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**Welcome to the BALCONY-Rochester
Breakfast Forum:**

BALCONY- ROCHESTER ACCESS FOR SMALL BUSINESS FORUM

Keynote Speaker: Congressman Chris Lee (NY-26)

Friday, February 19, 2010

Colgate Rochester, Crozer Divinity School, 1100 S. Goodman Street, Rochester, NY

FORUM TOPICS

How can my business SURVIVE the credit crunch ?

How can my business MAINTAIN a line of credit?

Where can my business FIND AFFORDABLE HEALTH INSURANCE for its employees?

How can my business AFFORD A PRESCRIPTION DRUG PLAN for my workers?

How can my business IMPROVE its marketing?

How can e-commerce EXPAND my business?

What CAN STATE and FEDERAL GOVERNMENT PROVIDE my business?

How can my business KEEP its CUSTOMERS and FIND NEW CUSTOMERS?



your bank





Health Care Pulse of New York Small Business

ALBANY, N.Y. (June 4, 2008) – A healthy majority of small businesses in New York believe that a public-private partnership is the best way to provide health insurance to their workers, according to a new survey **The Health Care Pulse of New York Small Business** issued today (Wednesday) by **BALCONY** – The Business and Labor Coalition of New York, the **American Cancer Society**, **AARP** and the **Small Business Majority**

At the same time, fully half of New York small businesses do not provide health insurance, and of those that do, a large number are cutting benefits or raising costs to employees to maintain some coverage.

The survey results indicate that:

- **Businesses believe health insurance is important in attracting and retaining quality workers.**
- **Businesses believe that they have a societal obligation to offer health insurance.**
- **Businesses DO NOT believe that a free market approach is the sole answer.**
- **Businesses are feeling the impact of the high cost of pharmaceuticals and health insurance.**

The Health Care Pulse of New York Small Business survey key findings are:

- **The vast majority (81%)** of small businesses agree that in order to make health care more affordable **it is important to share the responsibility for financing** it among individuals, employers and government.
- **1 out of 2 are in favor of requiring employers** who are not currently offering health insurance **to pay some amount for the employees health insurance** – 58% of those in favor say that 8% of payroll or more is an appropriate percentage.
- Most of the respondents (72%) **favor giving businesses the ability to simply pay a fee to a statewide pool** that would bargain down costs, and that would then provide coverage to the business's workers at favorable rates.
- **55% of those who offer health insurance agree that small businesses have a responsibility to offer health insurance** to their employees, compared to 17% who disagree.
- **61%** say that **it is unfair that employers who provide coverage have to compete with those who don't have employee health care costs**, and that requiring all employers to contribute to employee health coverage would help level the playing field.
- The overwhelming majority (85%) **agree that we need government to act as a watchdog** to protect businesses and consumers against big rate hikes and unfair practices by health insurance companies.
- **Almost unanimously, small businesses agree (91%) that the cost of prescription drugs is driving up the cost of health care**, and the vast majority thinks that hospitals and health care labor costs are making health coverage unaffordable.
- 1 out of 2 small businesses (49%) which responded to this survey **do not offer health insurance**, and the majority of them cite **affordability as the most important reason**.
- **To confront the rising cost of health insurance, small businesses indicated that they would consider taking action which could negatively impact employees**, such as changing to a high-deductible plan (29%), reducing benefits offered through the plan (26%), and/or introducing or increasing employee contributions (26%).

The Health Care Pulse of New York was analyzed and written by Eleni Delimpaltadaki, director of research of **BALCONY**, and John Arensmeyer of the Small Business Majority. The telephone survey of 409 New York State businesses, conducted from April 21 to May 12, 2008, focused on businesses with fewer than 500 employees. In April and May 2008 **BALCONY**, the Business and Labor Coalition of New York, **Small Business Majority (SBM)**, the **American Cancer Society (ACS)** and **AARP** conducted a scientific survey of small businesses across New York State. The survey examines New York State small business attitudes towards health care reform. It also measures how New York's entrepreneurs feel about health care costs and the popularity of various options to reform the health care insurance system which have been circulating in Albany and elsewhere in the United States.



