

2016

CENTERSTATE CORPORATION FOR ECONOMIC OPPORTUNITY



ECONOMIC FORECAST

FOR CENTERSTATE NEW YORK





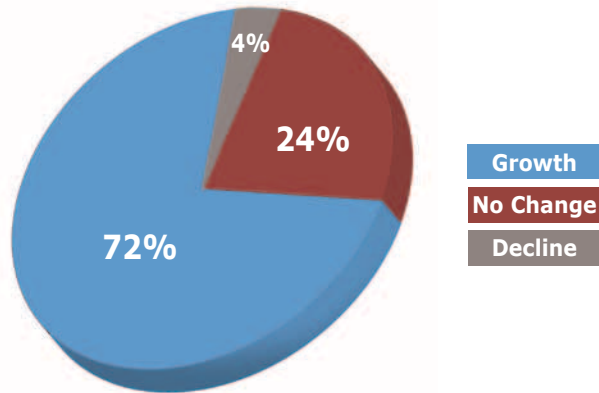
CenterState CEO is proud to present its 2016 Economic Forecast Report for CenterState New York. Produced annually, the Economic Forecast Report is a source of strategic insight on regional, state and national economic trends. Developed with support from Research & Marketing Strategies, Inc. (RMS), a third-party market research firm, the report draws on the input and expertise collected from CenterState CEO members through detailed surveys and moderated focus sessions. It also includes data from Manpower Inc. on industry, occupation, employment, and earnings expectations through 2018. Collectively this information provides a unique tool you can use throughout the year as a source of strategic information across industries.

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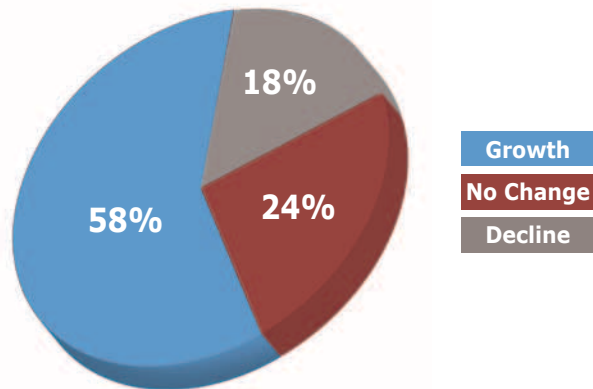
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2015 Perspective

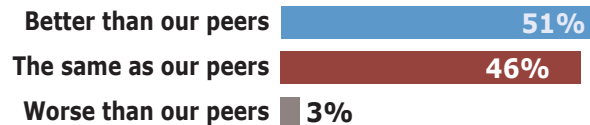
What were your business projections for 2015?



How did your business actually fare in 2015?



Compared to your industry sector peers in 2015, how is your business performing?



2015 Trends & Pressures

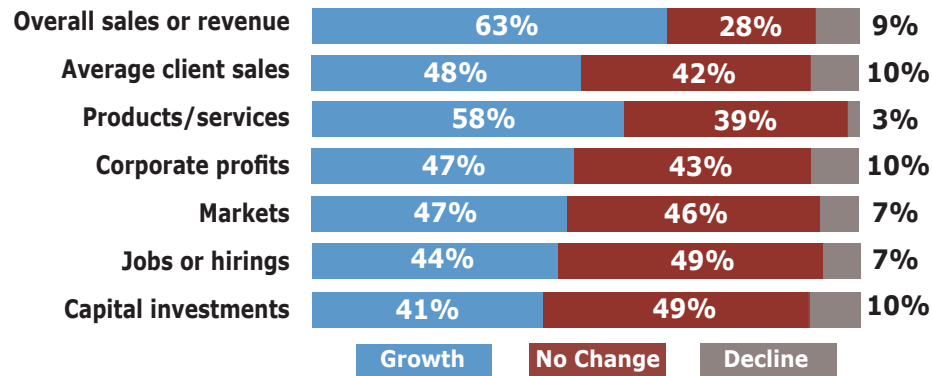
What were the major trends and/or pressures that dominated your industry sector this year?



Note: Respondents were allowed to select multiple trends and/or pressures.

2016 Outlook

What are your projections for 2016?



2016 Environmental Factors

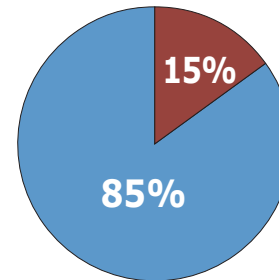
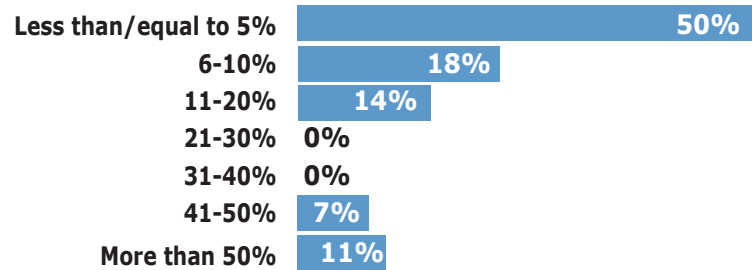
What were the major trends and/or pressures that dominated your industry sector this year?

Environmental Factor	Significant Impact				
	No Extent	Modest	Significant Impact	Significant Impact	Significant Impact
Governmental policies and structures - existing laws, government procedures, or the current political environment.	7%	12%	23%	24%	34%
Talent - the ability to attract and retain the right people in the right positions, and/or invest in and develop the skills of the existing workforce.	8%	8%	29%	25%	30%
Demographic factors - the characteristics of the community such as age, gender, racial and ethnic diversity, marital status, family size, etc.	14%	17%	28%	26%	15%
Competition - the number of similar competitive product/service brands available.	7%	16%	34%	29%	14%
Technological changes - innovations within an industry and the advancement of technology as it applies to business operations.	11%	18%	27%	32%	12%
Social and cultural forces - the structure and dynamics of behaviors, beliefs, lifestyles, etc.	10%	20%	32%	27%	11%
Transportation and logistics - the ability to effectively and efficiently move people and goods to markets, locally, domestically, and abroad.	39%	20%	23%	11%	7%
Natural forces/resources - the physical environment, and access and availability of natural resources.	45%	21%	24%	7%	3%

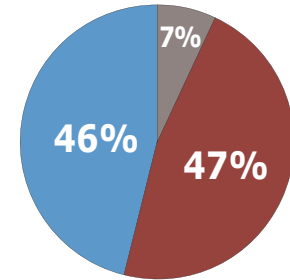


Exporters were asked for feedback on their exporting experiences, challenges they face with the export market, and export trends they see within their industry.

