

OUTLOOK

INNOVATION

\$122,789

94.5%

REVENUE

49%

2020

ECONOMIC FORECAST
for Central New York



INVESTMENT

EXPORT

WORKFORCE

33,875

CenterState CEO is pleased to present its 2020 Economic Forecast Report for Central New York. The Economic Forecast Report is a source of strategic insight on regional, state and national economic trends. This report is developed annually with the input and expertise collected from CenterState CEO members through surveys and moderated focus sessions with support from Research & Marketing Strategies, Inc. (RMS), a third-party market research firm. 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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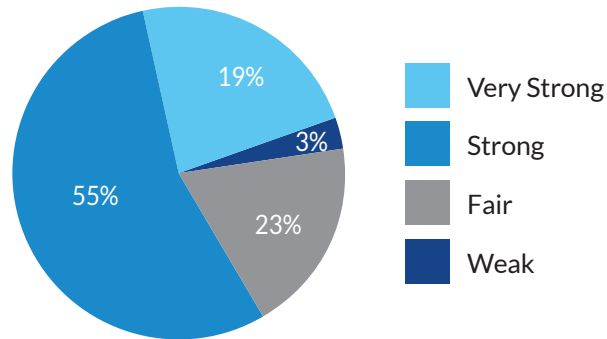
Participants were asked to describe the Central
New York economy in one word or phrase.



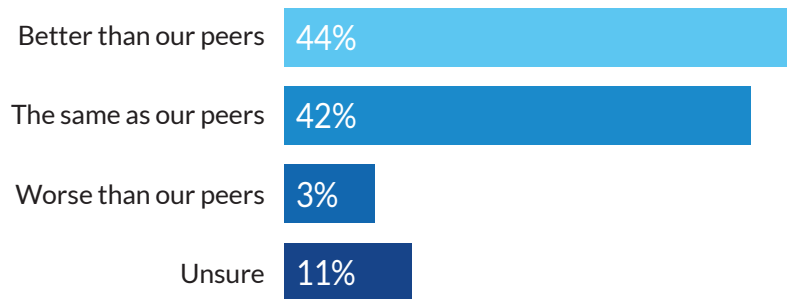
vibrant **GROWTH** **OPTIMISTIC**
strong **emerging** **ROBUST**
healthy **EVOLVING** **diverse** **GOOD**

2019 Perspective

How would you assess the strength of your business in 2019?

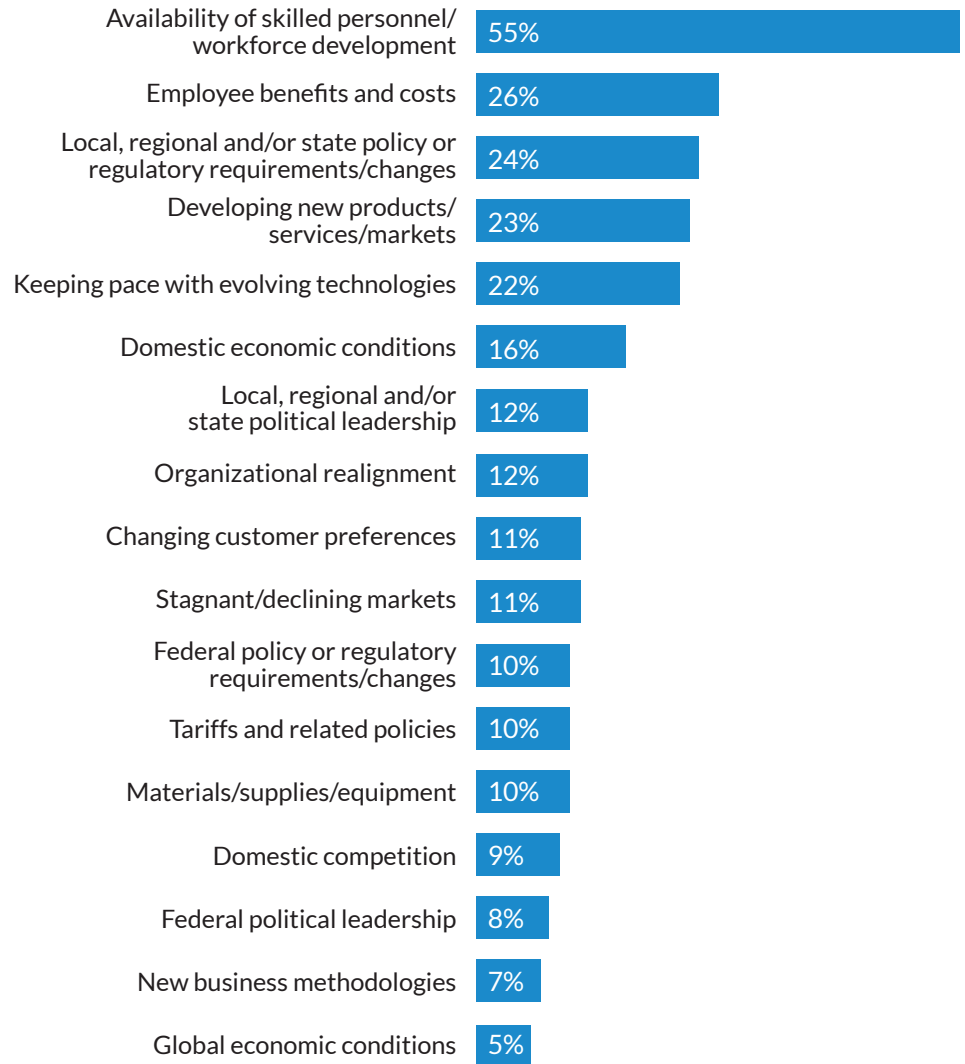


Compared to your industry sector peers in 2019, how is your business performing?



