

2018

**Economic Forecast**  
*for CenterState New York*



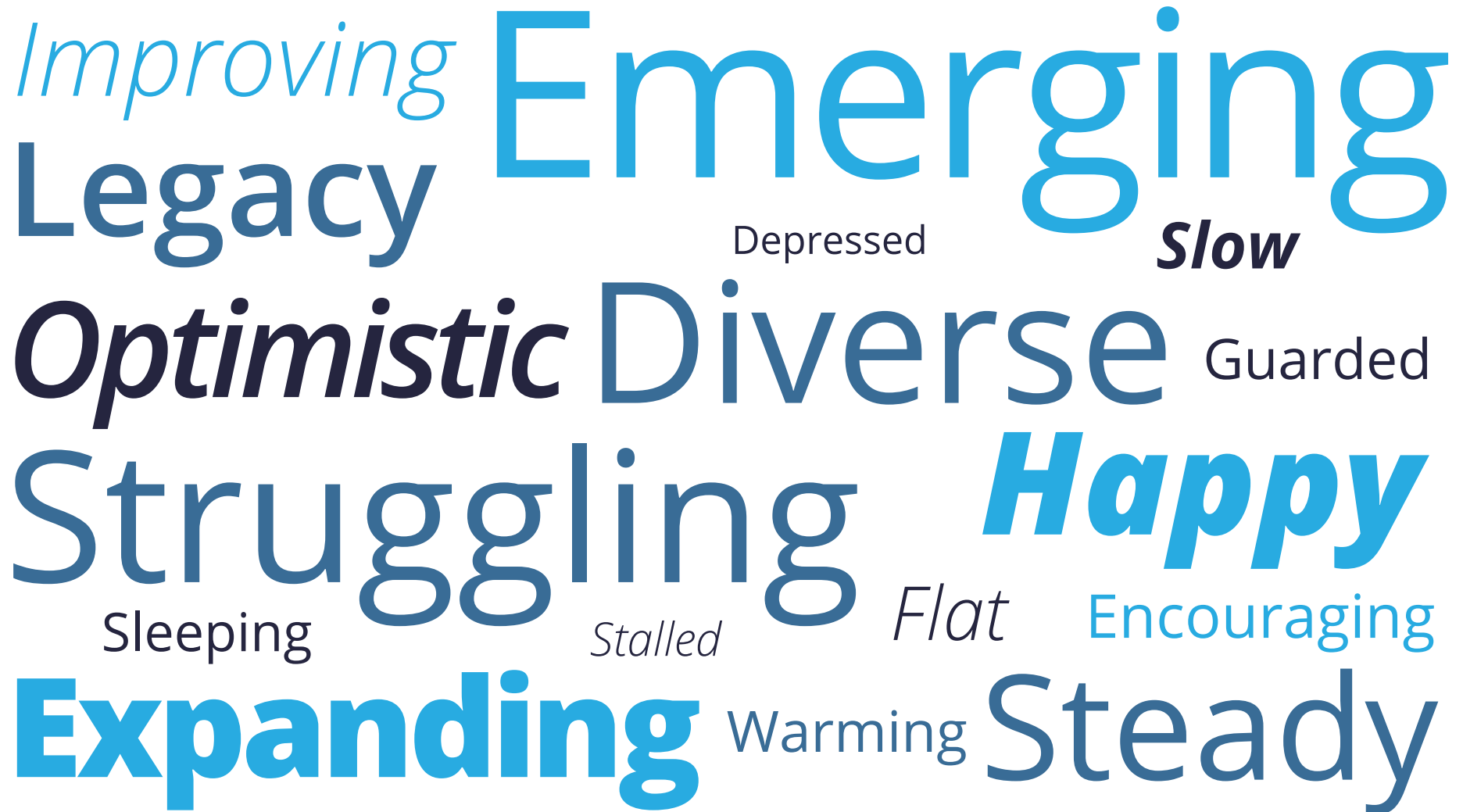


CenterState CEO is pleased to present its 2018 Economic Forecast report for CenterState New York. The Economic Forecast report is a source of strategic insight on regional, state and national economic trends. This robust report is developed annually with input and expertise collected from CenterState CEO members through detailed surveys and moderated focus group sessions with support from Research & Marketing Strategies, Inc. (RMS), a third-party market research firm. It also includes data from Manpower Inc. and CenterState CEO on exporting, industry and employment. 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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Participants were asked to describe the Central New York economy in one word

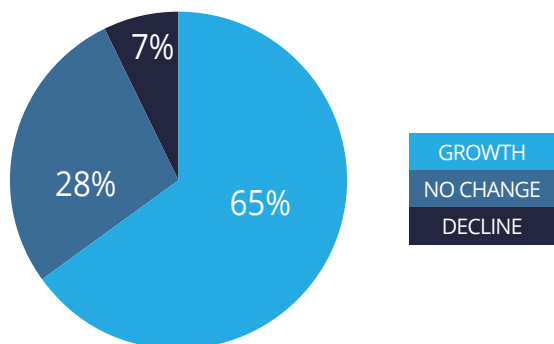


A word cloud of terms used to describe the Central New York economy. The words are arranged in a non-linear fashion, with varying font sizes and colors (shades of blue). The most prominent words are 'Emerging', 'Expanding', 'Happy', and 'Steady'. Other words include 'Optimistic', 'Diverse', 'Struggling', 'Legacy', 'Improving', 'Depressed', 'Slow', 'Guarded', 'Sleeping', 'Stalled', 'Flat', 'Encouraging', and 'Warming'.

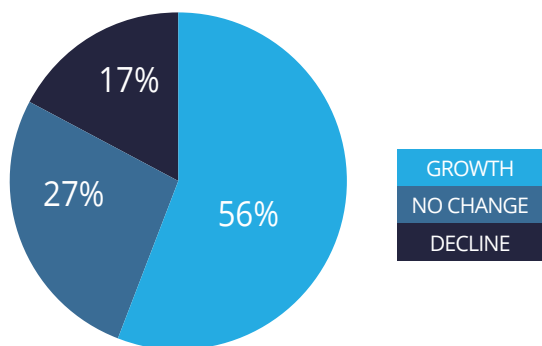
*Improving* **Emerging**  
**Legacy** Depressed **Slow**  
*Optimistic* **Diverse** Guarded  
**Struggling** **Happy**  
Sleeping *Stalled* Flat Encouraging  
**Expanding** Warming **Steady**

## 2017 PERSPECTIVE

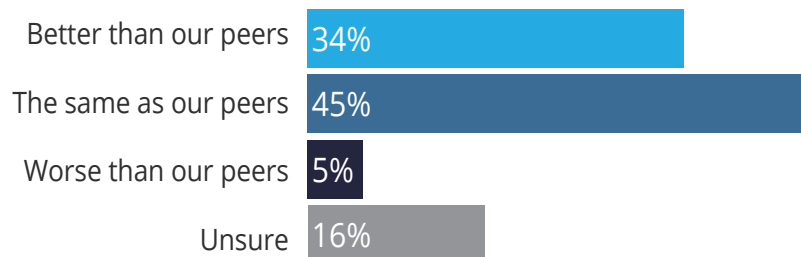
What were your business projections for 2017



How did your business actually fare in 2017?



