforce development goals
City of Ithaca adopted new waterfront zoning and the Waterfront Area Plan and Design Guidelines, which have catalyzed housing and mixed use development of underused waterfront properties
City of Ithaca adopted a PUD for the Immaculate Conception redevelopment project
The Industrial Development Agency is considering expansion of the Community Investment Incentive Tax Abatement Program (CIITAP) to an extended waterfront area, consistent with the City of Ithaca’s new Waterfront Zone.

Redevelopment of the Maplewood apartments on East Hill: 440 new units providing 870 beds – nearly doubling the 480 beds in the former, demolished complex
North Campus: 2,000-bed, dorm and student activities development at Cornell, was planned, approved and began construction
Inlet Valley: plan was completed for a new, agri-tourism centric business district in the Town of Ithaca
Waterfront DOT site: completed the 2016 NYSDOT Maintenance Facility Relocation & Redevelopment Feasibility Study; the State relocated the DOT facility from the Ithaca waterfront to near the airport in 2019
Chain Works pre-development: Chain Works is a vacant 800,000 square foot of manufacturing and office complex. The City and Town have collaborated to rezone and manage permitting of the District, which straddles the two municipalities (creating a PUD/PDZ with consistent regulations); multi-year environmental cleanup is nearly complete in 2019.

OBJECTIVE A.4
Achieve housing and economic development goals in a manner compatible with goal of reducing greenhouse gas emissions
Development and Reducing GHG Emissions
Planning for reducing fossil fuel use:
» Tompkins County: 2016 Energy Focus Area study; 2016 Energy Road Map; Medium Wind Feasibility study; 2019 Energy Strategy Update
» Town and City of Ithaca: 2019 Green Energy Policy
GOAL B  
**Develop a Labor Market where the Aspirations and Qualifications of the Workforce are Aligned with Employment Opportunities**

Goal B engages a number of agencies including public schools, colleges, and numerous agencies that directly support workforce development or provide wrap-around services, which support better engagement of the labor market. Primary policy guidance for this work is provided by the Tompkins Workforce Development Board (WDB). (Note: Appendix C provides an update of labor market data and information.)

**Access to Labor Market Information**
- In 2019, the WDB hosted its first National Manufacturing Day career day for Tompkins 10th and 11th graders. This mirrors their model Health Career day event
- This objective needs more attention. See upcoming activities in 2020-2024 comments below

**Engagement of Employers**
- The TST BOCES P-TECH Academy (Pathways in Technology Early College High School) opened in 2018. It is aligned with computer technology and manufacturing production career development and engages employers in student activities from grade 9 through an Associates degree
- TST BOCES started the Precision Machining Program, which provides training in design and production on equipment provided by manufacturers (e.g. CADD, CAM, and CNC equipment)
- In 2019 the Workforce Development Board hosted a series of listening and discussion sessions for training providers to understand manufacturers’ workforce needs

**APPENDIX A (continued)  
2015 to 2019 Progress Report**

- **Programs:**
  - In 2017 the Tompkins County Industrial Development Agency adopt an off-site commercial solar photovoltaic policy to encourage solar development
  - Tompkins County Business Energy Advisors launched in 2018
  - NYSEG non-pipe alternatives RFP for the Lansing natural gas moratorium area released in 2019
  - NYSERDA investments in the Lansing natural gas moratorium area support Heat Smart Tompkins, Business Energy Advisors Lansing, and Real Time Energy Management incentives for the moratorium area
  - Tompkins County Industrial Development Agency informally provided enhanced energy incentives to several project. Based on this experience, TCIDA aims to adopt a Green Energy Incentives Policy in 2019
  - A 2030 District was established in the City of Ithaca, grew to include 21 properties that pledged to significantly improve their energy performance by 2030

- **Municipalities**
  - The Town of Caroline installed a ground source heat pump and solar photo voltaic panels to achieve net-zero fossil fuel use.
  - The City of Ithaca adopted a New Green Deal policy in 2019 with significant fossil fuel reduction goals for 2025 and 2030.
  - About half of the municipalities in the County are exploring, or already underway with LED conversion of their street lighting
  - Tompkins County created an Energy Task Force advisory board
Workforce Development System

- Launched A2D (Arrival to Departure) expanded tourism sector training to replace the Hospitality Star program
- Launched SkillUp Tompkins online training solutions focused on career training and exploration
- TC3 initiated micro-credentialing through its Applied Sciences and Technology program
- The City of Ithaca’s IURA supported the Work Preserve and Finger Lakes Reuse Center entry-level job training programs
- Chamber of Commerce partnered with others to launch the Live In Ithaca website to help recruit skilled professionals
- Tompkins Workforce New York Career Center launched a communications campaign using social media, bus ads and radio spots to market their programs for youth (ages 14 to 24). The campaign has had good success engaging youth
- The Tompkins County Industrial Development Agency adopted a Local Labor Utilization Policy in 2016

GOAL C
Strengthen, Expand and Diversify Key Sectors to Foster Job Creation

Goal C is the traditional focus of economic development agencies, and other business and sector-focused agencies. Locally TCAD, the Industrial Development Agency, the Chamber of Commerce, the Downtown Ithaca Alliance, and Cooperative Extension work to strengthen these sectors. Technical assistance for entrepreneurs and small businesses is also provided by the Business CENTS program, the Small Business Development Center (SBDC), and the Rev Ithaca Startup Works incubator. There are also highly specialized innovation commercialization programs on the Cornell campus.