What percentage of your business is currently in exports?



Do you currently export a product or service?



How do you expect your export business will fare in 2016?



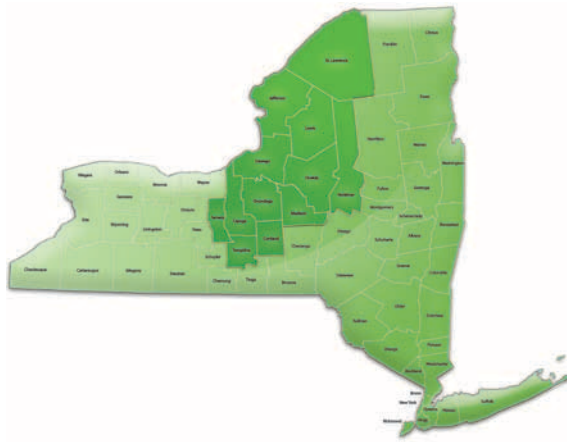
Introduction

Every market is unique in terms of its occupations and industries. Each of these plays into determining the overall growth of a market, among many other factors. The information in this analysis of the extended Syracuse Market should be utilized as part of a broader discussion on how to expand skill sets within the Syracuse area.

Region Info

For this analysis, the CenterState New York region is defined as the twelve counties surrounding the Syracuse market:

- Cayuga
- Cortland
- Herkimer
- Jefferson
- Lewis
- Madison
- Oneida
- Onondaga
- Oswego
- St. Lawrence
- Seneca
- Tompkins



Mild Job Market Expected for Syracuse, New York MSA

According to the Manpower Employment Outlook Survey, Syracuse, New York MSA employers expect to hire at a modest pace during Quarter 1 2016. From January through March, 16 percent plan to hire more employees while 9 percent plan to reduce payrolls. Another 75 percent of employers expect to maintain current staff levels and 0 percent indicate they are not sure of their hiring plans. This yields a Net Employment Outlook* of 7 percent.

Local employers anticipate a weaker hiring pace compared to Q4 2015 when the Net Employment Outlook was 11 percent. A year-over-year comparison shows employers expected similar hiring activity to Q1 2014 when the Outlook was 6 percent.

Observations

- For the coming quarter, job prospects appear best in durable goods manufacturing, transportation & utilities, information, financial activities, professional & business services, education & health services and leisure & hospitality.
- Employers in construction plan to reduce staffing levels.
- Hiring in nondurable goods manufacturing, wholesale & retail trade, other services and government is expected to remain unchanged.

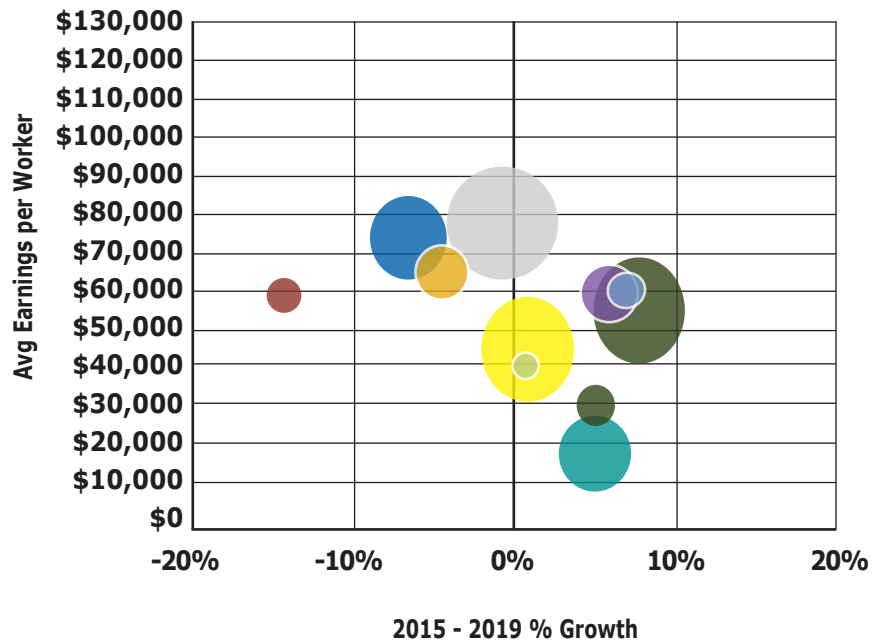
Industry Summary		Occupational Summary	
2015 Industry Jobs	604,354	2015 Occupational Jobs	605,133
2019 Industry Jobs	616,301	2019 Occupational Jobs	616,966
Total Change	11,947	Total Change	11,833
Total % Change	2.0%	Total % Change	2.0%
2015 Average Earnings per Worker	\$55,510	Openings	77,825
		2015 Median Hourly Earnings	\$20.23

The difference between the occupational jobs and the industry jobs are the jobs which are not classified within an industry, which makes up 779 jobs in 2015 in the market.

	Increase Staff Levels	Decrease Staff Levels	Maintain Staff Levels	Don't Know	Net Employment Outlook
Q1 2016	16%	9%	75%	0%	7%
Q4 2015	14%	3%	79%	4%	11%
Q1 2015	14%	8%	78%	0%	6%

*The Net Employment Outlook is derived by taking the percentage of employers anticipating an increase in hiring activity and subtracting from this the percentage of employers expecting a decrease in hiring activity.