Compared to your industry sector peers in 2017, how is your business performing?



## 2017 TRENDS AND/OR PRESSURES\*

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

Major Trends/Pressures



\*Respondents selected up to 3 trends/pressures

## 2018 OUTLOOK

*What are your projections for 2018?*

### Overall Sales or Revenue



### Products/Services



### Corporate Profits



### Jobs or Hirings



### Average Client Sales



### Capital Investments



### Markets



## 2018 ENVIRONMENTAL FACTORS

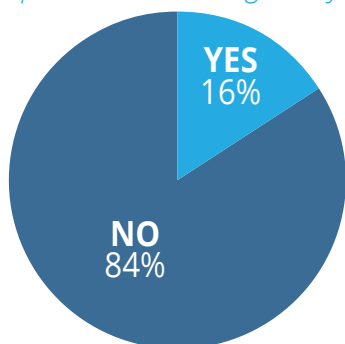
*To what extent do you expect the following environmental factors will impact your company/business in 2018?*

	No Extent					Modest					Significant Impact				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
<b>Workforce and Talent</b> - the ability to attract and retain the right people in the right positions, and/or the ability to invest in and develop the skills of the existing workforce.	5%	8%	22%	36%	29%										
<b>Governmental Policies and Regulatory Issues</b> - existing laws, policies, government procedures or the current political environment.	7%	8%	27%	27%	31%										
<b>Competition</b> - the number of similar competitive product/service brands available.	7%	14%	32%	32%	15%										
<b>Innovation and Technology</b> - innovations within an industry and the advancement of technology as it applies to business operations.	6%	14%	37%	28%	15%										
<b>Cultural Forces</b> - the structure and dynamics of behaviors, beliefs, lifestyles, etc.	15%	23%	30%	20%	12%										
<b>Social Forces</b> - the impact of poverty and economic disparity in the regional community.	17%	27%	26%	19%	11%										
<b>Demographic Factors</b> - the characteristics of the community such as age, gender, racial and ethnic diversity, marital status, family size, etc.	14%	24%	35%	19%	8%										
<b>Transportation and Logistics</b> - the ability to effectively and efficiently move people and goods to markets, locally, domestically and abroad.	33%	28%	23%	14%	2%										
<b>Natural Forces/Resources</b> - the physical environment, and access and availability of natural resources.	44%	31%	19%	5%	1%										

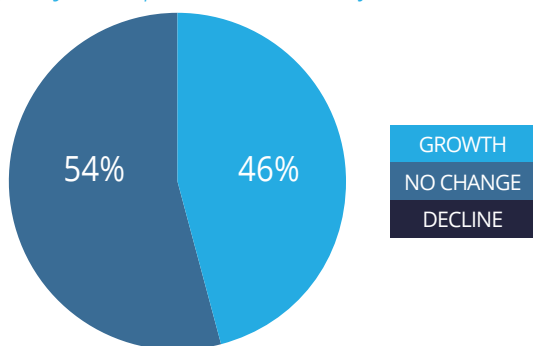
### EXPORT OUTLOOK

Exporters were asked for feedback on their exporting experiences and export trends they see within their industry.

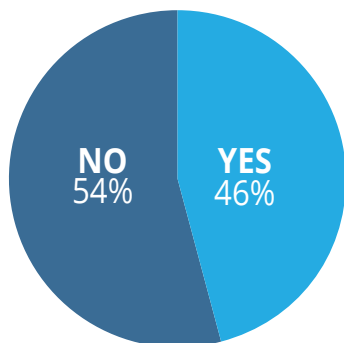
*Do you export a product or service globally?*



*How do you expect your export business will fare in 2018?*



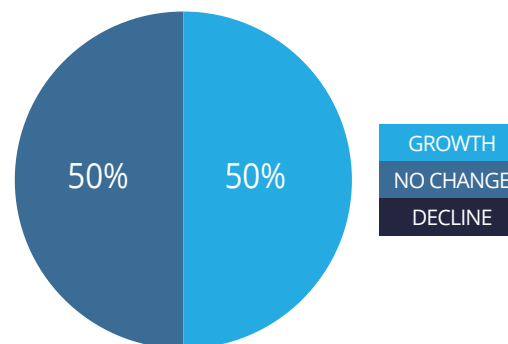
*Do you currently export a product or service to other states outside of New York?*



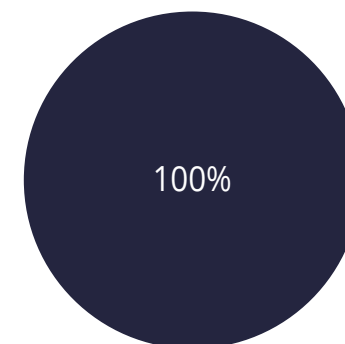
### AGRIBUSINESS

#### 2017 YEAR IN REVIEW

*What were your 2017 projections?*



*How did your business fare?*



#### Top Pressures/Trends

- Global economic conditions
- Federal political leadership
- Developing new products/services/markets
- Keeping pace with evolving technologies
- Organizational realignment

#### 2018 OUTLOOK

- Jobs or Hirings
- Capital Investments ▼
- Overall Sales or Revenue ▲
- Average Client Sales ▲
- Corporate Profits ▲
- Products/Services
- Markets

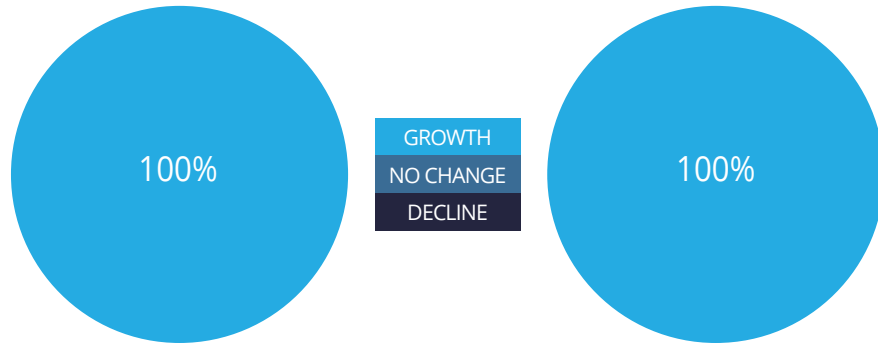


## AEROSPACE, UNMANNED AERIAL SYSTEMS & CYBERSECURITY

### 2017 YEAR IN REVIEW

What were your 2017 projections?