BALCONY- ROCHESTER ACCESS FOR SMALL BUSINESS AGENDA

M.C. - Lou Gordon, Director, BALCONY

8:00 AM- 8:30 AM - Registration & Breakfast

- Small Business Expo Networking
- Welcome- **Tom Gillett**, Director BALCONY Rochester, NYSUT

8:30 AM - 9:20 AM - Access to Health Care Panel

- **Panel Moderator: Lou Gordon**, Director, BALCONY
- Eileen Wolff, Regional Director of Strategic Health Initiatives, American Cancer Society
- Ben Geyerhahn, New York Project Director, Small Business Majority
- Jim Bertolone, President, Rochester and Genesee Valley Area Labor Federation
- Dave J. Mack, Senior Vice President/ Corporate Relations, The Lifetime Healthcare Companies, Excellus

9:20 AM- 10:00 AM- Keynote Speaker

- **Introduction by Hillary Clarke**, Regional Advocacy Director, American Cancer Society
- Congressman Chris Lee (NY-26), The Challenges Facing Small Business and the Federal Response

10:00 – 10:10 AM- Coffee Break

10:10 AM- 11:00 AM – Access to Business Development and Capital Panel

- **Panel Moderator: Lou Gordon**, Director, BALCONY
- Malcolm Richards, Rochester Branch Manager, U.S. Small Business Administration
- Darlene M. Anthopoulos, Vice President, RBS Citizens Bank
- Jeffrey Barker, Vice President Commercial Services, Canandaigua National Bank & Trust

11:00 AM- 11:50 AM- Access to Technology Solutions

- **Panel Moderator: Lou Gordon**, Director, BALCONY
- Paul Bornemann, VP of Consulting Services, Entre Computer Services
- Jim Bartolotta, Chief Executive Officer, Pulse Marketing Group
- Marquett Smith, President, Upstate New York Region for Verizon Wireless
- Matt Fregoe, District Manager, H&R Block

11:50 AM- Noon Closing Network Reception

- **Closing Remarks by Tom Gillett**, Co- Director, BALCONY Rochester, Regional Staff Director, NYSUT

FORUM COMMITTEE

- Lou Gordon, Director, BALCONY
- Tom Gillett- Co-Director BALCONY Rochester, Regional Staff Director, NYSUT
- Hillary Clarke Regional Advocacy Director and Federal Issues Manager
Eastern Division American Cancer Society
- Mike Leary - Sr. VP of Administration, Rochester Primary Care Network
- James Nofziger, Coordinator BALCONY-Rochester
- Allison Hirsch, Activities Coordinator & Program Designer, BALCONY
- Kevin R. Weaver, Webmaster, BALCONY

Special Thanks to Astoria Graphics for donation of the forum program



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I N C O R P O R A T E D

PANELIST BIOGRAPHIES

8:30 AM- 9:20 AM- Access to Health Care

Eileen Wolff

Regional Director of Strategic Health Initiatives, American Cancer Society

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www.cancer.org



Eileen Wolff is the regional Director of Strategic Health Initiatives for the American Cancer Society. She is responsible for the planning and strategic integration of prevention and detection initiatives into worksite, community and health care systems. In this capacity, Eileen has worked with local businesses and hospitals on implementation of tobacco policies and development of wellness programs aimed at improving employee health.

In 2008, Eileen received accreditation as a Certified Wellness Program Coordinator through the National Wellness Institute, and in 2009 became a Certified Wellness Program Manager.

Ben Geyerhahn

New York Project Director, Small Business Majority

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www.smallbusinessmajority.org



Ben Geyerhahn, Small Business Majority's New York project director, is a seasoned political strategist and policy analyst with extensive experience in healthcare issues. He has worked with the organization for more than five years.