Overarching metrics of success

From 2014 to 2018, TCAD supported investment projects in key sectors through the Tompkins County Industrial Development Agency, TCAD’s revolving loan funds, and the County’s Tourism Capital Grant program. Economic impacts include:

- 97 development projects
- $727 MM private investment
- 657 new jobs
- $50 MM new payroll
- 4,700 retained jobs

These are indicators of an overall healthy economic ecosystem with solid growth and investment. Appendix D provides an update of Key Sector data and analysis that detail sector strengths and, in some cases, challenges. Key sector highlights follow:

Higher Education

- Rev Ithaca Startup Works and Praxis business incubators provide new support for commercialization and tech transfer from Cornell, and to a lesser extent IC and TC3. TCAD and regional and State resources support the growth of graduating firms that stay in the region
- Downtown Ithaca Alliance worked with Cornell and IC to create the Student Welcome Weekend, founded in 2018
- The Convention and Visitors Bureau increasingly collaborates with the campuses to provide visitor support during key events
- Improved air service to Ithaca Tompkins Regional Airport, and expanded airport facilities, including the addition of customs, are positive factors for the colleges and university
- The concentration of jobs in the Higher Education sector has increased slightly from 27% to 28% of the jobs in the County. Thus the economy has not diversified
Manufacturing
- Manufacturing employment declined 11.5% from 2014 to 2019. The number of establishments also dropped, going from 101 to 95.
- Nevertheless, the manufacturing sector continues to be a significant engine of the economy, generating close to $800 MM in output annually. While there has not been net job growth, the manufacturing sector has a high need for replacement workers especially for production jobs (annual demand is for 180 new entrants to fill retirements and other vacancies). Several training initiatives at TST BOCES and TC3 are responding to this need. (See Goal B above)

Software, Mobile, Tech-enabled Services
- Overall, the sector saw a slight decline in employment. The decline was driven by loss of research and development positions, while computer programming services expanded. The sector added 6 new establishments including Ursa Space Systems, Rosie Applications, and GiveGab

Food/Beverage Production
- The Food and Beverage manufacturing sector grew 4% adding 57 jobs and four new establishments
- During the same period food wholesalers declined by 42 jobs
- New and expanding food and beverage manufacturers included: Ithaca Hummus, Ithaca Beer, Liquid State, Emmy’s Organics, South Hill Cider, and Old Chatham Creamery
- The Food Processing Business Incubation Program initiated regional service in 2018

Visitors and Tourism
- Construction of three new hotels – The Marriott, Holiday Inn Express, and Hilton Canopy, adding 375 rooms – helped support increases in the Visitors in Tourism sector from 2015 to 2019
- Oxford Economics reports 5% average annual growth in the sector’s output from $195 MM in 2015 to $227 MM in 2018. However mid-week and winter season sales remain a challenge
- Preparatory work for a conference center located in downtown Ithaca moved the project forward — defining the market demand and the scale of project, and bringing together key players to develop a revenue structure. The conference center is being considered as part of the mixed-use Green Street redevelopment project
- The new agri-culinary tourism initiative worked with about 40 businesses to improve their marketing and facilities for tourism visitors
- A2D (Arrival to Departure) visitor training launched in 2019 and serves this industry
- The new Taughannock Falls visitor center opened in 2016 and has been a huge success
- The County’s Strategic Planning Tourism Board completed a new Visitor Profile study and a new Tourism Strategic Plan in 2019. These will guide marketing and program investments during 2020 to 2024

Agriculture
- New jobs on farms are emerging in dairy, agri-tourism, and horticulture, as well as new specialties in hops and hemp.
- There has been a significant increase in training opportunities through
  » High school programs such as BOCES and Groton
  » New non-profit programs: Youth Farm Project, Ithaca Children’s Garden Youth Horticultural Apprentices
  » TC3’s Sustainable Farming and Food Systems Program
  » Groundswell Center’s New Farmer Training program trained about 100 people from
APPENDIX A (continued)
2015 to 2019 Progress Report

2015 to 2019. Recent focus has been on people of color and immigrants

Assistance for Entrepreneurs and Small Businesses
  • The Binghamton Small Business Development Center (SBDC) increased its presence in Tompkins County from about 25% FTE presence to 100% FTE from 2015 to 2019
  • City of Ithaca created the Doing Business in Ithaca Guide in 2019
Economic Data - Household Wellbeing

The distribution of Household income has not changed significantly from 2012 to 2017.

Median Household Income increased from $49,159 in 2012 to $56,200 in 2017.
APPENDIX B (continued)
Economic Data - Household Wellbeing

The distribution of family income has not changed significantly since 2012. Median Family Income: $78,504
Economic Data - Household Wellbeing

Tompkins County Employment and Income Metrics 2017

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<td>6.8%</td>
<td>6.6%</td>
<td>5.8%</td>
<td>9.5%</td>
<td>10.1%</td>
</tr>
<tr>
<td>Self-employed</td>
<td>7.4%</td>
<td>5.8%</td>
<td>6.0%</td>
<td>7.6%</td>
<td>6.1%</td>
<td>6.2%</td>
</tr>
<tr>
<td>Population with health insurance coverage</td>
<td>95.0%</td>
<td>92.4%</td>
<td>89.5%</td>
<td>94.1%</td>
<td>88.6%</td>
<td>84.9%</td>
</tr>
<tr>
<td>Families in poverty</td>
<td>9.5%</td>
<td>11.3%</td>
<td>10.5%</td>
<td>7.5%</td>
<td>12.0%</td>
<td>11.6%</td>
</tr>
<tr>
<td>Families in poverty with children under 18</td>
<td>16.2%</td>
<td>17.6%</td>
<td>16.7%</td>
<td>13.9%</td>
<td>18.5%</td>
<td>18.4%</td>
</tr>
<tr>
<td>Families in poverty with children under 5</td>
<td>20.9%</td>
<td>15.1%</td>
<td>16.2%</td>
<td>15.9%</td>
<td>18.5%</td>
<td>19.2%</td>
</tr>
<tr>
<td>Median household income</td>
<td>$56,200</td>
<td>$62,765</td>
<td>$57,652</td>
<td>$52,070</td>
<td>$56,657</td>
<td>$51,771</td>
</tr>
<tr>
<td>Median family income</td>
<td>$78,504</td>
<td>$77,141</td>
<td>$70,850</td>
<td>$76,053</td>
<td>$68,750</td>
<td>$63,105</td>
</tr>
</tbody>
</table>

Source US Census
2013-2017 American Community Survey 5-Year Estimates

From 2012 to 2017, the slightly lower labor force participation rate likely reflects the retiring Baby Boomer generation. The lower unemployment rate reflects recovery from the Great Recession.