2019 Trends and/or Pressures*

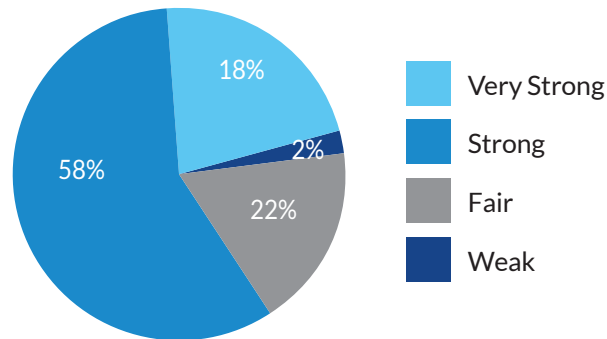
What were the major trends and/or pressures that dominated your industry sector this year?



*Respondents selected up to three trends/pressures.

2020 Outlook

What are your expectations for the strength of your business in 2020?



What are your projections for 2020?

Overall Sales or Revenue



Products/Services



Jobs or Hirings



Capital Investments



Geographic Markets



GROWTH NOCHANGE DECLINE

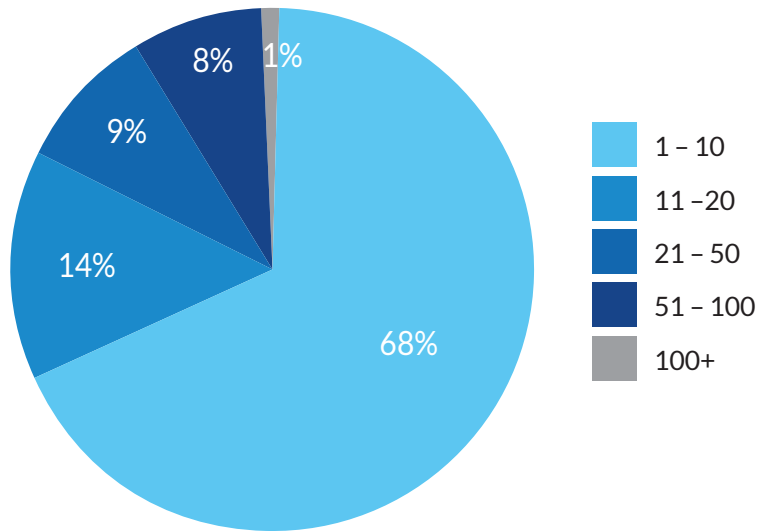
2020 Environmental Factors

To what extent do you expect the following environmental factors will impact your business in 2020?

	Positive Impact	No Impact	Negative Impact
Government Policy and Regulatory Issues – existing laws, policies, government procedures or the current political environment.	17%	27%	56%
Workforce and Talent – the ability to attract and retain the right people for existing and new positions, and/or the ability to invest in and develop the skills of the existing workforce.	35%	22%	43%
Demographic Factors – the characteristics of the regional community, such as age, gender, racial and ethnic diversity, marital status, family size, etc.	27%	61%	12%
Competition – the number of similar competitive product/service brands available.	9%	54%	37%
Innovation and Technology – innovations within an industry and the advancement of technology as it applies to business operations.	71%	24%	5%
Social Forces – the impact of poverty and economic disparity in the regional community.	6%	69%	25%
Cultural Forces – the structure and dynamics of behaviors, beliefs, lifestyles, etc.	31%	54%	15%
Transportation and Logistics – the ability to effectively and efficiently move people and goods to markets, locally, domestically and abroad.	13%	71%	16%
Natural Forces/Resources – the physical environment, and access and availability of natural resources.	7%	87%	6%
Tariffs – fees placed on the import of foreign goods into the country or on the export of U.S. goods by other countries.	1%	68%	31%

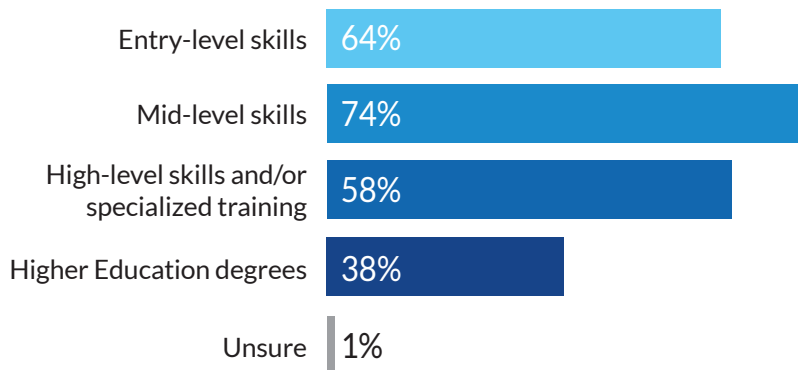
2020 Hiring Outlook

If hiring in 2020, how many employees do you intend to add?

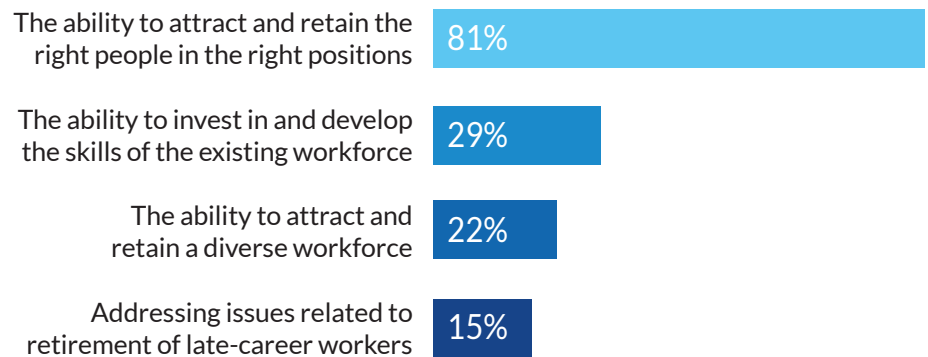


Credit: SyracuseCoE

What skill level are you seeking for additional employees?