How did your business fare?



#### Top Pressures/Trends

- Federal policy or regulatory requirements/changes
- Stagnant/declining markets
- Global economic conditions
- Availability of skilled personnel/workforce development
- Developing new products/services/markets
- Organizational realignment

### 2018 OUTLOOK

- Jobs or Hirings •
- Capital Investments •
- Overall Sales or Revenue ▲
- Average Client Sales ▲
- Corporate Profits ▲
- Products/Services ▲
- Markets •

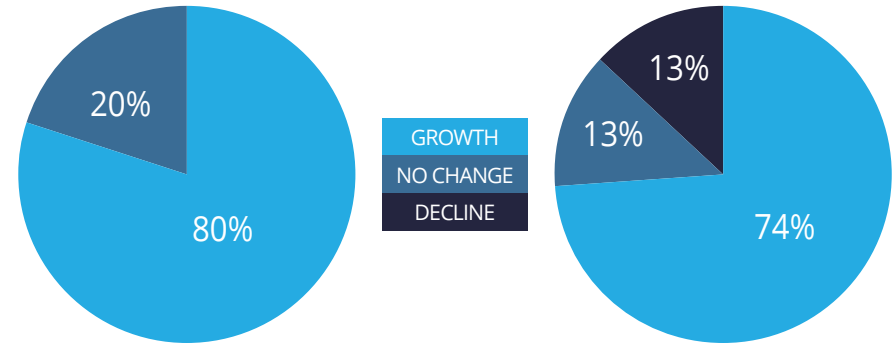


## BANKING, FINANCE & INSURANCE

### 2017 YEAR IN REVIEW

What were your 2017 projections?

How did your business fare?



#### Top Pressures/Trends

- Federal policy or regulatory requirements/changes
- Employee benefits and costs
- Domestic economic conditions
- Availability of skilled personnel/workforce development
- New business methodologies

### 2018 OUTLOOK

- Jobs or Hirings ▲
- Capital Investments ▲
- Overall Sales or Revenue ▲
- Average Client Sales ▲
- Corporate Profits ▲
- Products/Services •
- Markets ▲

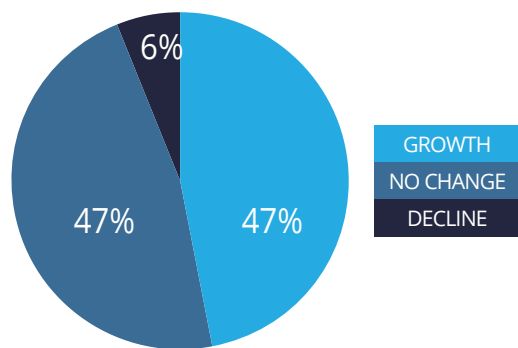
# 2018 FORECASTERS' INDUSTRY OUTLOOK



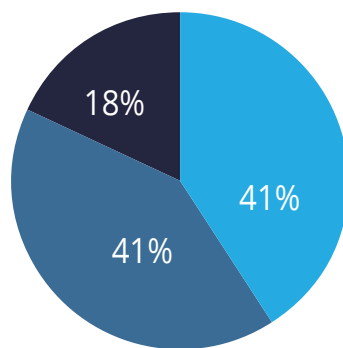
## CONSTRUCTION & REAL ESTATE

### 2017 YEAR IN REVIEW

What were your 2017 projections?



How did your business fare?



#### Top Pressures/Trends

- Availability of skilled personnel/workforce development
- Local, regional and/or state policy regulatory requirements/changes
- Stagnant/declining markets

### 2018 OUTLOOK

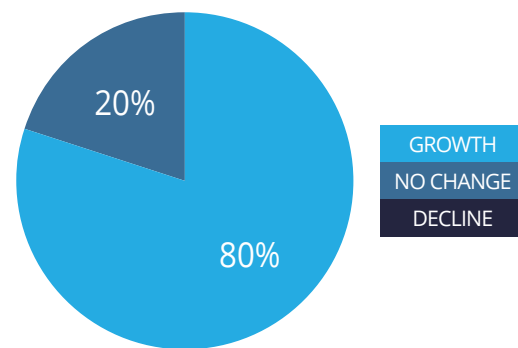
- Jobs or Hirings ▲
- Capital Investments •
- Overall Sales or Revenue ▲
- Average Client Sales ▲
- Corporate Profits •
- Products/Services •
- Markets •



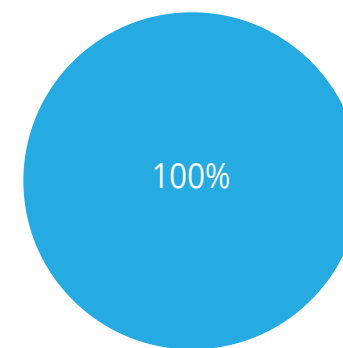
## ENGINEERING & ARCHITECTURE

### 2017 YEAR IN REVIEW

What were your 2017 projections?



How did your business fare?



#### Top Pressures/Trends

- Developing new products/services/markets
- Domestic economic conditions

### 2018 OUTLOOK

- Jobs or Hirings ▲
- Capital Investments •
- Overall Sales or Revenue ▲
- Average Client Sales ▲
- Corporate Profits ▲
- Products/Services ▲
- Markets ▲



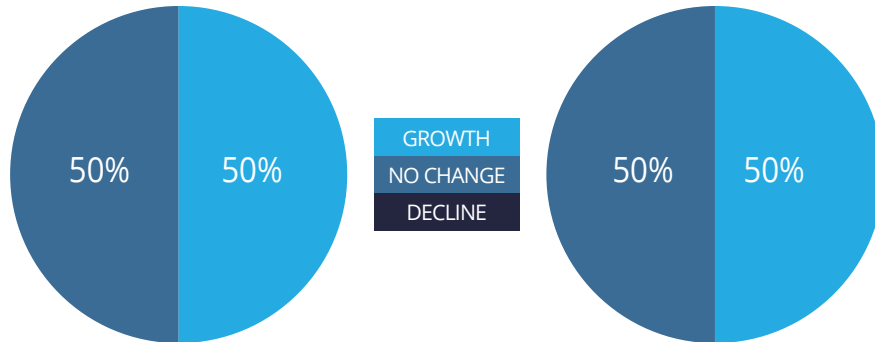


## GOVERNMENT & ECONOMIC DEVELOPMENT

### 2017 YEAR IN REVIEW

What were your 2017 projections?

