

Finger Lakes Region: Regional Plan, PY 2017

Finger Lakes Workforce Development Board

GLOW Workforce Development Board

Monroe County/Rochester Workforce Development Board

Table of Contents

Executive Summary	3
Regional Service Strategies	4
Finger Lakes Hired	4
NY INSPIRE	4
Sector Initiatives.....	4
Strategy 1: FLREDC Industry Pillars—Advanced Manufacturing	4
Phase of Development.....	5 54
Relevance to REDC and WIOA Priorities	5
Strategy	5
Progress Made Since the 2016 Regional Plan	6
Available Resources	8 87
Additional Resources Needed	8
Strategy 2: FLREDC Enabler Pathways to Prosperity—Healthcare.....	8
Phase of Development.....	9 98
Relevance to REDC and WIOA Priorities	9
Strategy	10
Progress Made Since the 2016 Regional Plan	11 114
Available Resources	12 121
Additional Resources Needed	12
Figure 1: ETA’s Sector Strategy Implementation Framework	14 141
Regional Labor Market Data	14 141
Advanced Manufacturing.....	14 141
Healthcare	17 174
Finger Lakes Region Priority Occupations	21 212
Monroe Community College LMI	21 212
Plans for Future Coordination	21 212
Regional Spending Plan	21 212
Coordination of Supportive Services	22 222
Coordination of Services With Economic Development Partners.....	22 222
Performance Accountability Measure Negotiation and Reporting.....	23 232

EXECUTIVE SUMMARY

The Finger Lakes counties form one unified economic region. Therefore, our three workforce development boards are committed to coordinating our efforts to serve the businesses, workers, and job seekers in our nine counties.

We have a history of collaboration on various initiatives among the three workforce boards and three community colleges in the region. ~~Current~~ Recent regional projects include Finger Lakes Hired and NY INSPIRE.

After a thorough analysis of the regional labor market and a careful consideration of Finger Lakes REDC and WIOA priorities, the local workforce development boards have selected two priority industry sectors: advanced manufacturing and healthcare. The need for business and job seeker services in both industry sectors is reflected throughout the priorities of integration of strategies with core partner programs and into the regional workforce development system under the WIOA law. An urgent regional priority under WIOA is the development of career pathways in both of our selected industry sectors.

We will focus on implementing the following sector strategy recommendations:

Advanced Manufacturing

1. Create a full-time advanced manufacturing navigator position.
2. Deploy eduFACTOR licenses for all middle and high schools in the nine-county Finger Lakes region.
3. Organize a yearly manufacturing design competition between teams of middle and high school students.

Healthcare

1. Create a full-time healthcare workforce navigator position.
2. Seek funding to cover the cost of real-time labor market information.

A detailed workforce analysis can be found in the Regional Labor Market section of this plan.

We have identified opportunities for closer regional coordination of supportive services, relationships with economic development partners, and performance accountability measure negotiation and reporting.

REGIONAL SERVICE STRATEGIES

Finger Lakes Hired

We began a four-year \$5.2 Million federally funded H-1B Ready to Work initiative in November 2014. The initiative, branded regionally as Finger Lakes Hired, targets the long-term unemployed for training and placement in three priority industry sectors, including advanced manufacturing, healthcare, and information technology. As of the grant end, September 30, 2017~~July 31, 2019~~, we ~~have~~ recruited ~~960-1,316~~ eligible individuals and enrolled ~~722 of a projected 1,500~~~~1,007~~ participants. (USDOL has required us to participate in a random assignment evaluation study, which has impacted our ability to recruit and enroll candidates as quickly as initially projected). ~~So far~~~~In all~~, ~~266-281~~ participants ~~have~~ received classroom training, ~~57-115~~ ~~have~~ received on-the-job training, and 23 ~~have~~ received customized training.

Finger Lakes Hired partners include the three workforce boards, the three community colleges, and the City of Rochester. Industry partners include several industry associations, most notably Finger Lakes Advanced Manufacturers' Enterprise (FAME) and Rochester Technology and Manufacturing Association (RTMA). The initiative has strengthened sector strategies planning among the partners, resulting in improved business engagement and coordination of training and supportive services resources.

~~We plan to request a no-cost extension of this grant through July 31, 2019. During PY '17~~~~Although the grant has ended, we will begin~~~~ahave identified~~ sustainability ~~plan~~~~strategies~~, which ~~will involve isolating~~~~include~~ successful features of the grant ~~and seeking ways to continue providing those features beyond the grant end date~~~~that should become ongoing best practices.~~

NY INSPIRE

Monroe Community College is the lead partner in a four-year, \$6 Million regional America's Promise grant. Partners include all three community colleges and all three workforce development boards in the Finger Lakes Region. The grant, initiated in 2017, provides tuition and training-related assistance in advanced manufacturing, healthcare, and information technology industries and occupations.

SECTOR INITIATIVES

Our region is focused on sector initiatives in two different industry sectors: advanced manufacturing and healthcare.

Strategy 1: FLREDC Industry Pillars—Advanced Manufacturing

Our advanced manufacturing sector strategy focuses on the following three key growth pillars: Optics, Photonics, and Imaging (OPI); Agriculture and Food Production (Ag & Food); and Next Generation Manufacturing (Next Gen).