This ACS estimate indicates that 2017 poverty rates are significantly higher in Tompkins County than 2012. The 2017 poverty rates are about 25% above 2012 rates for Tompkins County. These estimates put Tompkins poverty rates in alignment with the New York State and national poverty rates. However, local Department of Social Services case loads do not reflect this increase.
### Housing Data

#### 2017 Housing Statistics for Tompkins County and Surrounding Counties

<table>
<thead>
<tr>
<th>County</th>
<th>Homeownership Rate</th>
<th>Median Home Price</th>
<th>Homebuyers with Monthly Owner Costs Exceeding 30% of Income</th>
<th>Median Household Income</th>
<th>Rental Vacancy Rate</th>
<th>Median Gross Rent Exceeding 30% of Household Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tompkins</td>
<td>55.5%</td>
<td>Not Collected</td>
<td>20.6%</td>
<td>3.4%</td>
<td>$1,055</td>
<td>59.9%</td>
</tr>
<tr>
<td>Cayuga</td>
<td>70.8%</td>
<td>Not Collected</td>
<td>19.9%</td>
<td>4.8%</td>
<td>$715</td>
<td>43.3%</td>
</tr>
<tr>
<td>Chemung</td>
<td>68.1%</td>
<td>Not Collected</td>
<td>16.5%</td>
<td>7.6%</td>
<td>$764</td>
<td>53.9%</td>
</tr>
<tr>
<td>Cortland</td>
<td>64.7%</td>
<td>Not Collected</td>
<td>16.4%</td>
<td>3.1%</td>
<td>$742</td>
<td>44.3%</td>
</tr>
<tr>
<td>Schuyler</td>
<td>76.4%</td>
<td>Not Collected</td>
<td>19.6%</td>
<td>12.8%</td>
<td>$741</td>
<td>45.7%</td>
</tr>
<tr>
<td>Seneca</td>
<td>73.2%</td>
<td>Not Collected</td>
<td>19.3%</td>
<td>5.9%</td>
<td>$750</td>
<td>46.5%</td>
</tr>
<tr>
<td>Tioga</td>
<td>77.1%</td>
<td>Not Collected</td>
<td>19.4%</td>
<td>4.6%</td>
<td>$695</td>
<td>50.4%</td>
</tr>
</tbody>
</table>

**SOURCE:** 2013-2017 American Community Survey 5-Year Estimates

Tompkins County Department of Planning and Sustainability tracks housing data. The 2017 data is not significantly different from 2012 data in the 2015 Comprehensive Plan. Tompkins County continues to have the lowest level of homeownership in the region.

Rents in Tompkins County also remain the highest, as well as the highest rent burden. All these facts are largely due to the significant college student population that seek off-campus housing in Tompkins County.
## 2019 Demand of Occupations

### EQ Table: Occupations of Jobs in Tompkins County sorted by largest employment level

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Education, Training, and Library</td>
<td>9,180</td>
<td>$64,500</td>
<td>246</td>
<td>9,475</td>
<td>$81,500</td>
<td>830</td>
</tr>
<tr>
<td>Office and Administrative Support</td>
<td>7,622</td>
<td>$34,100</td>
<td>171</td>
<td>7,622</td>
<td>$42,800</td>
<td>740</td>
</tr>
<tr>
<td>Food Preparation and Serving Related</td>
<td>4,048</td>
<td>$21,700</td>
<td>164</td>
<td>4,439</td>
<td>$30,000</td>
<td>740</td>
</tr>
<tr>
<td>Sales and Related</td>
<td>3,889</td>
<td>$33,000</td>
<td>136</td>
<td>3,893</td>
<td>$36,300</td>
<td>514</td>
</tr>
<tr>
<td>Personal Care and Service</td>
<td>1,664</td>
<td>$27,300</td>
<td>68</td>
<td>2,272</td>
<td>$33,400</td>
<td>348</td>
</tr>
<tr>
<td>Management Occupations</td>
<td>2,756</td>
<td>$98,100</td>
<td>85</td>
<td>3,571</td>
<td>$130,400</td>
<td>276</td>
</tr>
<tr>
<td>Building &amp; Grounds Cleaning &amp; Maintenance</td>
<td>1,833</td>
<td>$27,800</td>
<td>54</td>
<td>1,928</td>
<td>$31,600</td>
<td>239</td>
</tr>
<tr>
<td>Transportation and Material Moving</td>
<td>1,911</td>
<td>$32,400</td>
<td>50</td>
<td>1,922</td>
<td>$37,800</td>
<td>218</td>
</tr>
<tr>
<td>Business and Financial Operations</td>
<td>2,102</td>
<td>$60,000</td>
<td>53</td>
<td>2,382</td>
<td>$71,800</td>
<td>211</td>
</tr>
<tr>
<td>Production</td>
<td>2,273</td>
<td>$34,100</td>
<td>42</td>
<td>2,003</td>
<td>$43,500</td>
<td>180</td>
</tr>
<tr>
<td>Community and Social Service</td>
<td>1,150</td>
<td>$44,100</td>
<td>35</td>
<td>1,538</td>
<td>$59,000</td>
<td>179</td>
</tr>
<tr>
<td>Healthcare Support</td>
<td>1,412</td>
<td>$30,800</td>
<td>53</td>
<td>1,354</td>
<td>$36,500</td>
<td>170</td>
</tr>
<tr>
<td>Healthcare Practitioners and Technical</td>
<td>2,506</td>
<td>$75,200</td>
<td>87</td>
<td>2,788</td>
<td>$87,100</td>
<td>154</td>
</tr>
<tr>
<td>Arts, Design, Entertainment, Sports, Media</td>
<td>876</td>
<td>$54,000</td>
<td>32</td>
<td>1,351</td>
<td>$63,200</td>
<td>132</td>
</tr>
<tr>
<td>Installation, Maintenance, and Repair</td>
<td>1,445</td>
<td>$44,100</td>
<td>40</td>
<td>1,429</td>
<td>$45,400</td>
<td>129</td>
</tr>
<tr>
<td>Construction and Extraction</td>
<td>1,078</td>
<td>$43,000</td>
<td>39</td>
<td>1,307</td>
<td>$48,400</td>
<td>127</td>
</tr>
<tr>
<td>Protective Service</td>
<td>775</td>
<td>$51,000</td>
<td>28</td>
<td>1,203</td>
<td>$61,900</td>
<td>124</td>
</tr>
<tr>
<td>Computer and Mathematical</td>
<td>1,405</td>
<td>$70,000</td>
<td>38</td>
<td>1,582</td>
<td>$86,000</td>
<td>109</td>
</tr>
<tr>
<td>Life, Physical, and Social Science</td>
<td>1,002</td>
<td>$60,400</td>
<td>34</td>
<td>814</td>
<td>$66,300</td>
<td>78</td>
</tr>
<tr>
<td>Architecture and Engineering</td>
<td>813</td>
<td>$76,000</td>
<td>18</td>
<td>758</td>
<td>$85,000</td>
<td>51</td>
</tr>
<tr>
<td>Farming, Fishing, and Forestry</td>
<td>344</td>
<td>$30,500</td>
<td>9</td>
<td>293</td>
<td>$34,200</td>
<td>40</td>
</tr>
<tr>
<td>Legal</td>
<td>226</td>
<td>$76,200</td>
<td>5</td>
<td>330</td>
<td>$99,900</td>
<td>19</td>
</tr>
<tr>
<td><strong>Total - All Occupations</strong></td>
<td><strong>50,313</strong></td>
<td><strong>$48,300</strong></td>
<td><strong>1,486</strong></td>
<td><strong>54,253</strong></td>
<td><strong>$59,600</strong></td>
<td><strong>5,619</strong></td>
</tr>
</tbody>
</table>