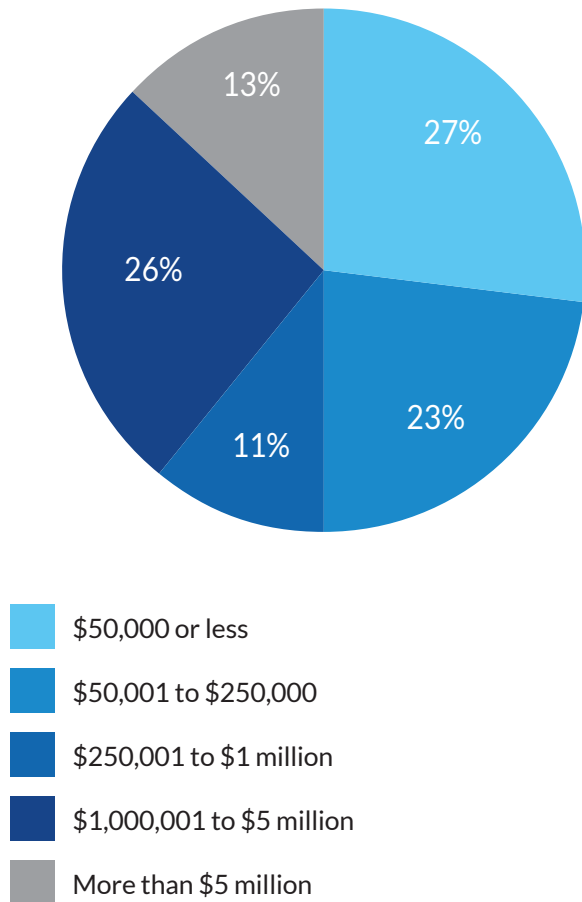


What hiring challenges do you expect in 2020?

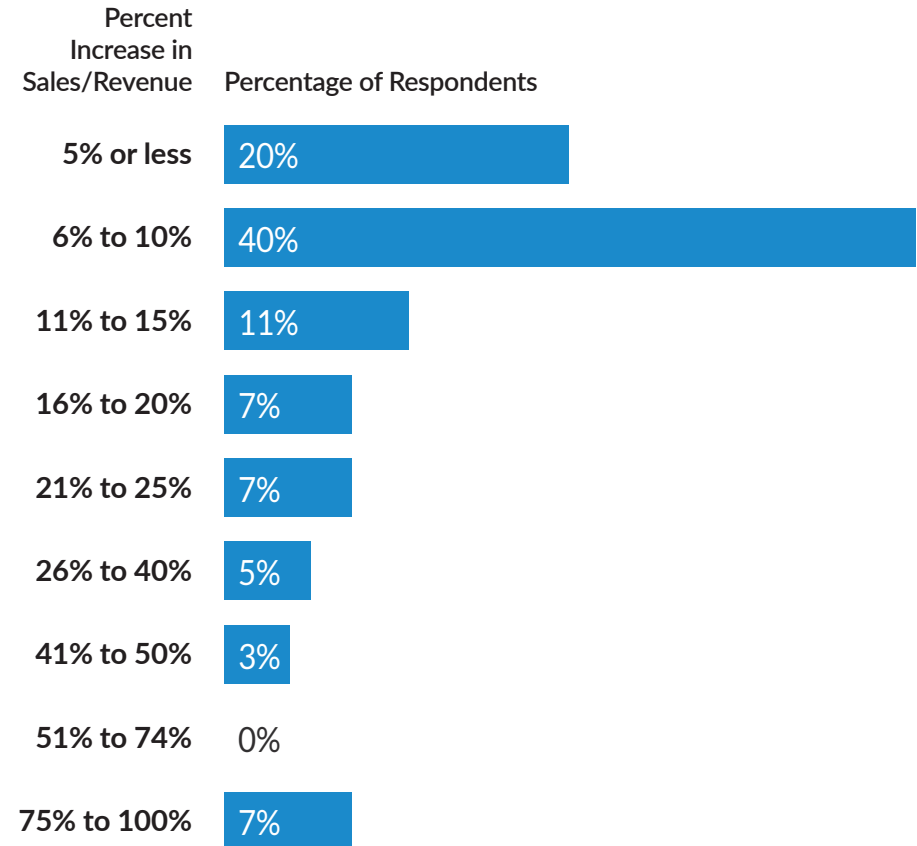


2020 Investment & Sales Outlook

By how much do you expect to increase capital investments in 2020?



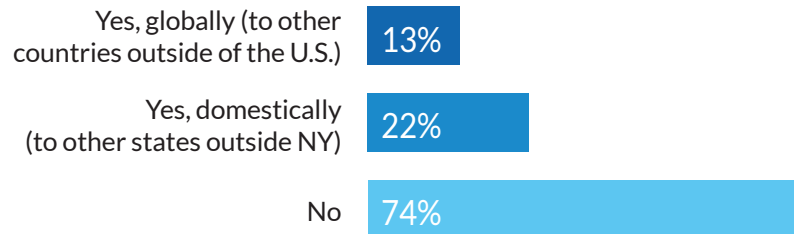
By how much do you expect to increase overall sales or revenue in 2020?