Phase of Development

Our Advanced Manufacturing Sector Strategy is in an intermediate stage of implementation. We have strengthened our foundation for this strategy, including useful, relevant data to inform our decisions; industry associations and champions; staff that engages in service delivery; and improved organizational capacity and alignment. Our goals will be to better align each of these capability areas and to build a plan that will achieve financial sustainability and continuous improvement.

Relevance to REDC and WIOA Priorities

Advanced Manufacturing is included in all three Key Growth Pillars of the strategic framework from the FLREDC URI Plan: Optics, Photonics, and Imaging (OPI); Agriculture and Food Production (Ag & Food); and Next Generation Manufacturing (Next Gen).

The need for business and job seeker services involving the Advanced Manufacturing sector is reflected in the following priorities from the WIOA law:

1. Integration of Strategies With Core Partner Programs
 - Develop career pathways for each of the identified industry sectors
 - Strategies should include the goal to improve access to credentials, including industry-recognized, portable, and stackable certificates and credentials
 - Strategies should be coordinated with statewide Rapid Response activities, especially layoff aversion
 - Strategies should be coordinated with Title II activities
 - Strategies should include WIOA and TANF-funded Youth activities, as well as coordination with in-school youth services funded by other partner and non-partner programs
2. Integration of Strategies into Regional Workforce Development System
 - Strategies should reflect alignment of programs within the workforce system, including TANF
 - Strategies should be employer-driven, with meeting the needs of regional businesses and increased employer engagement as goals
 - Strategies should reflect coordination between workforce development and economic development programs
 - Strategies should include employer-based training (e.g. OJT, IWT, Customized, and the development of apprenticeships)
 - Strategies should include the use of business intermediaries

Strategy

We are using the US Department of Labor Employment and Training Administration (ETA) Sector Strategies Technical Assistance Framework (figure 1 on p. 12) as the basis for our industry sector strategies. The ETA framework addresses the following capability areas.

1. Collect, analyze, and share meaningful data to make decisions about industry strategies.
2. Achieve a broad and deep involvement of industry sector businesses in the design and delivery of industry strategies.
3. Deliver workforce solutions, centered around career pathways, that are responsive to the needs of businesses and workers in the targeted industry sector.
4. Implement a plan that will achieve financial sustainability and continuous improvement of industry sector strategies.
5. Build organizational capacity and align policies and resources to continually support sector strategy outcomes.

Progress Made Since the 2016 Regional Plan

In late 2016, the Finger Lakes region workforce development boards were awarded a \$50,000 Sector Partnership National Emergency Grant for Regional Sector Partnership Development. The workforce boards contracted with Rochester Technology and Manufacturing Association (RTMA) to develop a career pathways map for each of the three key advanced manufacturing growth pillars, along with a set of recommendations for the workforce boards.

RTMA's work under this grant yielded the following goal: *Close the advanced manufacturing middle skills gap in the Finger Lakes region by 2023.*

In addition to the career pathways maps, the following *three recommendations* were made:

1. Create a full-time advanced manufacturing navigator position at a projected annual cost of \$100,000.
2. Deploy eduFACTOR licenses for all middle and high schools in the nine-county Finger Lakes region at a projected annual cost of \$135,000.
3. Organize a yearly manufacturing design competition between teams of middle and high school students at a projected annual cost of \$150,000.

We have taken an inventory of promising workforce area initiatives with the potential to expand to a regional scope. Here a list of the initiatives, including partners.

1. Machinist/CNC Training in GLOW LWDA. Partners: Genesee County Economic Development Center, GLOW WDB, GLOW Employment and Training Directors, NYS DOL Managers, Genesee Valley BOCES, and Genesee Community College. Industry Partners: Liberty Pumps, Amada, FTT Manufacturing, and B&B Precision Manufacturing. Training program offered at Genesee Valley BOCES Career and Technical Ed Centers in Batavia and Mt. Morris.
2. Advanced Manufacturing Machinist and Mechatronic Technology in Finger Lakes LWDA. Partners: Finger Lakes WIB, Finger Lakes Works Career Centers (including NYS DOL partner management and staff), Finger Lakes Community College, and Wayne-

Finger Lakes BOCES. Industry Partners: Finger Lakes Advanced Manufacturers' Enterprise (FAME), GW Lisk, and ITT Goulds. Training offered at various sites at employer locations.