Since 2008, Ben has been responsible for building a Small Business Majority presence in New York State. He has significantly advanced the organization's top state-level policy priority, the expansion of Family Health Plus to the small group market. Working with a coalition of partners that includes both Health Care for All New York and the National Federation of Independent Businesses, Ben has helped prod the State of New York toward issuing a plan that will provide high-quality, low-cost health insurance to New York's small business community. Ben is also a founder and partner of Hudson TG, a New York political consulting and strategy firm. Founded in 2007, the firm works with a diverse array of clients, including candidates for public offices, nonprofits and corporate entities, on healthcare and other public policy issues. Ben has participated in a number of healthcare panels and other events, focusing on the small business perspective on healthcare reform.

Jim Bertolone

President, Rochester & Genesee Valley Area Labor Federation

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Jim Bertolone, is local and regional leader of organized labor. He serves as President of the Rochester and Genesee Valley Labor Federation representing 160 Unions and their 100,000 Union members in eleven counties since 2000. He is President of the Rochester and Vicinity Labor Council that represents 100 Unions and their 60,000 Union members in Monroe County since 1998. Jim has also been President of the American Postal Workers Union (APWU) Local 215 for the Greater Rochester Area for nearly twenty years. In addition, he also serves on the Executive Council of the New York State AFL-CIO and the Board of Directors for the New York State Workforce Development Institute. In his various capacities Jim has negotiated labor contracts for more than thirty years and has a voice in local and regional labor policy.

Dave J. Mack

**Senior Vice President/ Corporate Relations,
The Lifetime Healthcare Companies, Excellus**

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David J. Mack is senior vice president / corporate relations of The Lifetime Healthcare Companies, parent organization of Excellus BlueCross BlueShield. Dave joined the company in 1997 after a 34-year career in newspapers. He started as a copyboy during high school and ended as president and publisher of the Gannett Rochester Newspapers from 1990 to 1997. He served in state government from 1978 to 1980 as public information director of the Department of Social Services. A lifelong resident of Upstate New York, Dave earned a bachelor's degree in English from the University of Rochester. He has served as an officer or director of numerous state and local not-for-profit organizations.

9:20 AM- 10:00 AM - Keynote Speaker

Congressman Chris Lee

www.chrislee.house.gov



Chris Lee brings to Washington two decades of experience in the private sector, where he gained a first-hand understanding of the tough decisions businesses face every day and helped create hundreds of good-paying jobs for Western New Yorkers. This is his first term representing New York's 26th Congressional District. Chris's priorities in Congress include strong constituent service, putting Western New Yorkers back to work, holding Washington accountable for every dollar it spends, and seeking out long-term solutions for our energy and health care challenges. A day after being sworn-in, Chris was appointed by House leaders to serve on the influential House Committee on Financial Services. Congressman Lee fought for a seat on the sought-after panel to ensure Western New Yorkers were represented on the front lines of efforts to create jobs, protect taxpayers, aid homeowners and right our economy.

10:10 AM- 11:00 AM- Access to Business Development and Capital

Malcolm Richards

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Branch Manager, U.S. Small Business Administration

www.sba.gov



Malcolm Richards, Rochester branch manager oversees branch personnel and operations while also focusing on small business lending, outreach and commercial development. Richards has worked in the private sector primarily in commercial banking focusing on lending, credit and strategic planning. He has over 16 years professional experience working with small businesses and 10 years management experience. He graduated with a BSc and MA degrees.

Darlene M. Anthopoulos

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Vice President, RBS Citizens Bank

www.citizensbank.com



Darlene has over thirty years of banking experience in the Rochester area. All of these years were with Citizens Bank and their predecessors. She currently manages the Business Banking Department for Rochester and outlying areas. Her expertise with business owners in the revenue range of one to five million dollars allows her to effectively manage her team of six business banking officers. As a trusted advisor, she is able to build relationships and help local business owners improve cash flow, make and save money while growing their businesses to profitable levels. Darlene takes an active part in participating in the banks community outreach by providing financial education to local elementary students within the City of Rochester, as well as encouraging her colleagues to do the same.