2015-2019 CenterState NY Industry Size and Growth



- Agriculture, natural resources, and mining
- Construction
- Education and health services
- Financial activities
- Government
- Information
- Leisure and hospitality
- Manufacturing
- Other services
- Professional and business services
- Trade, transportation, and utilities

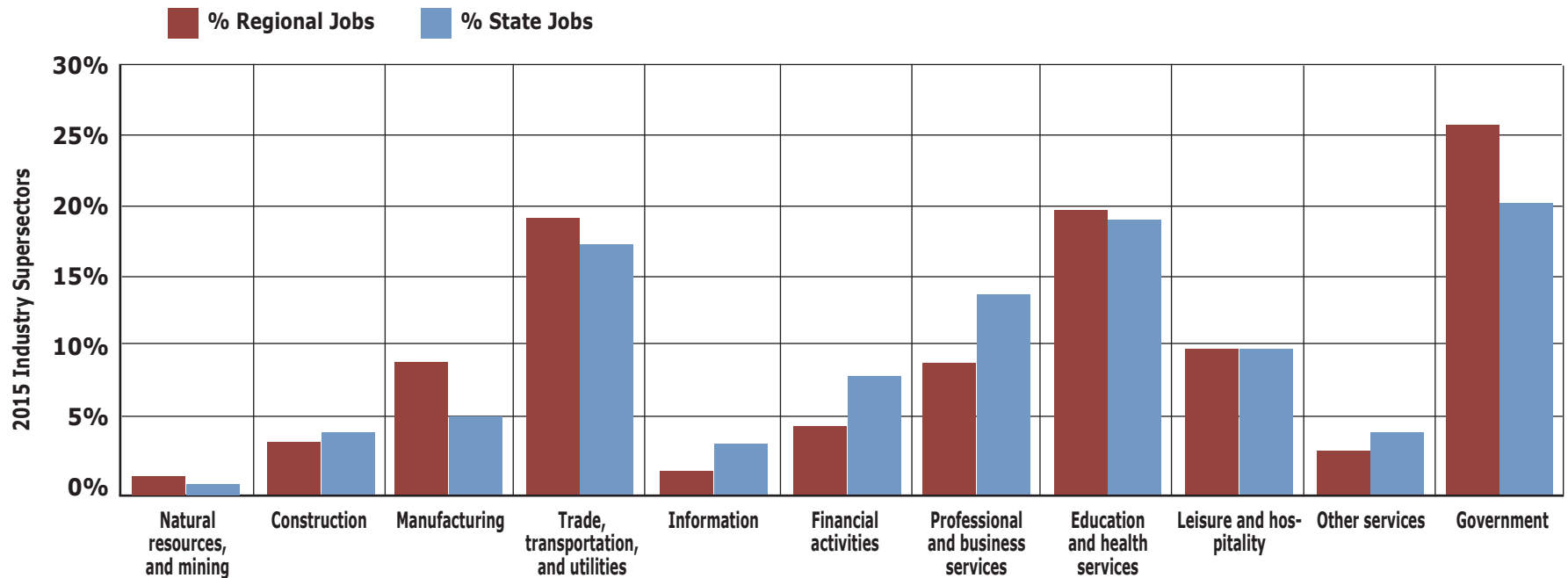
	2015 Jobs	2019 Jobs	Growth	% Growth	2015 Total Earnings
Construction	19,953	21,094	1,141	5.7%	\$61,461
Manufacturing	53,504	49,817	-3,687	-6.9%	\$73,996
Trade, transportation, and utilities	116,623	118,181	1,558	1.3%	\$44,497
Information	7,935	7,024	-911	-11.5%	\$58,942
Financial activities	27,200	25,939	-1,261	-4.6%	\$65,006
Professional and business services	51,422	54,499	3,078	6.0%	\$57,696
Education and health services	119,362	128,263	8,901	7.5%	\$54,203
Leisure and hospitality	59,575	62,314	2,740	4.6%	\$18,308
Other services	19,901	20,818	916	4.6%	\$29,573
Government	123,492	122,917	-575	0.5%	\$77,743
Natural resources, mining	5,389	5,436	47	0.9%	\$40,926
Total	604,354	616,301	11,947	2.0%	\$55,510

*EPJ: Average Earnings Per Job

Observations

- The largest industry super sector in the CenterState New York region is government.
- Other large industry super sectors include education and health services and trades, transportation and utilities. This is overall consistent with data reported in 2013 and 2014 at the broader industry super sector level (1 digit NAICS).
- The super sector with the largest total earnings per worker on average is government (\$78K) followed by manufacturing (\$74K).
- The largest growth is in education and health services (7.5%) and professional and business services (6.0%).

2015 CenterState NY Industrial Makeup

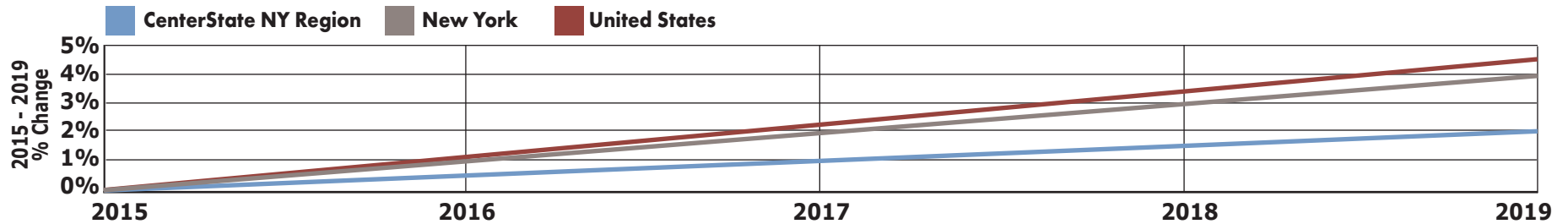


	2015 Regional Jobs	% Regional Jobs	2015 State Jobs	% State Jobs
Natural resources, and mining	5,389	0.9%	29,984	0.3%
Construction	19,953	3.3%	345,028	3.9%
Manufacturing	53,504	8.9%	449,169	5.0%
Trade, transportation, and utilities	116,623	19.3%	1,557,895	17.5%
Information	7,935	1.3%	265,865	3.0%
Financial activities	27,200	4.5%	689,613	7.7%
Professional and business services	51,422	8.5%	1,253,944	14.1%
Education and health services	119,362	19.8%	1,730,687	19.4%
Leisure and hospitality	59,575	9.9%	878,816	9.9%
Other services	19,901	3.3%	353,429	4.0%
Government	123,492	20.4%	1,361,825	15.3%

Observations

- Compared to state industry jobs overall, the CenterState New York region has a higher percentage of government, trade, transportation & utilities and manufacturing jobs but less professional services, financial activities and information industry jobs.