This table is sorted by forecast demand for new entrants into the occupation. Top occupations remain unchanged from 2014. They are: Education, training and library; Office and administration support; Food preparation and serving related; Sales and related.

*Source: JobsEQ accessed in October 2019*
### 2019 Top Demand Occupations

**JobsEQ Annual demand for new entrants, average annual wages, Total Jobs in Occupation**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Education, Training, Library</td>
<td>830</td>
<td>8.8%</td>
<td>9,475</td>
<td>9,180</td>
<td>$64,500</td>
<td>26.4%</td>
<td>3.2%</td>
</tr>
<tr>
<td>Office &amp; Admin Support</td>
<td>740</td>
<td>9.7%</td>
<td>7,622</td>
<td>7,622</td>
<td>$34,100</td>
<td>25.5%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Food Prep &amp; Serving</td>
<td>740</td>
<td>16.7%</td>
<td>4,439</td>
<td>4,048</td>
<td>$21,700</td>
<td>38.2%</td>
<td>9.7%</td>
</tr>
<tr>
<td>Sales</td>
<td>514</td>
<td>13.2%</td>
<td>3,889</td>
<td>3,889</td>
<td>$33,000</td>
<td>10.0%</td>
<td>0.1%</td>
</tr>
<tr>
<td>Personal Care &amp; Service</td>
<td>348</td>
<td>15.3%</td>
<td>2,722</td>
<td>1,664</td>
<td>$27,300</td>
<td>22.3%</td>
<td>36.5%</td>
</tr>
<tr>
<td>Management</td>
<td>276</td>
<td>7.7%</td>
<td>3,571</td>
<td>2,756</td>
<td>$98,100</td>
<td>32.9%</td>
<td>29.6%</td>
</tr>
<tr>
<td>Building &amp; Grounds Cleaning &amp; Maintenance</td>
<td>239</td>
<td>12.4%</td>
<td>1,928</td>
<td>1,833</td>
<td>$27,800</td>
<td>13.7%</td>
<td>5.2%</td>
</tr>
<tr>
<td>Transportation, Material Moving</td>
<td>218</td>
<td>11.3%</td>
<td>1,922</td>
<td>1,911</td>
<td>$32,400</td>
<td>16.7%</td>
<td>0.6%</td>
</tr>
<tr>
<td>Business, Financial Operations</td>
<td>211</td>
<td>8.9%</td>
<td>2,382</td>
<td>2,102</td>
<td>$60,000</td>
<td>19.7%</td>
<td>13.3%</td>
</tr>
<tr>
<td>Production</td>
<td>180</td>
<td>9.0%</td>
<td>2,003</td>
<td>2,273</td>
<td>$34,100</td>
<td>27.6%</td>
<td>-11.9%</td>
</tr>
<tr>
<td>Community, Social Service</td>
<td>179</td>
<td>11.6%</td>
<td>1,538</td>
<td>1,150</td>
<td>$44,100</td>
<td>33.8%</td>
<td>33.7%</td>
</tr>
<tr>
<td>Healthcare Support</td>
<td>170</td>
<td>12.6%</td>
<td>1,354</td>
<td>1,412</td>
<td>$30,800</td>
<td>18.5%</td>
<td>-4.1%</td>
</tr>
<tr>
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<td>154</td>
<td>5.5%</td>
<td>2,788</td>
<td>2,506</td>
<td>$75,200</td>
<td>15.8%</td>
<td>11.3%</td>
</tr>
<tr>
<td>Arts, Design, Entertainment, Sports, Media</td>
<td>132</td>
<td>9.8%</td>
<td>1,351</td>
<td>876</td>
<td>$54,000</td>
<td>17.0%</td>
<td>54.2%</td>
</tr>
<tr>
<td>Installation, Maintenance, Repair</td>
<td>129</td>
<td>9.0%</td>
<td>1,429</td>
<td>1,445</td>
<td>$44,100</td>
<td>2.9%</td>
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</tr>
<tr>
<td>Construction, Extraction</td>
<td>127</td>
<td>9.7%</td>
<td>1,307</td>
<td>1,078</td>
<td>$43,000</td>
<td>12.6%</td>
<td>21.2%</td>
</tr>
<tr>
<td>Protective Service</td>
<td>124</td>
<td>10.3%</td>
<td>1,203</td>
<td>775</td>
<td>$51,000</td>
<td>21.4%</td>
<td>55.2%</td>
</tr>
<tr>
<td>Computer, Mathematical</td>
<td>109</td>
<td>6.9%</td>
<td>1,582</td>
<td>1,405</td>
<td>$70,000</td>
<td>22.9%</td>
<td>12.6%</td>
</tr>
<tr>
<td>Life, Physical, Social Science</td>
<td>78</td>
<td>9.6%</td>
<td>814</td>
<td>1,002</td>
<td>$60,400</td>
<td>9.8%</td>
<td>-18.8%</td>
</tr>
<tr>
<td>Architecture Engineering</td>
<td>51</td>
<td>6.7%</td>
<td>758</td>
<td>813</td>
<td>$76,000</td>
<td>11.8%</td>
<td>-6.8%</td>
</tr>
<tr>
<td>Farming, Fishing, Forestry</td>
<td>40</td>
<td>13.7%</td>
<td>293</td>
<td>344</td>
<td>$30,500</td>
<td>12.1%</td>
<td>-14.8%</td>
</tr>
<tr>
<td>Legal</td>
<td>19</td>
<td>5.8%</td>
<td>330</td>
<td>226</td>
<td>$76,200</td>
<td>31.1%</td>
<td>46.0%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>5,619</strong></td>
<td><strong>10.4%</strong></td>
<td><strong>54,253</strong></td>
<td><strong>50,313</strong></td>
<td><strong>$45,700</strong></td>
<td><strong>30.4%</strong></td>
<td><strong>7.8%</strong></td>
</tr>
</tbody>
</table>

