



## **BOARD MEETING AGENDA**

**September 17, 2024**

12:00 p.m. CityPlace Building

- A. Call Meeting to Order
- B. Pledge of Allegiance
- C. Approval of Minutes – August 20, 2024
- D. Public Comments
- E. Local Labor Monitoring Report – August – Kevin Loewke
- F. Local Labor Exemptions Report – August
- G. Financial Report – August - Gregg Genovese
- H. Applications for Consideration
- I. Project Modifications
  - 1. 20 Fairwood Road Associates, LLC/The Collegiate Rochester, LLC – Assumption
  - 2. The Marketplace – PILOT Modification
- J. Executive Director – Discussion Items
  - Monroe 2–Orleans BOCES CDL-B program Workforce Development Fund – Increase Request
  - Camp Good Days and Special Times, Courage Bowl Event – Marketing Request
  - Genesee Country Village & Museum, Agricultural Fair - Marketing Request
  - Rochester Downtown Development Corporation – Funding Reallocation
  - Mpower Program – Workforce Development Fund Request
  - Monroe County Finger Lakes Apex Accelerator – Annual Update and Budget Request
  - Database Upgrade Project – Increase Request
  - Dashboard
- K. Finance Committee Report – A. Burr
  - Fiduciary & Investment Management Services RFP
- L. Compliance Committee Report – A. Burr
  - 587, LLC - Pilot Termination
  - Job Waivers
- M. Chair Burr – Discussion Items
- N. Adjourn Meeting

Next meeting: Tuesday, October 15, 2024



COUNTY OF MONROE  
**COMIDA**  
INDUSTRIAL DEVELOPMENT AGENCY

DRAFT  
BOARD MEETING MINUTES  
August 20, 2024

Time & Place: 12:00 p.m. at City Place

Board Present: A. Burr, N. Jones, L. Bolzner, R. King, T. Milne, J. Popli, J. Alloco

Also Present: A. Liss, R. Finnerty, R. Baranello, Esq., T. Francis, K. Loewke, G. Genovese

Chair Burr called the meeting to order at 12:00 p.m. and R. King led the board in the Pledge of Allegiance.

On motion by N. Jones, second by L. Bolzner, all aye, minutes of the July 16, 2024 meeting were approved.

K. Loewke presented the local labor monitoring report for July 2024.

Executive Director Liss presented the local labor exemption report for July 2024, on behalf of B. Lafountain

G. Genovese presented the financial report for July 2024. T. Milne questioned how the financial report tracks the interest income earned on the investments. G. Genovese stated the interest goes back into cash account. T. Milne asked for a report to track the interest income earned on the investments. T. Milne stated that he would also like to see the fiduciary insurance policy.

### **Gleason Corporation**

The Gleason Corporation proposes the renovation of its 700,000 sq ft building originally built in the early 1900s in the City of Rochester. This project involves major plant reconfiguration, improved infrastructure, and significant equipment upgrades. Renovations include HVAC upgrades, roof replacement, restoration of factory floors, creation of new office spaces, and restoration of the exterior building structure. The renovation of Gleason Works Rochester will allow the company to expand their specialized gear services and automation businesses, relocate their plastic gears business from Bergen, NY to support growth, and develop a digital manufacturing solutions platform. These investments will allow The Gleason Corporation to maintain global competitiveness and grow in Rochester while retaining jobs that could have gone elsewhere. This \$17 million project is expected to create 34 new FTEs over the next three years. The applicant is seeking approval of a sales tax exemption. The Benefit/Incentive ratio is 46:1.

The applicant was represented by Dominick Patriarca, VP Operations & General Manager. The applicant confirmed awareness of the local labor policy and that exemptions must be requested 45 days in advance. The applicant does not anticipate any local labor exemptions at this time. Ms. Baranello stated that there were no comments at the public hearing which was held on August 15, 2024.

The board considered the following resolution: RESOLUTION OF THE COUNTY OF MONROE INDUSTRIAL DEVELOPMENT AGENCY TAKING OFFICIAL ACTION TO APPOINT (i) GLEASON CORPORATION OR A RELATED ENTITY FORMED OR TO BE FORMED (COLLECTIVELY, THE "COMPANY") AS ITS AGENT TO UNDERTAKE A CERTAIN PROJECT; (ii) PROVIDE FINANCIAL ASSISTANCE TO THE COMPANY IN

THE FORM OF A SALES AND USE TAX EXEMPTION FOR PURCHASES AND RENTALS RELATED TO THE UNDERTAKING OF THE PROJECT; (iii) AUTHORIZE THE EXECUTION AND DELIVERY OF A PROJECT AGREEMENT AND RELATED DOCUMENTS; AND (iv) MAKE A DETERMINATION WITH RESPECT TO THE PROJECT PURSUANT TO SEQRA (AS DEFINED BELOW).

On motion by N. Jones, second by L. Bolzner for inducement and final resolution approving a sales tax exemption, a roll call vote resulted as follows and the motion carried:

J. Popli	Yea	J. Alloco	Absent
L. Bolzner	Yea	R. King	Yea
T. Milne	Yea	A. Burr	Yea
N. Jones	Yea		

Executive Director Liss presented the following modifications for consideration:

**Boyatzies, Inc. – Increase and Extension**

Boyatzies, Inc. dba Interstate Battery System of Rochester received board approval in September 2023 for a sales tax exemption for fleet upgrades and improvements to their headquarters in the Town of Henrietta. The application is now seeking an increase in project costs of \$124,132 as the original scope did not include necessary equipment upgrades nor an additional truck that needs to be replaced. The total project costs are now \$239,332 and the sales tax exemption is now not to exceed \$19,147. The applicant is also seeking and extension through December 31, 2025 as fleet upgrades are not expected to be made until early 2025.

The applicant was represented by Jimmy Boyatzies, General Manager

The board considered the following resolution: RESOLUTION OF THE COUNTY OF MONROE INDUSTRIAL DEVELOPMENT AGENCY (THE "AGENCY") AUTHORIZING (i) ADDITIONAL FINANCIAL ASSISTANCE TO BOYATZIES, INC. D/B/A INTERSTATE BATTERY SYSTEM OF ROCHESTER (THE "COMPANY") IN AMOUNTS EXCEEDING THE AMOUNTS PREVIOUSLY APPROVED BY THE AGENCY; (ii) THE PURCHASE OF AN ADDITIONAL VEHICLE; (iii) THE EXTENSION OF THE SALES TAX EXEMPTION BENEFIT and (iv) THE EXECUTION OF RELATED DOCUMENTS.

On motion by J. Popli, second by N. Jones, all aye, motion carried to approve an increase in project costs and an extension of the sales tax exemption through December 31, 2025

J. Alloco arrived.

**GS Optics, LLC - Increase**

GS Optics, LLC, a tenant of Germanow-Simon Corp, received board approval in November 2023 for a sales tax exemption for the renovation of a 44,000 sq. ft. building in the City of Rochester. The applicant is seeking an increase in project costs of \$202,000 as the project now includes additional buildout and furnishings. The total project costs are now \$877,000 and the sales tax exemption is now not to exceed \$46,160.

The applicant was represented by Annette Cucchiara, Director of Finance and Ben Vespone, Principal Hardware Systems Engineer.

The board considered the following resolution: RESOLUTION OF THE COUNTY OF MONROE INDUSTRIAL DEVELOPMENT AGENCY ADDITIONAL FINANCIAL ASSISTANCE TO GS OPTICS LLC IN AMOUNTS EXCEEDING THE AMOUNTS PREVIOUSLY APPROVED BY THE AGENCY AND THE EXECUTION OF RELATED DOCUMENTS.

On motion by L. Bolzner, second by J. Popli, all aye, motion carried to approve an increase in project costs.

**Hard Road Realty LLC/EEG Parking LLC - Assumption**

LeFrois Development, LLC constructed a 32,000 square foot building that was leased to the University of Rochester in the Town of Webster. The project was primarily dedicated to Medical and Radiation Oncology services featuring a Linear Accelerator Vault, a unique device used in radiation treatments for patients with cancer that requires special construction as well as an Ophthalmology office and related services. LeFrois provided the building shell and the U of R completed interior renovations. The University of Rochester is purchasing the building through a for-profit LLC and will assume the LeasePlus PILOT agreement.

The applicant was represented by Mark Wright and Andrea Wright.

The board considered the following resolution: RESOLUTION OF THE COUNTY OF MONROE INDUSTRIAL DEVELOPMENT AGENCY (THE "AGENCY") AUTHORIZING THE ASSIGNMENT BY HARD ROAD REALTY LLC OF CERTAIN FINANCIAL ASSISTANCE AND DOCUMENTS (EACH AS DEFINED BELOW) IN CONNECTION WITH A CERTAIN PROJECT LOCATED AT 875 HARD ROAD IN THE TOWN OF WEBSTER, NEW YORK, TO EEG PARKING LLC; AND THE EXECUTION OF RELATED DOCUMENTS.

On motion by R. King, second by J. Popli, all aye, motion carried to approve the sale of the facility and assignment of the real property tax abatement.

The Governance Committee Report was given by J. Popli. The Governance Committee met on July 23, 2024 and discussed the scope of the potential housing study and advised staff on what to include in the RFP. The committee discussed revising the mission statement to include specific mention of housing. The revised mission statement had been distributed to the board.

On motion by J. Popli, second by N. Jones, all aye, motion carried to approve and accept the amended mission statement as presented

Executive Director Liss introduced Chris Rapp from YAMTEP who will provide a program update and review the new request. N. Jones commented that he would like to acquire a follow-up report on participants who have completed the program in order to measure the impact of the program. As a condition to additional funding, YAMTEP will be required to provide such a report. On motion by L. Bolzner, second by R. King, all aye, motion carried to approve the execution and delivery of a contract with YAMTEP, Inc to support the workforce development program in an amount not to exceed \$520,000 for one year.

Executive Director Liss introduced Matt Hurlbutt from Greater Rochester Enterprise Economic Gardening Program to provide a program update and review the new request. On motion by R. King, second by J. Popli, all aye, motion carried to approve the execution and delivery of a contract with the Greater Rochester Enterprise for the Economic Gardening program in an amount not to exceed \$50,000 for one year.

Executive Director Liss discussed the need for the NYSDOT Passenger and Freight Rail Assistance Program resolution, which is required by NYS and authorizes COMIDA staff to access the NYS Department of Transportation's Equitable Business Opportunities System.

On motion by R. King, second by J. Alloco, all aye, motion carried to approve the Executive Director, Deputy Director, Director of Operations and Project Manager of the Agency to have access to the NYS DOT EBO (Equitable Business Opportunities) system.

Executive Director Liss discussed two PILOT Agreement modifications. The first, 1733 Ridge Rd LLC(former Medley Mall), will require an amendment to remove a parcel from the PILOT Agreement for the recently completed Aldi's store in the Town of Irondequoit. The second, I-Square, LLC, will require an amendment to remove a parcel, add a parcel and adjust the construction milestone provision. footage. J. Popli requested that the owner provide information to the board regarding the satisfaction of the investment milestone and how, despite that, the owner is unable to achieve the construction milestone. Both special PILOT Agreements require approval from the Town and respective School boards, as well as COMIDA board, and will be on a future agenda.

Executive Director Liss reviewed the current dashboard.

There being no further business to discuss, on motion by J. Popli, second by N. Jones, all aye, the regular meeting of the Board was adjourned at 1:15 p.m.



## August 2024 Monthly C.O.M.I.D.A. Report

September 2<sup>nd</sup>, 2024

1. This report covers our site visits between August 1<sup>st</sup>, 2024 and August 31<sup>st</sup>, 2024.
2. During this period Loewke Brill made 61 monthly site visits.
3. During this period Loewke Brill made “1” Follow up visits.
4. Loewke Brill checked for residence with 1104 workers.
5. Of those workers, there were “4” non-compliant.
  - a. 0– No proof of residence
  - b. 4 – Out of Area
    - i. 8/19/24 – 587, LLC – Madrano Plumbing – 4 out of area. Non-compliant workers still on job site on follow up 8/20/24.
  - c. 0 – Invalid ID
6. There were “0” new COMIDA sign(s) delivered

Big firm capability. Small firm personality.

# THE BONADIO GROUP

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## CPAs, Consultants & More

### Verified Local Labor Exemption Report

Board Meeting – September 2024

The following Verified Local Labor Exemption Requests were processed in August 2024

#### 1. Sibley Redevelopment II, LLC

- a. One exemption related to the installation/application of the gypcrete flooring product to the floors of the building at the project site. The exemption was based on the “No local labor available...” criteria. The exempted contractor is Henderson Johnson.

#### 2. Andrews Terrace Community Partners LP

- a. One exemption related to the installation of the masonry restoration – painting of balcony railings, lintels and the operation of the hydro mobile masonry scaffolds, and application of special coatings at the project site in Rochester. The exemption was based on the “No local labor available...” criteria. The exempted contractor is R.E. Kelley Inc.

#### 3. Jay’s Acquisitions II LLC

- a. One exemption related to the installation and use of the transport platform to provide vertical transportation of labor and materials at the project site in Rochester. The exemption was based on the “No local labor available...” criteria. The exempted contractors is Arsenal Scaffold, Inc.

#### 4. fairlife, LLC – **Waiver was denied**

- a. One exemption related to the roof installation at the facility site in Webster. The exemption was submitted based on warranty. It was determined that there was insufficient evidence to grant the waiver based on warranty.

**5. 1733 Ridge Road, LLC**

- a. One exemption related to the tile replacement work at the project site in Irondequoit. The exemption was based on the “Significant Cost Differentials...” criteria. The exempted contractor is Neal Kaufman.



**COMIDA**  
**Statement of Financial Position**

	Year To Date 08/31/2024	Year Ending 12/31/2023
	Actual	Actual
<b>Assets</b>		
Current Assets		
Cash and Cash Equivalents	520,700	5,637,860
Cash - Grant Funding	7,075,512	0
Accounts Receivable, Net	74,067	151,709
Short Term Investments	16,031,855	12,349,432
Prepaid Expenses	10,747	19,901
<b>Total Current Assets</b>	<b>23,712,881</b>	<b>18,158,902</b>
Long-term Assets		
Property & Equipment	629,039	625,000
Other Long-term Assets	260,511	260,511
<b>Total Long-term Assets</b>	<b>889,550</b>	<b>885,511</b>
<b>Total Assets</b>	<b>24,602,431</b>	<b>19,044,413</b>
<b>Liabilities and Net Assets</b>		
Liabilities		
Short-term Liabilities		
Accounts Payable	35,192	143,283
Accrued Liabilities	522,322	584,239
Grant Liabilities	7,075,512	0
<b>Total Short-term Liabilities</b>	<b>7,633,026</b>	<b>727,522</b>
Long Term Liabilities	335,927	335,926
<b>Total Liabilities</b>	<b>7,968,953</b>	<b>1,063,448</b>
Net Assets		
Net Assets	17,980,964	15,098,946
Change In Net Assets	(1,347,486)	2,882,019
<b>Total Net Assets</b>	<b>16,633,478</b>	<b>17,980,965</b>
<b>Total Liabilities and Net Assets</b>	<b>24,602,431</b>	<b>19,044,413</b>

**Summary Statement of Activities - All Funds with Prior Year**

	Year To Date 08/31/2024	Year To Date 08/31/2024	Prior Year To Date 08/31/2023
	Actual	Budget	Actual
Revenue			
Fee Income	513,825	1,666,667	353,240
Interest Income	478,611	233,333	165,850
<b>Total Revenue</b>	<b>992,436</b>	<b>1,900,000</b>	<b>519,090</b>
Payroll			
Program & Community Development	267,367	238,667	193,640
General & Administrative	1,582,014	2,291,682	972,831
<b>Total Expenses</b>	<b>490,540</b>	<b>460,667</b>	<b>451,558</b>
<b>Total Expenses</b>	<b>2,339,922</b>	<b>2,991,015</b>	<b>1,618,029</b>
Change In Net Assets	(1,347,486)	(1,091,015)	(1,098,939)



## ASSIGNMENT/ASSUMPTION SUMMARY

**DATE:** September 17, 2024

**APPLICANT:**

Assignor:  
20 Fairwood Road Associates, LLC  
333 South Wabash Avenue, Suite 2700  
Chicago, IL 60604

Assignee:  
The Collegiate Rochester, LLC  
222 Bloomingdale Road, Suite 40  
White Plains, NY 10605

**PROJECT LOCATION:**

4000 East River Road  
Rochester, NY 14623

**ORIGINAL APPROVAL DATE:**

August 21, 2018

**MODIFICATION REQUEST:**

The Collegiate Rochester, LLC has entered into an agreement to purchase the student housing project at 4000 River Road in the Town of Henrietta and is requesting approval to assume the Shelter Rent property tax abatement.