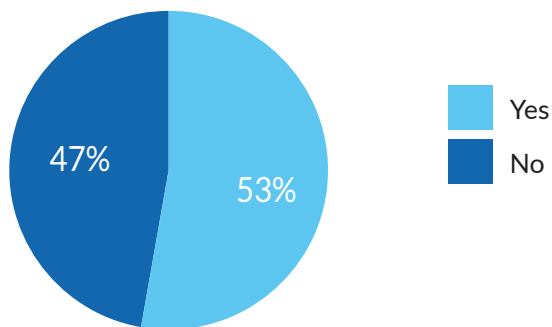


2020 Export Outlook

Do you currently export a product or service?



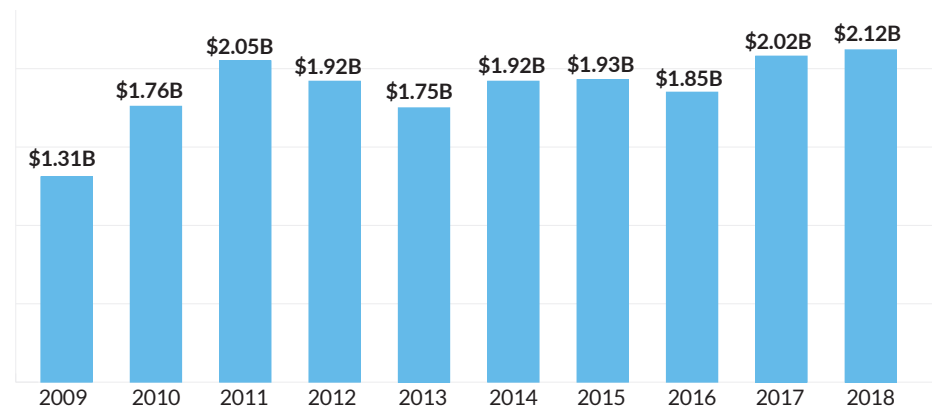
Do you expect your export business to grow in 2020?



Syracuse MSA Export Trends

	2009	2018	% Change
Total Goods Exports	1.3 Billion	2.1 Billion	61%

Total Goods Exports



Exports by Manufacturing Type

	2018	Percent
Primary Metal Manufacturing	634,787,545	30%
Computer and Electronic Product Manufacturing	471,305,124	22%
Machinery Manufacturing	269,652,647	13%
Chemical Manufacturing	103,767,910	5%
Electrical Equipment; Appliance; and Component Manufacturing	99,469,906	5%
All Others	537,761,222	25%

Source: International Trade Administration



Respondents expect to expand into the following new domestic and global markets in 2020:

- 📍 Northeast - U.S.
- 📍 Midwest - U.S.
- 📍 Southeast - U.S.
- 📍 Entire United States
- 📍 Capital District - NYS
- 📍 Central New York - NYS
- 📍 Southern Tier - NYS
- 📍 Western New York - NYS
- 📍 New York state
- 📍 Domestic (unspecified)
- 📍 International (unspecified)
- 📍 Asia
- 📍 Canada
- 📍 Europe

State(s), region(s) or countries respondents currently export to or their general market area:

- 📍 Northeast - U.S.
- 📍 Asia
- 📍 Europe
- 📍 Japan
- 📍 South America
- 📍 Midwest - U.S.
- 📍 Australia
- 📍 Germany
- 📍 Korea
- 📍 Sweden
- 📍 Southeast - U.S.
- 📍 Canada
- 📍 India
- 📍 New Zealand
- 📍 United Kingdom
- 📍 West coast - U.S.
- 📍 China
- 📍 Israel
- 📍 Puerto Rico
- 📍 Vietnam
- 📍 Entire United States

Forecasters were asked to outline opportunities and challenges unique to their specific industry or cluster in 2020.

Aerospace/Unmanned Aerial Systems/Cybersecurity



Leading Opportunities

The adoption of beyond visual line of sight flight operations will radically expand the drone industry in terms of disruptive applications and solutions. As more companies integrate drones into their existing processes, there is an incredible opportunity to train the region's talent for these new roles, and to ensure that the existing workforce knows how to use drones safely and effectively.

Top Pressures/Trends

As more companies integrate drones into their existing processes, there is an incredible opportunity to train the region's talent for these new roles, and to ensure that the existing workforce knows how to use drones safely and effectively.

Agribusiness & Food Processing



Credit: Visit Syracuse

Leading Opportunities

The industry will benefit from advances in unmanned farm equipment that will support field management and result in an increase of crop yields. The growth of the hemp industry is also an important opportunity for the sector.

Top Pressures/Trends

Increasing labor demand is putting downward pressure on the industry.

Screening, hiring and retaining employees are noted challenges. Trade wars are driving exporters to find new markets for their products.

Banking, Financing & Insurance



Credit: Bankers Healthcare Group

Leading Opportunities

Strong local economic trends and job opportunities are supporting new business growth. An increased demand for housing has supported an increased need for financing. There has been an overall increased demand for basic financial services, with a new focus in underserved areas. Advancing technology and the increased use of data has enabled companies to better identify trends and create new solutions for clients.

Top Pressures/Trends

Increased competition and industry consolidation and regulations create headwinds for the industry. At the same time, tariffs and trade wars are impacting customers and businesses.

Construction & Real Estate



Leading Opportunities

The adaptive reuse of downtown Syracuse's office buildings is tightening the office market and increase leasing rates. New construction is now becoming a reasonable alternative as occupancy rates increase and push up costs.

There is a renewed focus on working collaboratively with high schools to develop career and technical education programs with construction related pathways.