This table is sorted by the 2019 annual demand for new entrants to occupation categories. The top four Demand Occupation Categories are in the occupations with the most jobs in Tompkins County: education, administrative support, food preparation, and sales.

The demand for new entrants number captures demand generated by retirements, transfers to another occupation, and growth of jobs. It does not capture job openings due to “churn”, such as retail sales people who change employer during the year.

Demand for new entrants also does not capture which positions are hardest to fill. For instance two highly paid and high skilled occupations that are particularly hard to fill are healthcare practitioners and computer/mathematical occupations. The numbers of online advertisements for these positions are in the top ten, reflecting the scarcity of qualified individuals seeking these positions in our region.

In addition to “demand for new entrants”, and “level of online advertising”, the Tompkins Workforce Development Board identifies in detail, 147 demand occupations. Analyzing these three characteristics of demand, the four highest demand occupation categories are:

- Education, Training, Library
- Production
- Office & Administrative Support
- Healthcare Practitioners & Technical

Another three key demand occupation categories are:
- Management; Computer/Mathematical; Transportation/Materials Moving.

*Source: JobsEQ accessed in October 2019*
### Tompkins Employment Trends and Projections by Sector

#### EQ Table

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Educational Services</td>
<td>18,699</td>
<td>$48,621</td>
<td>-0.7%</td>
<td>0.7%</td>
<td>19,121</td>
<td>$60,947</td>
<td>0.3%</td>
</tr>
<tr>
<td>Health Care and Social Assistance</td>
<td>6,248</td>
<td>$39,759</td>
<td>1.3%</td>
<td>1.8%</td>
<td>7,019</td>
<td>$52,645</td>
<td>0.6%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>4,990</td>
<td>$24,037</td>
<td>-0.1%</td>
<td>-0.1%</td>
<td>4,983</td>
<td>$28,356</td>
<td>-0.6%</td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>3,774</td>
<td>$17,165</td>
<td>1.3%</td>
<td>0.3%</td>
<td>4,566</td>
<td>$21,651</td>
<td>-0.3%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>3,301</td>
<td>$62,232</td>
<td>-2.6%</td>
<td>-0.9%</td>
<td>3,092</td>
<td>$69,025</td>
<td>-1.5%</td>
</tr>
<tr>
<td>Professional, Scientific, and Technical Services</td>
<td>2,113</td>
<td>$60,221</td>
<td>0.0%</td>
<td>0.0%</td>
<td>2,778</td>
<td>$64,042</td>
<td>0.3%</td>
</tr>
<tr>
<td>Public Administration</td>
<td>2,072</td>
<td>$46,144</td>
<td>0.4%</td>
<td>1.5%</td>
<td>2,160</td>
<td>$54,394</td>
<td>-0.7%</td>
</tr>
<tr>
<td>Other Services (except Public Administration)</td>
<td>1,418</td>
<td>$23,792</td>
<td>1.7%</td>
<td>0.6%</td>
<td>2,013</td>
<td>$26,254</td>
<td>-0.3%</td>
</tr>
<tr>
<td>Construction</td>
<td>917</td>
<td>$45,997</td>
<td>-0.8%</td>
<td>2.3%</td>
<td>1,236</td>
<td>$43,087</td>
<td>0.0%</td>
</tr>
<tr>
<td>Finance and Insurance</td>
<td>1,070</td>
<td>$58,368</td>
<td>0.0%</td>
<td>0.0%</td>
<td>1,057</td>
<td>$72,934</td>
<td>-1.2%</td>
</tr>
<tr>
<td>Admin &amp; Support &amp; Waste Manag’t &amp; Remediation Svs</td>
<td>805</td>
<td>$27,344</td>
<td>2.4%</td>
<td>1.3%</td>
<td>1,043</td>
<td>$33,892</td>
<td>0.2%</td>
</tr>
<tr>
<td>Transportation and Warehousing</td>
<td>847</td>
<td>$38,666</td>
<td>-3.1%</td>
<td>-0.3%</td>
<td>936</td>
<td>$41,939</td>
<td>-1.1%</td>
</tr>
<tr>
<td>Arts, Entertainment, and Recreation</td>
<td>746</td>
<td>$27,645</td>
<td>-2.2%</td>
<td>0.7%</td>
<td>888</td>
<td>$23,238</td>
<td>-0.1%</td>
</tr>
<tr>
<td>Agriculture, Forestry, Fishing and Hunting</td>
<td>505</td>
<td>$36,454</td>
<td>0.7%</td>
<td>-1.0%</td>
<td>772</td>
<td>$38,802</td>
<td>-0.6%</td>
</tr>
<tr>
<td>Real Estate and Rental and Leasing</td>
<td>641</td>
<td>$35,671</td>
<td>-1.5%</td>
<td>0.4%</td>
<td>661</td>
<td>$40,991</td>
<td>-0.6%</td>
</tr>
<tr>
<td>Information</td>
<td>450</td>
<td>$53,297</td>
<td>-3.1%</td>
<td>-1.0%</td>
<td>603</td>
<td>$58,466</td>
<td>-0.4%</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>533</td>
<td>$45,338</td>
<td>-0.2%</td>
<td>0.3%</td>
<td>484</td>
<td>$60,112</td>
<td>-0.6%</td>
</tr>
<tr>
<td>Management of Companies and Enterprises</td>
<td>77</td>
<td>$55,222</td>
<td>14.3%</td>
<td>-0.4%</td>
<td>342</td>
<td>$42,770</td>
<td>-0.4%</td>
</tr>
<tr>
<td>Mining, Quarrying, and Oil and Gas Extraction</td>
<td>255</td>
<td>$63,468</td>
<td>-2.0%</td>
<td>0.9%</td>
<td>299</td>
<td>$70,239</td>
<td>-1.8%</td>
</tr>
<tr>
<td>Utilities</td>
<td>197</td>
<td>$104,595</td>
<td>-7.1%</td>
<td>-1.8%</td>
<td>164</td>
<td>$97,508</td>
<td>-1.0%</td>
</tr>
<tr>
<td>Unclassified</td>
<td>52</td>
<td>$26,087</td>
<td>-3.0%</td>
<td>0.6%</td>
<td>36</td>
<td>$52,063</td>
<td>-0.1%</td>
</tr>
<tr>
<td>Total - All Industries</td>
<td>49,711</td>
<td>$44,771</td>
<td>-0.4%</td>
<td>0.6%</td>
<td>54,253</td>
<td>$54,731</td>
<td>-0.1%</td>
</tr>
</tbody>
</table>