**ORIGINAL PROJECT AMOUNT:**

**\$30,018,546**

**Motion By:** \_\_\_\_\_  
**Seconded By:** \_\_\_\_\_

**RESOLUTION**

(Assignment of 20 Fairwood Road Associates, LLC Project to The Collegiate Rochester LLC)  
OSC Code 2602-24-021A

A regular meeting of the County of Monroe Industrial Development Agency (the "Agency"), was held at the Agency's Offices, 50 West Main Street, Rochester, New York 14614, on September 17, 2024 at 12:00 p.m.

After the meeting had been duly called to order, the Chair announced that among the purposes of the meeting was to consider and take action on certain matters pertaining to a certain Project more particularly described below.

RESOLUTION OF THE COUNTY OF MONROE INDUSTRIAL DEVELOPMENT AGENCY (THE "AGENCY") AUTHORIZING THE ASSIGNMENT BY 20 FAIRWOOD ROAD ASSOCIATES, LLC OF CERTAIN FINANCIAL ASSISTANCE AND DOCUMENTS (EACH AS DEFINED BELOW) IN CONNECTION WITH A CERTAIN PROJECT LOCATED ON FAIRWOOD DRIVE (P/K/A 4000 EAST RIVER ROAD) IN THE TOWN OF HENRIETTA, NEW YORK, TO THE COLLEGIATE ROCHESTER LLC; AND THE EXECUTION OF RELATED DOCUMENTS.

WHEREAS, by Title I of Article 18-A of the General Municipal Law of the State of New York, as amended and Chapter 55 of the Laws of 1972 of the State of New York (collectively, the "Act"), the Agency was created with the authority and power among other things, to assist with the acquisition of certain industrial development projects as authorized by the Act; and

WHEREAS, by resolution duly adopted on August 21, 2018, the Agency appointed 4000 East River Road LLC, a New York limited liability company ("4000 LLC"), the true and lawful agent of the Agency to undertake a certain project (the "Project") consisting of: (A) the acquisition of a leasehold interest in an approximately 12.42-acre parcel of land located on Fairwood Drive (previously known as 4000 East River Road) in the Town of Henrietta, New York [Tax Map No.: 174.01-2-58.1] (the "Land") together with the existing 102-unit student housing apartment complex thereon known as Racquet Club Apartments (the "Existing Improvements"); (B)(i) the renovation and modernization of the Existing Improvements including, but not limited to, new kitchens/baths and full furnishings and (ii) the construction of an additional 3-story approximately 125,000 square-foot building with 81-units of additional student housing (the "Improvements"); and (C) the acquisition and installation therein, thereon or thereabout of certain machinery, equipment and related personal property (the "Equipment" and, together with the Land and the Improvements, the "Facility"); to serve the students of Rochester Institute of Technology; and

WHEREAS, the Agency and 4000 LLC executed and delivered (i) a certain Lease Agreement, dated as of August 1, 2018, by and between the Agency and 4000 LLC, pursuant to which 4000 LLC leased the Facility to the Agency (the "Lease Agreement"), a memorandum of which (the "Memorandum of Lease") was recorded in the Monroe County Clerk's Office on

September 19, 2018 in Liber 12083 of Deeds, at Page 199; (ii) a certain Leaseback Agreement, dated as of August 1, 2018, by and between the Agency and 4000 LLC, pursuant to which the Agency leased the Facility back to 4000 LLC (the "Leaseback Agreement"), a memorandum of which was recorded in the Monroe County Clerk's Office on September 19, 2018 in Liber 12083 of Deeds, at Page 203 (the "Memorandum of Leaseback"); and (iii) a certain Payment-In-Lieu-Of-Tax Agreement, dated as of August 1, 2018, by and between the Agency and 4000 LLC, as amended by that certain First Amendment to Payment-In-Lieu-Of-Tax Agreement, dated as of February 1, 2020 and as further amended by that certain Amended and Restated Payment In Lieu Of Tax Agreement, dated as of June 1, 2023 (as amended, the "PILOT Agreement"; and, together with Lease Agreement and the Leaseback Agreement, the "Documents"); and

WHEREAS, pursuant to the Documents, the Agency provided financial assistance (the "Financial Assistance") to 4000 LLC in the form of (a) sales and use tax exemptions for purchases and rentals related to the acquisition, renovation and equipping of the Facility; (b) a partial mortgage recording tax exemption for financing relating to the Project; and (c) a partial real property tax abatement structured through the PILOT Agreement; and

WHEREAS, 4000 LLC requested, and the Agency adopted a resolution, dated September 19, 2019 approving the sale of the Facility and assignment of the Financial Assistance and the Documents to 20 Fairwood Road Associates, LLC (herein, "Assignor"); and

WHEREAS, by Application for Assumption, dated August 27, 2024, Assignor has requested the Agency's approval of the sale of the Facility and assignment of the Financial Assistance and the Documents to The Collegiate Rochester LLC, a New York limited liability company (in said capacity, the "Company"); and

WHEREAS, Assignor and the Company represent that the sale of the Facility to the Company will not in any way change the use of the Facility and that the Facility will continue to constitute a "project" as such quoted term is defined in the Act; and

WHEREAS, the Agency now desires to adopt a resolution: (i) approving the sale of the Facility, (ii) approving the assignment of the Financial Assistance and the Documents to the Company and (iii) approving the execution of any and all documents necessary to effectuate the assignment of the Financial Assistance and the Documents.

NOW, THEREFORE, BE IT RESOLVED by the County of Monroe Industrial Development Agency (a majority of the members thereof affirmatively concurring) as follows:

Section 1. The Agency hereby consents to the sale of Assignor's rights, title and interests in and to the Facility to the Company.

Section 2. The Agency hereby consents to the assignment of the Financial Assistance and the Documents from Assignor to the Company.

Section 3. The Executive Director, Deputy Director, Chairman or Vice Chairman of the Agency is hereby authorized, on behalf of the Agency, to execute and deliver any and all documents necessary to effectuate the above-described assignments and continuation of the Financial Assistance and the Documents with respect to the Facility.

Section 4. This resolution shall take effect immediately.

The question of the adoption of the foregoing Resolution was duly put to vote on roll call, which resulted as follows:

	<u><i>Yea</i></u>	<u><i>Nay</i></u>	<u><i>Absent</i></u>	<u><i>Abstain</i></u>
Troy Milne				
Lisa Bolzner				
Joseph Alloco				
Rhett King				
Norman Jones				
Ann L. Burr				

The Resolutions were thereupon duly adopted.

STATE OF NEW YORK )  
COUNTY OF MONROE ) ss.:

I, the undersigned Executive Director of the County of Monroe Industrial Development Agency, DO HEREBY CERTIFY:

That I have compared the annexed extract of the minutes of the meeting of the County of Monroe Industrial Development Agency (the "Agency"), including the resolutions contained therein, held on September 17, 2024, with the original thereof on file in my office, and that the same is a true and correct copy of the proceedings of the Agency and of such resolutions set forth therein and of the whole of said original insofar as the same related to the subject matters therein referred to.

I FURTHER CERTIFY that public notice of the time and place of said meeting was duly given to the public and the news media in accordance with Sections 103 and 104 of the New York Public Officers Law (Open Meetings Law) that all members of the Agency had due notice of the meeting and that the meeting was in all respects duly held.

IN WITNESS WHEREOF, I have hereunto set my hand on this 17<sup>th</sup> day of September, 2024.

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Ana J. Liss, Executive Director

old: 2602 19073A  
new: 2602 24021A



# COUNTY OF MONROE COMIDA INDUSTRIAL DEVELOPMENT AGENCY

## APPLICATION FOR ASSUMPTION

Each applicant seeking assumption of an existing Project must complete this form and provide additional information if requested. A **non-refundable** application fee of \$350 must be included with this application. Make check payable to COMIDA. If assumption is approved, assumption will require preparation of legal documentation and a fee of \$2,000 plus legal costs.

**Please** answer all questions. Use "None" or "Not Applicable" where necessary. Information in this application may be subject to public review under New York State Law, except for information that is considered deniable by the Freedom of Information Law. This form is available online at [www.monroecountyida.org](http://www.monroecountyida.org).

### I. PROJECT

a. Address 4000 East River Road  
City/State/Zip Rochester (T. of Henrietta), NY 14  
TAX Map No 174.01-2-58.1

b. Current Project Owner  
20 Fairwood Associates LLC

c. Does Applicant contemplate any changes in use or tenancy of the project? YES  NO   
If YES, provide information on additional pages.

### II. APPLICANT

a. Name The Collegiate Rochester LLC  
Address 222 Bloomingdale Road, Suite 40  
City/State/Zip White Plains, NY 10605  
TAX ID No 99-3547777  
Contact Name Erin Daly  
Title Director of Transactions  
Telephone # 845-527-9972  
Email edaly@thebdcgroup.com

b. Owners of 20% or more Applicant Company  
Cosmo D. Marfione  
\_\_\_\_\_  
\_\_\_\_\_

Do any of these owners currently own property within Monroe County New York? YES  NO

### III. APPLICANT Legal Counsel

Name Jon C. Lapper, Esq.  
Firm Bartlett, Pontiff, Stewart & Rhodes  
Address One Washington St, PO Box 2168  
City/State/Zip Glens Falls, NY 12801  
Telephone # 518-792-2117  
Email jcl@bpsrlaw.com

### IV. CERTIFICATION

Current Project Owner represents that (i) it is not in default under any documents executed in connection with the Project being assigned; (ii) Assignee must agree to assume Current Project Owner's rights, interest, duties, obligations and liability set forth in any documents executed in connection with the Project being assigned; and (iii) Assignee will pay all fees of the Agency and its counsel in connection with the assignment of said Project.

Signed:  
Current Project Owner: 

Shingxuan Tan Aug. 13  
Name, Title Date

#### Assignee:

Signed by:  
Cosmo D. Marfione 8/27/2024  
Name, Title Date  
Cosmo D. Marfione  
Managing Member



## MODIFICATION SUMMARY – PILOT Modification

**DATE:** September 17, 2024

**APPLICANT:**

The Marketplace 1265 Scottsville Road Rochester, NY 14625
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**PROJECT LOCATION:**

West Henrietta Road and Miracle Mile Drive Rochester, NY 14623
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**ORIGINAL APPROVAL DATE:**

December 17, 2013
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**Modification Request:**

The Marketplace has requested that the Agency amend the PILOT Agreement payment schedule with respect to the 2025 Town of Henrietta and Monroe County tax year and the 2024-2025 Rush-Henrietta Central School District tax year for all of the parcels that comprise the site. The Town and School District have each granted their respective support of the Agency and the Marketplace to amend and modify the terms of the PILOT agreement.
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**Motion By:** \_\_\_\_\_  
**Seconded By:** \_\_\_\_\_

**RESOLUTION**  
(The Marketplace Project)

A regular meeting of the County of Monroe Industrial Development Agency (the "Agency"), was held at the Agency's Offices located at 50 West Main Street, Rochester, New York 14614, on September 17, 2024, at 12:00 p.m.

After the meeting had been duly called to order, the Chair announced that among the purposes of the meeting was to consider and take action on certain matters more particularly described below.

RESOLUTION OF THE COUNTY OF MONROE INDUSTRIAL DEVELOPMENT AGENCY AUTHORIZING THE MODIFICATION OF THE EXISTING PAYMENT-IN-LIEU-OF-TAX AGREEMENT, DATED AS OF FEBRUARY 1, 2014, BY AND BETWEEN THE AGENCY AND THE MARKETPLACE WITH RESPECT TO THE PAYMENT SCHEDULE THEREUNDER AND THE EXECUTION AND DELIVERY OF CERTAIN DOCUMENTS IN CONNECTION THEREWITH.

WHEREAS, by Title I of Article 18-A of the General Municipal Law of the State of New York, as amended and Chapter 55 of the Laws of 1972 of the State of New York (collectively, the "Act"), the Agency was created with the authority and power among other things, to assist with the acquisition of certain industrial development projects as authorized by the Act; and

WHEREAS, **THE MARKETPLACE** is the developer of an approximately 125.46 acres parcel of land (the "Land"), located in the Town of Henrietta (the "Town") leased to the Company by Hylan Enterprises, Inc., pursuant to a ground lease as described in a Memorandum of Lease recorded in the Monroe County Clerk's Office in Liber 4130 of Deeds, page 225; as amended by Memorandum of Lease recorded in Liber 4733 of Deeds, page 181, and a Memorandum of Lease recorded in Liber 4733 of Deeds, page 174, and has subleases on the Land with certain operating retail tenants;

WHEREAS, the Company and the Agency executed and delivered a Lease Agreement, a Leaseback Agreement (the "Original Lease and Leaseback") and Payment in Lieu of Tax Agreement ("Original PILOT Agreement"), each dated as of February 1, 2014, by and between the Agency and the Company;

WHEREAS, the Original Lease and Leaseback and the Original PILOT Agreement were each amended by that certain Amendment to Agreements, by and between the Agency and the Company, dated as of February 26, 2020 and recorded in the Monroe County Clerk's Office on February 28, 2020 in Liber 12316 of Deeds, at page 210, to remove from the Original PILOT Agreement the newly formed University of Rochester Parcel;

WHEREAS, the PILOT Agreement was further modified and amended by (i) that certain Modification of PILOT Benefits for 2018, dated as of February 1, 2018, which amended the PILOT Agreement payment schedule with respect to 2018 Town and Monroe County (the "County") tax year and the 2018-2019 School Main Mall and Macy's PILOT payments only, (ii)

that certain Modification of PILOT Benefits for 2019, dated as of January 1, 2019, which amended the PILOT Agreement payment schedule with respect to 2019 and 2020 Town and County tax years and the 2019-2020 School Main Mall and Macy's PILOT payments only, (iii) that certain Modification of PILOT Benefits to Remove Subdivided UR Parcel, dated as of February 26, 2020, (iv) that certain that certain Modification of PILOT Benefits for 2020, dated as of July 1, 2020, which amended the PILOT Agreement payment schedule with respect to the 2021 Town and County tax year and the 2020-2021 School tax year for the Main Mall and Macy's PILOT payments only, (v) that certain that certain Modification of PILOT Benefits for 2021, dated as of August 1, 2021, which amended the PILOT Agreement payment schedule with respect to the 2022 Town and County tax year and the 2021-2022 School tax year for the Main Mall and Macy's PILOT payments only, (vi) that certain Modification of PILOT Benefits for 2022-2023, dated as of August 1, 2022, which amended the PILOT Agreement payment schedule with respect to the 2023 Town and County tax year and the 2022-2023 School tax year, (vii) that certain Modification of PILOT Benefits to Remove the Cornerstone Parcel, dated as of November 18, 2022, and (viii) that certain Modification of PILOT Benefits for 2023-2024, dated as of October 1, 2023, which amended the PILOT Agreement payment schedule with respect to the 2024 Town and County tax year and the 2023-2024 School tax year (as so amended and modified, the "PILOT Agreement"); and

WHEREAS, the Town and the Rush-Henrietta Central School District (the "School District") have each granted their respective support for the Agency and the Company to further amend and modify the terms of the PILOT Agreement to establish payment schedules for all remaining tax parcels through the balance of the term of the Original PILOT Agreement; and

WHEREAS, the Agency desires to amend the PILOT Agreement payment schedule with respect to 2025 Town and County tax year and the 2024-2025 School tax year and all future tax years through the balance of the term of the Original PILOT Agreement.