Top Pressures/Trends

Uncertainty is the biggest challenge facing the industry. This includes changing costs and the direction of the national and global economy. This uncertainty will inhibit long-term commitments and plans.

Energy or Environmental Systems/Services



Leading Opportunities

The movement toward low carbon fuel standards will create new opportunities for the region and industry. Developing specific, measurable, achievable, relevant, and time-based solutions and aligning the industry with the growth of internet of things will impact the sector.

Top Pressures/Trends

Access to capital, the instability of American politics at the federal level, and tariffs all create challenges for the industry and its ability to make continued progress.

Engineering & Architectural Services



Credit: VIP Structures

Leading Opportunities

Creating solutions to respond to climate change pressures and incorporating renewable energy systems in buildings is a significant market opportunity. Aging infrastructure also creates opportunities, and the redesign of Interstate 81 is expected to be one of the most significant opportunities in decades.

Top Pressures/Trends

Increasing minority and women-owned business enterprises (MWBE) state requirements makes it difficult for small businesses to comply and be competitive. Additionally, tax pressures and regulations lead to greater administrative burden and costs. Recessionary pressures, tariffs on construction materials and volatility in major market indices make it hard to plan for the future. The new Climate Leadership and Community Protection Act will have significant ramifications.

Government, Public Administration & Economic Development



Credit: Wainwright Photography

Leading Opportunities

Leveraging state investments in downtowns through the Downtown Revitalization Initiative; in priority projects through the Regional Economic Development Council awards; and key sectors through the Upstate Revitalization Initiative will support continued progress for the region. Engaging and attracting young professionals to the area will support business growth and overall development.

Top Pressures/Trends

There is a need to increase use and deployment of technology and data to compete in domestic and global markets.

Health Care



Credit: Upstate Medical University

Leading Opportunities

There is an increasing demand for memory care services and high-end independent living facilities in the region as its population ages. There is a need and an opportunity to expand and improve the quality of patient care as well as continued pressure on hospitals to reduce length of stay.

Top Pressures/Trends

Skilled workers are in high-demand. The sector is challenged by increased regulatory oversight and downward pressure on Medicaid and Medicare. The cost of health care puts pressure on middle class families, which impacts the regional economy.

Higher Education



Credit: Scott Snell

Leading Opportunities

Post-traditional student learning delivery options create new opportunities to engage students. Veterans continue to drive up enrollments at local institutions.

Top Pressures/Trends

There is a competitive climate for traditional student sector

and nationally student enrollment is down. Finding and attracting faculty and staff continues to be a pressure point.

Human Services & Nonprofits



Credit: Rescue Mission

Leading Opportunities

Increased collaboration and consolidation is supporting business growth. There is also a broader recognition that the nonprofit

sector is a major employment and economic development force.

Top Pressures/Trends

There is a lot of competition for fundraising. Staff shortages and retention are constant pressures for the industry.

Manufacturing/Advanced Manufacturing



Credit: Office of the Governor

Leading Opportunities

New product development and increased consumer demand for new solutions is driving opportunities. Technology advances, including larger and faster equipment, 5G telecom deployment and automation create solutions that address workforce deficiency and increase efficiencies. Growth of the defense sector (radar and electronic warfare investment); acquisitions and consolidations and consumer optimism drives sales growth.

Top Pressures/Trends

Aging equipment that needs to be upgraded will require significant investments. Supply issues and increased cost of raw materials are creating challenges for the industry. Challenging trade relationships, especially with China, create uncertainty and drive up costs.

Professional & Technical Services



Credit: C.R. Fletcher Associates

Leading Opportunities

The changes to the tax laws and the complexity of financial planning, accounting and auditing results in business growth. Additionally, acquisitions and mergers have provided opportunity for growth.

The overall strength of the regional economy is providing more opportunities for local businesses.

Top Pressures/Trends

Labor shortages and significant age diversity among staff causes management and communication challenges. There is high leadership turnover that creates instability as well. Federal and NYS tax penalty confusion, increased federal tax rules, and accounting automation leads to difficulties for auditors and loss of business for accountants.

Retail & Food Services



Credit: City of Syracuse

Leading Opportunities

A more diverse New American population has introduced new cuisine to Syracuse in brick and mortar restaurants and popups, adding to the regions vibrancy.

Top Pressures/Trends

Regulations put pressures on small businesses. Customers have a high expectation from delivery services that can't and aren't met.

Technology, Software & Internet Services



Credit: City of Syracuse

Leading Opportunities

There is significant opportunity for growth of business intelligence design and development and data-driven hybrid products and services, including application programming interface

integration. Central New York's growing tech scene supports small and growing tech firms. There is also an increasing need for the development and integration of cyber-physical systems, internet of things and connected systems.

Top Pressures/Trends

Economic instability and political upheaval create uncertainty for businesses. Talent shortage create challenges for small and large employers alike. Access to capital also creates challenges for tech startups and limits growth opportunities in the region.

Tourism, Arts, Entertainment & Recreation



Credit: Visit Syracuse

Leading Opportunities

Social media marketing has improved communications and reach to the broader public. Improving economic conditions in the region have

increased customer spending on tourism, recreation and the arts. Growth of the local film industry is having a positive impact through job creation and tourism, as cast and crew contribute to overnight stays at hotels and spending at local restaurants and area attractions. Upwards to 70% of each production's budget stays in the community.

Top Pressures/Trends

Creating connections and engagements for the arts among all generations is a challenge as are changes to the state's labor law and continual minimum wage increases. The Visit Syracuse Film Office is working with multiple area facilities and organizations to explore additional ways to grow local infrastructure and workforce for the industry to accelerate impact.

