

LONG ISLAND CENTER FOR SOCIO-ECONOMIC POLICY

STATE OF LONG ISLANDS AGRICULTURAL SECTOR

**PREPARED FOR
THE LONG ISLAND FARM BUREAU**

**PREPARED BY
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ABSTRACT

The purpose of this study is to evaluate the current and future needs of Suffolk County's agriculture sector and its economic impact on the Suffolk County economy. The benefit of this study is that it will identify the needs of Long Islands agriculture community and the agencies that support them in development, training and financing opportunities to serve those businesses, agencies, individuals and families.

This study examines the needs of the agriculture economic sector, how they view the current and future Long Island economy, the challenges that they currently face, and the challenges that they believe they will have to confront in the future. The includes business strategies and financial resources to improve their operations, impediments to growth, regulatory agencies and regulations that adversely impact operations, best management practices to decrease nitrogen or pesticide loading, whether succession plans are in place providing for the continuous use of farmland for agriculture production and for land preservation, the contraction and expansion of their industry sector, finding qualified employees, importance of workforce development, and dependence on changing technology.

Also examined were the relationships in the Long Island agriculture sector between annual gross revenues, number of employees, importance of technology innovation, importance of qualified employees, importance of workforce development, and whether operations will close in five years.

Determined was how Long Island agriculture sector's gross revenues, number of employees, technology innovation predict that operations will close in five years.

INTRODUCTION

Since the earliest days of Long Island's settlement more than 300 years ago, agriculture has been an important industry, providing fresh vegetables and fruit, fiber, seafood, poultry, and a variety of horticultural products for our residents. Today's farming activities help preserve Long Islands wildlife habitats, water supply, and natural aesthetic beauty, with farmland providing a buffer against housing sprawl helping to maintain the traditional rural character Long Island's East End.

Farming is also an economic force with Agri-businesses employing well over 10,000 people in the region, with a multiplier effect that generates thousands more jobs. Long Island agriculture is a billion-dollar-a-year industry and generates billions of dollars more for the Long Island's tourism, travel, and hospitality industry.

Long Island agriculture provides visitors and residents with scenic vistas, farm markets, and locally produced fruits, vegetables, poultry, fish, flowers, herbs, specialty products, ornamental horticultural products, and the best varieties of wine from more than two dozen local wineries.

With excellent, well drained soils, more sunshine than any other area in New York State, abundant fresh water and nearness to wholesale and retail markets, Long Island is one of the most important agricultural regions in the state. Suffolk County is New York's leading county in the wholesale dollar value of local agricultural products.

The purpose of this study conducted by the Long Island Farm Bureau is to evaluate the current and future needs of Suffolk County's agriculture sector and its economic impact on the Suffolk County economy. The benefit of this study is that it will identify the needs of Long Islands agriculture community and the agencies that support them in development, training and financing opportunities to serve those farms, businesses, agencies, individuals and families.

PURPOSE OF THE STUDY

The purpose of this study is to identify the development, training and financing needs of the farms comprising Long Island's agriculture sector necessary to sustain their current and future business operations, and employment levels.

This study examined the relationships between agricultural operations and their size, years operated on Long Island, annual gross revenues, increase or decrease in gross revenues, employees, and increase or decrease in employees.

Also examined were the relationships of the farms and the importance of raising capital; banking relationships; the importance to their businesses of government, taxes and regulations; expanding business offering, identifying new markets, and the ability to compete in the global market; finding qualified employees and investment in workforce development; and their current view of the future of their farms, Long Island's economy and the agriculture sector.

The benefit of this study is that it will provide an opportunity for the Long Island Farm Bureau to self-assess its' strategic plan and subsequently develop its economic development plan and associated legislative priorities that will assist the growth of Long Island's agriculture sectors. Participation in this study involved no risks, with responses confidential and anonymous

RESEARCH QUESTIONS

The following research questions guided this study.