2015-2019 Industry Sector Change Summary (at 2-digit NAICS)



	2015 Jobs	2019 Jobs	Change	% Change	2015 Avg. Earnings Per Job EPJ	2014 Establishments
CenterState Region	604,354	616,301	11,947	2.0%	\$54,805	34,528
New York	8,916,255	9,272,358	356,103	4.0%	\$81,382	574,094
United States	138,824,695	145,072,832	6,248,137	4.5%	\$62,892	9,146,027

Industry Breakdown (at 2 digit NAICS)

Source: EMSI Covered Employment - 2015.3

NAICS	Industry	2015 Jobs	2019 Jobs	2015 Jobs Earnings	2014 Establishments	2015 Location Quotient
11	Crop and Animal Production	4,626	4,725	\$36,681	452	0.86
21	Mining, Quarrying, and Oil and Gas Extraction	763	710	\$66,673	56	0.21
22	Utilities	4,837	4,701	\$143,481	99	2.00
23	Construction	19,953	21,094	\$61,461	3,393	0.72
31	Manufacturing	53,504	49,817	\$73,996	1,368	1.00
42	Wholesale Trade	19,895	20,383	\$69,111	1,582	0.77
44	Retail Trade	75,355	76,292	\$30,569	5,025	1.11
48	Transportation and Warehousing	16,536	16,804	\$49,400	770	0.85
51	Information	7,935	7,024	\$58,942	467	0.66
52	Finance and Insurance	21,311	20,057	\$71,738	1,754	0.86
53	Real Estate and Rental and Leasing	5,889	5,882	\$40,645	1,266	0.65
54	Professional, Scientific, and Technical Services	25,012	27,037	\$71,135	2,754	0.67
55	Management of Companies and Enterprises	5,016	4,871	\$81,933	218	0.53
56	Administrative and Support Services	21,394	22,591	\$36,303	1,651	0.56
61	Educational Services	30,478	31,848	\$67,248	360	2.58
62	Health Care and Social Assistance	88,884	96,415	\$49,730	3,597	1.12
71	Arts, Entertainment, and Recreation	7,844	8,451	\$20,925	697	0.85
72	Accommodation and Food Services	51,731	53,863	\$17,911	3,564	0.92
81	Other Services (except Public Administration)	19,901	20,818	\$29,573	3,507	1.0
90	Government	123,492	122,917	\$77,743	1,951	1.34
	Total	604,354	616,301	\$55,510	34,528	

Observations

- The CenterState New York area is projected to grow slightly slower than the nation overall, based on all industry jobs at the 2 digit NAICS level. The region is expected to grow at 2% in the next four years while jobs are expected to grow 4.5%, nationally. This is slightly slower than reported last year for the 2014-2018 timeframe (3% growth reported).
- There are an estimated 34,528 establishments in the area, slightly less than the establishments reported in 2014 (34,602). The establishments within the region make up 6% of the state, similar to last year's analysis.

Agribusiness

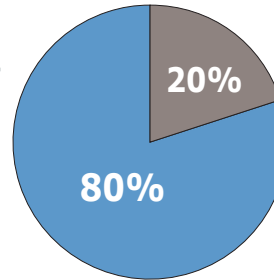


2015 Year in Review

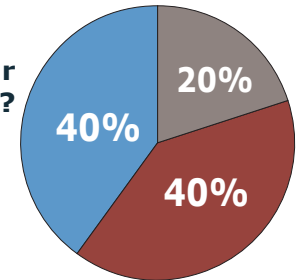
Top Pressures/Trends

- Regulatory requirements/changes
- Employee benefits and costs
- Global economic conditions
- Availability of skilled personnel/workforce development

What were your 2015 projections?



How did your business fare?



2016 Outlook



Banking, Finance, & Insurance

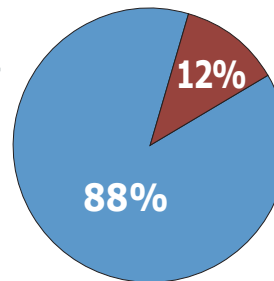


2015 Year in Review

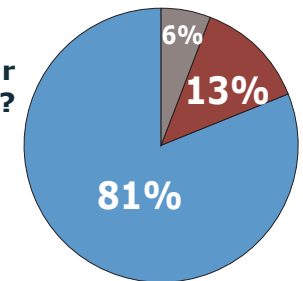
Top Pressures/Trends

- Regulatory requirements/changes
- Changing customer preferences
- Global economic conditions
- Availability of skilled personnel/workforce development
- Keeping pace with evolving technologies

What were your 2015 projections?



How did your business fare?



2016 Outlook



Construction & Real Estate



2015 Year in Review

Top Pressures/Trends

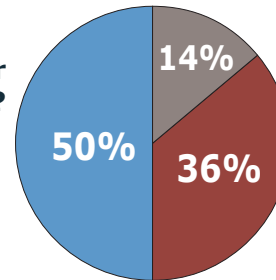
- Stagnant/declining markets
- Regulatory requirements/changes
- Employee benefits and costs
- Domestic political leadership

What were your 2015 projections?

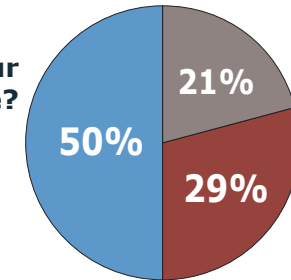
Growth

No Change

Decline



How did your business fare?