How did your business fare?



#### Top Pressures/Trends

- Local, regional and/or state political leadership
- Employee benefits and costs
- New business methodologies

### 2018 OUTLOOK

- Jobs or Hirings •
- Capital Investments ▲
- Overall Sales or Revenue ▲
- Average Client Sales •
- Corporate Profits •
- Products/Services ▲
- Markets •



## HEALTH CARE

### 2017 YEAR IN REVIEW

What were your 2017 projections?

How did your business fare?



#### Top Pressures/Trends

- Availability of skilled personnel/workforce development
- Federal policy or regulatory requirements/changes
- Domestic competition

### 2018 OUTLOOK

- Jobs or Hirings ▲
- Capital Investments ▲
- Overall Sales or Revenue ▲
- Average Client Sales ▲
- Corporate Profits ▲
- Products/Services ▲
- Markets ▲

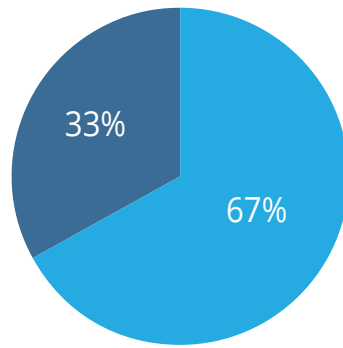
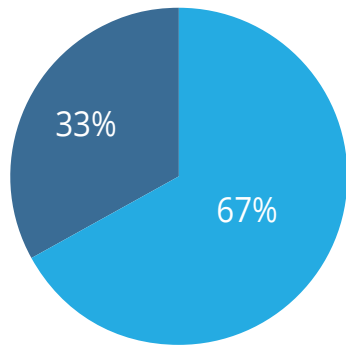


## HIGHER EDUCATION

### 2017 YEAR IN REVIEW

What were your 2017 projections?

How did your business fare?



#### Top Pressures/Trends

- Local, regional and/or state policy regulatory requirements/changes
- Federal policy or regulatory requirements/changes
- Employee benefits and costs
- Federal political leadership
- Domestic competition

### 2018 OUTLOOK

- Jobs or Hirings ▲
- Capital Investments ▲
- Overall Sales or Revenue •
- Average Client Sales •
- Corporate Profits •
- Products/Services ▲
- Markets •

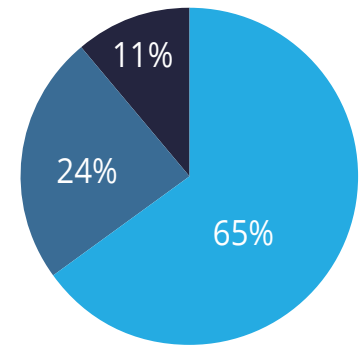
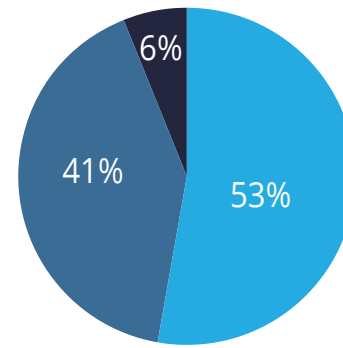


## HUMAN SERVICES & NONPROFITS

### 2017 YEAR IN REVIEW

What were your 2017 projections?

How did your business fare?



#### Top Pressures/Trends

- Employee benefits and costs
- Local, regional and/or state policy regulatory requirements/changes
- Federal policy or regulatory requirements/changes

### 2018 OUTLOOK

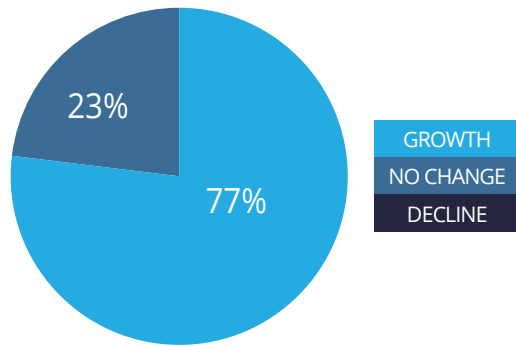
- Jobs or Hirings •
- Capital Investments •
- Overall Sales or Revenue •
- Average Client Sales •
- Corporate Profits •
- Products/Services •
- Markets •



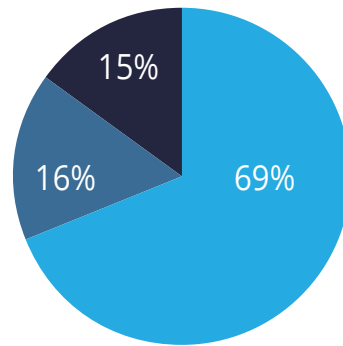
## MANUFACTURING

### 2017 YEAR IN REVIEW

What were your 2017 projections?



How did your business fare?



#### Top Pressures/Trends

- Employee benefits and costs
- Global economic conditions
- Developing new products/services/markets

### 2018 OUTLOOK

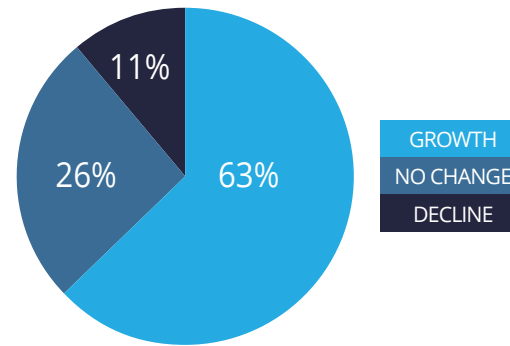
- Jobs or Hirings ▲
- Capital Investments •
- Overall Sales or Revenue ▲
- Average Client Sales ▲
- Corporate Profits ▲
- Products/Services •
- Markets •



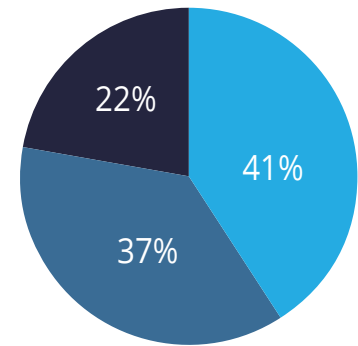
## SMALL BUSINESS & PROFESSIONAL SERVICES

### 2017 YEAR IN REVIEW

What were your 2017 projections?