Jeffrey Barker

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Vice President Commercial Services, Canandaigua National Bank & Trust

www.cnbank.com



Your Financial Professional

Mr. Barker has 25 years of banking experience. He joined CNB as a Commercial Loan Officer in 2004 after holding commercial lending positions at First National Bank of Rochester and M&T Bank. He started his career at Central Trust Co. in 1985 in the Retail Collections Department before joining the Commercial Credit department in 1986. Since then he has held a variety of positions providing commercial services to small and middle market companies in the Greater Rochester area.

Professional and Civic Affiliations

Catholic Family Center of Rochester – Finance Committee Member; past Finance Committee Chairman and board member

Fairport Soccer Club/Fairport Cheerleading Booster Club - Volunteer

Risk Management Associates – former Chapter and Group President

American Lung Association – former Board Member and past Board President

11:00 AM- 11:50 AM- Access to Technology Solutions

Paul Bornemann
VP of Consulting Services, Entre Computer Services

pbornemann@entrecs.com
www.entrecs.com



Paul joined Entre in 2001 in the role of Chief Technologist where his focus was on defining technical direction for the company, and its customers as well as managing large projects. Today, in his role as Vice President of Consulting Services, he leads our IT consulting practice. That practice spans multiple professional services including consulting CIO/CTO, strategic planning, project-management, disaster recovery, application implementation, and IT best practice auditing. In all cases, the alignment of technology-based solutions with business goals is the focus of Paul and his consultant staff. Paul's expertise and training spans several areas and diverse technologies including: Health Information systems best practices, Alignment of Information Technology with Strategic Objectives, Information Systems Service Management, Regulatory compliance, Business Continuity/Disaster Recovery Planning, Project Management, Business Process Optimization, Information Systems Product Selection, Application/Infrastructure Design and Management of Implementation. Paul brings 29 years of information systems experience to our clients. He has worked at and with numerous local and global companies such as Bausch & Lomb, Eastman Kodak, Xerox, CTG Global Consulting, Unity Health, University of Rochester Medical Center, and Energy East.

Jim Bartolotta
Chief Executive Officer, Pulse Marketing Group

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www.pulsemarketinggroup.com



Jim Bartolotta is Chief Executive Officer of Pulse Marketing Group in Fairport, N.Y., overseeing all agency management, marketing, and advertising activities. Prior to founding PULSE, Jim served as Vice President and Operations Manager of a **local marketing company**. In his 13 years, Jim was largely responsible for **the company's** increase in sales and name recognition in over 42 States and Canada. Jim is an active Fairport Rotarian and Board Member for Bristol Harbour HOA and the Advertising Council of Rochester. He is also married with two sons, and spends his leisure time running, golfing, boating, and fly fishing.

Marquett Smith
President – Upstate New York Region for Verizon Wireless

Contact: Susan.Poulter@VerizonWireless.com
www.verizonwireless.com



Marquett Smith is president – Upstate New York Region for Verizon Wireless, where he is responsible for the company's sales, marketing and customer service throughout Upstate New York. Before this assignment, Marquett was vice president - customer service operations for Verizon Wireless, overseeing the company's national customer service operations. Previously, Smith served as director of store sales & operations, where he oversaw Verizon Wireless' network of more than 100 company-owned Verizon Wireless Communications Stores in the Washington D.C. , Baltimore and Virginia markets. Prior to that, he served as director of Verizon Wireless' customer service center in Laurel , MD. Smith began his career in 1985 with Sprint in Reston , VA and held a series of executive positions of increasing responsibility in service and sales with America Online, Cybercash and Interliant. Smith received a Bachelor of Science degree in Marketing from Radford University and completed the Executive Management

Program at MIT Sloan School of Management

FORUM COMMITTEE

Lou Gordon
Director, BALCONY

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Lou Gordon is the founding director of BALCONY, the Business and Labor Coalition of New York, www.balconynewyork.com since its inception in 2006. He has successfully built BALCONY from a small start up to a coalition that represents more than 1000 New York State business, major labor unions, advocacy organization and non profits. Gordon has directed the BALCONY efforts regarding the Partnership for Coverage initiative of the New York State Insurance Department and the New York State Department of Health as well as other forums and initiatives of the organization.