2016 Outlook

Jobs or Hirings



Capital Investments



Overall Revenue



Average Client Sales



Corporate Profits



Products/Services



Markets



Energy & Environmental Systems/Services



2015 Year in Review

Top Pressures/Trends

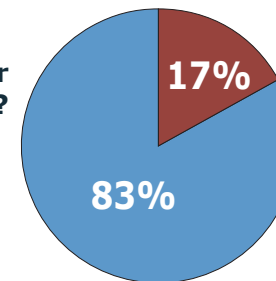
- Regulatory requirements/changes
- Stagnant/declining markets
- Availability of skilled personnel/workforce development

What were your 2015 projections?

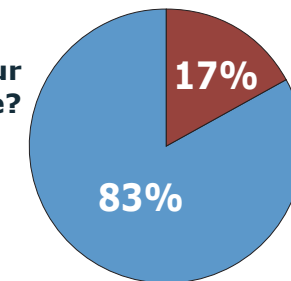
Growth

No Change

Decline



How did your business fare?



2016 Outlook

Jobs or Hirings



Capital Investments



Overall Revenue



Average Client Sales



Corporate Profits



Products/Services



Markets



Government & Economic Development

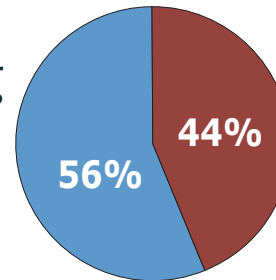


2015 Year in Review

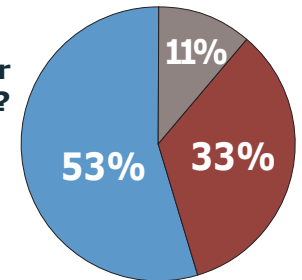
Top Pressures/Trends

- Organizational realignment
- Regulatory requirements/changes
- Stagnant/declining markets
- Availability of skilled personnel/workforce development
- Domestic political leadership

What were your 2015 projections?



How did your business fare?



2016 Outlook



Health Care

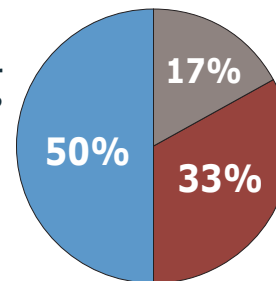


2015 Year in Review

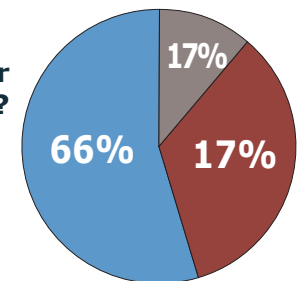
Top Pressures/Trends

- Regulatory requirements/changes
- Availability of skilled personnel/workforce development
- Employee benefits and costs

What were your 2015 projections?



How did your business fare?



2016 Outlook



Higher Education

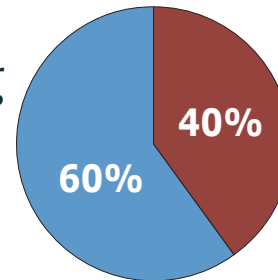


2015 Year in Review

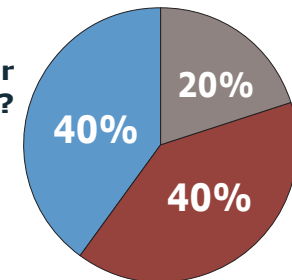
Top Pressures/Trends

- Stagnant/declining markets
- Keeping pace with evolving technologies
- Domestic political leadership

What were your 2015 projections?



How did your business fare?



2016 Outlook



Human Services & Not-for-Profits

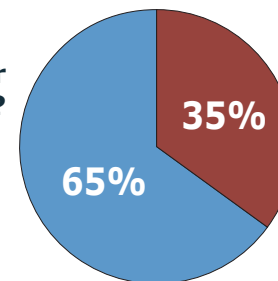


2015 Year in Review

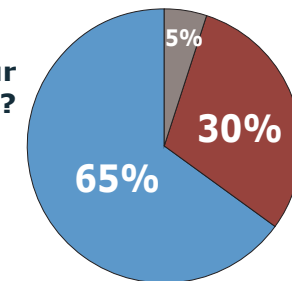
Top Pressures/Trends

- Employee benefits and costs
- Regulatory requirements/changes
- Availability of skilled personnel/workforce development

What were your 2015 projections?



How did your business fare?



2016 Outlook



Manufacturing

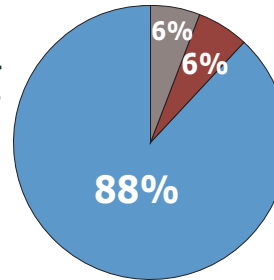


2015 Year in Review

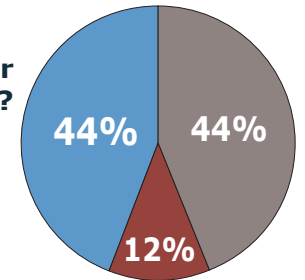
Top Pressures/Trends

- Developing new products/services/markets
- Global economic conditions
- Stagnant/declining markets
- Availability of skilled personnel/workforce development

What were your 2015 projections?



How did your business fare?



2016 Outlook



Small Business & Professional Services

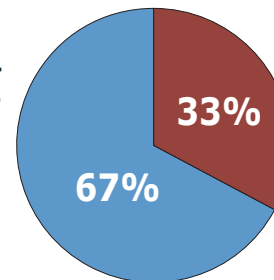


2015 Year in Review

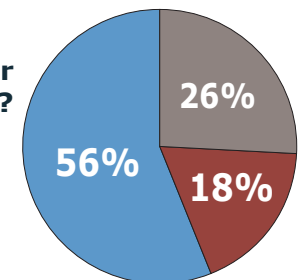
Top Pressures/Trends

- Availability of skilled personnel/workforce development
- Developing new products/services/markets
- Stagnant/declining markets

What were your 2015 projections?