This table is sorted by 2019 employment. The table presents employment and wages by business sector. Sector performance is not significantly changed from 2014. Education leads employment, followed by health care. Growth of the local construction sector is a positive metric. Construction added 310 jobs (7% average annual growth) reflecting strong investment in new construction projects over the five year period from 2014 to 2019.

*Source: JobsEQ accessed in October 2019*
This is a concept chart – the story is clear: Employers are on track to keep growing while the local workforce is not. A key challenge for economic development is to bring more people into the labor market.

Note: This chart is intended to show this concept. Numbers should not be drawn from this chart. The following charts provide a deeper look at the data.
Unemployment rose significantly in response to the Great Recession between 2008 and 2011. In response the labor force constricted as discouraged job seekers dropped out of the labor market. As the economy recovered and unemployment dropped, there was a natural reaction that people who had dropped out, came back into the labor market. However then in 2014 and 2015 there is a precipitous drop in labor force. This is likely due to Baby Boomers, who began turning 65 in 2011, retiring. Across all these dynamics, the Department of Labor shows fairly steady job growth with flat years in 2009, 2014, and 2017. The widening divergence of steady job growth from decline in labor force is a concern.
One would expect to see the labor force increasing as unemployment goes down. But the labor force is declining.
Why is the labor force declining? There are a number of factors restraining the growth of the labor force, such as the expensive housing market compared to the region. However a critical factor is demographic. The Baby Boom generation has started to retire. The following generations are not offsetting the scale of that retirement wave.
In Tompkins County, the unemployment rate is cyclical in nature with peaks in Jan-Feb and June. Tompkins County’s unemployment rate is usually near the lowest rate in the state. The low unemployment rate is partly created by a statistical anomaly – college students who are employed even for an hour per week, say giving campus tours, are considered “employed”. This affects the unemployment ratio, pushing it down about one percent.

As of 2019, the unemployment rate is hovering around 3%.

*Source: JobsEQ accessed in October 2019*
APPENDIX D
Economy and Key Sector Data

Tompkins County Key Sectors 2014 to 2019
Employment, Wages and Growth

Of the six key sectors identified in 2015, four had growing employment from 2014-2019: Higher Education; Visitors and Tourism; Agriculture, Forestry, Fishing and Hunting; Food and Beverage Manufacturing. The Software, Mobile, Tech-led Services sector was essentially flat and Manufacturing saw declining employment.


Comparisons of these sectors to US for one-year job growth forecast, from JobsEQ:

- Higher Education: employment at the Tompkins County and US levels are both forecast to grow at an average annual rate of 0.9%
- Manufacturing: US is forecast to grow at 1.1% while Tompkins is forecast to decrease at - 2.4%
- Agriculture, Fishing, Forestry, Hunting: US is forecast to grow at 0.1% while Tompkins forecast is for 1.0% growth.
- Visitors and Tourism: US 1.5% Tompkins 1.8%
- Software, Mobile, Tech-led Services: US 4.1% growth, TC decrease at - 0.5%
- Food, Beverage Manufacturing: US 2.2% growth, TC to decrease at -0.9%.
- All sectors: US 1.6% growth, TC 0.7% growth

Source: JobsEQ accessed in October 2019
Note: The 2014 key sector data in the 2015 ED Strategy is not comparable to the current 2019 data. Therefore the 2014 data in this table was generated in 2019.
**Gross Regional Output**

2014

---

**Gross Product, Employment and Compensation.**

**Method:** The data in this report is primarily from IMPLAN’s 2014 data set, which was released in 2017. The Visitors and Tourists “sector” is not defined as a sector by IMPLAN since it draws from Accommodations, Food and Beverage, Retail, Entertainment, and Transportation sectors. Therefore, the V&T sector was assembled from relevant IMPLAN industries. To build the V&T sector, TCAD referred to the Tourism Economics 2015 report for the Finger Lakes region of New York. Using its distribution of visitor spending, portions of relevant industries were aggregated to create the V&T sector. The V&T data here does not exactly match the Tourism Economics values: output is 25% higher, employment is 20% lower, compensation is 5% lower.