Research Question One

For the total of returned surveys of the Long Island agriculture sector, what were the agriculture sector of the farms, their sizes, the years operated on Long Island, annual gross revenues, increase or decrease in gross revenues, employees, and increase or decrease in employees.

Also examined were the importance of technology, finding qualified employees, investment in workforce development; having succession plans in place providing for the continuous use of farmland for agriculture production and for land preservation; and their current view of the future of their farms, Long Island's economy and the agriculture sector.

Research Question Two

For the agricultural sector respondents what was the importance of raising capital; their banking relationships; the shortage of labor, the importance to their operations of government, taxes and regulations; expanding business offering, identifying new markets, wildlife damage, minimum wage, the ability to compete in the global market; finding qualified employees, investment in workforce development, and the use of best management practices to decrease nitrogen or pesticide loading.

Research Question Three

What were the relationships in the Long Island agriculture sector between annual gross revenues, number of employees, importance of technology innovation, importance of qualified employees, importance of workforce development, and whether their operations will close in five years?

Research Question Four

How did Long Island agriculture sector's gross revenues, number of employees, technology innovation predict whether operations will close in five years?

RESEARCH DESIGN AND METHODOLOGY

The Setting

This study examined Long Island farms in the agriculture industry. The 609 purposely selected population in the sample were from the membership of the Long Island Farm Bureau and represented all regular members of the Long Island Farm Bureau including farms, farm owners and farm managers

Selection and Description of Subjects

Six hundred and nine surveys were sent by U. S. Mail during September 2017 to the 609 selected owners and managers of the purposefully selected farms. Of the 609 purposely selected farms, 109 surveys were completed and returned, of which 106 (97.2 percent) agriculture and 3 (2.8 percent) were aquaculture.

Data Gathering Techniques

All survey respondents and their specific responses were kept confidential. The relationships between the farms, their size, the years operated on Long Island, annual gross revenues, increase or decrease in gross revenues, employees, and increase or decrease of employees were ascertained by way of a survey that was distributed by U.S. Mail during September 2017 (Appendix).

Other variables for the agricultural sector respondents ascertained by the survey were the importance of raising capital; their banking relationships; the importance to their business of government, taxes and regulations; expanding business offering, identifying new markets, the ability to compete in the global market, finding qualified employees, and investment in workforce development, and their current view of the future of their farms, Long Island's economy, and the agriculture sector.

Included with the mailed survey packet to the owners and operators of the purposefully selected sample of 609 farms was a letter from Long Island Farm Bureau Administrative Director Robert Carpenter and Director of Public Policy Jessica Anson asking them in for their assistance and instructions on how to complete the survey. The letter of invitation to participate explained the guarantee of confidentiality and anonymity. The survey was individually addressed with preprinted labels addressed to the farm owners and managers of the purposefully selected farms with a self-addressed return envelope to LIFB economic consultant Dr. Martin R. Cantor, CPA.

Instrumentation

A survey (Appendix A) gathered data from 109 owners and managers of the purposefully selected sample of farms. A six-point Likert Scale was used by respondents to report their business practices and strategies. The Likert Scale for all items was 1=Strongly Disagree, 2=Disagree, 3=Somewhat Disagree, 4=Somewhat Agree, 5=Agree, and 6=Strongly Agree.

The survey was comprised of two parts. Part one consisted of 10 questions designed to obtain from survey respondents the importance of finding qualified employees, investment in workforce development and technology; succession plans, land preservation programs, and their current and future view of their operations and of Long Island's economy and agriculture sector.

Part 2 consisted of ten parts designed to obtain how long survey respondents have operated on Long Island, size of their farm, their annual gross revenues, increase or decrease in gross revenues, employees, increase or decrease in employees; the importance of labor, raising capital; their banking relationships; the importance to their businesses of government taxes and regulations, wildlife damage, minimum wage, expanding business offerings, identifying new markets, and best management practice to decrease nitrogen or pesticide loading.