How did your business fare?



2016 Outlook



Retail

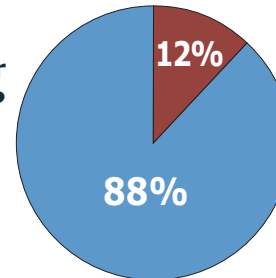


2015 Year in Review

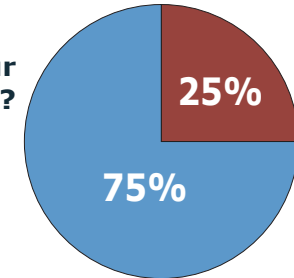
Top Pressures/Trends

- Stagnant/declining markets
- Employee benefits and costs
- Domestic political leadership

What were your 2015 projections?



How did your business fare?



2016 Outlook



Technology, Utilities & Telecommunications

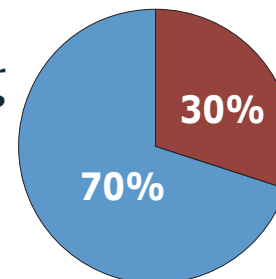


2015 Year in Review

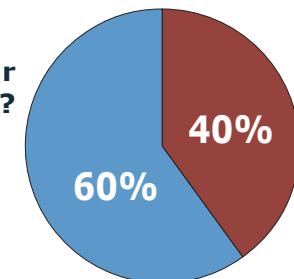
Top Pressures/Trends

- Keeping pace with evolving technologies
- Employee benefits and costs
- New business methodologies
- Regulatory requirements/changes
- Developing new products/services/markets

What were your 2015 projections?



How did your business fare?



2016 Outlook



Tourism & the Arts

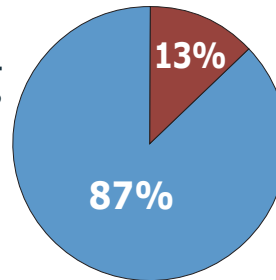


2015 Year in Review

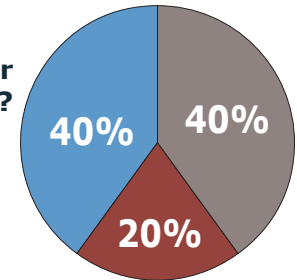
Top Pressures/Trends

- Changing customer preferences
- Stagnant/declining markets
- Employee benefits and costs

What were your 2015 projections?



How did your business fare?



2016 Outlook



Transportation

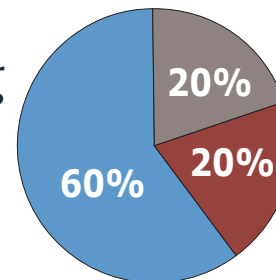


2015 Year in Review

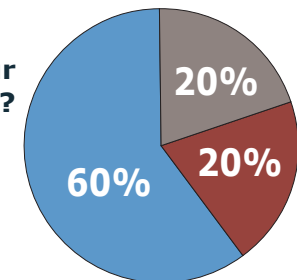
Top Pressures/Trends

- Regulatory requirements/changes
- Availability of skilled personnel/workforce development
- Stagnant/declining markets
- Employee benefits and costs
- Global economic conditions

What were your 2015 projections?



How did your business fare?



2016 Outlook



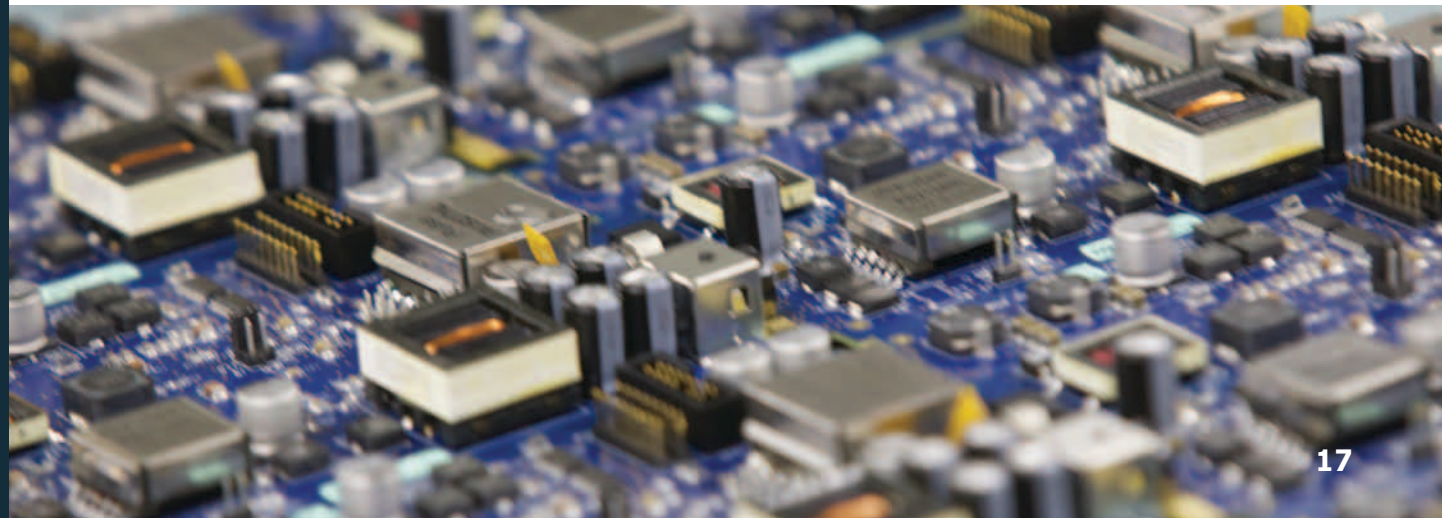
"The Information Technology industry is always evolving. To stay competitive you must stay abreast of the latest changes."

"(Technology) gives us better data to manage the business."

"Our industry is rapidly changing with technology. We will need to not only be aware of the new trends, but adapt our business to accommodate the needs of our customers."