3. Accelerated Precision Tooling Certificate and Mechatronics Certificate in Monroe LWDA. Partners: Monroe Community College and RochesterWorks, Inc. Industry Partner: Rochester Technology and Manufacturing Association (RTMA). Training programs offered at Monroe Community College.
4. FLWIB Economic Development Committee. The partnership among Finger Lakes WIB, County Economic Developers, and FAME has resulted in a model that is very responsive to business needs.
5. Partnerships With Local School Districts in Finger Lakes LWDA. Partners: Finger Lakes WIB, FAME, Wayne-Finger Lakes BOCES, and local school districts. WFL BOCES offers a Summer Advanced Manufacturing Experience (SAME) program for 9th and 10th-graders. Finger Lakes WIB provides workforce intelligence to local school districts to help shape curriculum and advise students and parents on opportunities in advanced manufacturing. SAME is also provided in Monroe County at Monroe-2 Orleans BOCES through funding from Imagine Monroe, Monroe County's IDA.
6. Next Generation Manufacturing at the Science and Technology Advanced Manufacturing Park (STAMP) in Batavia. Partners: Genesee County Economic Development Center, GLOW WDB, GLOW Employment and Training Directors, NYS DOL Manager, and Business Services Representatives. Industry Partner: 1366 Technologies. Discussions on workforce and training needs for the commercial solar wafer manufacturing facility, which will create more than 1,000 jobs.
7. FAME's 5% Pledge. FAME has asked its members to provide work experience and job shadowing opportunities to interns, high school students, and/or the long-term unemployed to expose them to opportunities in advanced manufacturing. The challenge is to involve a number of interns equal to 5% of a company's workforce. This effort has spread from the Finger Lakes LWDA into Monroe County. Thirty-seven companies have signed the Pledge.
8. MFG Month. RochesterWorks, Inc. held a mini-job fair for manufacturing industry employers in October 2017 and expects to hold similar events annually in October.
- 8.9. FLWIB has sponsored "Finger Lakes Works with Their Hands", a hands on career event for high school students to learn about careers in Advanced Manufacturing and Skilled Trades. Over 700 students attend this event which highlights over 50 exhibitors and has two buildings dedicated to Advanced Manufacturers.

Finally, we look forward to supporting the FLREDC's efforts to give more attention to workforce development. There has been some positive movement in this direction, and we look forward to participating in continued efforts to incorporate workforce development into regional economic development strategies.

Available Resources

Available resources to support our regional advanced manufacturing industry sector strategy include the one-stop career centers, WIOA-funded and local and regional NYSDOL staff, economic development staff in the nine counties, and one-stop partner staff, including ACCES-VR staff.

Upstate Revitalization Initiative awards have been committed to support the three key industry pillars as follows:

- \$147,160,000 committed for Optics, Photonics & Imaging, including \$147 Million for the AIM regional photonics center
- \$17,800,000 committed for Agriculture & Food Production
- \$35,100,000 committed for Next Generation Manufacturing & Technology

The following federal and state grants are also likely to support this strategy:

- \$5.2 Million USDOL H-1B Ready to Work Grant with RochesterWorks, Inc. as lead agency—[completed July 31, 2019](#).
- \$4 Million USDOL Strengthening Working Families Initiative Grant with Rochester Rehabilitation Center as lead agency
- \$6 Million NY Inspire/America’s Promise Grant with Monroe Community College as lead agency

Additional Resources Needed

The following critical strategy elements cannot be addressed with available resources.

1. To make our efforts at developing a meaningful advanced manufacturing sector strategy successful and sustainable, we need a full-time industry sector navigator whose role is to coordinate the efforts of economic development and workforce development in this sector for the entire region, with a focus on business engagement. This individual could also increase the emphasis on workforce development in the REDC planning process. Projected annual cost: \$100,000.
2. Deploy eduFACTOR licenses for all middle and high schools in the nine-county Finger Lakes region. Projected annual cost: \$135,000.
3. Organize a yearly manufacturing design competition between teams of middle and high school students. Projected annual cost: \$150,000.

Strategy 2: FLREDC Enabler Pathways to Prosperity—Healthcare

Phase of Development

Our Healthcare Sector Strategy is in an advanced stage of implementation. We have a solid foundation for this strategy, including useful, relevant data to inform our decisions; industry champions who have been leading the efforts of the healthcare/workforce subcommittee of the FLREDC; staff that engages in service delivery; and some organizational capacity and alignment. Our goals will be to strengthen and better align each of these capability areas and to build a plan that will achieve financial sustainability and continuous improvement.

Relevance to REDC and WIOA Priorities

Healthcare is the industry that is best positioned to offer career pathway opportunities to large numbers of new workers, unemployed, and working poor. It is the sector in our region with the most combined growth and job openings, the most well-defined career pathways, and the greatest available resources for workforce development. As such it is the best starting point to address the Key Enabler Pathways to Prosperity in the FLREDC plan. Additionally, the Healthcare/Workforce subcommittee of the REDC has already done much of the initial planning needed to launch a sector strategy centering on the healthcare industry. Moreover, Healthcare is one of six key assets identified as part of the region's Quality of Life foundation to the strategic plan.

The need for business and job seeker services involving the healthcare sector is reflected in the following priorities from the WIOA law:

1. Integration of Strategies With Core Partner Programs
 - Develop career pathways for each of the identified industry sectors
 - Strategies should include the goal to improve access to credentials, including industry-recognized, portable, and stackable certificates and credentials
 - Strategies should be coordinated with statewide Rapid Response activities, especially layoff aversion
 - Strategies should be coordinated with Title II activities
 - Strategies should include WIOA and TANF-funded Youth activities, as well as coordination with in-school youth services funded by other partner and non-partner programs
2. Integration of Strategies into Regional Workforce Development System
 - Strategies should reflect alignment of programs within the workforce system, including TANF
 - Strategies should be employer-driven, with meeting the needs of regional businesses and increased employer engagement as goals

- Strategies should reflect coordination between workforce development and economic development programs
- Strategies should include employer-based training (e.g. OJT, IWT, Customized, and the development of apprenticeships)
- Strategies should include the use of business intermediaries

Strategy

We are using the US Department of Labor Employment and Training Administration (ETA) Sector Strategies Technical Assistance Framework (figure 1 on p. 12) as the basis for our industry sector strategies. The ETA framework addresses the following capability areas.