Research Question One

For the total of returned surveys of the Long Island agriculture sector, what were the agriculture sector of the farms, their sizes, the years operated on Long Island, annual gross revenues, increase or decrease in gross revenues, employees, and increase or decrease in employees.

Also examined were the importance of technology, finding qualified employees, investment in workforce development; having succession plans in place providing for the continuous use of farmland for agriculture production and for land preservation; and their current view of the future of their farms, Long Island’s economy, and the agriculture sector.

Descriptives of Survey Respondents

Six hundred and nine surveys were distributed by U. S. Mail during September 2017 to the selected owners and managers of purposefully selected farms. Of the purposely selected farms, Table 1 indicates that 109 surveys were completed and returned (17.9 percent of total mailed) and of the 109 completed surveys 106 (97.2 percent) were agriculture and 3 (2.8 percent) were in aquaculture.

Table 1: Farming Sector

	Frequency	Percent	Valid Percent	Cumulative Percent
1	106	97.2	97.2	97.2
2	3	2.8	2.8	100.0
Total	109	100.0	100.0	

Note: (1) Agriculture; (2) Aquaculture

Of the 109 surveys returned, Table 2 indicates that 105 or 96.3 percent reported the size of their farm of which 59 or 56.2 percent had farms of less than 60 acres and 46 or 43.8 percent had farms of more than 60 acres.

Table 2: Owned or Leased Farm Acreage

	Frequency	Percent	Valid Percent	Cumulative Percent
1	59	54.1	56.2	56.2
2	46	42.2	43.8	100.0
Total	105	96.3	100.0	
No Reply	4	3.7		
Total	109	100.0		

Note (1) Less than 60 Acres; (2) More than 60 Acres

Of the 105 respondents answering how many years they farmed on Long Island, Table 3 indicates that the median years farmed were 31 years, with the average years farmed of 41 years.

Table 3: Years Farmed on Long Island

	Frequency	Percent	Valid Percent	Cumulative Percent
3	2	1.8	1.9	1.9
7	2	1.8	1.9	3.8
8	1	.9	1.0	4.8
10	2	1.8	1.9	6.7
14	1	.9	1.0	7.7
15	4	3.7	3.8	11.5
16	2	1.8	1.9	13.5
17	1	.9	1.0	14.4
19	1	.9	1.0	15.4
20	9	8.3	8.7	24.0
21	1	.9	1.0	25.0
22	2	1.8	1.9	26.9
24	1	.9	1.0	27.9
25	5	4.6	4.8	32.7
26	1	.9	1.0	33.7
27	1	.9	1.0	34.6
28	3	2.8	2.9	37.5
30	12	11.0	11.5	49.0
31	1	.9	1.0	50.0
32	1	.9	1.0	51.0
33	1	.9	1.0	51.9
34	1	.9	1.0	52.9
35	3	2.8	2.9	55.8
36	1	.9	1.0	56.7
38	1	.9	1.0	57.7
40	5	4.6	4.8	62.5
45	3	2.8	2.9	65.4
47	1	.9	1.0	66.3
48	2	1.8	1.9	68.3
50	12	11.0	11.5	79.8
54	1	.9	1.0	80.8
55	1	.9	1.0	81.7

58	1	.9	1.0	82.7
60	2	1.8	1.9	84.6
63	1	.9	1.0	85.6
65	1	.9	1.0	86.5
67	1	.9	1.0	87.5
70	1	.9	1.0	88.5
71	1	.9	1.0	89.4
75	2	1.8	1.9	91.3
80	2	1.8	1.9	93.3
90	2	1.8	1.9	95.2
95	2	1.8	1.9	97.1
109	1	.9	1.0	98.1
125	1	.9	1.0	99.0
301	1	.9	1.0	100.0
Total	104	95.4	100.0	
No Reply	5	4.6		
Total	109	100.0		

2016 Revenues, Employees and Growth from 2015 and 2010

Tables 4, 4.1 and 4.2 illustrate the revenue and revenue growth of responding farms between 2010 and 2016. Table 4 indicates 62.6 percent of the 99 responding farms reported that their 2016 gross revenues were less than \$1 million, 32.3 percent were between \$1 and \$3 million, and 5.1 percent were more than \$3 million.