Innovation & Technology

- New technology provides data that allows management teams to better direct company initiatives and make data-driven decisions.
- As organizations store more data, additional resources are needed to protect customer information and minimize the risk of data breaches.
- Evolving technologies can create competitive advantages for organizations that can quickly adjust and implement them to create opportunities for new and better service offerings.
- Changes in technology have a significant impact on business models across all industries. The major challenge is staying ahead of the curve. These changes require organizations to make significant investments to keep up.
- Organizations will have to measure the demand for specific technology and be selective when choosing where to invest their resources.
- Organizations will need employees who are comfortable with new technology and equipment.
- Customer demands, convenience, and the need for greater efficiencies will drive new technology advancements. These advancements can lead to internal efficiencies and ultimately minimize operating costs.





"A key requirement for growth next year is the launch of new products."

"Expanding our reach into new venues and sectors will increase capacity and sustainability."

"We are launching new products in 2016 which have advantages over competitors."

"It is anticipated that continuing changes in health care will cause health care facilities and physician practices to combine and consolidate."

Market Conditions & Business Climate

New Products/Services

- Some organizations are looking to develop and expand product lines in order to stay competitive within their industry.
- Organizations will look to expand new product/service lines into new markets (by geography and/or industry) to maintain revenue growth and offset the stagnant economy.
- Consumers of online products and services are demanding more responsive customer service.
- Online shopping continues to grow and present new opportunities as consumers spend more dollars online and additional consumers utilize these services.

Collaboration, Re-alignment and Consolidation Opportunities

- Organization realignment creates an opportunity for some businesses to stay competitive by improving the delivery of services and the efficiency of internal processes.
- Collaborations between organizations and industries will enable growth.
- Regional businesses may look to other organizations to support their business through professional services.
- The consolidation of businesses potentially limits the number of new business opportunities for some support service organizations.



"CNY has a unique economy in that it has broad industry strengths. This supports a stable economy that doesn't experience extreme ups and downs."

"Our region has a central location, natural assets like access to water, and a strong quality of life all which support our economy."

"We have a new sales force and new equipment to enter into new markets of innovative packaging that will help propel our growth."



Regional Economy

- The variety of recent and future government investment in regional projects will help boost the local economy.
- Non-monetary governmental support and/or economic development incentives will be vital to the continued growth of the regional economy.
- Entertainment attractions including casinos, shopping centers, and music venues could bring more tourists into the region, ultimately improving the health of the local economy.
- Businesses may look outside of the area to grow market share.
- Stagnant populations in local markets potentially inhibit the growth of organizations.
- Consumer discretionary spending may be limited due to economic conditions.

Competition

- Technology creates opportunities for organizations to compete in new and larger markets. However, along with these changes comes the risk of facing increased competition from new entrants outside of the market.
- Competition is forcing organizations to become more efficient, lower prices, and/or explore new services or markets.
- Organizations will actively seek to create low-competition markets by developing unique products/services or finding a specific niche.



Employee Benefits

- The increasing cost of health care benefits remains a significant challenge for businesses going into 2016.
- Organizations currently paying for the full cost of health care are considering scaling back on the comprehensiveness of health care benefits to afford the increasing costs. Some organizations noted the increased benefits costs will be shared with employees.
- A lack of competitive benefit packages will have a negative impact when looking to attract workers to the area.
- Organizations have concerns about the potential impact of the changing (increased) minimum wage laws on operating costs.
- The increased costs to employ workers will raise the minimum standard businesses have for worker quality and productivity.

"We currently offer 100% paid health care for employees; we may not be able to offer that benefit in coming years."

"We've had to adjust our compensation levels as a result of proposed overtime rules."

"We need to attract the best highly skilled employees to CNY, but being unable to offer competitive benefits impacts our hiring ability."





Government Policy & Regulatory Issues

Regulatory Requirements

- Reworking organizational processes and environments to adhere to regulations can potentially create a competitive advantage or new business opportunities for some organizations.
- While some regulations provide benefits or new business opportunity, organizations are concerned that these benefits will not offset the resulting net costs from regulations.
- Some regulatory changes require investments in new technologies and equipment in order to meet new, specific standards, resulting in additional costs to the organization.
- Some organizations noted that the added costs of adhering to regulations will likely be passed along to customers.
- Most organizations reported that regulatory requirements/changes will have a negative impact on business.

Political Landscape

- The shift of political power in Albany and Washington creates a level of uncertainty for some organizations. Main areas of concern are congressional budget cuts and federal and state grant availability.
- Some organizations are hopeful that a change in domestic political leadership will have an overall positive impact on the economy.

"Keeping current and in full compliance NYS Medicaid regulations requires dedicated staffing and investment in new IT equipment."

"Our industry is experiencing more and more government audits which increase our cost of doing business. We expect this trend to continue."





"It's challenging to find the right people to help grow our business."

"We anticipate the availability of skilled workforce and development of the next generation to be our number one focus over the next 5 years."

"We are fully staffed, but it is incredibly hard to find and retain skilled workers."