How did your business fare?



#### Top Pressures/Trends

- Keeping pace with evolving technologies
- Employee benefits and costs
- Changing customer preferences

### 2018 OUTLOOK

- Jobs or Hirings ▲
- Capital Investments ▲
- Overall Sales or Revenue ▲
- Average Client Sales ▲
- Corporate Profits ▲
- Products/Services ▲
- Markets •

# 2018 FORECASTERS' INDUSTRY OUTLOOK

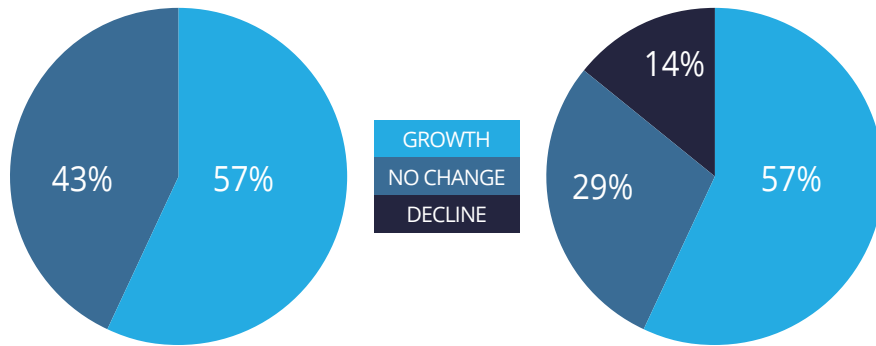


## RETAIL

### 2017 YEAR IN REVIEW

What were your 2017 projections?

How did your business fare?



#### Top Pressures/Trends

- Employee benefits and costs
- Stagnant/declining markets
- Local, regional and/or state policy regulatory requirements/changes
- Local, regional and/or state political leadership
- Domestic competition

### 2018 OUTLOOK

- Jobs or Hirings •
- Capital Investments •
- Overall Sales or Revenue •
- Average Client Sales ▲
- Corporate Profits •
- Products/Services •
- Markets •

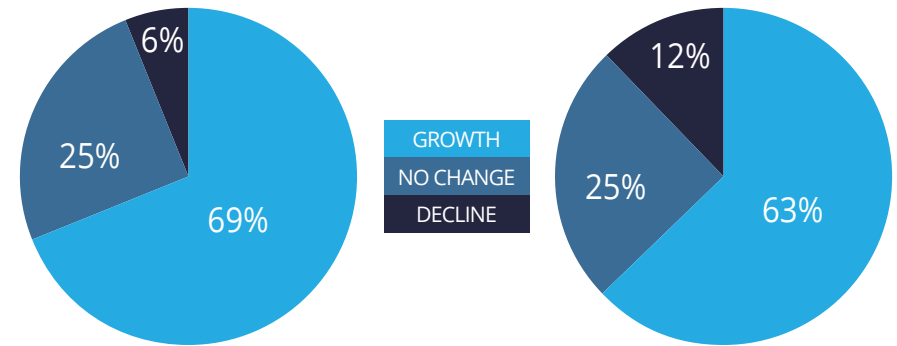


## TECHNOLOGY, UTILITIES & TELECOMMUNICATIONS

### 2017 YEAR IN REVIEW

What were your 2017 projections?

How did your business fare?



#### Top Pressures/Trends

- Employee benefits and costs
- Availability of skilled personnel/workforce development
- Developing new products/services/markets

### 2018 OUTLOOK

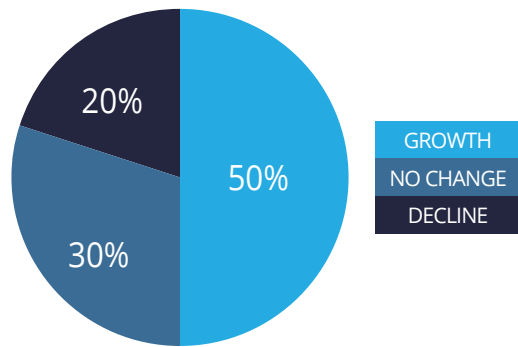
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- Products/Services ▲
- Markets ▲



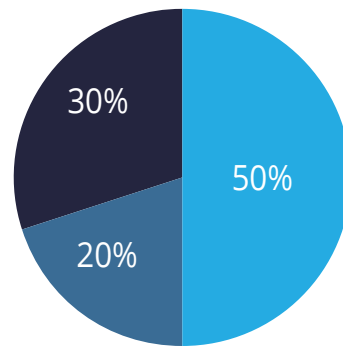
## TOURISM & THE ARTS

### 2017 YEAR IN REVIEW

What were your 2017 projections?



How did your business fare?



#### Top Pressures/Trends

- Domestic economic conditions
- Domestic competition
- Stagnant/declining markets
- Employee benefits and costs
- Developing new products/services/markets

### 2018 OUTLOOK

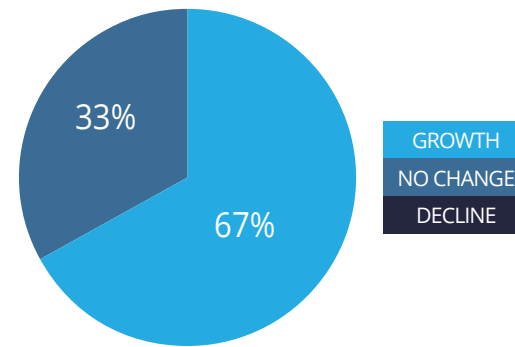
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- Overall Sales or Revenue ▲
- Average Client Sales ▲
- Corporate Profits ▲
- Products/Services ▲
- Markets ▲



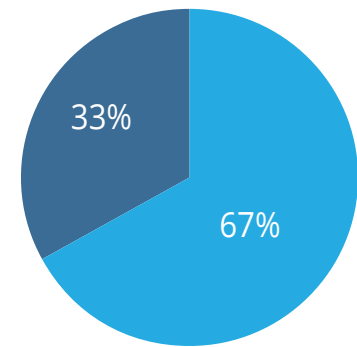
## TRANSPORTATION

### 2017 YEAR IN REVIEW

What were your 2017 projections?