Transportation, Warehousing & Distribution



Leading Opportunities

Tariff policies that allow free trade will support the industry. The region's central location and multimodal

transportation systems support the industry and new projects are being attracted to the region.

Top Pressures/Trends

Current tariff policies create uncertainty in the supply chain.

Utilities & Telecommunications



Leading Opportunities

The expansion of 5G wireless services will support new rate plans, new devices and new services. Growth of the internet of things sector will support regional

progress. Syracuse's Smart Cities solutions are a model that will create new growth opportunities.

Top Pressures/Trends

The cost of doing business in New York state and regulations like Net Neutrality that applies to ISPs and not edge providers (like Google, Amazon, Netflix, Facebook, etc.) creates an unequal playing field. As 5G technologies develop, companies and communities will need to keep pace with the real impact of those services and manage related data and information.

INNOVATION & TECHNOLOGY

“We will need younger staff to represent the latest technologies in our field; recruiting in CNY has been challenging.”

“Technology is the key for 2020. It will streamline workflow thus making us more efficient and successful.”

“As a digital business, platforms such as Facebook and Google are the definition of how we run our business; as these platforms make changes, they affect how we can help our clients.”



Credit: Density

- Customer and client demands/ preferences continue to drive the adaptation of technology investments for many organizations. Organizations have realized the need to adapt to customer preferences that revolve around digital platforms.
- Some organizations have embraced technology as a means to attract new clients.
- For many organizations, adopting new technology is burdensome, but required in order to stay relevant in the marketplace. Constantly evolving technology continues to be costly and time-consuming.



Credit: Rapid Response

WORKFORCE & TALENT

“[There is] high turnover and higher than normal recruiting and training costs due to compression of available skilled labor.”

“[The] availability of workforce is a state and national issue.”

“Our ability to provide services to our current and future clients is dependent on our ability to fill vacancies with highly qualified professionals.”

- Organizations continue to report difficulty finding key talent. There is a general sense that more needs to be done to recruit people to Upstate New York. This is the top noted trend/pressure faced by businesses this year.
- Some feel there needs to be funding allocated for training to up-skill and retain talent. Also, young people should be encouraged to look at trade opportunities if there is personal interest.
- One of the greatest challenges businesses say they face is finding new talent to replace those who have or plan to retire soon. Participants stated they are very concerned with the loss of experienced employees. Additionally, employers are nervous about the knowledge loss that will incur as staff retires. Many are hoping to develop strategies for “near retirement” staff that will help keep them engaged and allow for the transfer of their experience to the remaining workforce.

MARKET CONDITIONS & BUSINESS CLIMATE

“Our industry is ever-changing; in order to stay competitive we need to keep innovating.”

“We are always strategizing about new services to provide to clients and prospects, which takes time and financial resources.”

“Continuous improvement of our business methodologies is a critical differentiator for us, and goes hand-in-hand with our commitment to data-driven decision-making and technology solutions.”

“Organizational realignment will help us streamline operations to reduce overhead where possible.”

Local/Regional Economy

- Most businesses shared that they are experiencing a positive momentum. Additionally, businesses almost unanimously expressed a belief that the Central New York economy will be better in five years. Most believe that we are experiencing an upswing in the local economic environment.
- Cooperation and collaboration of local leaders supports economic progress.
- Businesses and organizations say they believe that growth is being spurred from initiatives already underway, including drone-related technology/services; the region’s focus on clean energy; technology infrastructure and building “smart city” interconnectivity; and the existing collaborations between education manufacturing to address workforce needs.
- Businesses and the community are adapting to a new economy base and this



has shifted perceptions about progress. The community is focused on encouraging new innovative entrepreneurial endeavors and this has helped create a reputation for the region of being very technology focused.

- CNY also has tapped into its high-quality natural resources, which supports agriculture-based industries such as hemp, micro-breweries, wineries, dairy and local farm-to-table products.

New Products/Services/ Business Methodologies

- Organizations are actively looking for ways to differentiate products and services to improve their competitive position in the market. This includes investments in

niche small business opportunities such as craft breweries and hemp production; collaborative workspaces; the entertainment and tourism industries; and existing building structures to re-purpose them into multi-use facilities.

- New business methodologies are seen as a critical component to an organization's success and ability to compete.
- Businesses see new product and service development primarily as an opportunity and critical component to support business growth.
- Organizations continue to look to diversify their revenue streams with new products and services as a way of protecting their cash flow and minimizing their vulnerability to rapidly changing markets.

Re-alignment and Collaboration

- Participants expressed the desire to have more local businesses be more engaged with each other and share "best practices."
- It was recognized that through collaboration, businesses can help each other be more comfortable in adopting continuous innovative practices.

- Strategic investments in organizational alignment are seen as an opportunity to improve overall efficiency. Participants felt that there are opportunities for local companies to share resources for back office operations.
- Some report being forced to re-align the organization due to an aging employee base.

Competition

- Overall, competition across industries is perceived as a continuing issue. For some, this provides a motivator, but for other organizations, increased competition is making growth difficult.



"As long as the local economy is strong our business will also be vibrant."

"Succession planning is tough; we have very talented partners retiring and we need to effectively transition that work and more importantly, the relationships, to younger partners."

"Increased local competition results in lower fees and slimmer operating margins as pressure mounts to win work in a competitive procurement setting."

"We continue to face competition in our industry. However, because of our partnerships we are in a great position to attain significant growth."

GOVERNMENT POLICY & REGULATORY ISSUES

“Local leaders working together will create economic growth for the region.”

“State mandated programs create undue burden for our operations.”

“As an MWBE, we benefit from NYS MWBE requirements and hopefully we will see an increase in these services.”