Workforce & Talent

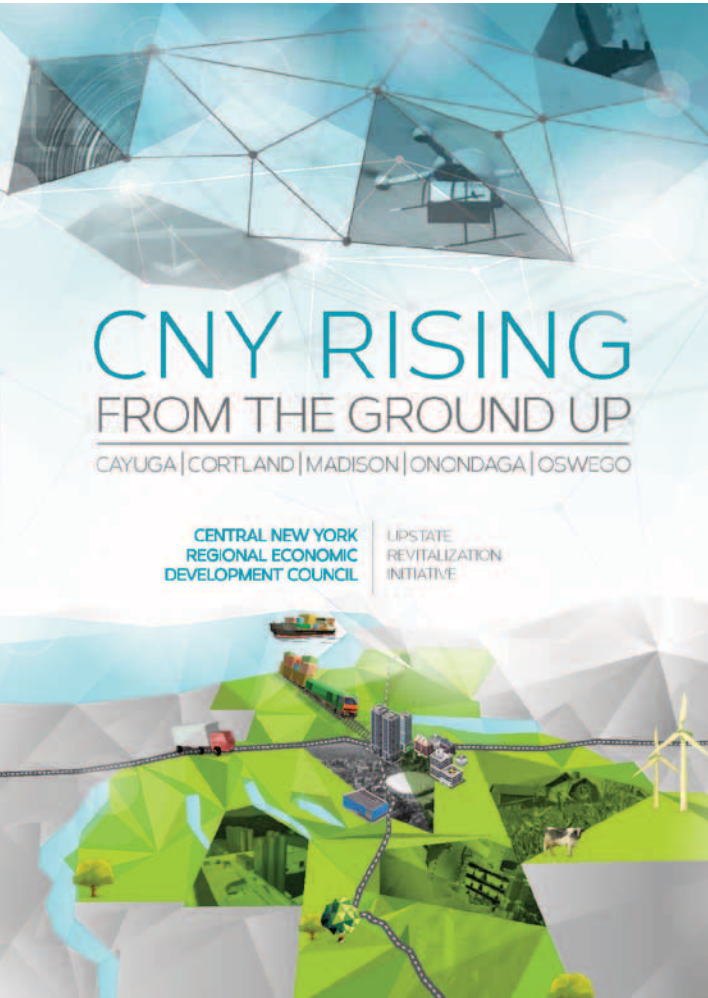
- The CNY region has a loyal workforce that is well-educated. The number of people with degrees at all levels, associate through graduate, is tracking upwards.
- Across all industries, finding qualified employees will be critical to the growth of business in the region.
- Organizations report that the availability of skilled workers has been an ongoing challenge with difficulty finding, hiring, and retaining top talent, including certified professionals and technical workers.
- Businesses state that the lack of skilled personnel in the area results in missed opportunities and creates a bottleneck for organizational growth.
- Additional resources need to be spent on recruitment to find qualified workers. Some organizations are also spending resources to train and develop workers' skills.
- Technology solutions, such as a virtual workforce incorporating remote capabilities, are being used to ease the difficulty of finding skilled workers.



Upstate Revitalization Initiative: CNY Rising

In December 2015 the Central New York Regional Economic Development Council's plan, "CNY Rising" was awarded \$500 million as part of Governor Cuomo's Upstate Revitalization Initiative competition. The plan's six signature investments provide a blueprint for implementation over the next five years. In the first year of implementation,

this plan will leverage more than \$889.9 million in private investment and a total five-year payroll of over \$765.8 million, for a more than 16 to 1 return on New York State's investment. Over five years, CNY Rising's components will create nearly 6,000 jobs, and have a ripple effect through the larger CenterState New York region.



Six Signature Investments Drive Transformational Growth for Central New York



Global Center for Unmanned Systems and Cross-Connected Platforms

Central New York will leverage its competencies in precision-sensing, radar systems, and data analytics, and role as one of six Federal Aviation Administration unmanned aerial systems test sites, to become the global leader in unmanned systems, cross-connected platforms, and information assurance to ensure safety and security in a world of interconnected devices.



New York-Grown, New York -Certified—Safe and Market-Ready

Central New York will utilize its natural assets—a resilient climate, affordable land, abundant water, and deep agricultural expertise—to meet the rapidly rising global demand for food and food safety. Central New York will capture the global demand for safe and nutritious food by investing in controlled environment agriculture and aseptic packaging facilities, while building a brand identity for safe, New York-produced food through a “Grown in NY Certification.”



Consensus Commission on Government Modernization

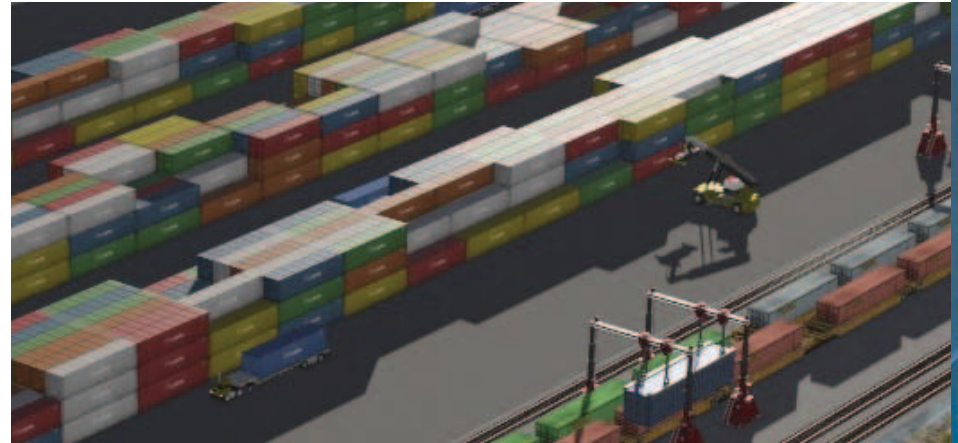
The plan proposes building on the work of Consensus to advance bold, collaborative, and modern approaches to governance to better position Central New York to compete in the 21st century.





Global Manufacturing and Logistics Hub

Leveraging our region's geographic centrality, the hub would transform 225 acres of brownfields into a thriving center of manufacturing, warehousing and distribution that will dramatically reduce the costs to Central New York agricultural and manufacturing producers to get goods to international markets. This hub will create more than 300 jobs and an estimated 1,644 warehouse and distribution jobs within a 10 mile radius of 54 percent of underemployed workers.



Alliance for Economic Inclusion

The Alliance will lead and implement strategies toward best practices in training, eliminating misalignment of skills, increasing education, fighting blight and addressing homelessness to ensure that no Central New Yorkers are left behind as these efforts are pursued.



National Veterans Resource Complex

Over 1 million service members are expected to transition to veteran status in the next five years, and Central New York, leveraging Syracuse University's Institute for Veterans and Military Families, will position the area as the national leader for veterans affairs – offering premier employment, education, job training and research opportunities – making the area the best place in the nation for veterans and their families.



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