Table 4: Gross Revenues for 2016

	Frequency	Percent	Valid Percent	Cumulative Percent
1	62	56.9	62.6	62.6
2	32	29.4	32.3	94.9
3	5	4.6	5.1	100.0
Total	99	90.8	100.0	
No Reply	10	9.2		
Total	109	100.0		

Note: (1) Less than \$1 Million; (2) Between \$1 and \$3 Million; (3) More than \$3 Million.

Table 4.1 indicates that 57.5 percent of respondents reported that their 2016 gross revenues increased from 2015 as compared to 11.5 percent with no change with 31 percent decreasing.

Table 4.1: 2016 Gross Revenue Increase/Decrease from 2015

	Frequency	Percent	Valid Percent	Cumulative Percent
0	10	9.2	11.5	11.5
1	50	45.9	57.5	69.0
2	27	24.8	31.0	100.0
Total	87	79.8	100.0	
No Reply	22	20.2		
Total	109	100.0		

Note (0) No Change; (1) Increase; (2) Decrease

Table 4.2 illustrates that 67.9 percent of respondents reported that their 2016 gross revenues increased from 2010 as compared to 12.3 percent with no change, with 19.8 percent decreasing. Comparing the data in Table 4.2 with Table 4.1 indicates that more farms generated greater revenue between 2010 and 2015.

Table 4.2: 2016 Gross Revenues Increase/Decrease from 2010

	Frequency	Percent	Valid Percent	Cumulative Percent
0	10	9.2	12.3	12.3
1	55	50.5	67.9	80.2
2	16	14.7	19.8	100.0
Total	81	74.3	100.0	
No Reply	28	25.7		
Total	109	100.0		

Note (0) No Change; (1) Increase; (2) Decrease

2016 Employees and Employee Growth from 2015 and 2010

Tables 5, 5.1, and 5.2 Illustrate the 2016 employee levels and whether those levels increased from 2015 and 2010. Table 5 illustrates that respondents reported 2016 employee levels of between none and 400 with the median employee level of six employees and an average employee level of 25.

Table 5: 2016 Employees

	Frequency	Percent	Valid Percent	Cumulative Percent
0	8	7.3	7.9	7.9
1	7	6.4	6.9	14.9
2	11	10.1	10.9	25.7
3	7	6.4	6.9	32.7
4	10	9.2	9.9	42.6
5	2	1.8	2.0	44.6
6	6	5.5	5.9	50.5
7	1	.9	1.0	51.5
8	4	3.7	4.0	55.4
9	1	.9	1.0	56.4
10	3	2.8	3.0	59.4
11	3	2.8	3.0	62.4
12	4	3.7	4.0	66.3
13	1	.9	1.0	67.3
14	1	.9	1.0	68.3
15	5	4.6	5.0	73.3
17	1	.9	1.0	74.3
18	1	.9	1.0	75.2
20	2	1.8	2.0	77.2
21	1	.9	1.0	78.2
23	1	.9	1.0	79.2
24	1	.9	1.0	80.2
25	1	.9	1.0	81.2
26	1	.9	1.0	82.2
28	1	.9	1.0	83.2
30	3	2.8	3.0	86.1
40	1	.9	1.0	87.1
45	1	.9	1.0	88.1
55	1	.9	1.0	89.1
60	1	.9	1.0	90.1
75	1	.9	1.0	91.1
80	2	1.8	2.0	93.1
82	1	.9	1.0	94.1
110	1	.9	1.0	95.0
120	1	.9	1.0	96.0

170	1	.9	1.0	97.0
250	1	.9	1.0	98.0
300	1	.9	1.0	99.0
400	1	.9	1.0	100.0
Total	101	92.7	100.0	
No Reply	8	7.3		
Total	109	100.0		

Tables 5.1 and 5.2 illustrate the employee growth during the period between 2010 and 2016. Table 5.1 reflects that 40.3 percent of respondents reported that their 2016 employee levels increased from 2015, however 59.7 percent of respondents reported no change (33.3 percent) and an employee level decrease (26.4 percent).