1. Collect, analyze, and share meaningful data to make decisions about industry strategies.
2. Achieve a broad and deep involvement of industry sector businesses in the design and delivery of industry strategies.
3. Deliver workforce solutions, centered around career pathways, that are responsive to the needs of businesses and workers in the targeted industry sector. The work completed to date by the Healthcare/Workforce Subcommittee of the FLREDC includes the identification of the following strategic objectives:
 - a. Career Pathways
 - i. Development of pathways
 - ii. Marketing/communication plan within the community
 - b. Tools & Protocols
 - i. Communication methods among employers, educators, and agencies surrounding health care
 - ii. Methods of connection talent pools identified by agencies to the appropriate education or employer partner
 - iii. Centralized resource center
 - c. Retention Strategies
 - i. Guidelines for employer and employee success
4. Implement a plan that will achieve financial sustainability and continuous improvement of industry sector strategies.
5. Build organizational capacity and align policies and resources to continually support sector strategy outcomes.

Progress Made Since the 2016 Regional Plan

After making significant progress on a career pathway map, the Healthcare/Workforce Subcommittee of the REDC has not met in the past year. Nevertheless, a pilot CNA to LPN career pathway program has emerged from these discussions. In July of 2017, Rochester Regional Health System started 23 currently employed CNAs in a new LPN pathway program that allows workers to take the LPN course while maintaining an income to support themselves and their families.

Additionally, we have taken an inventory of promising workforce area initiatives with the potential to expand to a regional scope. Here a list of the initiatives, including partners.

1. Coordination of Training in Healthcare Occupations. Partners: GLOW WDB, GLOW counties, GLOW school districts, Genesee Community College, and Genesee Valley BOCES. Ongoing strategic planning to engage healthcare providers and address their workforce and training needs. During the past program year, more than two-thirds of WDB-funded ITAs were in healthcare occupations.
2. Employer-Based CNA and LPN Training Partnerships in Finger Lakes and Monroe LWDAs. Partners: Finger Lakes WIB, RochesterWorks! (Monroe County WDB), Finger Lakes Community College, and Wayne-Finger Lakes BOCES. Industry Partners: Rochester Regional Health System, Monroe Community Hospital, Seneca County Nursing and Rehabilitation Center, St. John's Home. On-site training at various healthcare facilities.
3. Partnerships With Local School Districts in Finger Lakes LWDA. Partners: Finger Lakes WIB, Healthcare Alliance of the Finger Lakes, and local school districts. For ~~over 58~~ years this partnership has produced an annual career exploration event known as "Serving Community Healthcare in the Finger Lakes". Each year hundreds of high school students from dozens of local school districts attend to learn about careers in healthcare from local healthcare providers. Additionally, The Healthcare Alliance of the Finger Lakes has sponsored an annual healthcare job fair designed to highlight openings in one of the fastest growing industries in the Finger Lakes. Finger Lakes WIB provides workforce intelligence to local school districts to help shape curriculum and advise students and parents on opportunities in healthcare.
4. Wyoming County Healthcare. Various partners. William F. Thiel left a legacy to the county to address and benefit the health needs of Wyoming County residents. Funding priorities are determined by community forums.
5. CNA to LPN Healthcare Career Pathway Pilot Program. Partners: Finger Lakes Community College, SUNY Rochester Educational Opportunity Center, RochesterWorks, Inc., and Workforce Development Institute. Industry Partner: Rochester Regional Health System. Training provided on-site at Hill Haven's (long-term care facility) training center.

Finally, we look forward to supporting the FLREDC's efforts to give more attention to workforce development. There has been some positive movement in this direction, and we

look forward to participating in continued efforts to incorporate workforce development into regional economic development strategies.

Available Resources

Available resources to support our regional healthcare industry sector strategy include the one-stop career centers, WIOA-funded and local and regional NYSDOL staff, economic development staff in the nine counties, and one-stop partner staff, including ACCES-VR staff.

The following federal and state grants are likely to support this strategy:

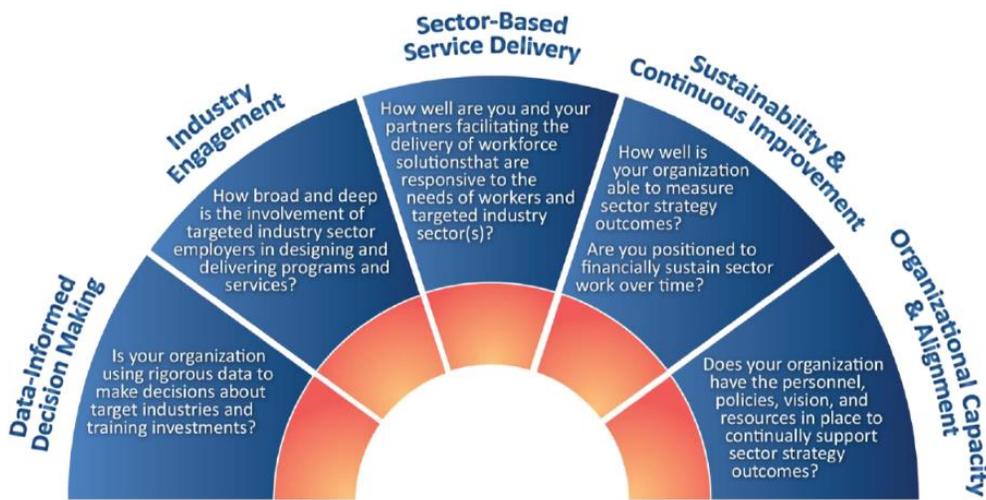
- \$5.2 Million USDOL H-1B Ready to Work Grant with RochesterWorks, Inc. as lead agency—completed July 31, 2019.
- \$1.6 Million federal HHS Health Profession Opportunity Grant with Action for a Better Community as lead agency
- \$4 Million USDOL Strengthening Working Families Initiative Grant with Rochester Rehabilitation Center as lead agency
- \$6 Million NY Inspire/America’s Promise Grant with Monroe Community College as lead agency
- \$26.6 Million Center for Medicare and Medicaid Innovation Grant to Common Ground Health to transform primary care delivery
- A portion of a \$565 Million Delivery System Reform Incentive Payment (DSRIP) Grant to Rochester Regional Health System and UR Medicine, among other regional partners

Additional Resources Needed

The following critical strategy elements cannot be addressed with available resources.

1. To make our efforts at developing a meaningful healthcare sector strategy successful and sustainable, we need a full-time industry sector navigator whose role is to coordinate the efforts of economic development and workforce development in this sector for the entire region, with a focus on business engagement. This individual could also increase the emphasis on workforce development in the REDC planning process. The Health Care Alliance of the Finger Lakes, or another organization, could fill this role. However, they do not have adequate support staff. The industry navigator could serve as a full-time support staff to the identified organization.
2. A sustainable sector strategy depends on a continuous analysis of workforce needs. Current products available through NYSDOL R&S Division lack the detailed analysis and access to real-time LMI that we need. The costs of these products are modest but beyond what our WIOA Title I budgets can sustain, especially given the budget cuts that we have sustained over the last several years.

Figure 1: ETA's Sector Strategy Implementation Framework



REGIONAL LABOR MARKET DATA

Our regional workforce development boards have worked cooperatively to collect and analyze labor market data for regional sector strategies in advanced manufacturing and healthcare, as well as the Finger Lakes Region Priority Occupations list.

Advanced Manufacturing

The Finger Lakes Region has a large workforce and a clear comparative advantage in manufacturing. According to JobsEQ® data from the ~~first~~ third quarter of ~~2017~~ 2019, the Finger Lakes Region has 64,600 workers in the manufacturing industry, comprising 11% of the regional workforce. The Location Quotient (LQ) for manufacturing in the region is 1.35, as compared to .56 statewide and 1.00 nationwide. Here are the individual county data.

Table 1: Manufacturing Industry Data by County

County	&-% (and number) of Manufacturing jobs	Location Quotient	Average manufacturing wage vs. Average of all Industries
Genesee	13% (3,2013,260)	1.571.56	\$53,44256,634 vs. \$40,81042,296
Livingston	913% (2,0747,071)	1.141.52	\$46,37158,680 vs. \$37,80046,934
Monroe	10% (39,79639,407)	1.201.17	\$66,84871,126 vs. \$50,16952,047
Ontario	1213% (6,8327,071)	1.501.52	\$59,009 vs. \$46,07246,934
Orleans	17% (2,2822,163)	2.082.01	\$53,57955,163 vs. \$41,50843,314
Seneca	16% (2,1032,223)	1.921.97	\$69,04087,242 vs. \$42,59448,528
Wayne	1718% (5,2565,592)	2.122.22	\$53,55753,541 vs. \$41,47843,894
Wyoming	1213% (1,7371,857)	1.451.52	\$49,21350,427 vs. \$42,70643,684
Yates	1618% (1,3221,477)	1.942.13	\$41,87643,822 vs. \$35,40336,268

Source: JobsEQ® Data as of ~~2017Q1~~ 2019Q3 Notes: Figures may not sum due to rounding. All data are based on a four-quarter moving average.

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The Finger Lakes Regional Economic Development Council (FLREDC) Upstate Revitalization Initiative (URI) Plan, October 2015, measured the comparative advantage of three advanced manufacturing industry pillars in the Finger Lakes region: Optics, Photonics, and Imaging (OPI); Agriculture and Food Production (Ag & Food); and Next Generation Manufacturing (Next Gen). Data from Economic Modeling Specialists, Inc. (EMSI) revealed the following comparative results for 2014 in jobs, output, and wages.