**Sector Output:** The total gross output (sales) of the Tompkins County economy is about $9 billion. That is divided nearly evenly between local sectors that provide goods and services to local residents, and traded sectors. This report focuses on the traded sectors — the wealth generating sectors of the economy that sell their goods and services outside the County and often outside the region. Education Services and the Visitors and Tourists sectors are defined as “traded” sectors because the funds to purchase those goods and services come from outside the County. Education is the largest sector, comprised primarily of Cornell University and Ithaca College. The next largest sectors are Manufacturing and HighTech. Locally manufactured goods include automotive and machine parts, electronics, food and beverages, pharmaceuticals, and innovative materials. High Tech includes scientific and technical research, software design, materials testing, and mobile and tech-enabled services. Mining primarily extracts salt, as well as sand and gravel. Agriculture primarily exports milk as well as fruits, vegetables, field crops, and other animal production.

The funds that are brought into the county through trade support local sectors.

The total number of jobs in Tompkins County including students who work on the campuses, is about 65,000 jobs. Total compensation generated by the local economy is about $3.2 billion.

Tompkins Employment: Counts part-time and full-time jobs

Summary: Education Services is clearly the County’s economic engine, generating 22% of jobs and 30% of compensation. The High Tech sector contributes 8.5% of employment and with good paying jobs it generates 11% of compensation. Manufacturing generates 4.9% of jobs and 7% of compensation. The Visitors and Tourism sector generate 4.4% of jobs with significant entry level opportunities. However, the lower wages result in 2.5% of the County’s total compensation. Utilities, Mining, and Ag, Fish, Forestry sectors are the smallest traded sectors.

The Southern Tier on a per capita basis has been awarded a high level of SBIR grants, reflecting strong innovation and commercialization efforts by small businesses across the Southern Tier region.

Source: Provided by Rev Ithaca Startup Works
APPENDIX D (continued)
Economy and Key Sector Data

Per capita spending consistently tops the charts in NYS for R&D spending, beating out every other region when taking into account population size.

Source: Provided by Rev Ithaca Startup Works
The Southern Tier is consistently the second highest region in R&D expenditure in the state, beat out only by New York City.

Source: Rev Ithaca Startup Works
Looking specifically at Tompkins County (Ithaca Area), the real dollar investment in Small Business Innovation Research (SBIR) grants is surprisingly close to the total SBIR awards New York City.

SBIR grants are federal funds to encourage small businesses to engage in R&D of technology that has the potential for commercialization.

Source: Provided by Rev Ithaca Startup Works
APPENDIX E
Economic Development Collaborative and Other Partner Agencies

The following agencies participate in the ED Collaborative. They are all organizations with a local interest and public purpose – be they not-for-profits, or departments of local government. These thirteen organizations make a formal commitment to form the Economic Development Collaborative. Members work together to accomplish the goals identified in the ED Strategy.

ED Collaborative Agencies
1. City of Ithaca’s Department of Planning and Development
2. Cornell Cooperative Extension of Tompkins County
3. Council of Governments for Tompkins County
4. Downtown Ithaca Alliance
5. Ithaca / Tompkins County Convention and Visitors Bureau
6. Ithaca Tompkins County Transportation Council
7. Ithaca Urban Renewal Agency
8. Tompkins County Area Development
9. Tompkins County Chamber of Commerce
10. Tompkins County Department of Planning
11. Tompkins County Industrial Development Agency/Development Corporation
12. Tompkins County Workforce Development Board
13. Town of Ithaca Planning Department

In addition there are several liaisons to the ED Collaborative who represent: Cornell’s Community Relations and Center for Regional Economic Advancement, County Legislature (Chair and Chair of the ED Committee), City of Ithaca mayor, AFCU Business CENTS, the Small Business Development Center, rural municipal planners.

Thirteen Collaborative Agencies
1. The primary goals of the City of Ithaca’s Department of Planning and Development are strengthening the City’s economy, improving the quality of life of its citizens, and strengthening its residential neighborhoods. This work depends on the effective partnership among the City, the Ithaca Urban Renewal Agency, and Ithaca Neighborhood Housing Services. http://www.cityofithaca.org

2. The mission of Cornell Cooperative Extension of Tompkins County (TCCCE) is strengthening youth, adults, families, and communities through learning partnerships that put knowledge to work. TCCCE is a portal to Cornell – New York’s land grant university – and applies research in understandable and useful ways for the community. Three broad programming areas are: agriculture, community well-being, and youth development. http://www.cce.cornell.edu/tompkins/

3. Council of Governments for Tompkins County (TCCOG). Participants include nine towns, six villages, the City of Ithaca, and the County of Tompkins. The TCCOG provides a forum for communication on common issues and a vehicle to undertake joint delivery of services. The goal is to improve inter-municipal cooperation for the benefit of the people that the local governments serve. http://tompkinscountyny.gov/tccog

4. The Downtown Ithaca Alliance (DIA) is a Business Improvement District created in 1997 and charged with the development, management, and promotion of a 22-block area of downtown Ithaca. DIA provides small business technical assistance and organizes major events and an outdoor entertainment series. It also provides supplemental cleaning,
5. The Ithaca / Tompkins County Convention and Visitors Bureau (I/TCCVB), a division of the Tompkins County Chamber of Commerce, is the Destination Marketing Organization that serves the greater Ithaca area. The I/TCCVB actively promotes the area and operates two visitor centers. The County’s Strategic Tourism Board oversees the work of the I/TCCVB and also supports development of visitor attractions such as The Sciencenter. http://www.visitithaca.com