“Make imported goods more costly thereby decreasing volumes at the port = less jobs.”

“Decreased revenues for recovered metal and other recyclable materials.”

“Tariffs have already increased prices for some of our materials, which we then have to pass along to the customer.”

“New York state needs to focus on a better tax structure to retain businesses.”

Regulatory Requirements/Changes

- Organizations remain uncertain, as their daily business functions can be significantly impacted with pending or frequently changing legislation relevant to their industry. More staff time needs to be dedicated to these new requirements, with some organizations noting a lack of enforcement.
- Businesses continue to be concerned that new legislation may negatively impact the ability to attract and maintain top talent.
- There is an ongoing concern that 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 new organizations expanding within or coming to the state.
- Regulatory requirements and changes continue to create an opportunity

for business support vendors that help organizations adhere to state and federal regulations. In particular, MWBE businesses feel a positive impact from state regulation quotas for MWBE participation.

Impact of Tariffs

- The cost of materials and supplies across industries is rising, placing additional strain on already streamlined operational budgets, and creating a concern over reduced revenues.
- Tariffs, which make imported goods more costly, are expected to decrease port volumes and lead to fewer jobs.
- Tariffs are expected to result in increasing consumer prices across industries.

Political Landscape

- Business leaders continue to believe that cooperation among local and statewide

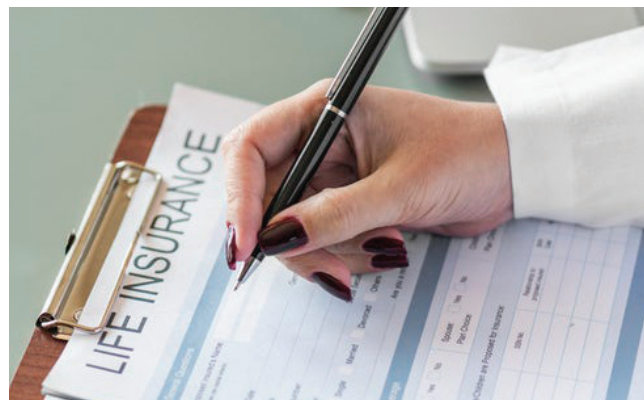


political leadership will be integral to the growth of the Central New York economy.

- Some organizations feel optimistic about local and federal political leaders working together to create economic growth.
- Organizations are concerned with political influence on budgets, particularly those that rely on federal and state funding to maintain operations. This also negatively impacts the ability of local businesses to compete with other regions and states.

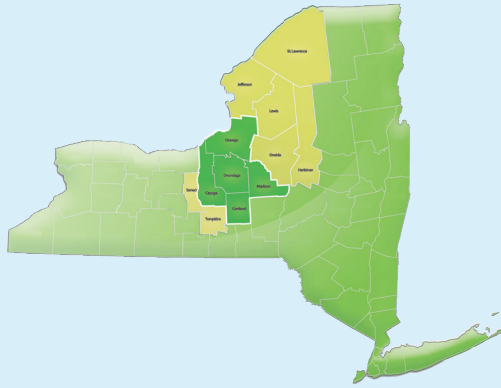
EMPLOYEE BENEFITS

- Employee benefits and costs was the second most commonly reported anticipated trend/pressure for organizations in 2020. Organizations continue to express concern over the expense of employee benefits, particularly health insurance.
- Some organizations expect a negative impact in profits and the ability to hire personnel as a result of the increase in cost for employee benefits and wages.
- Employee wage expectations continue to rise as the workforce continues to experience a shortage in skilled workers. This continues to put a strain on businesses as they find they need to offer higher salary packages to compete in the marketplace for top talent.



“The cost of health insurance continues to rise, and this has an impact on all aspects of our business and our clients.”

“Costs continue to rise, and employees are looking for raises to cover these raises in costs.”



The Region

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



Syracuse MSA* Employers Report Steady Hiring Expectations into 2020

Employers in the Syracuse MSA expect to hire at a favorable pace in Q1 2020. Among employers surveyed, 13% plan to hire more employees from January through March, according to ManpowerGroup’s latest Employment Outlook Survey. This number is offset by the 8% that plan to reduce payrolls, while 79% of employers expect to maintain current staff levels; 0% were unsure of their hiring plans. This yields a net employment outlook of 5%.

Compared to Q4 2019 when the Net Employment Outlook was 11%, Syracuse MSA employers have reported a weaker hiring pace. When looking at year-over-year expectations, hiring intentions have slowed down from when the Outlook was 11%.

	Increase Staff Levels	Decrease Staff Levels	Maintain Staff Levels	Don't Know	Net Employment Outlook
Q1 2020 (current)	14%	8%	79%	0%	5%
Q4 2019 (over previous quarter)	18%	7%	73%	2%	11%
Q1 2019 (year over year)	18%	7%	73%	2%	11%