Table 5.1: 2016 Employees Increase/Decrease from 2015

	Frequency	Percent	Valid Percent	Cumulative Percent
0	29	26.6	33.3	33.3
1	35	32.1	40.3	73.6
2	23	21.1	26.4	100.0
Total	87	79.8	100.0	

Note (0) No Change; (1) Increase; (2) decrease

Table 5.2 indicates that when the period of employee growth is expanded to between 2016 and 2010, 48.8 percent of respondents reported employee growth from 2010 as compared to the 40.3 percent reporting employee growth between 2015 and 2016 with respondents reporting no change between 2015 and 2016 greater than between 2010 and 2016.

Table 5.2: 2016 Employees Increase/Decrease from 2010

	Frequency	Percent	Valid Percent	Cumulative Percent
0	20	18.3	23.8	23.8
1	41	37.6	48.8	72.6
2	23	21.1	27.4	100.0
Total	84	77.1	100.0	
No Reply	25	22.9		
Total	109	100.0		

Note (0) No Change; (1) Increase; (2) Decrease

**Long Island Farms and the Current and Future Long Island Agricultural Economy:
Concern for the Agricultural Economy but Positive About Long Island Farming**

Tables 6, 7, and 8 illustrate how farm owners and managers feel about Long Island’s agriculture economy and the future of their farming on Long Island. Tables 6 and 7 reflect that equivalent respondents (7.5 percent) strongly disagreed that the agriculture economy had improved during the past year and would improve over the next five years, while an aggregate of 53.7 percent in Table 6 and 58.5 percent in Table 7 included those who somewhat agreed and somewhat disagreed.

Table 6: Agriculture Economy Has Improved During Past Year

	Frequency	Percent	Valid Percent	Cumulative Percent
1	8	7.3	7.5	7.5
2	15	13.8	14.2	21.7
3	24	22.0	22.6	44.3
4	33	30.3	31.1	75.5
5	20	18.3	18.9	94.3
6	6	5.5	5.7	100.0
Total	106	97.2	100.0	
No Reply	3	2.8		
Total	109	100.0		

Note:(1) Strongly Disagree; (2) Disagree; (3) Somewhat Disagree; (4) Somewhat Agree
(5) Agree; (6) Strongly Agree

Table 7: Agriculture Economy Will Improve Over Next Five Years

	Frequency	Percent	Valid Percent	Cumulative Percent
1	8	7.3	7.5	7.5
2	14	12.8	13.2	20.8
3	30	27.5	28.3	49.1
4	32	29.4	30.2	79.2
5	14	12.8	13.2	92.5
6	8	7.3	7.5	100.0
Total	106	97.2	100.0	
No Reply	3	2.8		
Total	109	100.0		

Note:(1) Strongly Disagree; (2) Disagree; (3) Somewhat Disagree; (4) Somewhat Agree
(5) Agree; (6) Strongly Agree

Table 7 reflects that respondents were evenly split about whether Long Island’s agricultural economy will improve over the next five years with a total of 49.1 percent strongly disagree to somewhat disagree as compared to a total of 50.9 percent somewhat agreeing to strongly agreeing.

While respondents in Tables 6 and 7 were basically split about whether the agriculture economy had improved during the past year and would improve over the next five years, Table 8 indicates respondents felt strongly about the future of their farming on Long Island. A total of 73.3 percent strongly disagree to somewhat disagree that their operations would close during the next five years as compared to 26.7 who somewhat agree to strongly agree.