NOW, THEREFORE, BE IT RESOLVED BY THE COUNTY OF MONROE INDUSTRIAL DEVELOPMENT AGENCY AS FOLLOWS:

Section 1. The Executive Director, Deputy Director, Chairman or Vice Chairman of the Agency are hereby authorized, on behalf of the Agency to negotiate, execute and deliver any and all documents necessary to modify and amend the PILOT Agreement with respect to 2025 Town and County tax year and the 2024-2025 School tax year and all future tax years through the balance of the term of the Original PILOT Agreement.

Section 2. The Executive Director, Deputy Director, Chairman or Vice Chairman of the Agency are hereby authorized and directed for and in the name and on behalf of the Agency to do all acts and things required and to execute and deliver all such certificates, instruments and documents, to pay all such fees, charges and expenses and to do all such further acts and things as may be necessary or, in the opinion of such Executive Director, Deputy Director, Chairman or Vice Chairman of the Agency acting, desirable and proper to effect the purposes of the foregoing resolutions and to cause compliance by the Agency with all of the terms, covenants and provisions of the documents executed for and on behalf of the Agency.

Section 3. These Resolutions shall take effect immediately.

The question of the adoption of the foregoing Resolution was duly put to vote on roll call, which resulted as follows:

	<u><i>Yea</i></u>	<u><i>Nay</i></u>	<u><i>Absent</i></u>	<u><i>Abstain</i></u>
Troy Milne				
Lisa Bolzner				
Joseph Alloco				
Rhett King				
Norman Jones				
Ann L. Burr				

The Resolutions were thereupon duly adopted.

STATE OF NEW YORK )  
COUNTY OF MONROE ) ss.:

I, the undersigned Executive Director of the County of Monroe Industrial Development Agency, DO HEREBY CERTIFY:

That I have compared the annexed extract of the minutes of the meeting of the County of Monroe Industrial Development Agency (the "Agency"), including the resolutions contained therein, held on September 17, 2024, with the original thereof on file in my office, and that the same is a true and correct copy of the proceedings of the Agency and of such resolutions set forth therein and of the whole of said original insofar as the same related to the subject matters therein referred to.

I FURTHER CERTIFY that public notice of the time and place of said meeting was duly given to the public and the news media in accordance with Sections 103 and 104 of the New York Public Officers Law (Open Meetings Law) that all members of the Agency had due notice of the meeting and that the meeting was in all respects duly held.

IN WITNESS WHEREOF, I have hereunto set my hand on this 17<sup>th</sup> day of September, 2024.

\_\_\_\_\_  
Ana J. Liss, Executive Director

**THE MARKETPLACE  
1265 Scottsville Rd.  
Rochester, New York 14625  
(585) 464-9400**

August 29, 2024

County of Monroe Industrial Development Agency  
City Place Suite 1150  
50 W. Main Street  
Rochester, NY 14614

Attn: Ana J. Liss, Executive Director  
AnaLiss@monroecounty.gov

(Via Email)

Dear Ms. Liss:

As counsel to The Marketplace, I am requesting the County of Monroe Industrial Development Agency ("COMIDA") amend the existing Application, to modify the current Original PILOT and related lease and leaseback for the 2024/2025 school and tax years for the Marketplace Mall parcels per the below Pilot analysis.

Property	Tax ID	Proposed 2024 Assessment	Percent Change	Proposed 2024 Equivalent Tax	Current 2024 PILOT	Proposed 2024 PILOT	Property	School	County	Town	Tax ID
D) Pole Position/Dave & Buster's (was BTMPM)	161.12-1-1.1/D	\$ 5,000,000.00	0.00%	\$ 112,812.98	\$ -	\$ 112,812.98	Pole Position/Dave & Buster's (was BTMPM)	\$ 76,920.09	\$ 30,981.70	\$ 4,911.20	161.12-1-1.1/D
G) Dicks	161.12-1-1.1/G	\$ 5,600,000.00	0.00%	\$ 126,350.54	\$ 218,696.30	\$ 126,350.54	Dicks	\$ 86,150.50	\$ 34,699.50	\$ 5,500.54	161.12-1-1.1/G
E) Field & Stream (was DSW)	161.12-1-1.1/E	\$ 5,400,000.00	4.85%	\$ 121,838.02	\$ -	\$ 121,838.02	Field & Stream (was DSW)	\$ 83,073.70	\$ 33,460.23	\$ 5,304.09	161.12-1-1.1/E
A) JC Penney	161.12-1-1.1/A	\$ 5,570,000.00	0.00%	\$ 125,673.66	\$ 262,691.91	\$ 125,673.66	JC Penney	\$ 85,688.98	\$ 34,513.61	\$ 5,471.07	161.12-1-1.1/A
B) Floor & Décor (was Macy's)	161.12-1-1.1/B	\$ 4,972,000.00	88.55%	\$ 112,181.23	\$ 302,321.27	\$ 112,181.23	Floor & Décor (was Macy's)	\$ 76,489.34	\$ 30,808.20	\$ 4,883.69	161.12-1-1.1/B
Mall	161.12-1-1.111	\$ 14,000,000.00	0.00%	\$ 315,876.34	\$ 2,069,445.67	\$ 315,876.34	Mall	\$ 215,376.25	\$ 86,748.75	\$ 13,751.35	161.12-1-1.111
		\$ 40,542,000.00		\$ 914,732.77	\$ 2,853,155.15	\$ 914,732.77		\$ 623,698.86	\$ 251,211.98	\$ 39,821.93	

We are requesting that this modification be put on the next COMIDA meeting agenda.

Thank you for your consideration and attention to this matter.

Sincerely,

A handwritten signature in cursive script, appearing to read 'Cecilia Bonaccio', written in black ink.

Cecilia Bonaccio, Esq.

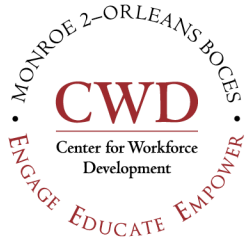
Senior Counsel

Cc Andrew Whitmor, Steve Schultz, Rachel Baranello, Lori Palmer, Greg Hofmann



Monroe 2–Orleans  
Board of Cooperative Educational Services

Jo Anne L. Antonacci, District Superintendent



**Subject: Request for Additional Funding for CDL-B Third-Party Course Implementation**

**Shawna Gareau-Kurtz**  
Director  
Tel: (585) 349-9100  
Fax: (585) 349-9101  
sgareau@monroe2boces.org

The Center for Workforce Development is currently making significant progress in implementing the recently approved third-party road test program for our CDL-B Course. As we work towards making this a reality, we have encountered some additional expenses necessary to effectively run this program.

We are kindly seeking additional funds in the amount of **\$4,566.50** to augment the current allotment approved in May of this year. Specifically, we are requesting additional funding to cover the following expenses:

- **Fingerprinting costs for Examiners:** \$203.50
- **Road Cones for the Skills Course:** \$731.50
- **Replacement cones (should the primary set become damaged, lost, etc.):** \$731.50
- **Skills course layout painted to DMV specifications (prevailing wage):** \$2,250.00
- **Outdoor storage shed for the cones when not in use:** \$480.00
- **Outdoor Measuring Wheel:** \$150.00
- **Whistles:** \$20.00

**Total:** \$4,566.50

These expenses are crucial for ensuring the success of our third-party road test site. We appreciate your consideration of this request and look forward to your positive response.

Thank you for your continued support,  
Center for Workforce Development



## COMIDA

### Request For Support Application

Program Name: Courage Bowl  
Contact Name: James R. McCauley Jr.  
Contact Email: [jmccauley@campgooddays.org](mailto:jmccauley@campgooddays.org)  
Address: 1332 Pittsford-Mendon Rd. Mendon NY 14506  
Contact Phone: 585-624-5555  
Year Program Started: 2005

This program provides an opportunity for children dealing with cancer, the experience of attending a college football game while at the same time providing students at two of our major universities, insight into the debilitating disease of cancer. This is a fundraiser where all proceeds go toward programs for children, women, and men dealing with cancer. Those in attendance come from all demographics, all over Monroe County and beyond.

This program is unique because it allows the children to participate in the practices and team meals, as well as be on the sidelines during the game. Further, the entire team, from both Universities, come down to our facility in Branchport, New York, and actually interact with a camping program

This year's program will be held at Brockport University, where we will be expecting a crowd of more than 10,000 people. This exposure, funds collected from ticket and merchandise sold, but more importantly, the number of children we are able to provide this experience for, will determine the success of this program.

The logistics of putting together something of this nature involves a tremendous number of dedicated volunteers and interns, at both schools, collaborating with the Camp Good Days and Special Times staff, to make this a truly successful event. The experience of planning, managing, and executing something of this nature can be utilized in so many areas of career development.

**Western New York Office**  
6430 Transit Rd., Suite 200  
Depew, New York 14043  
Phone: 716-206-0709 Fax: 716-206-0712  
[Buffalo@CampGoodDays.org](mailto:Buffalo@CampGoodDays.org)

**Headquarters - Rochester Office**  
1332 Pittsford-Mendon Rd.  
PO Box 665, Mendon, NY 14506  
Phone: 585-624-5555 Fax: 585-624-5799  
[Info@CampGoodDays.org](mailto:Info@CampGoodDays.org)

**Central New York Office**  
356 N Midler Ave  
Syracuse, NY 13206  
Phone: 315-434-9477 Fax: 315-434-9590  
[Syracuse@CampGoodDays.org](mailto:Syracuse@CampGoodDays.org)

[campgoodddays.org](http://campgoodddays.org)





CREATING SPECIAL TIMES  
SINCE 1979



This program provides an experience for young people dealing with cancer, an up close and personal look at a college atmosphere, that they may never have gotten. Further, it allows the students a hands on opportunity to make a difference in a disease that kills 566,000 people, every year, in this country. This game has become a highlight of our community and will generate many opportunities for employment.

**Amount of Funding requested :\$10,000**

These funds will be used for refreshments, transportation, promotional materials and advertisements. COMIDA/ Monroe County Economic Development Logos will be placed on all shirts worn by staff and players. A marketing table will also be provided to allow for promotion of the RETAIN program as this event is heavily attended by both St. John Fisher and SUNY Brockport students.

Sincerely,

James R. McCauley Jr.  
Director of Community Initiatives  
Camp Good Days and Special Times

**Western New York Office**  
6430 Transit Rd., Suite 200  
Depew, New York 14043  
Phone: 716-206-0709 Fax: 716-206-0712  
Buffalo@CampGoodDays.org

**Headquarters - Rochester Office**  
1332 Pittsford-Mendon Rd.  
PO Box 665, Mendon, NY 14506  
Phone: 585-624-5555 Fax: 585-624-5799  
Info@CampGoodDays.org

**Central New York Office**  
356 N Midler Ave  
Syracuse, NY 13206  
Phone: 315-434-9477 Fax: 315-434-9590  
Syracuse@CampGoodDays.org

[campgoodddays.org](http://campgoodddays.org)



GENESEE COUNTRY VILLAGE & MUSEUM

BOARD OF TRUSTEES

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D.H.S. Wehle, Ph.D.

Philip K. Wehrheim

Janet S. Welch

Michael R. Whelan

September 10, 2024

Allison Clark

50 W Main St Ste 8100

Rochester, NY 14614-1293

Dear Allison,

As a longstanding partner of Genesee Country Village & Museum (GCV&M), COMIDA has played a crucial role in empowering our mission over the past seven years. Your unwavering support has enabled us to highlight local businesses in our community during the Agricultural Fair.

As you know, GCV&M is the largest living history museum in New York State, welcoming over 90,000 visitors annually. Our mission is to enrich lives by connecting people with history, art, and nature through immersive experiences. The Agricultural Fair is a cornerstone event that celebrates our region's rich agricultural heritage while supporting local businesses.

We're deeply grateful for COMIDA's participation in the Agricultural Fair, and your support has been instrumental in the event's growth and success. Last year, we welcomed over 4,100 visitors, and we're anticipating up to 4,300 visitors this October 5-6, 2024.

This year, we are once again inviting COMIDA to be a key sponsor with a \$5,000 contribution. As a sponsor, you'll receive:

- **Prime Visibility:** Your logo prominently displayed on all event signage and marketing materials, including signs at the main entrance and inside the Farmers' Market tent.
- **Digital Presence:** Featured placement on our website's event page (over 234,000 annual website visitors) and mentions in our social media promotions (reaching 50,000+ followers).
- **Print Recognition:** Acknowledgment in our program, distributed to all attendees.
- **On-Site Promotion:** Up to six complimentary 10x10 booths in a high-traffic area to showcase your support of local businesses. GCV&M will handle all coordination on COMIDA's behalf, including contacting and arranging for local businesses to fill the booths.
- **Community Goodwill:** Recognition as a long-standing supporter of local economic development.

Your sponsorship will directly support the Farmers' Market tent, a central feature of the fair that highlights local producers and artisans. This aligns perfectly with COMIDA's demonstrated commitment to community development and local business support.

The Agricultural Fair offers visitors the chance to explore regional agricultural history, enjoy craft demonstrations, cooking exhibits, and livestock displays, all while supporting local farmers and businesses. It's a unique platform that connects our past with the present, fostering economic growth and community engagement.

We would be honored to continue our partnership with COMIDA for this event. Your support would play a crucial role in enhancing the fair's impact on our community.

Should you require any further information or have any questions, please do not hesitate to reach out to me at [cdimuro@gcv.org](mailto:cdimuro@gcv.org) or 585-294-8267. Thank you for your consideration and your ongoing support of GCV&M and the Agricultural Fair.

Best regards,

A handwritten signature in cursive script that reads "Christine DiMuro".