How did your business fare?



#### Top Pressures/Trends

- Employee benefits and costs
- Local, regional and/or state policy regulatory requirements/changes
- Domestic economic conditions
- Stagnant/declining markets
- Changing customer preferences

### 2018 OUTLOOK

- Jobs or Hirings ▲
- Capital Investments •
- Overall Sales or Revenue ▲
- Average Client Sales •
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- Markets •

*"Technology is changing rapidly. If you cannot keep up, you'll lose your client base in a hurry."*

*"Time is money in our profession. We need to make sure we are saving time to free us up to provide more services to clients within the same number of hours."*

*"We try to be cutting edge in technology for our associates and clients. They use and expect the best technology available in the marketplace."*



## INNOVATION & TECHNOLOGY

- For many organizations, adopting new technology is required in order to stay relevant in the marketplace or capture new market share.
- Customer and client demands/preferences drive the adaptation of technology investments.
- Organizations are finding ways to work more effectively and efficiently through the use of technology, automating processes where possible. This frees up time for employees to focus on more complicated and involved tasks. Organizations are also saving money by using inexpensive or free resources and online tools, as well as using digital advertising (which can often be more efficient than traditional advertising).
- Constantly evolving technology can also be costly and time-consuming as organizations work to keep up with competitors. There is also uncertainty with the return on investment related to technology implementation.
- Technology may impact other industries (e.g., brick and mortar space) by providing flexibility for companies to expand or contract as needed.
- Some employers express frustration that new technology adoption was required, however prior product and services (without technology) need to be maintained – thereby increasing costs and management.



## WORKFORCE & TALENT

- Organizations report difficulty finding key talent and/or attracting highly skilled labor to the area.
- The cost of recruitment, training and turnover is an increasing expense for organizations.
- Resources for workforce development are needed to develop more skilled labor, particularly for growing industries like unmanned aerial systems.
- Improving the skills of the local workforce will allow local organizations to grow. For some organizations, this is preventing companies from taking on more (or larger) clients.
- Some also indicated a reduction in the number of individuals interested in working; not enough workers are available.
- With multiple generations in the workforce at the same time, organizations need to understand the values of different generations and how they can all work cohesively.
- There is a perception among some that Millennials and Gen Z, while technologically skilled, have a lesser work ethic than older generations and are less likely to invest and take pride in the company they work for.
- The retiring baby boomer population leaves some concerned that certain skilled labor may become depleted within the market.

*“Without a pool of skilled people, we cannot improve our productivity, quality, or expand our businesses.”*

*“Access to federal, state, and local resources for workforce development in cybersecurity will greatly facilitate the creation of skilled labor required to support this business.”*

*“We are in a significant growth industry and we must heavily compete for skilled resources. We will have much greater growth if fully staffed.”*

## MARKET CONDITIONS & BUSINESS CLIMATE

### NEW PRODUCTS/SERVICES

- Organizations are actively looking for ways to differentiate products and services to improve their competitive position in the market.
- New product research and development is a key operational function to stay competitive and maintain growth for many organizations.
- Organizations look to diversify their revenue streams with new products and services to protect their cash flow and minimize their vulnerability to rapidly changing markets.

### COLLABORATION, RE-ALIGNMENT AND CONSOLIDATION OPPORTUNITIES

- Collaboration among organizations in Central New York may create opportunities for new product and service offerings.
- Individuals expressed a need to identify collaboration opportunities across industry segments.
- Businesses are seeing organizational re-alignment as a way to increase their profits. It develops leaner and more efficient operations and establishes more effective leadership throughout the organization.
- Organizational realignment can improve employee engagement and retention by placing individuals in roles that are more directly connected and relevant to the success of the business.
- Local shared service initiatives may be an opportunity to reduce taxes and help promote growth in the area.
- Businesses believe that the best way to facilitate collaboration is for community and government organizations to continue to facilitate a discussion between businesses in the area.

*"Digital marketing changes every day and we need to keep up with what is and isn't working for our clients."*

*"We introduced a major new product in 2017; we expect to see improving demand in 2018."*



## REGIONAL ECONOMY

- Most business leaders believe the local economy is slow to show change but is also improving. Organizations are optimistic regarding the economy's future growth.
- Opportunities exist within several industries that may ultimately help support the local economy and allow CNY to advance in a positive direction. The unmanned aircraft systems industry was mentioned as a new market for CNY with significant potential. The higher education and health care industries were also mentioned as being extremely important to CNY. Other commonly mentioned industries with future potential include: tourism, craft beer, green energy, and technology.
- Poverty is a significant issue in the area; businesses need to do more to support the community and organizations need to help create opportunities for employing and developing the impoverished.
- Businesses like the "buy local" push and believe more needs to be done to promote collaboration. There should be a more intensive effort to identify ways to "lift everyone economically" rather than promoting competition.
- Business leaders believe that more needs to be done to make CNY attractive to employers and talent to entice businesses/individuals to the area and ensure CNY retains them.

## COMPETITION


- The internet has created opportunities for organizations to sell their products and services across the world. However, this also means local businesses are now competing with organizations from across the globe. The impact of international competition extends well beyond retail shopping and has become relevant for most industries.
- Due to the increased level of competition, some organizations are looking for an appropriate niche to work within or are preparing themselves to handle a wide variety of customer preferences and needs.
- Increased competition creates thin margins for some organizations and opportunity for others. Some organizations are able to purchase goods and services cheaper due to the high level of competition, while other industries benefit more directly from this global competitive market (i.e., shipping and logistics).
- Smaller organizations are finding opportunities to compete with larger organizations by being more agile and quicker to jump on time-sensitive opportunities.



*"Competition is strong, and it will take a sustained effort to achieve decent growth."*

*"Our markets are highly, highly competitive primarily from domestic competitors."*

*"Our rates will decline as competition continues to try and provide the same services for less money."*

A photograph of two documents on a desk. The document on the left is titled 'Employee Benefits Package' and the one on the right is titled 'HEALTH INSURANCE POLICY'. A pen and a paperclip are also visible on the desk.