Table 8: My Operations Will Close During Next Five Years

	Frequency	Percent	Valid Percent	Cumulative Percent
1	48	44.0	45.7	45.7
2	18	16.5	17.1	62.9
3	11	10.1	10.5	73.3
4	16	14.7	15.2	88.6
5	7	6.4	6.7	95.2
6	5	4.6	4.8	100.0
Total	105	96.3	100.0	
No Reply	4	3.7		
Total	109	100.0		

Note:(1) Strongly Disagree; (2) Disagree; (3) Somewhat Disagree; (4) Somewhat Agree (5) Agree; (6) Strongly Agree

As compared to respondents in Tables 6 and 7 who were basically split about the future of Long Island’s agricultural economy, Tables 9 and 10 illustrate that respondents believe in greater numbers that the agricultural sector will not expand during the next five years but will contract.

In Table 9, 61.7 percent of respondents strongly disagree to somewhat disagree that Long Islands agricultural sector will expand over the next five years. This corresponds with 65.4 percent who indicated in Table 10 that they somewhat agree to strongly agree that the agricultural sector will contract over the next five years.

Table 9: Agriculture Sector Will Expand Over Next Five Years

	Frequency	Percent	Valid Percent	Cumulative Percent
1	13	11.9	12.1	12.1
2	17	15.6	15.9	28.0
3	36	33.0	33.6	61.7
4	26	23.9	24.3	86.0
5	12	11.0	11.2	97.2
6	3	2.8	2.8	100.0
Total	107	98.2	100.0	
No Reply	2	1.8		
Total	109	100.0		

Note:(1) Strongly Disagree; (2) Disagree; (3) Somewhat Disagree; (4) Somewhat Agree
(5) Agree; (6) Strongly Agree

Table 10: Agriculture Sector Will Contract Over Next Five Years

	Frequency	Percent	Valid Percent	Cumulative Percent
1	10	9.2	9.3	9.3
2	13	11.9	12.1	21.5
3	14	12.8	13.1	34.6
4	30	27.5	28.0	62.6
5	31	28.4	29.0	91.6
6	9	8.3	8.4	100.0
Total	107	98.2	100.0	
No Reply	2	1.8		
Total	109	100.0		

Note:(1) Strongly Disagree; (2) Disagree; (3) Somewhat Disagree; (4) Somewhat Agree
(5) Agree; (6) Strongly Agree

Qualified Employees, Workforce Development and Technology Innovation

Tables 11, 12, 13 clearly illustrate that respondents highly regard for the growth of their operations qualified employees, technology and workforce development.

Of the respondents in Table 11, 85.3 percent agree to strongly agree that finding qualified employees are important to the growth of their farms.

Table 11: Qualified Employees Important to Operations

	Frequency	Percent	Valid Percent	Cumulative Percent
1	2	1.8	1.8	1.8
2	9	8.3	8.3	10.1
3	5	4.6	4.6	14.7
4	10	9.2	9.2	23.9
5	15	13.8	13.8	37.6
6	68	62.4	62.4	100.0
Total	109	100.0	100.0	

Note:(1) Strongly Disagree; (2) Disagree; (3) Somewhat Disagree; (4) Somewhat Agree
(5) Agree; (6) Strongly Agree

To a lesser degree, respondents in Table 12 illustrate that they understand how technology can impact the productivity of their employees and their operations. Nearly 63 percent of respondents somewhat agree to strongly agree that growth of their operations depend on technology innovation.

Table 12: Operations Depend on Technology Innovation

	Frequency	Percent	Valid Percent	Cumulative Percent
1	9	8.3	8.4	8.4
2	20	18.3	18.7	27.1
3	11	10.1	10.3	37.4
4	31	28.4	29.0	66.4
5	23	21.1	21.5	87.9
6	13	11.9	12.1	100.0
Total	107	98.2	100.0	
No Reply	2	1.8		
Total	109	100.0		

Note:(1) Strongly Disagree; (2) Disagree; (3) Somewhat Disagree; (4) Somewhat Agree
(5) Agree; (6) Strongly Agree

Respondents in Tables 11 and 12 have noticeably shown they understand the importance that qualified employees and technology have in improving their farming operations. The responses in Table 13 continues that trend with 79.4 percent of respondents who somewhat agree to strongly agree that workforce development was integral to the growth of their operations.