Christine DiMuro  
Director of Membership & Sponsorship



COUNTY OF MONROE  
**COMIDA**  
INDUSTRIAL DEVELOPMENT AGENCY

## PROGRAM SUPPORT APPLICATION

COMIDA is proud to support workforce development initiatives to improve access to employment opportunities. Please fill in all information below and attach your program proposal to be considered for support. For questions and submissions, please email Allison Clark at [AllisonClark@monroecounty.gov](mailto:AllisonClark@monroecounty.gov) or call (585) 753-2006.

Organization and/or Program Name: Downtown Revitalization

Downtown Revitalization

Contact Name: Galin Brooks Contact Phone: 202-570-0700

Contact Email: galin@rddc.org Year program started: 1977

Address: 100 Chestnut St Suite 1910 City: Rochester State: NY Zip: 14604

Tax EIN: 16-1081958

**Please attach to this page your proposal for program funding. Please note, you must address each of the questions below to be considered for funding**

- A brief overview of your program including your program's mission and target audience.
- Who are your other community partners, if any. Please list all funding partners, collaborative partners as well as businesses or industry groups for job placement.
- How your program is directly linked to job creation in Monroe County. Are jobs available for the program participants to be placed into upon completion of the program/training.
- How you plan to measure the success of your program. Performance metrics should include success rates, job placement rates and number of participants. If your program is new, projected metrics should be included.
- Amount of funding requested and how these dollars would be used.
- A copy of the operating budget and statement of financial position (balance sheet).
- Administration and operation of the organization. Please give a basic outline of how the program organizational structure as well as staff duties, org chart and an explanation of internal controls.
- Copy of your most recent audit.

- **A brief overview of your program including your program’s mission and target audience.**

Rochester Downtown Development Corporation (RDDC) is a non-profit organization with a mission to drive economic vitality in downtown Rochester. For almost 50 years RDDC has worked to achieve this mission by promoting downtown’s assets to attract businesses and investment, while fostering innovative ideas to create a more vibrant and inclusive community.

As a continuation of this work, expanded downtown revitalization programs and services will help to drive vitality in Rochester’s downtown core. Through extensive community engagement efforts over 1.5 years, top priority services areas were identified as follows:

**Marketing, Events, and Activation Services**

- Free public events to activate and enliven public spaces that serve residents and workers and attract visitors, driving economic vibrancy
- Amplifying downtown through additional PR, social media, and thought leadership events

**Small Business and Livability Services**

- Support for small and local businesses downtown
- Promotional campaigns highlighting downtown success stories and neighborhood assets
- Recruitment of neighborhood-serving retail and promotion of available space
- Support, encourage, and participate in projects and policies that advance livability

This work prioritizes high impact projects and initiatives that support a vibrant downtown core with an active street life, and leverage partnerships for public space enhancements. Funding for this program will enhance the ability to further drive vitality that is much needed in Rochester’s downtown core today.

- **Who are your other community partners, if any. Please list all funding partners, collaborative partners as well as businesses or industry groups for job placement.**

RDDC is proud to work with several community partners for collaboration on and funding of downtown revitalization efforts including OneROC (formerly known as ROC2025), University of Rochester, REOC, Visit Rochester, Rochester Riverside Convention Center (RRCC), and other RDDC members. A full list of RDDC members can be found here:

<https://rochesterdowntown.com/membership>

- **How your program is directly linked to job creation in Monroe County. Are jobs available for the program participants to be placed into upon completion of the program/training.**

There will be three new staff positions created to support the effective implementation of services. Additionally, the revitalization of downtown will support job growth through the attraction of new businesses and amenities, and through the growth and retention of jobs in existing businesses that rely on a vibrant downtown for their success.

- **How you plan to measure the success of your program. Performance metrics should include success rates, job placement rates and number of participants. If your program is new, projected metrics should be included.**

Key Performance Indicators to measure success will include but not be limited to staffing levels; visitor counts and pedestrian activity levels; number of public, outdoor events, and event attendees downtown; positive press for downtown businesses and other happenings; social media activity; volume of small businesses downtown; vacancy rates; pipeline projects; number of residents and workers.

- **Amount of funding requested and how these dollars would be used.**

We are requesting \$300K for general operating support to provide programs and services that help to drive economic vitality in downtown Rochester.

- **A copy of the operating budget and statement of financial position (balance sheet).**

See attached.

- **Administration and operation of the organization. Please give a basic outline of how the program organizational structure as well as staff duties, org chart and an explanation of internal controls.**

Daily operations of the program will be run by existing RDDC staff and new roles to be added in marketing and events, small business support and economic development, and public space and livability. All staff report to the President & CEO. RDDC is overseen by a Board of Directors.

As it relates to internal controls, RDDC is subject to an annual external audit. There are established procedures measured annually by an independent audit firm to ensure controls for payroll, payment of expense, deposits, and handing of bank statements. Copies of these procedures are available upon request.

- **Copy of your most recent audit**

See attached.

8/14/2024

COMIDA Board  
Monroe County Economic Development  
50 West Main St  
Rochester, NY 14614

Dear COMIDA Board Member,

I am pleased to write this letter of support of funding for Downtown Revitalization put forward by Rochester Downtown Development Corporation (RDDC).

CSD Housing is a developer and owner of multifamily housing in Downtown Rochester. It is vitally important to increase the quality of living and amenities to complement our housing development efforts. We are excited about the continued growth and vibrancy of Center City and thankful for RDDC leading many of those efforts.

Rochester Downtown Development Corporation (RDDC) is a non-profit organization with a mission to drive economic vitality in downtown Rochester and for almost fifty years has worked to achieve this mission by promoting downtown's assets to attract businesses and investment, while fostering innovative ideas to create a more vibrant and inclusive community.

The key pillars of their work- **Marketing, Events, and Activation Services**; and **Small Business and Livability Services** - require operating support to successfully support a revitalized downtown. These areas are critical to residents, workers, visitors, employers, and small and local business owners downtown. This work prioritizes high impact projects and initiatives that support a vibrant downtown core with an active street life, and leverage partnerships for public space enhancements. Funding for this program will enhance the ability to further drive vitality that is much needed in Rochester's downtown core today.

I appreciate your consideration of this request.

Sincerely,

Whitney McClary

*Whitney McClary*

Development Director  
CSD Housing LLC

August 14, 2024

COMIDA Board  
Monroe County Economic Development  
50 West Main St  
Rochester, NY 14614

Dear COMIDA Board Member,

I am writing on behalf of Greater Rochester Chamber of Commerce to express our strong support for the funding request submitted by the Rochester Downtown Development Corporation (RDDC) for Downtown Revitalization efforts. As an organization deeply committed to the economic vitality and growth of the Greater Rochester area, we recognize the crucial role that a vibrant and thriving downtown plays in the overall health of our region's economy.

RDDC has been a cornerstone in the revitalization of downtown Rochester for nearly fifty years. As a non-profit organization, RDDC's mission is to drive economic vitality in downtown Rochester by promoting the area's assets, attracting businesses and investments, and fostering innovative ideas to create a more vibrant and inclusive community. Through its dedicated work in marketing, events, and activation services, as well as small business and livability services, RDDC has consistently focused on making downtown Rochester a more attractive, inclusive, and dynamic place for everyone.

The revitalization of downtown Rochester is essential not only for attracting new businesses and investments but also for creating an environment where current businesses can thrive. A revitalized downtown serves as a hub for innovation, collaboration, and cultural enrichment, which are all vital to retaining and attracting top talent in the region. The work being done by RDDC is pivotal in ensuring that our downtown remains a dynamic and attractive place for residents, visitors, and businesses alike.

The support provided by COMIDA will be instrumental in enabling RDDC to continue its vital work and to implement high-impact projects that will contribute to a vibrant downtown core. These projects, focused on creating an active street life and improving public spaces, will have lasting positive effects on our community and will help to drive the economic vitality that is so needed in Rochester's downtown today.

Thank you for considering this request. We appreciate your continued support for initiatives that help to build a stronger and more vibrant Rochester.

Sincerely,



Robert J. Duffy  
President and CEO





## Ibero-American Development Corporation

954 Clifford Avenue, Rochester, New York 14621

phone: (585) 467-6410

fax: (585) 339-9451

web: [www.iadconline.org](http://www.iadconline.org)

September 5, 2024

COMIDA Board  
Monroe County Economic Development  
50 West Main St  
Rochester, NY 14614

Dear COMIDA Board Member,

I am pleased to write this letter of support of funding for Downtown Revitalization put forward by Rochester Downtown Development Corporation (RDDC).

The Ibero-American Development Corporation (IADC) recognizes that the vitality of downtown Rochester benefits all area residents and we are currently developing affordable housing in the downtown area to bring life to the area and to help residents have access to the activities that RDDC so aptly brings to the area.

Rochester Downtown Development Corporation (RDDC) is a non-profit organization with a mission to drive economic vitality in downtown Rochester and for almost fifty years has worked to achieve this mission by promoting downtown's assets to attract businesses and investment, while fostering innovative ideas to create a more vibrant and inclusive community.

The key pillars of their work- **Marketing, Events, and Activation Services**; and **Small Business and Livability Services** - require operating support to successfully support a revitalized downtown. These areas are critical to residents, workers, visitors, employers, and small and local business owners downtown. This work prioritizes high impact projects and initiatives that support a vibrant downtown core with an active street life, and leverage partnerships for public space enhancements. Funding for this program will enhance the ability to further drive vitality that is much needed in Rochester's downtown core today.

I appreciate your consideration of this request.

Sincerely,

Eugenio Marlin  
Executive Vice President

August 15, 2024

COMIDA Board  
Monroe County Economic Development  
50 West Main St  
Rochester, NY 14614

Dear COMIDA Board Member,

The Rochester Educational Opportunity Center (REOC) is pleased to provide this letter of support of funding for Downtown Revitalization put forward by Rochester Downtown Development Corporation (RDDC). REOC knows that RDDC is a non-profit organization with a mission to drive economic vitality in downtown Rochester, and for almost fifty years RDDC has worked to achieve this mission by promoting downtown's assets to attract businesses and investment, while fostering innovative ideas to create a more vibrant and inclusive community. RDDC's Downtown Revitalization supports the mission of the REOC. REOC's professional connection to RDDC fosters a partnership of information sharing and community that understands that the revitalization of the area facilitates jobs, business growth, and increased living opportunities for residents in Rochester and surrounding areas.

REOC is one of the many educational enterprises through the SUNY University Center for Academic and Workforce Development's learning system, and delivers comprehensive, community-based, academic and workforce development programs for adults 18 years of age and older. REOC's programs and support services lead to enhanced employment opportunities, access to further education, and personal growth and development. REOC's graduates are essential to the economic growth of the community; and with over a 55-year history of approximately 33,000 graduates who contribute to the economy of the community, revitalization efforts are crucial.

The key pillars of RDDC's work - Marketing, Events, Activation Services, and Small Business and Livability Services - require operating support to successfully support a revitalized downtown. These areas are critical to residents, workers, visitors, employers, and small and local business owners downtown. This work prioritizes high impact projects and initiatives that support a vibrant downtown core with an active street life, and leverage partnerships for public space enhancements. Funding for this program will enhance the ability to further drive vitality that is much needed in Rochester's downtown core today.



OFFICE OF THE DEAN | EXECUTIVE DIRECTOR

If there are any questions, please contact me at 585-327-4069 or [rmareus@brockport.edu](mailto:rmareus@brockport.edu). I appreciate your consideration of this request.

Sincerely,

A handwritten signature in black ink, appearing to read "R. Mareus".

Dr. Roosevelt Mareus  
Dean/Executive Director



Urban League of  
Rochester, N.Y., Inc.

*Empowering Communities.  
Changing Lives.*

September 6, 2024

COMIDA Board  
Monroe County Economic Development  
50 West Main St  
Rochester, NY 14614

265 North Clinton Avenue  
Rochester, N.Y. 14605-1857

P (585) 325-6530  
F (585) 325-4864  
E-m [www.ulr.org](http://www.ulr.org)

Dear COMIDA Board Member,

I am pleased to write this letter of support of funding for Downtown Revitalization put forward by Rochester Downtown Development Corporation (RDDC).

The Urban League’s mission is to enable African Americans, Latinos, and other disadvantaged individuals to secure economic self-reliance, parity and power, and civil rights. We are an affiliate of the National Urban League, a leading civil rights organization. The agency directly serves over 6,000 individuals per year and operates more than 25 programs in the areas of Youth Education and Development, Workforce Development, Family and Children Services, Entrepreneurship and Wealth Building, Housing Services, Services for Individuals with Intellectual and Developmental Disabilities, Economic Development, and Equity and Advocacy. Our main office is located on North Clinton Avenue in downtown near the railway and bus stations, and we have two additional sites in the area.

The vitality of the downtown is critical to ensuring that the neighborhood where the Urban League of Rochester operates provides a welcoming, safe, and inclusive environment for the individuals who come to our offices daily to engage with our programs and for our staff. Furthermore, a revitalized downtown supports the overall wellbeing of the city and its residents supporting more economic opportunities for residents through small businesses and employment opportunities and better quality of life for those who live in or come to the area.

Rochester Downtown Development Corporation (RDDC) is a non-profit organization with a mission to drive economic vitality in downtown Rochester and for almost fifty years has worked to achieve this mission by promoting downtown’s assets to attract businesses and investment, while fostering innovative ideas to create a more vibrant and inclusive community.

The key pillars of their work- **Marketing, Events, and Activation Services**; and **Small Business and Livability Services** - require operating support to successfully support a revitalized downtown. These areas are critical to residents, workers, visitors, employers, and small and local business owners downtown. This work prioritizes high impact projects and initiatives that support a vibrant downtown core with an active street life, and leverage partnerships for public space enhancements. Funding for this program will enhance the ability to further drive vitality that is much needed in Rochester’s downtown core today.

I appreciate your consideration of this request.

Sincerely,

Dr. Seanelle Hawkins  
President and CEO

*President & Chief Executive Officer*  
DR. SEANELLE HAWKINS

**BOARD OF DIRECTORS**

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Tashanda Thomas



## WORKFORCE DEVELOPMENT FUND APPLICATION

COMIDA is proud to support workforce development initiatives to improve access to employment opportunities. Please fill in all information below and attach your program proposal to be considered for support. For questions and submissions, please email Allison Clark at [AllisonClark@monroecounty.gov](mailto:AllisonClark@monroecounty.gov) or call (585) 753-2006.

Organization and/or Program Name: Monroe Community College - MPower

Monroe Community College - MPower

Contact Name: James Gertner Contact Phone: 585-685-6232

Contact Email: jgertner1@monroecc.edu Year program started: 2017

Address: 1000 E. Henrietta Rd. City: Rochester State: NY Zip: 14623

Tax EIN: 16-0849590

**Please attach to this page your proposal for program funding. Please note, you must address each of the questions below to be considered for funding**

- A brief overview of your program including your program's mission and target audience.
- Who are your other community partners, if any. Please list all funding partners, collaborative partners as well as businesses or industry groups for job placement.
- How your program is directly linked to job creation in Monroe County. Are jobs available for the program participants to be placed into upon completion of the program/training.
- How you plan to measure the success of your program. Performance metrics should include success rates, job placement rates and number of participants. If your program is new, projected metrics should be included.
- Amount of funding requested and how these dollars would be used.
- A copy of the operating budget and statement of financial position (balance sheet).
- Administration and operation of the organization. Please give a basic outline of how the program organizational structure as well as staff duties, org chart and an explanation of internal controls.
- Copy of your most recent audit.