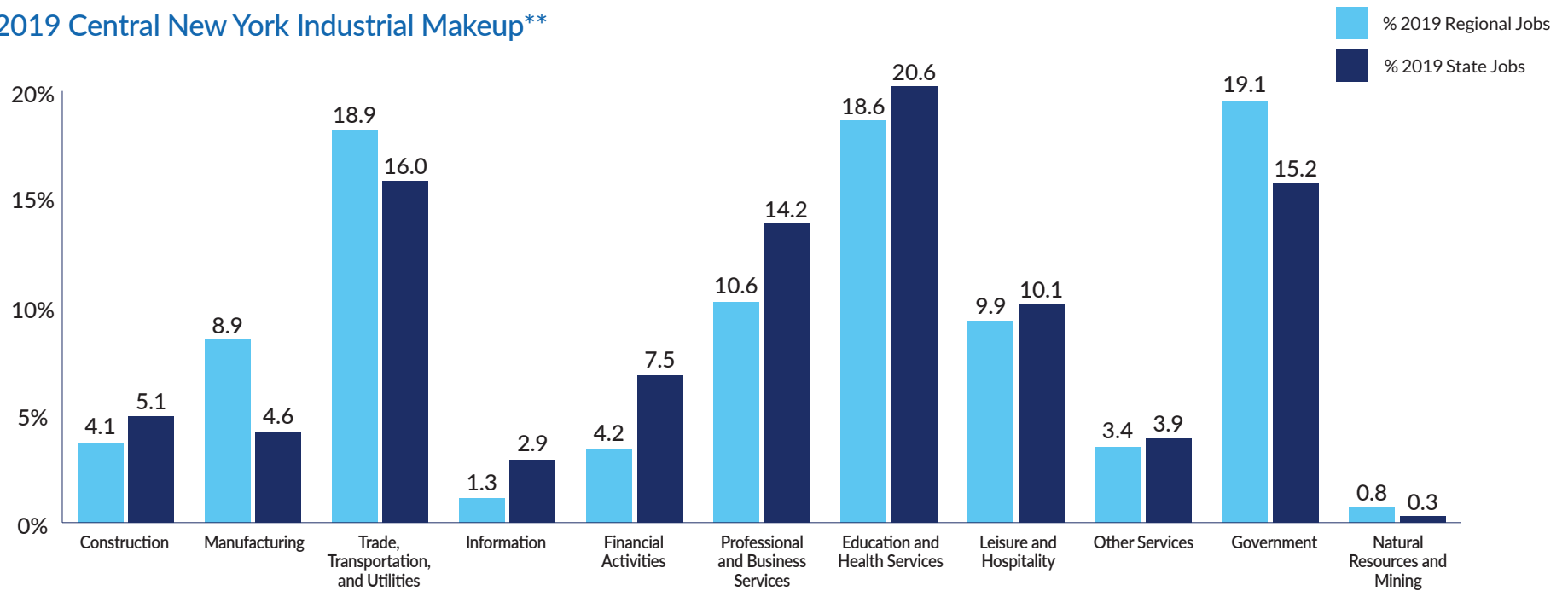
**The net Employment Outlook is derived by taking the percentage of employers anticipating an increase in hiring activity and subtracting from this the percentage of employers expecting a decrease in hiring activity.*

- For Q1 2020, employers are optimistic to hire in wholesale and retail trade; information, professional and business services; education and health services; leisure and hospitality, and other services.
- In contrast, local employers expect a decrease in payrolls in construction; durable goods manufacturing; transportation and utilities; and financial activities. Nondurable goods manufacturing and government job prospects remain unchanged.
- National results forecast stable hiring across the U.S. for Q1 2020, with an Outlook of +19%, down 1% year-over-year.

Source: ManpowerGroup Employment Outlook Survey, Syracuse MSA 2020

*The Syracuse MSA includes Madison, Onondaga and Oswego counties.

2019 Central New York Industrial Makeup**



	2019 (Q2) Regional Jobs	% Regional Jobs	2018 State Jobs	% State Jobs
Construction	14,416	4.1%	408,302	4.3%
Manufacturing	31,212	8.9%	439,013	4.6%
Trade, transportation and utilities	66,304	18.9%	1,536,829	16.0%
Information	4,452	1.3%	281,257	2.9%
Financial activities	14,649	4.2%	718,463	7.5%
Professional and business services	36,993	10.6%	1,365,597	14.2%
Education and health services	65,219	18.6%	1,982,670	20.6%
Leisure and hospitality	34,905	10.0%	971,403	10.1%
Other services	11,950	3.4%	971,403	3.9%
Government	66,820	19.1%	1,458,882	15.2%
Natural resources and mining	2,856	0.8%	31,364	0.3%

Source: NYSDOL QCEW, Central New York Region 2019 Q2

**Data represents five-county Central New York Regional Economic Development Council region: Cayuga, Cortland, Onondaga, Oswego and Madison counties.

2020 Thank You Forecasters*

Eric M. Alderman
Scratch Bakehouse

Tania Anderson
ARISE Child and Family Service, Inc.

Nathan Andrews
Morse Mfg. Co., Inc.

Cynthia Barnaby
Community Options, Inc.

Brian Bisaccio
Tompkins Trust Co.

Mike Brown
YMCA of Central New York

Roger Burdick
Drivers Village

Kristen Clark
The Bonadio Group

Mirco Coccoli
MPD Partners

David J. Constas
Just the Right Stuff

Calvin Corriders
Pathfinder Bank

Stephanie Crockett
Mower

Lou DeMent
Giovanni Foods

Nick Dereszynski
Brown & Brown Empire State

Crystal DeStefano
Strategic Communications, LLC

Chris Dugan
Knowles Precision Devices

Meghan Durso
Remedy Intelligent Staffing

Gregg Evans
The Bonadio Group

Lori Florack
Lifetime Benefit Solutions

Nancy Fox
CNY Arts Center, Inc.

Ralph F. Gaiss
*Northeast Equipment Dealers
Association, Inc. (NEDA)*

Keith George
Gaylord Bros., Inc.

Pennie L. Gorney
Dermody, Burke & Brown, CPAs, LLC

Gary Grossman
Grossman St. Amour CPAs, PLLC

Bob Haight
*Cortland County Chamber of
Commerce*

Ben Haith
GZA GeoEnvironmental

Earl R. Hall
Syracuse Builders Exchange

John H. Hamlin
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