Table 2: Comparison of Key Advanced Manufacturing Growth Pillars

Measure	Jobs, % of Total Economy	Output (GRP), % of Total Economy	Wages, % of Total Economy
<u>OPI</u>			
Finger Lakes	2.1%	4.7%	4.0%
Rest of Upstate NY	0.3%	0.3%	0.3%
US	0.2%	0.2%	0.2%
<u>Ag & Food</u>			
Finger Lakes	3.7%	4.1%	3.0%
Rest of Upstate NY	1.7%	2.5%	1.4%
US	2.0%	2.2%	1.4%
<u>Next Gen</u>			
Finger Lakes	3.4%	6.5%	6.1%
Rest of Upstate NY	2.3%	5.1%	4.3%
US	3.0%	6.4%	5.5%

Here are some additional key figures from each of the three industry pillars.

- a. OPI: Approximately 15,000 jobs at about 120 large and small businesses.
- b. Ag & Food: Region produces approximately a quarter of New York State’s total agricultural output, with strengths across the entire food value chain.

- c. Next Gen: The Eastman Business Park is one of the largest, most diverse advanced manufacturing and technology parks in the U.S. It includes 1,200 acres and 2.5 million sq. ft. of industrial space with a 120-megawatt power plant, water processing supply, waste treatment, on-site fire and safety, and rail services. Once exclusively belonging to Eastman Kodak Company, the park now hosts over 70 companies, employing over 6,000 people. The Science and Technology Advanced Manufacturing Park (STAMP) in Genesee County is a 1,250-acre greenfield production site designed to attract multiple, large manufacturing facilities. The location draws workers from both the Rochester and Buffalo metro areas.

Due to the decline in *traditional* manufacturing jobs in the region, the net change in jobs is showing an overall decline. However, the high numbers of persistently unfilled jobs, combined with a documented mismatch in skill sets, especially in Applied Integrated Technologies/Mechatronics, Tooling and Machining, and Optical Systems Technology, give evidence of an urgent need for training in *advanced* manufacturing jobs.

Monroe Community College conducted a needs assessment and business climate survey in 2014. Among the results of the survey, 85.6% of Applied Integrated Technologies/Mechatronics jobs, 68.8% of Tooling and Machining jobs, and 75.7% of Optical Systems Technology jobs in the region may go unfilled each year due to an insufficient number of graduates produced locally. The needs survey estimated 23,000 persistently unfilled jobs in the region, with a high percentage of those being in production occupations.

Healthcare

The Finger Lakes Region has a large workforce in our fastest growing industry sector—healthcare. According to JobsEQ® data from the third quarter of ~~2017~~2019, the Finger Lakes Region has ~~94,901~~98,810 workers in the healthcare and social assistance industry, comprising ~~16~~17% of the regional workforce. The Location Quotient (LQ) for health care and social assistance in the region is ~~1.14~~1.16, as compared to 1.00 nationwide. Here are the employment totals, average annual wages, and employment forecasts in key industry subsectors.

Table 3: Healthcare Industry Employment Forecast

		Current		Forecast		
		Four Quarters Ending with 2017q3 2019q3		Over the Next 1 Year		
NAICS	Industry	Employment	Avg. Annual Wages	Total Approx Sep Demand	Total Growth Demand	Avg. Annual Growth Percent
6211	Offices of Physicians	6,186 5,789	\$69,033 75,210	495 482	922 4	1.50 4%
6212	Offices of Dentists	3,195 3,186	\$46,038 48,040	280 281	394	1.20 1%
6213	Offices of Other Health Practitioners	2,721 2,947	\$45,378 46,857	227 288	654 1	2.41 4%
6214	Outpatient Care Centers	2,320 2,175	\$48,426 48,752	195 224	564 2	2.41 9%
6215	Medical and Diagnostic Laboratories	1,308 1,338	\$51,713 53,553	109 132	262 2	2.01 6%
6216	Home Health Care Services	5,116 5,523	\$33,847 33,990	527 760	205 187	4.03 4%
6219	Other Ambulatory Health Care Services	1,834 1,855	\$36,178 38,426	144 157	331 3	1.80 7%
6221	General Medical and Surgical Hospitals	31,524 33,834	\$54,813 58,878	2,408 2,427	15 147	0.0 0.4%
6231	Nursing Care Facilities (Skilled Nursing Facilities)	9,736 9,472	\$33,717 35,868	998 854	-50 177	-0.5 1.2%
6232	Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	8,993 9,399	\$34,732 38,893	1,057 1,161	946	1.00 5%
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	3,536 3,665	\$23,950 25,629	426 513	917 0	2.61 9%

62	Total, Health Care and Social Assistance	94,901,988.81 0	\$43,700,462.23	8,927,764	962,454	1.00.5%
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Source: JobsEQ® Data as of 2017Q3—2019Q3 Note: Figures may not sum due to omission of some subsectors.

In the Finger Lakes Regional Economic Development Council (FLREDC) Upstate Revitalization Initiative (URI) Plan, October 2015, a Key Enabler to the plan has been titled “Pathways to Prosperity: Workforce Development.” Among the goals for the Pathways to Prosperity enabler are supporting the Rochester-Monroe Anti-Poverty Initiative, targeting hard-to-place workers, and reducing unemployment. We have chosen the healthcare industry sector as the most promising sector to achieve these goals. It is the sector in our region with the most combined growth and job openings, the most well-defined career pathways, and the greatest available resources for workforce development.