August 30, 2024

# Proposal to Administer

POWERED BY  
MCC & COMIDA

**m**power  
WORKFORCE DEVELOPMENT  
@MONROE COUNTY

October 2024 – December 2025

Proposing Entity:



**Monroe Community College**

STATE UNIVERSITY OF NEW YORK

## **Brief Summary of Organization**

Monroe Community College  
1000 E. Henrietta Road  
Rochester, NY 14623

Established in 1961, Monroe Community College (MCC) in upstate Rochester, New York is an associate-degree granting public institution. Having opened the doors to opportunity for more than a half a million students since fall 1962, MCC is western New York's largest community college. The mission of Monroe Community College is to provide a high-quality learning environment to a diverse community. In offering education and training opportunities, student success is the College's highest priority. As such, the College is committed to access, teaching excellence, comprehensiveness, lifelong learning, partnership building and economic development.

Monroe Community College has more than 100 degree and certificate programs and grants associate degrees in arts, science, and applied science. It has cooperative degree programs with many four-year colleges. Monroe Community College is accredited by the Middle States Association of Colleges and Secondary Schools and curricula are registered and approved by the New York State Department of Education. Monroe Community College employs over 1,300 faculty, professional staff, and administrators.

MCC's operating budget for the period ending Aug. 31, 2024, is \$111.5 million. More than 8,500 full-time and part-time students are enrolled for the fall 2024 semester. The MCC Economic & Workforce Development Center, considered a self-supporting, other special program at the College, stands to achieve \$3.7 million in revenue with a more than \$300,000 return to the College general fund for the period ending Aug. 31, 2024. Mpower funded activity falls under this self-supporting program.

Monroe County and MCC launched the FWD Center (Finger Lakes Workforce Development Center) in early 2022, serving as a premier training center for the entire region; focusing on rapid training, retraining, and upskilling of technical middle-skilled workers that continue to be needed by local employers. The FWD Center's ability to execute on the main pillars of the Mpower partnership is powerful. The FWD Center links education and training to the evolving needs of the regional workforce, which benefit Monroe County businesses by providing access to newly trained workers, and benefit individuals by transitioning displaced workers or career changers into self-sustaining jobs. With MCC as the lead for Tech Hub workforce development interests between Buffalo and Syracuse, positioning support for Monroe County workers through Mpower enhances that prospect.

Our dedication to developing healthcare professionals with comprehensive, state-approved curricula continues abundantly. Initially delivered when the need was most critical during COVID, learning continues today with nearly 70 cohorts completing our Certified Nursing Assistants program in the last three years and joining the workforce or moving into patient-focused positions. Our Medical Interpreter program has supported hundreds of participants now assisting non-English speaking patients with services to enhance care in multiple County healthcare facilities.

The MCC Economic & Workforce Development Center expanded its information technology programming catalog in the past two years primarily for entry-level opportunities for job seekers and those needing additional credentials to advance in IT roles.

**Individuals Assigned to the Mpower Project:**

MCC will provide a dedicated Mpower team to administer the project: Jim Gertner, Director, and Ann Kuhn, Fiscal Manager, will be your day-to-day points of contact. The following is a complete list of highly qualified and experienced individuals assigned to work on the Mpower program. All have numerous years of experience in workforce development.

- Dr. Robin Cole Jr., Vice President, MCC Economic Development, Workforce and Career Technical Education, Mpower Program Leader/Senior Administrator. Dr. Cole will provide program oversight and strategic leadership as well as function as the primary contact with Monroe County and COMIDA leadership.
- James J. Gertner, Mpower Program Director and primary day-to-day point of contact. Mr. Gertner will provide oversight for all individual and employer program delivery including qualification and assessment of need, proposal development and budgeting, program implementation, organization/participant documentation and record keeping, reporting, evaluation, and program closeout. Mr. Gertner will act as liaison between MCC leadership, Monroe County and COMIDA to facilitate program updates and planning.
- Ann Kuhn, MCC Manager, Operations, Project & Budget. Ms. Kuhn will manage the Mpower budget and provide quarterly reports to Monroe County leadership. Ms. Kuhn also leads intake of all individuals, assessing for eligibility, supporting retention and tracking program completion with the program directors. Ms. Kuhn will liaison with MCC and Monroe County leadership regarding budget and reporting related topics.
- Kristin Sine-Kinz, MCC Chief of Staff & Director, Marketing. Ms. Sine-Kinz will lead the program marketing plan development and implementation for all strategic and tactical promotional efforts and program messaging. Ms. Sine-Kinz will liaison with MCC, Monroe County and COMIDA leadership regarding communication updates and strategic marketing plans.
- Carly Rooney, MCC Marketing Manager. Ms. Rooney will work closely with the MCC Mpower team and play a key role in the execution of marketing plans. Ms. Rooney will liaison with MCC, Monroe County and COMIDA leadership regarding communication updates and strategic marketing plans.



- Siva Visveswaran, Interim Director, FWD Center. Mr. Visveswaran will manage the efforts to support participants in our Industry 4.0 and IT programs. He will provide oversight for all individual and employer program delivery options for entry level learning in the advanced manufacturing and information technologies catalog options.
- Kelly Brown Lonis, MCC Director Corporate Relations Management and Mpower Participant Recruiter (incumbent workforce). Generates leads within advanced manufacturing, IT, and health care organizations and affiliates to secure opportunities for learning, development, and upskilling workers for enhanced job growth and/or advancement. Serves as point of contact for participating industry leadership.
- Julianna Frisch, Director, Healthcare Programs. Ms. Frisch and her team will manage the efforts to support participants in our healthcare programs, most specifically our Certified Nursing Assistants and Medical Interpreter programs. She will provide oversight for all individual and employer program delivery options for learning in the healthcare catalog options.
- Joe Snowden, MCC Manager, Education to Employment. Mr. Snowden is responsible for supporting education to employment pathways for learners as they transition through education and into the workforce. Job placement assistance is built into to the Mpower experience to help newly trained individuals find employment.

### **Scope of Work/Implementation Plan**

Monroe Community College will continue to develop, implement, and manage the Mpower workforce development program in partnership with COMIDA. The objective of the program is to recruit and train 300 workers in the period between October 1, 2024 and December 31, 2025 and place them into the high demand industry sectors of Advanced Manufacturing, IT, and Healthcare or upskill into advanced opportunities. To accomplish this objective, MCC will provide the team of experienced workforce development professionals. The team's vision and purpose will align with that of the workforce development strategy of the COMIDA organization.

MCC has an extensive catalog of credit and non-credit programming related to Advanced Manufacturing, IT, and Healthcare and a history of providing successful programs designed to rapidly upgrade the skills of entry-level and middle-skilled workers. The College uses labor market intelligence (<https://mcclmi.com/>) to provide occupational-based analyses that focus on measuring demand for middle-skilled occupations within the Finger Lakes region. This labor market intelligence will continue to enhance and inform the Mpower program's ability to identify areas of most need with specific industry partners in addressing employment gaps within industry sectors. MCC has further enhanced its offerings by incorporating active career assessment and counseling to create pre-program assessment services for all career technical education and workforce students enrolling through MCC's Economic and Workforce Development Center. MCC plans to continue to utilize the automated lead process located at <https://workforceforward.com/mpower/>.

In collaboration with COMIDA and RochesterWorks!, the MCC Mpower team will recruit participants for inclusion in the program. The team assesses the needs of participants and industry partners, customizes training to suit their needs, and provides program curriculum, training/education space, equipment, instructors, and student tuition, fees, books, and tools. Due to its thorough assessment of industry partner needs, MCC is able to facilitate placement assistance to Mpower completers by connecting them to employers who are hiring, the MCC Career Center, and RochesterWorks!.

The MCC Mpower team will develop and execute a marketing plan highlighting the Mpower initiatives and be a steward of the Mpower brand while continuing with the existing identity. The marketing materials will be updated as needed, and a detailed marketing plan outlining development and execution will be developed. MCC will coordinate with COMIDA to ensure all desired objectives are included.

The Mpower program will maintain thorough records of participant enrollment, trainings provided, industry partners, and program costs, and will continue to submit quarterly status reports to include up-to-date statistics. In addition, MCC will be able to provide a program report to COMIDA's board upon request by the Executive Director.

### **Experience**

MCC has a lengthy history of successful implementation of federal, state, and local workforce development programs including Mpower from 2017-2024. Since 2017, and as of 6/30/24, MCC has served approximately 2,800 participants, far exceeding the proposed number of participants to be served.

Included as an addendum to our proposal is the last Mpower quarterly report provided to the County with a snapshot of most recent status and results. Other highlights appear in the overviews of the request for the next 15 months.

Monroe Community College will complement the Mpower objectives by leveraging several of MCC's externally funded workforce projects including the Ralph C. Wilson Foundation, SUNY Pre-Apprenticeship, SUNY Future of Work, SUNY REACH, SUNY Transformation, ESL Mentorship, ARPA, and SUNY Pathways. These projects are focused on providing tuition and support services for underrepresented populations seeking to enter the workforce or to upgrade their skills. These projects will work in tandem with Mpower to serve more students.

MCC partners with the highest quality training consultants, either part of the MCC faculty, adjuncts, or industry professionals with long-standing experience, success, and capacity to train the adult learner in an interactive, results- and solutions-based approach. We match subject matter expertise and experience in adult learning instruction for delivery of curricula addressing industry skillsets in technical and skilled trades, process and project management, information and computer technology, health care, communication, supervisory, and leadership training. These instructional resources and skills-based programs consistently receive high evaluation scores for content and delivery. Each delivered program asks participants to complete evaluations on course content and instruction. Our average evaluation rate on a five-point scale for all courses in the past year exceeds 4.5.

## **Proposal Breakdowns: Healthcare, Advanced Manufacturing, IT, Consortium (contract training)**

### **Healthcare**

Our Certified Nurse Assistant (CNA) program graduated 166 students between Sept. 5, 2023 and Aug. 16, 2024. Rochester Regional Health, Monroe County Hospital, Friendly Home, and Highlands (URMC) sent employees to the program. We also served students unattached to an employer seeking CNA certification and employment.

Program completion rate was 91%. Completers were successful in first-time certification exam passage 89% of the time.

Demand to serve open enrollment, non-attached participants grows with the community need. Many seek financial support to enroll, complete, become certified, and land employment in the Monroe County healthcare community.

Combining SUNY pre-apprentice funds for each open enrollment CNA student (\$1,000 each), we request **\$158,000** to support the balance of tuition and fees (\$2,975 total). Mpower funds would provide 80 students in 10 cohorts the opportunity to join the CNA workforce upon successful course and exam completion.

Employment status of these students three months post-completion is a requirement of the SUNY pre-apprentice funds. We will have data to share with the County for these students.

Our Medical Interpreter program has graduated more than 150 professional interpreters in the past 18 months. Mpower has supported the tuition and fees for many of these talented, bilingual individuals to enter the field. Holders of the recognized Certificate of Successful Completion exam are gainfully employed by URMC, Rochester Regional Health, Anthony Jordan Health Centers, and Catholic Family Charities.

We desire to continue to meet the demand for qualified medical and community interpreters that grows with many with limited English proficiency.

Our request for **\$89,500** will support 100 medical interpreter students in 10 cohorts in the next 15 months. Each successful completer will find immediate workforce opportunity. We will track, monitor and report placement throughout the program.

**TOTAL - \$247,500**

## **Advanced Manufacturing/Automation/Welding and Fabrication**

The Finger Lakes Workforce Development (FWD) Center offerings have grown to include 10 programs in advanced manufacturing, automation, smart factory learning and robotics since opening in May 2022.

Several of the newest programs have provided completers with job positions or advancements at Baldwin Richardson Foods, LiDestri, and Bausch & Lomb, for example. Leveraging support from SUNY Future of Work grant and MCC Foundation awards via Baldwin Richardson Foods, our focuses approach to support greatest current industry demand of Mpower students support will concentrate on six programs.

- Certified Industry 4.0 Control Systems Specialist
- Certified Industry 4.0 Process Control Technician
- FANUC Robotics Handling Tool Operation and Programming (certificate)
- FANUC Robotics Vision (certificate)
- Universal Robots Operator Training (Certified)
- Stratasys Operation and Programming (Certified)

We expect Mpower support for 36 students in the programs listed with full tuition and fees (**\$89,551**). With consistent outreach to partners in industry seeking new employees with these credentials or to upskill incumbent workers on their advancing technologies, this support benefits the emerging tech hub partners with just-in-time skills.

### **Welding and Fabrication**

In partnership with Arc+Flame Center, MCC Economic & Workforce Development Center trains future welders for immediate job placement (100% in spring 2024 among 32 participants). Leveraging Krupnicki Scholarships through the Arc+Flame Center and individuals who use loans and personal funds to pay for the nearly \$11,000 program, Mpower has provided funds for those determined having the greatest need.

Six received \$2,500 Mpower grants in spring 2024 and all graduated. The six are employed with a farm maintenance company, a manufacturing company, a sheet metal contractor, an automotive company, and a rail company. One is developing a business plan to open a custom automotive fabrication company.

Our plan for future support of individuals seeking the welding and fabrication program is to target eight students per semester beginning in January 2025 (and August 2025) for \$2,500 Mpower grants to support entry in the program (total **\$40,000**). Comments below are from two of the spring 2024 graduates:

“I really appreciate the help from the grant that enabled me to go to school and start a new career.”

“The program gave me such a huge base and knowledge to have confidence to start TIG welding immediately and I am extremely grateful.”

**TOTAL - \$129,551**

## **Information Technology (IT)**

Our expanded Information Technology non-credit course catalog includes programming across a wide spectrum of entry-level learning aimed at fast-track completions and workforce readiness for positions in the bursting IT fields. Our MCC Labor Market Intelligence in August 2024 lists more than 700 job openings in the nine-county Finger Lakes Region. Of those, 120 are considered growth positions from employers expanding their workforce.

Our catalog of programs includes areas in tech support/help desk/network administration, cybersecurity, cloud computing, data analytics, machine learning and artificial intelligence, and web development.

The focus for the use of Mpower support for IT professionals includes the following programs that in the past have netted jobs or elevated positions for completers.

- CompTIA ITF+ IT Foundation – 20 new students - \$15,930.00
- CompTIA A+ Network+ Certification/CCST – 12 students - \$21,546.00
- Cisco Certified Network Associate (CCNA) Part 1 – 12 students - \$16,200.00
- Data Analytics Foundation – 12 students - \$19,386.00
- Data Engineering Foundation using Python – 6 students - \$9,693.00
- Web Designer 2 – 6 students - \$10,773.00
- Web Designer 3 – 6 students - \$10,773.00

The Mpower support for the students and programs above includes 90% of tuition and fees. Recent experience shows individuals with some commitment for their learning and advancement will persist, complete, and are successful in achieving placement or new jobs.