## Employee Benefits Package

## HEALTH INSURANCE POLICY

### EMPLOYEE BENEFITS

- Employee benefits and costs were the most commonly reported trend/pressure for organizations in 2017. Organizations continue to express significant concern over the expense of employee benefits, particularly health insurance.
- Some businesses are concerned with the lack of clarity from the federal government with regards to pending legislation and how it may impact premiums and coverage.
- The increasing costs of benefits are often shared between the employer and the employee, leading to overall reduced profitability for the business and reduced wages for the employees. This also forces organizations to raise their prices for customers and can make them less attractive as an employer due to decreased coverage (or increased cost) of benefits.
- Employers often hire contractors and temporary workers rather than permanent employees as a means to minimize the rising costs of benefits and other costs associated with hiring a full-time employee.
- Some organizations use their benefit packages to attract talent and differentiate themselves from competitors.

*"We are concerned about what will happen to health care premiums given national decision making. We provide health care through the NY State of Health shop and premiums have been increasing rapidly."*

*"The costs of employee benefits continue to rise beyond inflationary rates, particularly employee health care."*

*"Employee benefits and costs will likely result in fewer new hires and more contracted workers (for us)."*



## GOVERNMENT POLICY & REGULATORY ISSUES

### REGULATORY REQUIREMENTS/CHANGES

- Learning to navigate current and upcoming regulatory requirements is becoming a regular part of doing business.
- As regulatory policies increase, organizations are concerned that more time is being spent on documentation of processes and adherence to policies, rather than improving or changing offerings. This can create opportunities for business support vendors that help organizations adhere to state and federal regulations.
- Organizations and their operations, including reimbursements and expenses can be significantly impacted by the uncertainty that results from pending or frequently changing legislation.
- Regulation can be costly due to the forced implementation of compliance monitoring and reporting technology, as well as associated workforce training expenses.
- Organizations are often unable to increase the price of their products and services to cover the costs associated with changing regulatory requirements.
- Some organizations feel New York state regulatory requirements are more of a burden compared to other states. This makes it harder for those organizations to keep up with out-of-state competitors and is a barrier to business expansion and attraction.
- The increasing minimum wage is a concern for some organizations, particularly those hiring from unskilled labor pools.
- Some employers are uncertain about and concerned with the impact the Family Medical Leave Act (FMLA) may have on their business.

*“The multitude of NYS regulations pertaining to procurement and reporting data, in addition to the lack of dedicated/predictable sources of NYS funding, make our business environment very difficult.”*

*“As a nonprofit, our business is very heavily audited to the point where services are negatively impacted since less time is spent on services and more on documentation of services.”*

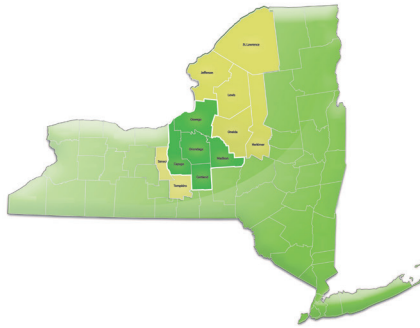
*“Our ability to navigate regulatory requirements is a new normal and continues to be embedded more in our culture of doing business.”*

### POLITICAL LANDSCAPE

- Organizations continue to remain hopeful that federal political leadership will create a more business-friendly environment, resulting in economic improvement and growth for organizations in the area.
- There is concern and uncertainty among arts, nonprofits and human services organizations that funding may be cut for their programs.
- Business leaders believe that cooperation among local and statewide political leadership will be integral to the growth of the CNY economy, by enabling the growth of businesses and making the region a more attractive place to live and work.

### THE REGION

Central New York is part of the larger 12-county CenterState New York region, which includes the counties of: Cayuga, Cortland, Herkimer, Jefferson, Lewis, Madison, Oneida, Onondaga, Oswego, Seneca, St. Lawrence and Tompkins.



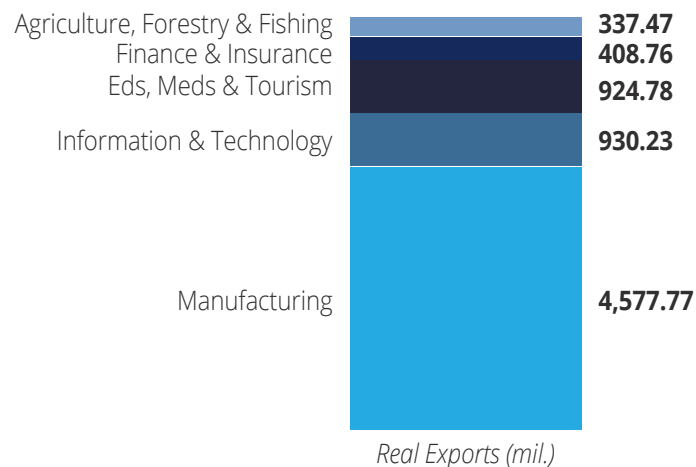
### PROMISING JOB MARKET EXPECTED FOR SYRACUSE MSA

Syracuse, NY MSA employers expect to hire at a positive pace during Q1 2018, according to the ManpowerGroup Employment Outlook Survey. Of those surveyed, 20 percent plan to hire more employees from January through March. This number is offset by the five percent that plan to reduce payrolls, while 73 percent of employers expect to maintain current staff levels and two percent indicate they are not sure of their hiring plans. This yields a Net Employment Outlook\* of 15 percent.

### CENTERSTATE NY EXPORT TOP SECTORS & TRENDS\*

	2007	2016	Growth %
Real Exports in Millions	\$6,709	\$7,654	14.1%
Direct Export-Supported Jobs	21,238	21,482	1.1%
Total Export-Supported Jobs	43,461	46,340	6.6%

### TOP INDUSTRY SECTORS BY REAL EXPORTS 2016\*



\* Source: Brookings Institution Export Monitor 2017

\*Note: Data represents high-level (2-digit NAICS) export data for the 12-county region

	Increase Staff Levels	Decrease Staff Levels	Maintain Staff Levels	Don't Know	Net Employment Outlook
Q1 2018 (current)	20%	5%	73%	2%	15%
Q4 2017 (previous quarter)	19%	4%	76%	1%	15%
Q1 2017 (one year ago)	19%	4%	74%	3%	15%