Additionally, Healthcare is one of six key assets identified as part of the region’s Quality of Life foundation to the strategic plan. The University of Rochester/UR Medicine is the sixth largest private employer in New York State and the largest private employer in upstate. Rochester also has the lowest overall Medicare spending rate in the nation. Finally, the region has been the recipient of two large grants that focus on reform of the healthcare delivery system. These reforms are projected to dramatically change the staffing needs of regional healthcare organizations. Employment will shift from hospitals to more community-based, ambulatory health care services. Healthcare organizations and workers will need assistance adapting to these changes.

The University at Albany Center for Health Workforce Studies NY Health Workforce Tracking Report, 2016-2018 highlights industry needs on the employer side. Here are some relevant findings from the report.

1. Seven of the eight counties outside of Monroe have a lower number of primary care physicians per 100,000 population than the statewide average of 85.580.8, with two four counties below 40 (Orleans, 32.232.0; Seneca, 28.5; and Wayne, 35.336.2; and Wyoming, 38.2). Whereas the majority of licensed healthcare professions experienced an increase in the number of licensed professionals between 2010-2013 and 2014-2017, three professions experienced decreases: Clinical Laboratory Technicians (-2.8%), Clinical Laboratory Technologists (-2.02.1%), Licensed Practical Nurses (-0.5%), and Occupational Therapy Assistants (-10.215.0%).
2. Hospitals in the region Upstate New York reported the most difficulty recruiting clinical lab technologists and Registered Nurses (RNs) with 2+ years of experience, followed by psychiatric all Nurse Practitioners (NPs), experienced registered nurses, nurse managers, physician assistants, and clinical laboratory technicians. Hospitals in the region Upstate New York reported the greatest retention difficulty for patient care technicians/CNAs, newly licensed RNs, experienced clinical laboratory technologists, Psychiatric Nurse Practitioners (NPs), and RNs and nurse managers all Registered Nurses. Hospitals in the region project increasing demand for RNs, NPs, and CNAs clinical job titles.

3. Nursing homes in the region reported recruiting difficulties for Minimum Data Set (MDS) coordinators, followed by experienced RNs, nurse directors and managers, experienced RNs, LPNs, and Minimum Data Set (MDS) coordinators newly licensed RNs. Nursing homes in the region reported the greatest retention difficulty for newly licensed RNs, followed by CNAs, LPNs, and experienced RNs, LPNs, and nurse managers. ~~Fifty-seven~~Sixty-seven percent of nursing homes reported difficulty hiring part-time workers, and ~~78~~65% reported difficulty hiring workers for off shifts (evenings, nights, and weekends).
4. Home Health Care agencies ~~surveyed in the combined Finger Lakes and Western New York in the~~ regions reported the most difficulty recruiting ~~homemakers and speech-language pathologists~~RNs, followed by LPNs, personal care aides, and home health aides. They reported the greatest retention difficulty for home health aides, ~~and personal care aides, and speech-language pathologists~~followed by LPNs. ~~Seventeen~~Fifty-eight percent reported difficulty hiring part-time workers and ~~50~~83% reported difficulty hiring workers for off shifts (evenings, nights, and weekends). ~~Two-thirds~~Ninety-two percent of the respondents reported plans to expand services their paraprofessional workforce (e.g., home health aides and personal care aides) within the next year.
5. FQHCs ~~surveyed in the combined Finger Lakes and Western New York in the~~ regions reported the most difficulty recruiting internal medicine physicians, psychiatric NPs, and substance abuse counselors. They reported the greatest retention difficulty for psychiatric NPs and family practice NPs.

The Healthcare/Workforce Subcommittee of the FLREDC has compiled and validated four different levels of priority occupations. Here is a list of all of those occupations with 40-100 or more annual openings.

Table 4: Healthcare Occupations With 40-100 or More Annual Openings

Level	SOC	Occupation	Annual Openings
1	37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	339 <u>1,860</u>
1	37-2012	Maids and Housekeeping Cleaners	44 <u>570</u>
1	43-4171	Receptionists and Information Clerks	154 <u>830</u>
1	39-9021	Personal Care Aides	361 <u>1,920</u>
1	43-9061	Office Clerks, General	356 <u>1,160</u>
2	31-1011	Home Health Aides	249 <u>900</u>
2	31-1014	Nursing Assistants	263 <u>920</u>
2	31-9092	Medical Assistants	43 <u>160</u>

2	15-1151	Computer User Support Specialists	461420
2	43-6013	Medical Secretaries	59160
2	29-2041	Emergency Medical Technicians and Paramedics	78140
2	29-2012	Medical and Clinical Laboratory Technicians	49100
2	29-2061	Licensed Practical and Licensed Vocational Nurses	186380
3	29-2034	Radiologic Technologists	42
2	31-9091	Dental Assistants	180
2	29-2052	Pharmacy Technicians	120
2	31-9097	Phlebotomists	100
3	29-2021	Dental Hygienists	100
3	29-1141	Registered Nurses	509970
4	11-9111	Medical and Health Services Managers	68150

Finger Lakes Region Priority Occupations

The list of Finger Lakes Region Priority Occupations may be found at <https://labor.ny.gov/workforcenypartners/lwda/lwda-occs.shtm>.