More than 80 students completed IT programs during the current Mpower program. Efforts for exposure and placement have included shadowing experiences and several internship opportunities for students. The comment from one below illustrates the program support for individuals

“Cybersecurity is impossible to ignore, even if the field doesn't apply to your career. Working in IT, taking this Security+ class helped me learn about how serious the threat is to people, companies and organizations around the world. Learning about attacks, defenses, disaster recovery, processes, etc., helps me bring knowledge that I didn't have previously to my current workplace. In terms of career success, the Security+ certificate is a very desired certificate, very much more compared to the other CompTIA certs. Certain government and DoD companies require it, so taking the class for this cert expanded my ability to work at places that I wouldn't be able to previously.”

**TOTAL - \$104,301**

### **Consortium Training (Contracts with Organizations – Upskilling Incumbent Workers)**

Dozens of Monroe County organizations have benefitted from Mpower support for the upskilling of their incumbent workers since the onset of the program. Custom deliveries in optics, process improvement, project management, industrial skills like blue print reading and geometric dimensioning and tolerancing have support expansion, growth, and employee development to retain critical workers.

The focus for the use of Mpower support for organizations in the future will focus on similar like programming, especially around technology, automation, and advanced manufacturing.

Several partners currently have training programs we expect to deliver in the near future with Mpower support.

#### **Gleason: Living Safety Every Day Training\_Fall 2024**

Description: The “Living Safety Every Day” program aims to transform executive leaders into safety champions, capable of influencing compliance and fostering a proactive safety culture. Through a combination of knowledge-building, practical application, and continuous improvement, executive and operation leaders will be equipped to lead their manufacturing plant towards excellence in safety.

Participant total: 35 – Mpower support - **\$4,000**

#### **Bausch & Lomb: OTJ Trainer Development – Fall 2024 and Spring 2025**

Description: This train-the-trainer course prepares individuals to deliver one-on-one training in an industry setting. Knowledge transfer for newer employees to quickly complete tasks around equipment, automation, and is the focus of this learning. Employees and employers see greater efficiency faster after learned complete this program. This hands-on course includes extensive practice to apply skills taught. Participant total: 40 - Mpower support - **\$19,100**

Additional corporate partners seeking custom incumbent worker upskilling programs will be offered Mpower support if meeting the criteria that come from ongoing collaborative discussions between us and County officials overseeing the Mpower program.

**TOTAL - \$70,699**

We would recommend continuation of the following, Monroe County approved, protocol for the development of training contracts with employers, and the disbursement of financial aid monies to individuals for training purposes. It is our intention to use this rubric for the distribution of all Mpower related monies.

We are proposing a change to the employer training opportunities outside current pipeline where the company match rises to 75% of training contracts with Mpower supporting 25% of those contact costs.

Audience	Financial Support Structure
<p><i>Individuals:</i></p> <ul style="list-style-type: none"> <li>• Monroe County residents</li> <li>• Program of choice will be prioritized, but not exclusive, to the following industry sectors:               <ul style="list-style-type: none"> <li>○ advanced manufacturing</li> <li>○ IT</li> <li>○ health care</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Funds will be applied to the individual’s greatest area of need, on a case-by-case basis.</li> <li>• May be used for first, last, or total dollar financial aid.               <ul style="list-style-type: none"> <li>○ In some situations, Mpower dollars will cover 100% of individual costs.</li> <li>○ In other situations, Mpower dollars will bridge a financial gap in existing aid and remove the student financial barrier to participation.</li> </ul> </li> </ul>
<p><i>MCC/Employer Training Opportunities:</i></p> <ul style="list-style-type: none"> <li>• Monroe County employer opportunities secured through the MCC Economic and Workforce Development Center.</li> </ul>	<p>All employer training contracts will be priced using the following formula.</p> <p><u>100% = Value of Training (instructional costs + coordination/operating costs)</u></p> <p>25% of total = funding from Mpower 75% of total = client match paid to MCC</p>
<p><i>Monroe County/Employer Training Opportunities:</i></p> <ul style="list-style-type: none"> <li>• Offered as part of business attraction/economic development package.</li> <li>• Other scenarios as directed by the County.</li> </ul>	<p>Monroe County to advise re: contractual agreements on a case-by-case basis, with an option for Mpower to fully or partially subsidize training.</p> <p>Bi-weekly meetings will be conducted to account for County-originated opportunities, and discuss other business related to Mpower.</p>

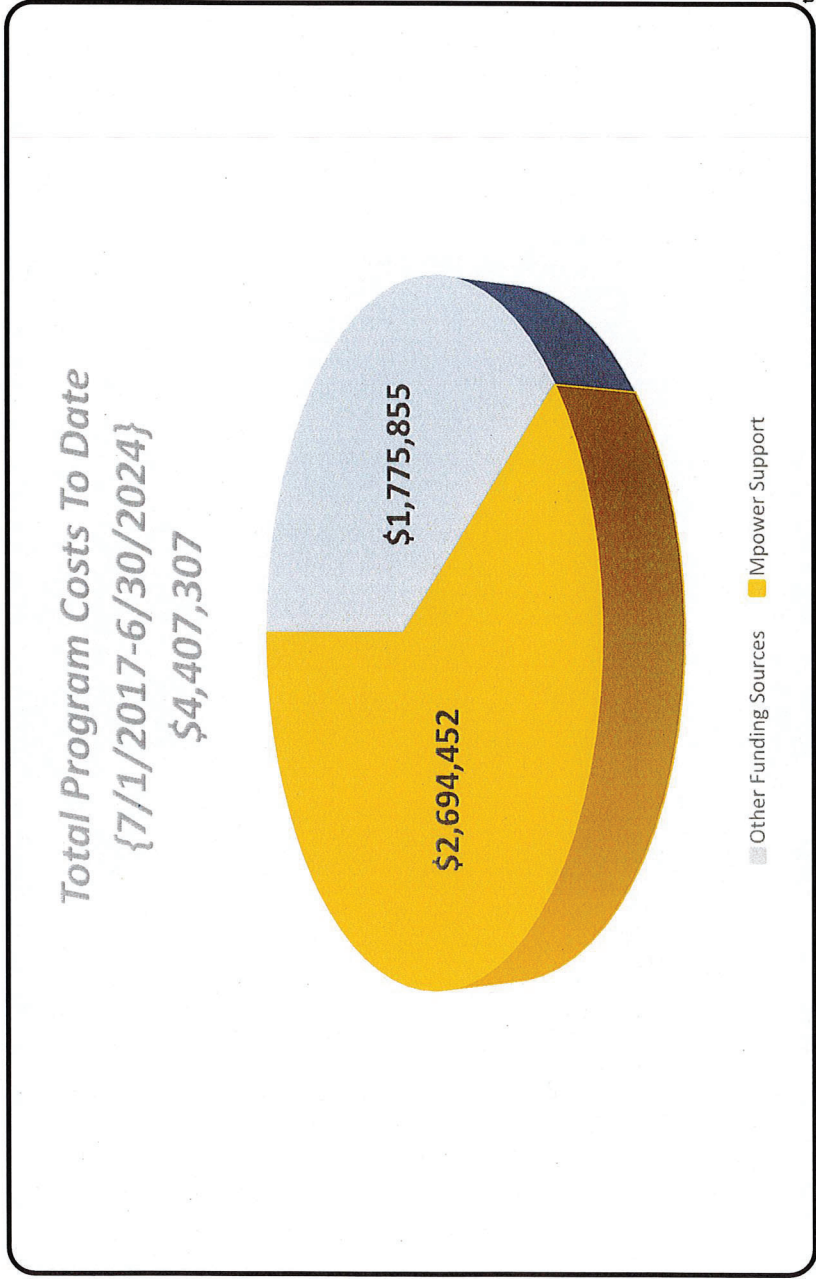
# Addendum



## 2024 Mpower Status Report

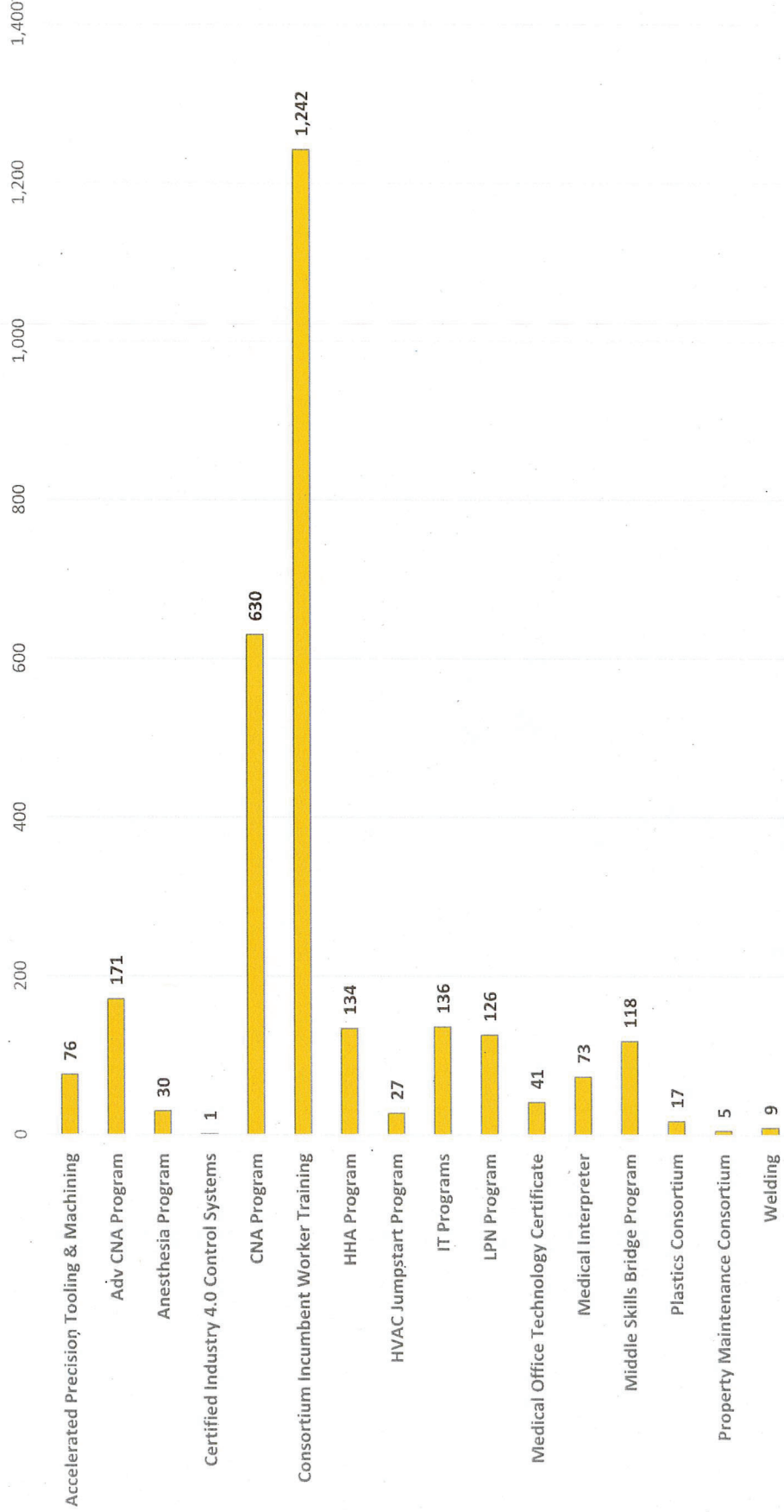
<b>Program to Date:</b>	
Total Training Costs:	\$4,470,306.60
Total Mpower Support:	\$2,694,451.82
Total Participants Served:	2,836

<b>April - June, 2024:</b>	
Training Costs:	\$ 349,406.00
Mpower Support:	\$ 232,126.50
Participants Served:	223



## 2024 Mpower Status Report

**Total Participants Served To Date: 2,836**  
**{7/1/2017- 6/30/2024}**





## 2024 Mpower Status Report

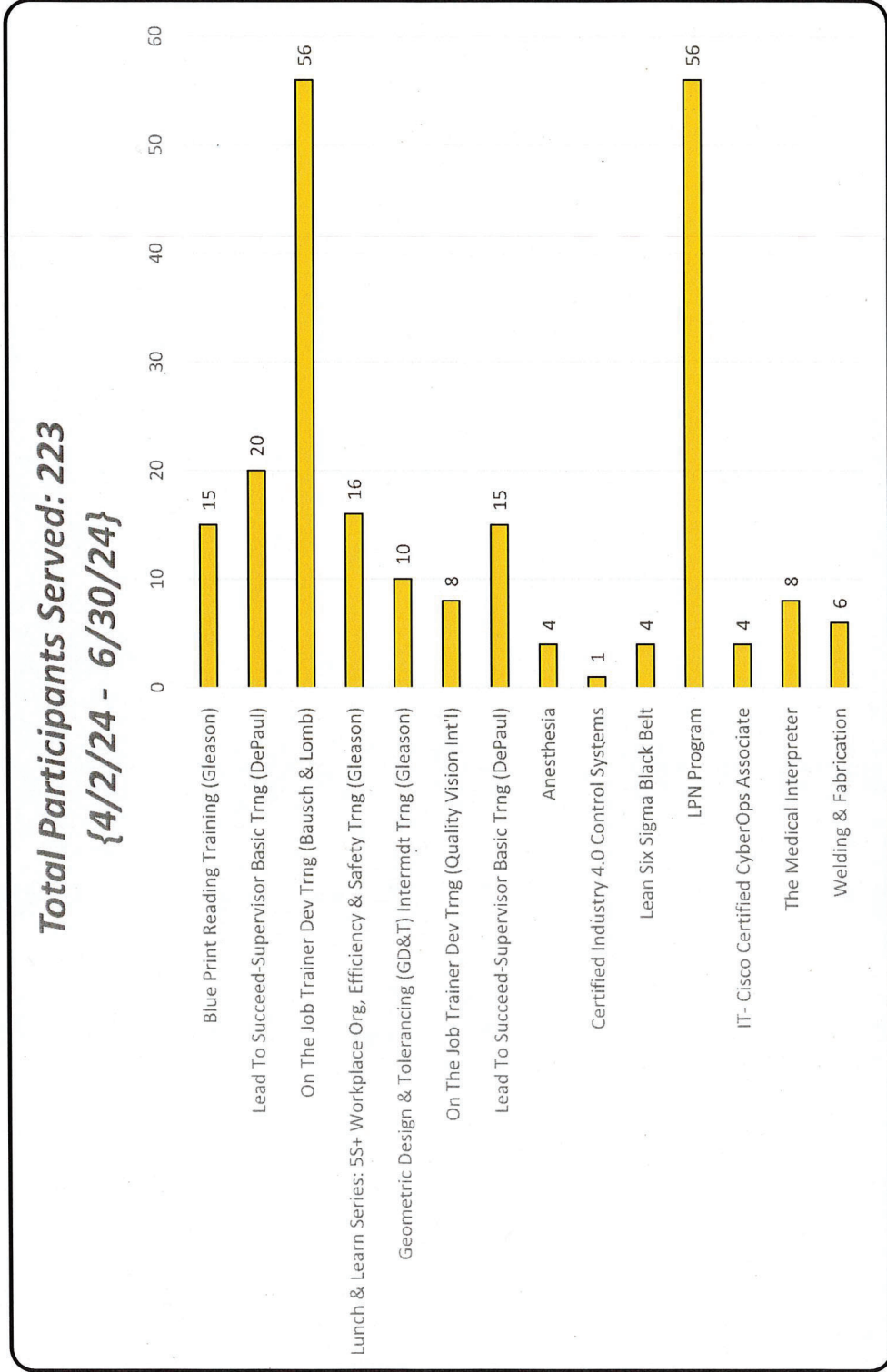
April 2 – June 30, 2024 Mpower Funding At-A-Glance