Table 13: Workforce Development Important to Growth

	Frequency	Percent	Valid Percent	Cumulative Percent
1	5	4.6	4.7	4.7
2	10	9.2	9.3	14.0
3	7	6.4	6.5	20.6
4	20	18.3	18.7	39.3
5	30	27.5	28.0	67.3
6	35	32.1	32.7	100.0
Total	107	98.2	100.0	
No Reply	2	1.8		
Total	109	100.0		

Note:(1) Strongly Disagree; (2) Disagree; (3) Somewhat Disagree; (4) Somewhat Agree
(5) Agree; (6) Strongly Agree

Succession Plan and Land Preservation Program

Maintaining farmland in Suffolk County has been an important concern to the agricultural community since the inception of Suffolk County’s Farmland Preservation program decades ago. An important element in sustaining farmland is for farm owners to have a succession plan in place that provides for the continuous use of farmland for agricultural production. Tables 14 and 15 reflect the level at which farm owners have succession plans and whether those succession plans include a land preservation program.

Table 14: Succession Plan in Place for Continuous Use of Farmland for Agriculture Production

	Frequency	Percent	Valid Percent	Cumulative Percent
1	12	11.0	11.5	11.5
2	12	11.0	11.5	23.1
3	13	11.9	12.5	35.6
4	23	21.1	22.1	57.7
5	26	23.9	25.0	82.7
6	18	16.5	17.3	100.0
Total	104	95.4	100.0	
No Reply	5	4.6		
Total	109	100.0		

Note:(1) Strongly Disagree; (2) Disagree; (3) Somewhat Disagree; (4) Somewhat Agree
(5) Agree; (6) Strongly Agree

While 64.4 percent of respondents in Table 14 somewhat agree to strongly agree that they had succession plans in place that provide for the continuous use of their farmland for agricultural production, 54.9 percent of respondents in Table 15 somewhat agree to strongly agree that their succession plans include a land preservation program. The 9.5 percent gap in farm successions plans that include or do not include land preservation programs suggests farmers are concerned about always maintaining control over their land and their capital.

Table 15: Succession Plan Includes Land Preservation Program

	Frequency	Percent	Valid Percent	Cumulative Percent
1	22	20.2	21.6	21.6
2	16	14.7	15.7	37.3
3	8	7.3	7.8	45.1
4	16	14.7	15.7	60.8
5	19	17.4	18.6	79.4
6	21	19.3	20.6	100.0
Total	102	93.6	100.0	
No Reply	7	6.4		
Total	109	100.0		

Note:(1) Strongly Disagree; (2) Disagree; (3) Somewhat Disagree; (4) Somewhat Agree (5) Agree; (6) Strongly Agree

Research Question Two

For the agricultural sector respondents what was the importance of raising capital; their banking relationships; the shortage of labor; the importance to their operations of government taxes and regulations; expanding business offerings; identifying new markets, wildlife damage, minimum wage, the ability to compete in the global market; finding qualified employees, investment in workforce development, and the use of best management practices to decrease nitrogen or pesticide loading.

Business Strategies for Improving Operations Over the Next Twelve Months

Respondents indicated in Tables 16 to 16.5 the business strategies that can improve their operations over the next 12 months. Exhibiting the strongest are 41.3 percent (Table 16.3) wanting to expand their business offerings; 50.5 percent (Table 16.5) for educating Long Islanders on the importance of farming; 38.5 percent in (Table 16.1) for expanding market area; and to a lesser degree 27.5 percent (Table 16.4) wanting

training in current marketing techniques, 23.9 percent in Table 16.2 seeking assistance with regulation compliance and 21.1 percent (Table 16) seeking outside capital infusion.