Jim Nofziger
Coordinator, BALCONY Rochester

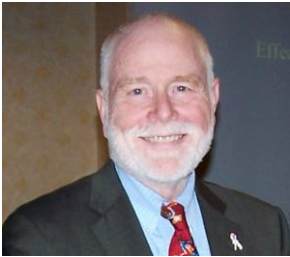
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Jim has focused 25 years of professional work on improving the system of health care in Upstate New York. Jim joined Excellus, Inc. as a Health Care Information Analyst in 1988 where he specialized in data systems management and the analysis of health care utilization and quality performance. In 2006 Jim directed his skills and time to support family and to advocate for health care system reform. Presently Jim is a Coordinator for the Rochester Chapter of BALCONY and works with business, labor, government and community partners to find common ground for valuable solutions to the demands of our upstate economic environment

Tom Gillett
Director BALCONY Rochester

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Thomas Gillett is currently the Regional Staff Director for the Rochester office of the New York State United Teachers (NYSUT/AFT/NEA). NYSUT provides a variety of services to more than 100 local affiliates here in the greater Rochester area. For more than twenty years, he served as 1st Vice President and chief negotiator for the Rochester Teachers Association, Local 616, during which time he negotiated dozens of contracts for the RTA bargaining units including the landmark 1987 teachers' contract. Gillett serves on several local boards and commissions including the United Way Campaign Cabinet and the Finger Lakes Health Systems Agency's 2020 Commission. He is secretary-treasurer of the Rochester and Genesee Valley Area Labor Federation, AFL-CIO.

Hillary Clarke
Regional Advocacy Director and Federal Issues Manager, American Cancer Society

Hillary.Clarke@Cancer.org



Hillary Clarke is the American Cancer Society's Regional Advocacy Director for the Lakes and Western regions of New York, and Federal Issues Manager for the Eastern Division. As such, she works with American Cancer Society volunteers, staff and cancer survivors to promote legislation at the local, state and federal level to reduce the burden of cancer. Before coming to the American Cancer Society in October of 1999, Hillary worked for the tobacco control program at Roswell Park Cancer Institute in Buffalo. She has an undergraduate degree from the Pennsylvania State University, and a law degree from the University of Maryland.

Mike Leary
Sr. VP of Administration, Rochester Primary Care Network

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Mike Leary, Senior Vice President of Administration for the Rochester Primary Care Network (RPCN), has worked to provide medically underserved patients with access to vital health services for over 14 years. He served on the advisory boards of the Genesee Health Service, Northeast Health Services and Clinton Family Health Center. He also served on the board of directors of Rochester Primary Care Network in the capacities of Board Chair and Treasurer. In 2008, he accepted a position on RPCN's staff, leading its business development and regulatory efforts to become a direct provider of primary care services. Mike also brings extensive experience in business aspects of telecommunications and information technology to his role at RPCN, providing insight and leadership on projects such as implementation of an electronic health record and wide area networking for its health centers.



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Canandaigua National Bank & Trust



Saratoga Capital Management



BALCONY, the Business and Labor Coalition of New York, represents more than 1,000 New York businesses, labor unions, and trade associations. BALCONY seeks common ground in the public policy debate in New York to spur economic development through the adoption of business/union friendly, socially responsible common sense laws that maintain and improve the quality of life for working New Yorkers.

BALCONY is a 501C4 Contributions are not tax deductible