**Program Funding Snapshot {4/2/24 - 6/30/24}**  
**Mpower: \$232,127 / Total Program: \$349,406**



## 2024 Mpower Status Report

### April 2 – June 30, 2024 Mpower Participants At-A-Glance





## 2024 Mpower Status Report

### Summary of Mpower Program Contributions

<u>Program</u>	<u>Training Delivered/In-progress Activities</u>   <u>4 Total Mpower-Funded Participants</u>	<u>Cost Details/Summary</u>		
<p><b>Cisco Certified CyberOps Associate</b> (Siva Visveswaran)</p>	<p><b>Program Dates:</b> 3/12 – 4/25/24</p> <p><b>Overview:</b> Cisco Certified CyberOps Associate certification program validates the day-to-day, tactical knowledge and skills that Security Operations Center (SOC) teams need to detect and respond to cybersecurity threats. This is an entry level course that will help students get an entry-level job as a Cybersecurity analyst and embark on a rewarding career in Cybersecurity.</p> <p>Students will also be prepared to successfully complete the Cisco CyberOps certification exam that will include knowledge and skills related to security concepts, security monitoring, host-based analysis, network intrusion analysis, and security policies and procedures to prevent, detect, and respond to incidents and breaches</p> <p><b>Program Updates:</b> 4 students enrolled   this program; all 4 students completed successfully and pass the certification exam.</p>	<p><b>Mpower Support April - June, 2024:</b></p> <p><b>\$5,580.00</b> {Included on Invoice #11}</p> <p><b>Use of Mpower Funds:</b> Program Costs</p> <table border="1" data-bbox="786 130 873 657"> <tr> <td><b>Total Program Costs:</b></td> <td>\$5,580.00</td> </tr> </table>	<b>Total Program Costs:</b>	\$5,580.00
<b>Total Program Costs:</b>	\$5,580.00			

## 2024 Mpower Status Report

Program	Training Delivered/In-progress Activities   <u>1 Total Mpower-Funded Participants</u>	Cost Details/Summary		
<p><b>Certified Industry</b> <b>4.0 Control Systems</b> (Siva Visveswaran)</p>	<p><b>Program Dates:</b> 2/22 – 6/27/24</p> <p><b>Overview:</b> Certified Industry 4.0 Control Systems Specialist certification prepares individuals to succeed as a controls technician in modern production environments, with skills in installing, troubleshooting, repairing, and maintaining industrial control systems using sensors, programmable logic controllers, and variable frequency drives. Additionally, individuals will perform industrial maintenance with a focus on using mobile/cloud technology, performing preventive maintenance, analyzing machine history, reducing downtime, and using basic troubleshooting skills.</p> <p>This curriculum covers various topics in Advanced Manufacturing Technology, including work area safety, ladder logic programming, troubleshooting programmable logic controllers, Human-Machine Interface (HMI) programs, and Lean production concepts. This training provides a comprehensive background to the technical aspects of control systems in modern manufacturing. Students will receive industry-recognized certifications from the Smart Automation Certification Alliance (SACA).</p> <p><b>Program Updates:</b> 5 students enrolled in this program, 4 were funded by various grants and self-payment methods, 1 was eligible to be funded by Mpower; all 5 students completed the program successfully and pass their certification exams.</p>	<p><b>Mpower Support April - June, 2024:</b></p> <p><b>\$3,995.00</b> {Included on Invoice #11}</p> <p><b>Use of Mpower Funds:</b> Program Costs</p> <table border="1" data-bbox="646 128 734 642"> <tr> <td><b>Total Program Costs:</b></td> <td>\$3,995.00</td> </tr> </table>	<b>Total Program Costs:</b>	\$3,995.00
<b>Total Program Costs:</b>	\$3,995.00			

## 2024 Mpower Status Report

<u>Program</u>	<u>Training Delivered/In-progress Activities</u>   <u>6 Total Mpower-Funded Participants</u>	<u>Cost Details/Summary</u>		
<p><b>Welding and Fabrication</b> (Bill Rotenberg)</p>	<p><b>Program Dates:</b> January – May 2024</p> <p><b>Overview:</b> This program will prepare the participant for successful entry into a welding career. Participants will build skills that are highly valued in the advanced manufacturing, construction and maintenance industries. To earn the certificate, the student will have passed the following: 10-hour OSHA Safety Outreach Program -Robust Theory and Practical Examinations -Aluminum Qualifications Tests in GTAW or GMAW-P -Carbon Steel Qualifications Tests in GMAW, FLAW, SMAW, GTAW -Stainless Steel Qualifications Tests in GMAW, GTAW.</p> <p><b>Program Updates:</b> 6 students enrolled in this program, who self-paid the majority of their program costs, were awarded M-Power Grant funding ranging from \$2500 - \$3000. The students had a funding gap that would have prevented them from being able to participate in the program. All six students completed the program successfully, earning multiple professional welding certifications. Each student has accepted a position utilizing the skills and earned certifications in welding.</p>	<p><b>Mpower Support April - June, 2024:</b></p> <p><b>\$15,500.00</b> {Included on Invoice #11}</p> <p><b>Use of Mpower Funds:</b> Program Costs</p> <table border="1" data-bbox="641 123 730 653"> <tr> <td><b>Total Program Costs:</b></td> <td>\$59,700.00</td> </tr> </table>	<b>Total Program Costs:</b>	\$59,700.00
<b>Total Program Costs:</b>	\$59,700.00			

## 2024 Mpower Status Report

<u>Program</u>	<u>Training Delivered/In-progress Activities</u>   <b>8 Total Mpower-Funded Participants</b>	<u>Cost Details/Summary</u>		
<p><b>The Medical Interpreter</b> (Julianna Frisch)</p>	<p><b>Overview:</b> The Program is taught by an instructor with expertise in linguistic, cultural &amp; legal aspects of the medical interpreting and a practicing Medical Doctor providing services for the diverse population groups. Successful completion of the Program satisfies the key requirement of National Certification for Medical Interpreters.</p> <p>The Medical Interpreter is a nationally recognized 48-hour certificate program in medical/community interpreting. The program is based on the industry accepted Codes of Ethics and Standards of Practice and addresses in detail the process of National Certification for Medical Interpreters. Role plays and group exercises provide hands-on experience for skills development. Video segments offer demonstrations of the "right and wrong" ways to interpret. Each student receives e-versions of the "Training Manual" and the "Human Body Systems and Medical Terminology for Interpreters" handbook.</p> <p><b>Program Updates:</b></p> <p><u>Cohort #1:</u> (4/11-4/26/24) 8 students enrolled; All students passed their final exams and successfully completed the program.</p>	<p><b>Mpower Support April - June, 2024:</b></p> <p><b>\$7,160.00</b> {Included on Invoice #11}</p> <p><b>Use of Mpower Funds:</b> Program costs</p> <table border="1" data-bbox="722 147 812 640"> <tr> <td><b>Total Program Costs:</b></td> <td>\$7,160.00</td> </tr> </table>	<b>Total Program Costs:</b>	\$7,160.00
<b>Total Program Costs:</b>	\$7,160.00			



## 2024 Mpower Status Report

<u>Program</u>	<u>Training Delivered/In-progress Activities   4 Total Mpower-Funded Participants</u>	<u>Cost Details/Summary</u>		
<p><b>Administration &amp; Monitoring of Local Infiltration Anesthesia and Nitrous Oxide Analgesia</b> (Julianna Frisch)</p>	<p><b>Program Description:</b> You must be a NYS registered dental hygienist to take this course. This course satisfies the state educational requirements for certification in the administration and monitoring of local infiltration anesthesia and nitrous oxide analgesia for dental hygienists. This course consists of 30 hours of online instruction (didactic component) in nitrous oxide analgesia and local infiltration anesthesia, and an additional 15 hours of class time, on campus, devoted to the clinical and laboratory studies. The course curriculum is based on amendments to Regulation 52.9 of the Regulations of the Commissioner of Education. In order to participate in this course, you will be required to provide a copy of your current CPR certification and NYS dental hygiene license. (45 contact hours)</p> <hr/> <p><b>Program Updates:</b></p> <p>Cohort #1: (3/11 – 6/2/24) 4 students enrolled in the Anesthesia class. All students successfully completed program and applied for their NYS Restricted Anesthesia License. One student employed at Mosaic Health and one student at Cornerstone Dental.</p>	<p><b>Mpower Support April - June, 2024:</b></p> <p style="text-align: center;"><b>\$6,000.00</b> {Included on Invoice #11}</p> <p><b>Use of Mpower Funds:</b> Program costs</p> <table border="1" style="width: 100%;"> <tr> <td style="width: 50%;"><b>Total Program Costs:</b></td> <td style="width: 50%; text-align: right;"><b>\$6,000.00</b></td> </tr> </table>	<b>Total Program Costs:</b>	<b>\$6,000.00</b>
<b>Total Program Costs:</b>	<b>\$6,000.00</b>			

## 2024 Mpower Status Report

Program	Training Delivered/In-progress Activities   34 Total Mpower-Funded Participants	Cost Details/Summary		
<p><b>LPN Program:</b> <b>Anatomy and Physiology</b> (Julianna Frisch)</p>	<p><b>Overview:</b> Anatomy and Physiology provides an in-depth analysis of the structure and function of the human body dealt with at the following levels of organization: chemical, biochemical, cellular, tissue, organ and organ system. Students discuss anatomical and physiological interrelationships and homeostatic mechanisms as they pertain to normal health and disease. Organ systems covered include the integumentary, skeletal, muscular, nervous, and closely related special senses,</p> <hr style="border-top: 1px dashed black;"/> <p><b>Program Updates:</b> (10/24 – 12/22/23) 34 students enrolled in this program and all 34 completed successfully and continued in the LPN program.</p>	<p><b>Mpower Support April - June, 2024:</b></p> <div style="background-color: #fff9c4; padding: 5px; border: 1px solid black; margin-bottom: 10px;"> <p style="text-align: center;"><b>\$94,520.00</b> {Included on Invoice #11}</p> </div> <p><b>Use of Mpower Funds:</b> Program costs</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"><b>Total Program Costs:</b></td> <td style="padding: 5px; text-align: right;"><b>\$94,520.00</b></td> </tr> </table>	<b>Total Program Costs:</b>	<b>\$94,520.00</b>
<b>Total Program Costs:</b>	<b>\$94,520.00</b>			

## 2024 Mpower Status Report

Program	Training Delivered/In-progress Activities   <b>22 Total Mpower-Funded Participants</b>	Cost Details/Summary		
<p><b>LPN Program:</b> <b>PNUR 300 Med Surg Specialty Areas</b> (Julianna Frisch)</p>	<p><b>Overview:</b> PNUR 300 Med Surg Specialty Areas applies the knowledge acquired in PNUR 100 and PNUR 200 as it relates to principles, concepts, and skills in addition to general education courses. The complex needs of the mental health, maternal, and newborn will be introduced this semester. Continuance of evidence-based practice with an emphasis on holistic care and cultural considerations will explored as they relate to disease processes and interventions. Evaluation of critical thinking and clinical judgement, coupled with nursing leadership will be an additional focus. The continued complex needs of the medical/surgical population specific to renal, integumentary, hematology, immunology, respiratory, cardiac, endocrine, and neurosensory will be examined. In addition, communicable diseases and disaster preparedness will be presented. In preparation for entry into the profession of nursing, the student nurse will function as a team leader modeling the scope of practice of a practical nurse.</p> <hr/> <p><b>Program Updates:</b> (1/23 – 5/2/24) 22 students enrolled in program. 19 students employed by various companies. 5 students employed at UPMC. 5 students employed at Friendly Home. 5 students employed at Rochester Regional Health (Unity). 1 student at Lee Chiropractic. 1 student at St Ann's Home. 1 student part-time at Monroe Community Hospital. 1 student self-employed.</p>	<p><b>Mpower Support April - June, 2024:</b></p> <p style="text-align: center;"><b>\$55,000.00</b> {Included on Invoice #11}</p> <p><b>Use of Mpower Funds:</b> Program costs</p> <table border="1" style="width: 100%;"> <tr> <td style="width: 50%;"><b>Total Program Costs:</b></td> <td style="width: 50%; text-align: right;"><b>\$98,032.00</b></td> </tr> </table>	<b>Total Program Costs:</b>	<b>\$98,032.00</b>
<b>Total Program Costs:</b>	<b>\$98,032.00</b>			



## 2024 Mpower Status Report

### Mpower Contributions to Incumbent Worker Training Programs April 2 – June 30, 2024

Timeframe Company/ Organization	Training Delivered/ In Progress	Total Program Cost (\$)	Company (or Other) Match (\$)	Mpower Support (\$)	# of Participants
Gleason GDT	Blue Print Reading Training 1/16 – 2/6/24	\$4,375.00	\$2,187.50	\$2,187.50 {Invoice #11}	15
Open Enrollment	Lean Six Sigma Black Belt 2/20 – 6/6/24	\$15,000.00		\$15,000.00 {Invoice #11}	4
DePaul Community Services	Lead to Succeed - Supervisor Basic Training (2 Sections) 3/27-4/17/24	\$6,760.00	\$3,380.00	\$3,380.00 {Invoice #11}	20
Bausch & Lomb	On The Job Trainer Development 10/24/23 – 1/25/24	\$30,994.00	\$15,497.00	\$15,497.00 {Invoice #11}	56

## 2024 Mpower Status Report

<u>Timeframe</u> <u>Company/</u> <u>Organization</u>	<u>Training Delivered/</u> <u>In Progress</u>	<u>Total</u> <u>Program</u> <u>Cost (\$)</u>	<u>Company</u> <u>(or Other)</u> <u>Match (\$)</u>	<u>Mpower</u> <u>Support (\$)</u>	<u># of</u> <u>Participants</u>
Gleason GDT	Lunch & Learn Series: 5S+ Workplace Organization, Efficiency & Safety Training 2/11 – 3/28/24	\$5,770.00	\$2,885.00	\$2,885.00 {Invoice #11}	16
Gleason GDT	Geometric Design & Tolerancing (GD&T) Intermediate 2/13 – 2/20/24	\$2,870.00	\$1,435.00	\$1,435.00 {Invoice #11}	10
Quality Vision International	On The Job Trainer Development 4/16 – 4/18/24	\$4,200.00	\$2,100.00	\$2,100.00 {Invoice #11}	8
DePaul Community Services	Lead to Succeed - Supervisor Basic Training 4/30 – 5/1/24	\$4,450.00	\$2,563.00	\$1,887.00 {Invoice #11}	15

## 2024 Mpower Status Report

### Incumbent Worker Training Programs Description

**Lean Six Sigma Black Belt** - Becoming a Lean Six Sigma Black Belt is an outstanding investment in your personal and professional development. Our program is structured so that White, Green and Black Belt candidates attend the first sections together. Black Belts then continue on for additional training, while Green Belts are deployed back to the job where they begin work on their projects. The continued training for Black Belts provides higher level tools and methodologies required to function in this role. This training does address the area of statistics in depth, as it is part of the Black Belt's job to provide this training, as needed, to their team.