Monroe Community College LMI

Monroe Community College’s Economic and Workforce Development Center has produced a website containing regional data on advanced manufacturing, applied technologies, healthcare, and information & computer technology clusters. The data may be found at <http://mcclmi.com/workforce-clusters/>.

Plans for Future Coordination

Finger Lakes Works publishes two “2022 — Outlook for Occupations and Industry” reports on its web site at <http://www.fingerlakesworks.com/finger-lakes-works-2022-outlook-for-occupations-and-industry/>. This is a best practice that the GLOW and Monroe County/Rochester Workforce Development Boards plan to replicate.

REGIONAL SPENDING PLAN

Our three workforce development boards have different organizational and governance structures. Therefore, it may be difficult to combine or pool administrative costs. We may ask our independent auditors to prepare an analysis of the costs and benefits of doing so at some point in the future.

COORDINATION OF SUPPORTIVE SERVICES

This program year, all three workforce boards will begin taking an inventory of supportive services available through the one-stop partner programs. By June 30, ~~2019~~2021, we will have a master list of all one-stop partner supportive services available throughout the region.

Finger Lakes Works has developed a common referral form to be used among one-stop system partners. This is a best practice that the GLOW and Monroe County/Rochester Workforce Development Boards ~~plan to replicate~~have replicated.

COORDINATION OF SERVICES WITH ECONOMIC DEVELOPMENT PARTNERS

The three workforce development boards have closely followed the priorities of the Finger Lakes REDC. Two of the boards have representation on the REDC's Pathways to Prosperity Work Team, whose areas of focus are to reduce poverty, increase college and career readiness, reduce unemployment, improve high school graduation rates, and employ hard-to-place workers. We have played a key role in several of the related priority projects.

We look to Greater Rochester Enterprise (GRE) as a regional economic development leader and work on many of the initiatives supported by GRE.

The Monroe County/Rochester Workforce Development Board works closely with the Monroe County Department of Planning and Development. Notably that office has replicated our "Recruiting 'Round Rochester" recruitments in the career centers and periodically holds recruiting events at various locations around the county, rebranded as "Recruiting on the Road." Our Executive Director is on the board of the Monroe County Industrial Development Council. We also collaborate with the City of Rochester's economic development staff. Cross referrals for services and value-added resources are made on a regular basis among RochesterWorks, Inc., Monroe County, and the City of Rochester.

The GLOW Workforce Development Board has established relationships with each of the Economic Development Partners in the four-county area. GLOW regularly participates in joint business calls, as well as partnering to assist employers who are seeking training resources. GLOW Career Center staff and Business Centers have a long partnership in supporting the entrepreneurial interests of our customers. Looking to the future, GLOW is working on a number of projects including anti-poverty initiative, continued FastTrac classes where participants are able to apply for WIOA resources to cover the cost of tuition, and the formation of new training programs in coordination with Genesee Valley Educational Partnership, as well as further development in the local community business parks.

The Finger Lakes Workforce Investment Board has established an Economic Development Committee that meets quarterly in an effort to understand the needs of our local businesses. Committee members include the four county economic developers, workforce development managers from the counties, and training providers. Outcomes of the meetings include the development of a soft skills curriculum that is provided to job seekers in the

career centers, along with presentations focused on staffing needs and transportation needs for local employers. The meetings also provide a forum to share best practices along with valuable labor market information to assist in developing hiring and training responses for the various industries in the region. This model could provide the basis for conducting regional meetings of the three workforce development boards with the nine county economic developers in the future.

In an effort to both increase the skills of the region's workforce and provide residents with tools to train for new job opportunities, Finger Lakes Works has launched its "SkillUp® Finger Lakes" program. All eligible residents can take classes, explore career pathways and even prepare for various industry-recognized certifications, all for free and all from home. Through an online portal, Finger Lakes Works provides free access to over 5,000 courses from Skillssoft, a nationally recognized training provider of workplace, business, technical and IT courses. Whether they are looking for a first job, a new job, or to advance in their chosen field, residents can take advantage of this career enhancing training. SkillUp® Finger Lakes delivers flexible, self-paced learning that can be accessed from anywhere with a high-speed internet connection, 24/7. Users will complete a self-assessment of their skills, identify any skill gaps, and automatically receive recommended courses to remediate those gaps. Jobseekers can train in essential workplace skills, study job interview talking points and search for employment opportunities nationwide. Available topics include Microsoft Office, Effective Customer Service, Project Management, Leadership, Critical Thinking, CompTIA, and many more.

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In Wayne County, a partnership has formed between the Wayne County Economic Development office and Edge Factor to tackle workforce development challenges, inspire students, reach parents and job-seekers and build relationships between local companies, schools and families. EDGE Factor uses the power of cinematic storytelling to showcase real-life stories of people using their heads, hands and technology to push back the edge of what is possible, make STEAM relevant to the real world, instill soft skills and ultimately, take people on a journey to discover how they can launch exciting careers and career pathways right in their own community.

PERFORMANCE ACCOUNTABILITY MEASURE NEGOTIATION AND REPORTING

The three workforce development boards will consult with one another before accepting or negotiating local benchmarks for the WIOA primary indicators of performance. We will share our analyses of performance and best practices for performance improvement. We will also discuss and coordinate performance on any regional customer service indicators.