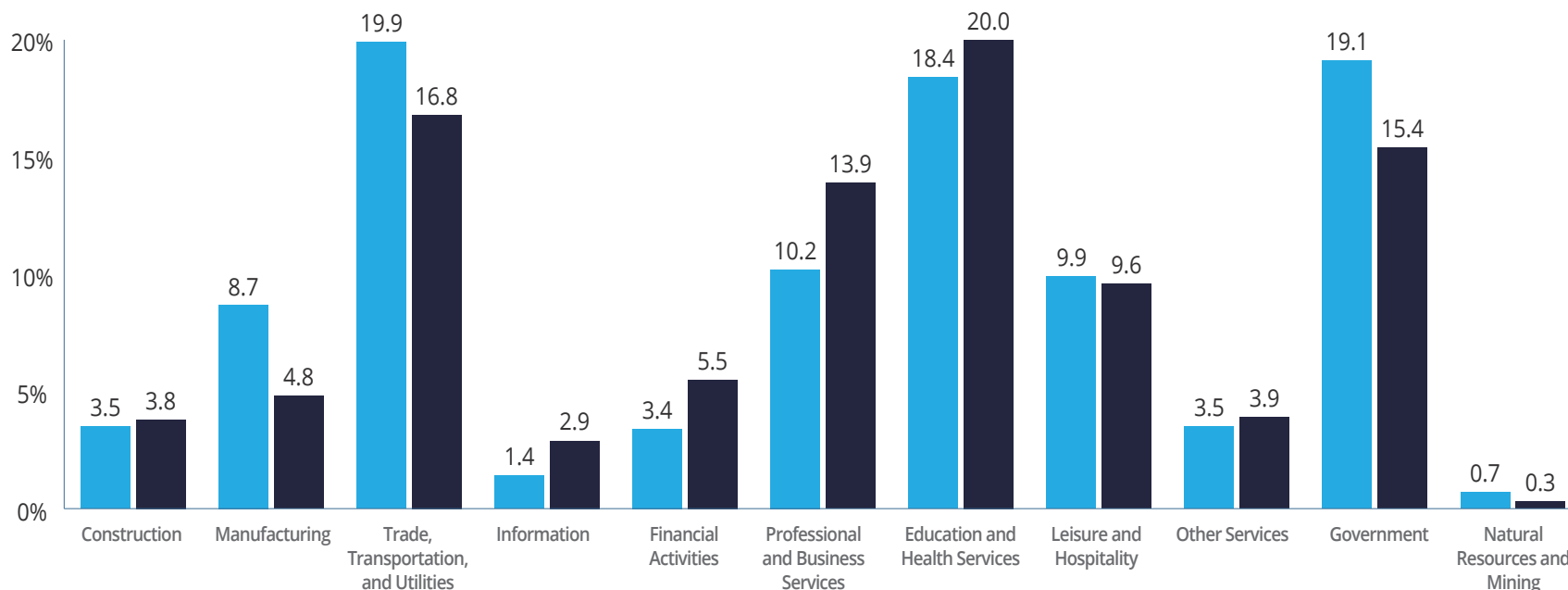
\*The Net Employment Outlook is derived by taking the percentage of employers anticipating an increase in hiring activity and subtracting from this the percentage of employers expecting a decrease in hiring activity.

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

Source: ManpowerGroup Employment Outlook Survey, Syracuse MSA 2018

## 2017 CENTRAL NY INDUSTRIAL MAKEUP\*\*

● % Regional Jobs  
● % State Jobs



	2017 Regional Jobs	% Regional Jobs	2017 State Jobs	% State Jobs
Construction	11,849	3.5%	350,766	3.8%
Manufacturing	29,285	8.7%	438,834	4.8%
Trade, transportation and utilities	67,089	19.9%	1,528,311	16.8%
Information	4,821	1.4%	262,684	2.9%
Financial activities	11,346	3.4%	502,871	5.5%
Professional and business services	34,262	10.2%	1,270,639	13.9%
Education and health services	62,137	18.4%	1,825,915	20.0%
Leisure and hospitality	33,242	9.9%	874,682	9.6%
Other services	11,686	3.5%	359,860	3.9%
Government	64,354	19.1%	1,402,347	15.4%
Natural resources and mining	2,344	0.7%	25,016	0.3%

\*\*Source: NYS DOL QCEW, Central New York Region, 2017.1 (preliminary data)

Note: Data represents five-county Central New York Regional Economic Development Council region

# 2018 THANK YOU FORECASTERS

**Nathan Andrews**  
*Morse Manufacturing Co., Inc.*

**Colette Astoria**  
*Oswego Food & History Tours*

**Lynn M. Blair**  
*Elderwood at Liverpool*

**Vicki R.Brackens**  
*Brackens Financial Solutions Network, LLC*

**William Brod**  
*Syracuse New Times and Family Times*

**Michael W. Brunner**  
*Bank of America, N.A.*

**Jane Cagwin**  
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**John Clark**  
*Cushman & Wakefield/Pyramid Brokerage Company*

**David J. Constas**  
*Just the Right Stuff*

**Sam Cosamano**  
*IPD Engineering*

**Gail Cowley**  
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**Art Delaney**  
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**John DeRousie**  
*Custom Marketing Solutions*

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**Dino Dimkopoulos**  
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**Fuz Eller**  
*Euphony, Inc.*

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*MLF Enterprises MWBE Medical (and general) Interpreters and Translators, LLCC*

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**Matt Gardner**  
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**Keith George**  
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**Pennie Gorney**  
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**Earl R. Hall**  
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**Russell Hall**  
*FASTSIGNS of Syracuse*

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*ProLiteracy*

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*Business Journal News Network*

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**Toni Ritter**

*James Flowers*

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*INFICON, Inc.*

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*Thompson & Johnson Equipment Co., Inc.*

**Alton Shader**

*Welch Allyn, Inc.*

**Jason Smorol**

*Syracuse Chiefs Baseball Club*

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**Michael Spoont**

*IV4, Inc.*

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**Conrad Struzik**

*Holiday Inn Express Airport*

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*Liverpool Blueprint, Inc.*

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*Felder-Syracuse Track and Field Stadium*

**Fanny Villarreal**

*YWCA of Syracuse and Onondaga County  
Inc.*

**Andrea B. Wandersee**

*Open Hand Theater*

**Teresa Woolson**

*VOW Foundation*

**Brooks Wright**

*KBM Management Inc.*

**Mike Yates**

*Young & Franklin / Tactair*

**Garson Zausmer**

*Zausmer-Frisch Scruton & Aggarwal*

*Advanced Business Systems, Inc.*

*Business Systems of CNY, Inc.*

*Central Association for the Blind and  
Visually Impaired*

*Centro (CNYRTA)*

*CXtec*

*Gifford Foundation*

*Harold L. Burstyn Attorney-at-Law &  
Registered Patent Attorney*

*Highland Patient Transport*

*Key Bank*

*Onondaga County Water Authority*

*Onondaga Historical Association*

*SGTR, LLC*

*SUNY Upstate Medical University*

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