The Project: Lean Six Sigma success is achieved through process improvement projects that yield higher quality, efficiency and customer satisfaction. For this reason, MCC has chosen a project-based approach to delivering and reinforcing Lean Six Sigma Black Belt skills. Our program requires candidates to work through a real improvement project with training and coaching provided over a specific time. This results in a deeper level of learning and immediate payback for the organization.

160 hours of total training, 25% asynchronous (online) 12% synchronous (interactive webinars), and 63% face-to-face classroom instruction.

**Lead to Succeed** - Supervisor Basic Training Description: New and short-term managers and supervisors or those preparing for the role will gain multiple tools for their toolbox. Supervisors and managers will learn core knowledge, skills and effective means to supervise others. They will be introduced to the factors affecting employees' performance and learn best practices of the supervisor/manager who is most able to influence. They will also explore what 'managing others effectively' looks like, with a view to dispelling unhelpful myths that can undermine confidence and create unnecessary stress. Topics covered include principles of effective performance management, goal setting, delegation, motivating others, giving constructive feedback, and introduction to coaching for performance.

**OJT Trainer Development** - This train-the-trainer course prepares individuals to deliver outstanding training sessions regardless the topic. This hands-on course includes extensive practice to apply skills taught. Exercises designed to teach sequencing, delivery, body language, verbal skills and more are used extensively.

**Geometrical Dimensioning and Tolerancing Intermediate** - The intermediate GD&T class offers a brief review of the concepts established in the basic class followed by a wider range of datum topics including degrees of freedom, mating envelopes and datum feature shift. The main focus of the class is on positional tolerance. Single and multiple frame applications of position will be presented using animated illustrations applied to single features and patterns of features. Computational and graphical methods for positional tolerance verification are discussed. Functional gauge design for the inspection of single features and patterns using virtual condition calculations conclude the course.



## APEX Accelerator Program Update

**Anna Vulaj Fitzsimmons**

Program Director, MCFL APEX Accelerator

NAPEX Region 2 Director – NY, NJ & DE

[avulaj@monroecounty.gov](mailto:avulaj@monroecounty.gov)

585-753-2017

[www.mcflapex.org](http://www.mcflapex.org)





# APEX ACCELERATORS

Helping businesses enter and participate in the government supply chain

We are a nationwide network of procurement professionals that help local businesses compete successfully in the government marketplace. Our 97+ APEX Accelerators operate in 300 offices as the bridge between buyer and supplier to foster a diverse and resilient domestic industrial base that can deliver preeminent solutions to the military and other government users.



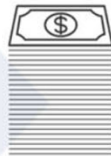
**4.9K+**

training events sponsored or participated in



**\$537**

ROI per federal \$ invested



**56K+**

active clients served

**\$24B**

in contracts awarded to APEX clients

**94%**

were small businesses

\*FY22 statistics provided by the Office of Small Business Programs





osd.pentagon.ousd-a-s.mbx.apex-accelerators@mail.mil



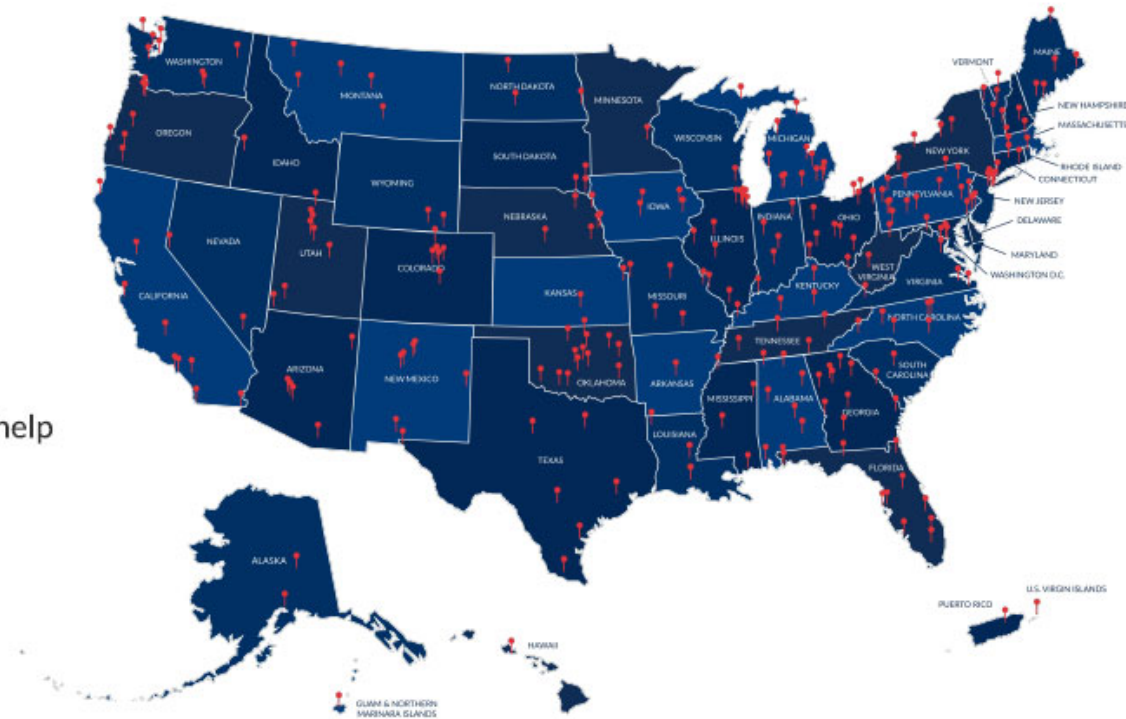
apexaccelerators.us



Use the locator on the website to find your local office

## APEX ACCELERATORS' NATIONWIDE PRESENCE

Nationwide network of 650+ procurement professionals that help local businesses compete successfully in the government marketplace.



## Providing Government Contract Counseling through...

### Contract Assistance

- One-on-one counseling\*

### Government Market Strategy

- Research
- Build a roadmap

### Training & Networking

- Workshops/Webinars
- G2B Matchmakers / Outreach

*\*Must complete application for free services.*

## Counseling

### Assess

- Business potential to do business with the government

### Assist

- Federal & state registrations & certifications
- Identify subcontracting opportunities
- Solicitation/bid preparation/SBIRs/STTRs
- Post-award performance

### Clarify

- Government Regulations
- Technical Information
- Specifications & Standards

### Guide

- Government markets/government marketing roadmap
- **Notice of upcoming opportunities “Bid Match” service**

## How We Help...

### **Government Agencies**

- ✓ Outreach to small businesses
- ✓ Identify potential vendors to meet contracting goals
- ✓ Partner for innovative acquisition strategies

### **Large Prime Contractors**

- ✓ Prepare subcontracting plans
- ✓ Identify qualified small business subcontractors

# Types of Registrations

Most registrations are mandated by law in order to do business with the government.

## Federal/ Military

- SAM
- CMMC
- DIBBS
- GSA
- ITAR
- JCP
- SBA Dynamic
- WAWF

## NY State

- NYS Contract Reporter
- NYS Contract System

## Primes & Agencies (federal, state and local)

- Vendor Registrations

VS.

# Types of Certifications

Certifications are optional, governed by law and based on qualifications.

## Federal

- SBA: 8(a), HUBZone
- ED/WOSB, SDVOB
- DOT DBE
- Self-certs

## NY State

- MBE
- WBE
- SDVOB

## Local

- MBE
- WBE



MCFL APEX Stats – MONROE County Only

UNCLASSIFIED



# Small Business Contracts Awarded

	FY '22 09/01/22 – 08/31/23	FY '23 09/01/23 – 03/31/24 <i>Note: 7 mos. year</i>	FY '24 (In Progress) (04/01/24 – 03/31/25) 04/01/24 – Current
Contract \$'s reported by clients (millions)	\$69.03  (Monroe County: 82.92% of all contract awards reported)	\$85.72  (Monroe County: 85.07% of all contract awards reported)	\$140.26  (Monroe County: 76.24% of all contract awards reported)
*Estimated # of Jobs Impacted: Retained or Created	1,466	1,821	2,980

UNCLASSIFIED

*\*Per DLA Calculations*

## Small Business Contracts Awarded

	FY '22 09/01/22 – 08/31/23	FY '23 09/01/23 – 03/31/24 <i>Note: 7 mos. year</i>	FY '24 (In-Progress) (04/01/24 – 03/31/25) 04/01/24 – Current
Contract \$'s reported by clients (millions)	\$83.25  (Monroe County: 82.92% of all contract awards reported)	\$100.76  (Monroe County: 85.07% of all contract awards reported)	\$183.97  (Monroe County: 76.24% of all contract awards reported)
*Estimated # of Jobs Impacted: Retained or Created	1769	2141	3909

UNCLASSIFIED

*\*Per DLA Calculations*



# September 1, 2023 – March 31, 2024 Monroe County Business Impact

UNCLASSIFIED



## Counseling and Training to Small Businesses in Monroe County: 2,624

### *Training Events – 09/01/2023 to 03/31/2024*

	<i># of Participants</i>
3/29/2024 Maximizing Government Contracting Certifications for Women-Owned Businesses	38
3/22/2024 MCFL APEX Webinar - How to Become a MAS Contractor with GSA	43
2/29/2024 Maximizing Innovation Opportunities: The Many Roads to SBIR/STTR Funding	154
2/28/2024 GovCon 101	65
2/23/2024 MCFL APEX 4th Friday Webinar - SBA 8(a) Business Development Program	46
2/12/2024 DCAA Bootcamp Intro into DCAA	222
1/25/2024 DoD & SBA Mentor Protégé Webinar	311
1/25/2024 UNY Supplier Diversity Summit	350
1/8/2024 DCAA Bootcamp Breaking into GovCon	40
12/13/2023 Amazon: Greater Rochester Area Supplier Diversity Virtual Event	324
12/5/2023 Tri-State APEX Mega Match Maker	650
10/27/2023 October 4th Friday- Becoming SAM Savvy	42
10/3/2023 3rd Annual Congressman Morelle Government Contracting Forum & Matchmaker	261
9/22/2023 Capabilities Statement Bootcamp	22
9/15/2023 Webinar Training - How to Prepare for a Matchmaker	37
9/8/2023 SCORE Counselor Presentation	19

UNCLASSIFIED



# April 1, 2024 – Current Monroe County Business Impact

UNCLASSIFIED



## Counseling and Training to Small Businesses in Monroe County: 2,143

### Training Events – FY24 (04/01/24 – 03/31/24)

		<i># of Participants</i>	
•	9/16/2024	Congressman Morelle & County Executive Bello Defense & Government Forum and Matchmaker	343
•	9/10/2024	Doing Business with Lockheed Martin 00032	226
•	8/27/2024	Upstate Navy Week	32
•	8/15/2024	Upstate Defense Microelectronics Forum	68
•	8/8/2024	How to Prepare for a Matchmaker	11
•	7/31/2024	Luminate: Government Contracting with APEX and L3Harris Technologies	15
•	7/9/2024	Luminate 2024 Government Registrations and Certifications MCFL APEX Training	9
•	6/26/2024	APEX Presentation at Fort Drum Mission & Installation Contracting Command	37
•	6/18/2024	2024 MWBE Regional Opportunities Expo Series	253
•	6/6/2024	MCFL APEX Defense and Government Contracting Roundtable Series: FTZ, ITAR and EAR	19
•	5/31/2024	MCFL APEX 4th Friday: You've Attended a Matchmaker Now What?	19
•	5/22/2024	Understanding How to Respond to a Government Solicitation - Part 1	29
•	5/15/2024	DoD Northeast Regional Council Training & Matchmaker	216
•	5/9/2024	Doing Business with the Government - City of Rochester Upstate NY MWBE Conference Training Component	43
•	5/8/2024	City of Rochester Upstate MWBE Conference	240
•	5/1/2024	2024 SBA Buffalo District Small Business Matchmaker	170
•	5/1/2024	DCAA Training – Cost Reimbursable Requirements Series – Part 1	56
•	4/30/2024	2nd Annual Monroe County Small Business Resource Fair	83
•	4/26/2024	4th Friday Webinar - Fueling Future Innovations: Exploring FuzeHub's Innovation Initiatives	36
•	4/22/2024	Finger Lakes Science and Tech Showcase/UR CEIS	160
•	4/11/2024	Government Contracting 101- Be Prepared! Live Workshop featuring Government & Industry Partners	48
•	4/04/2024	How to Prepare for a Matchmaker - SBA Buffalo District Matchmaker	30





U.S. CONGRESSMAN  
**JOSEPH MORELLE**  
REPRESENTING THE 25TH DISTRICT OF NEW YORK



**ADAM J. BELLO**  
COUNTY EXECUTIVE

# CONVERGENCE

## FORGING AN AGILE INDUSTRIAL BASE

4TH ANNUAL  
DEFENSE & GOVERNMENT  
CONTRACTING  
FORUM AND MATCHMAKER

PANEL DISCUSSIONS | NETWORKING | MEET BUYERS

MEET WITH DEFENSE, FEDERAL & LOCAL AGENCIES AND PRIME CONTRACTORS

MONDAY, SEPTEMBER 16, 2024

Memorial Art Gallery | Rochester, NY

THANK YOU TO OUR PARTNERS AND SPONSORS



RIT



Pike

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APEX  
ACCELERATORS





**APEX**  
ACCELERATORS

Questions?

*Thank you for your continued support!*





COUNTY OF MONROE  
**COMIDA**  
 INDUSTRIAL DEVELOPMENT AGENCY

**Dashboard**

September 2024

**Incentives Summary**

Sales Tax Exemptions		Mortgage Recording Tax Exemption		PILOTS		Total Company Investment	
Year To Date	Prior Year End	Year To Date	Prior Year End	Year To Date	Prior Year End	Year To Date	Prior Year End
16	30	10	12	9	12	\$198,442,948	\$1,151,621,436

**Jobs Summary**

Number of Total Projects		Existing Jobs Retained per Application		New Jobs Projected by Applicant		New Jobs Required*	
Year To Date	Prior Year End	Year To Date	Prior Year End	Year To Date	Prior Year End	Year To Date	Prior Year End
16	27	803	321	471	494	157	119

**Fees for Approved Projects (includes all app and agency fees)**

Total		Paid to Date		Outstanding	
2024 Projects YTD	2023 Projects YE	2024 Projects YTD	2023 Projects YE	2024 Projects YTD	2023 Projects YE
\$1,364,963	\$10,158,340	\$330,106	\$5,654,943	\$1,034,857	\$4,503,397

**Workforce Development Fund**  
 Beginning Balance \$2,500,000

Allocated Fee income		Committed Funds		Fund Balance	
2024 YTD	2023 YE	2024 YTD	2023 YE	2024 YTD	2023 YE
\$51,382	\$1,774,162	\$1,725,000	\$2,970,000	\$835,479	\$1,304,162

Solar WD Fund			
Fees Approved to Date	Fees Collected to Date	Allocated to Date	Balance
\$75,000	\$50,000	\$0	\$50,000

\*Required jobs are calculated as 10% of the existing jobs, with a minimum of 1 job. Enhanced JobsPlus is 100 jobs with a minimum of \$15,000,000 investment. There is no job creation requirement for projects that only receive sales tax exemptions.