6. The Ithaca Tompkins County Transportation Council (ITCTC) works to advance projects and programs that provide for an efficient, flexible, and multi-modal transportation system in Tompkins County. The ITCTC works cooperatively with all local governments, TCAT, NYSDOT, and federal transportation agencies. The ITCTC has expertise in the areas of transportation planning, data gathering, and analysis. http://tompkinscountyny.gov/itctc

7. The Ithaca Urban Renewal Agency (IURA) works to revitalize urban neighborhoods and strengthen the local economy. The IURA works to implement the Urban Renewal Plan, manages the City’s HUD Entitlement Grant award of Community Development Block Grant (CDBG) and Home Investment Partnerships Program (HOME) funds and administers various economic development loan programs and industrial park leases. http://www.cityofithaca.org/290/Ithaca-Urban-Renewal-Agency

8. Tompkins County Area Development (TCAD), a private, not-for-profit corporation founded in 1964, is the community’s lead economic development agency. TCAD’s mission is: to building a thriving and sustainable economy that improves the quality of life in Tompkins County by fostering the growth of business and employment. http://www.tcad.org

9. The Tompkins County Chamber of Commerce advocates for the free enterprise system and sound economic development. It fosters success for its for-profit and not-for-profit members, and promotes a high quality of life for all residents. The Chamber hosts a number of networking and educational programs for business. A key strength is its ability to bring diverse parties together to solve community problems. http://www.tompkinschamber.org

10. The Tompkins County Department of Planning provides planning and related services to County government and local municipalities. The Department is charged with preparing a comprehensive plan for the development of the County; collecting and distributing data and information on population, land use, housing, environment and community facilities; and preparing planning studies and analyses. http://www.tompkins-co.org/planning/

11. The Tompkins County Industrial Development Agency and Development Corporation (TCIDA) (TCDC) are public benefit corporations controlled by the Tompkins County Legislature and managed by TCAD. The TCIDA can abate taxes and the TCDC issue tax-exempt bonds. Purposes of the IDA and TCDC are to create quality employment opportunities, and support investments in not-for-profit corporations and in certain mixed-use revitalization projects. http://www.tompkinsida.org/ http://www.tompkinsdc.org/

12. The mission of the Tompkins County Workforce Development Board (TCWDB) is to enhance the productivity and competitiveness of Tompkins County by developing and coordinating...
resources that meet employer workforce needs and facilitate employment and development opportunities for individuals. The One Stop Career Center is the flagship product of the TCWDB. http://www.tompkinsworkforceny.org

13. The Town of Ithaca Planning Department develops and maintains the Town’s comprehensive plan, zoning ordinance, and site design regulations. The Department balances the goals of preserving the Town’s significant and sensitive natural features and open space and neighborhood character with the need to provide for reasonable growth, economic development and housing that is affordable to households at all income levels. http://www.town.ithaca.ny.us/

As part of the 2006 Economic Development Strategy for Tompkins County, these thirteen organizations made a formal commitment to form the Economic Development Collaborative. Members work together to accomplish current economic development goals. Over time, they identify emerging goals and continue to work collaboratively on those. Examples of projects spawned by the ED Collaborative are the Tompkins County Community Housing Affordability Program, the Tompkins Workforce Development Strategy (2010), the County-wide Inter-municipal Water and Sewer Feasibility Study for Tompkins County (2010), the 2015 to 2020 Economic Development Strategy (2015).

TCAD gratefully acknowledges the participation of the Economic Development Collaborative and the following agencies in the review of the 2015 Economic Development Strategy to create the ED Strategy 2.0 2020 to 2024.

- Small Business Development Center – Binghamton University
- Tompkins County Department of Social Services
- Tompkins County Legislature
- Town of Dryden Planning Department
- Town of Lansing Planning Department

- Center for Regional Economic Advancement at Cornell
- Cornell Office of Community Relations
APPENDIX F
Implementing Econ. Dev.

What do Economic Development Agencies Do?
TCAD and the members of the ED Collaborative:
- Invest in the workforce – so businesses have the workforce they need
- Help businesses start, stay, thrive, and expand to create jobs. ED focuses on businesses that sell their products and services outside the County, fill community needs and create jobs with career paths.
- Provide direct ED services to businesses: technical and financial assistance
- Assess labor and business resources and make that information available for policy, program and project development
- Provide leadership

What are Other Public Sector ED Activities?
- Physical infrastructure planning and investment (and oversight of private utilities) roads, water sewer, energy, airport/ports
- Development process facilitation and oversight (zoning, planning, permitting, inspection)
- Community infrastructure such as public transportation, waste management, affordable housing, day care, recreation
- Manage the regulatory environment
- Supply household safety net
- Provide leadership

Community Sector Activities:
- Recreation like YMCA and The Rink
- Vibrant arts and culture
- Vibrant social and religious communities

Business and Non-Profit Sector Activities:
- Create jobs
- Manage business expansions and property investments
- Provide leadership

APPENDIX G
Acronyms and Definitions

ED - Economic development ROI - Return on investment
WDB - Workforce Development Board
CVB - (Tompkins County) Convention and Visitor’s Bureau
ICSD - Ithaca City School District
Sq. Ft. - Square feet
TCAD - Tompkins County Area Development
TCDC - Tompkins County Development Corporation
TCIDA - Tompkins County Industrial Development Agency
JobsEQ - Proprietary software created by Chmura Economics and Analytics. Provides current labor data and analytical tools for WDBs and ED professionals
Local Sectors - Industry sectors that primarily provide goods and services to local customers
Traded Sectors - Industry sectors that primarily sell their goods or services to customers outside Tompkins County