**Table 16: Business Strategies that Can Improve Operations:
Outside Capital Infusion**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	23	21.1	100.0	100.0
No reply	86	78.9		
Total	109	100.0		

**Table 16.1: Business Strategies that Can Improve Operations:
Expansion of Market Area**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	42	38.5	100.0	100.0
No Reply	67	61.5		
Total	109	100.0		

**Table 16.2: Business Strategies that Can Improve Operations:
Compliance with Regulations**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	26	23.9	100.0	100.0
No Reply	83	76.1		
Total	109	100.0		

**Table 16.3: Business Strategies that Can Improve Operations:
Expand Business Offerings**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	45	41.3	100.0	100.0
No Reply	64	58.7		
Total	109	100.0		

**Table 16.4: Business Strategies that Can Improve Operations:
Training in Current Marketing Techniques**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	30	27.5	100.0	100.0
No Reply	79	72.5		
Total	109	100.0		

**Table 16.5: Business Strategies that Can Improve Operations:
Educating Long Islanders on the Importance of Farming**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	55	50.5	100.0	100.0
No Reply	54	49.5		
Total	109	100.0		

Financial Resources That Can Improve Operations Over the Next Twelve Months

Reflecting the importance placed on capital and bank lending, respondents indicated in Tables 17 to 17.3, as well as included hand-written comments, the financial resources that can improve the working capital of their operations over the next 12 months. Exhibiting the strongest needs are, 34.9 percent (Table 17.2) indicating banks; 33.9 percent (Table 17.3) citing cash management; and 26.6 percent (Table 17) seeking capital infusions from both private and public sources.

Private capital or internally generated capital is a preferable financial resource because it frequently does not require repayment nor does it carry interest costs. Better cash management often reduces the need for higher interest cost working capital often provided by banks. None the less respondents cited bank relationships and a needed resource.

**Table 17: Financial Resources to Improve Working Capital:
Capital Infusion-Public/Private**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	29	26.6	100.0	100.0
No Reply	80	73.4		
Total	109	100.0		

**Table 17.1: Financial Resources to Improve Working Capital:
Crowd Sourcing**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	5	4.6	100.0	100.0
No Reply	104	95.4		
Total	109	100.0		

**Table 17.2: Financial Resources to Improve Working Capital:
Banks**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	38	34.9	100.0	100.0
No Reply	71	65.1		
Total	109	100.0		

**Table 17.3: Financial Resources to Improve Working Capital:
Cash Management**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	37	33.9	100.0	100.0
No Reply	72	66.1		
Total	109	100.0		

Other Financial Resources That Can Improve Operations

Accommodation was made for respondents to write in financial resource needs not provided in the survey choices. Of the 15 needs reported, four were for farm credit; three were for grants – one wrote that Southold Town officials block New York State grants, another for increased shellfish

production, modern equipment and waterfront preservation, and low interest loans; two cited lower taxes; and one each for better prices for crops, be more financially sound, increased sales, better retained earnings to internally generate capital from operations, changing to a not-for-profit, and better value added to raw products.

Impediments to Growth of Farming Operations

The impediments to the growth of farming operations in the constantly evolving business and regulatory environment facing the agricultural community was illustrated in Tables 18 to 18.6. At 67.9 percent (Table 18), respondents cited government regulations as their greatest impediment to growth, followed by a shortage of farm labor at 64.2 percent (Table 18.4). Wildlife damage was an impediment to 45.9 percent (Table 18.2), minimum wage an impediment to 40.4 percent (Table 18.1) of respondents. Finding new markets and the ability to compete in global markets were a concern of an aggregate 41.3 percent of respondents, while of note only 18.3 percent (Table 18.5) cited business succession as an impediment to farming operations.

**Table 18: Impediments to Growth of Operations:
Government Regulations**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	74	67.9	100.0	100.0
No Reply	35	32.1		
Total	109	100.0		

**Table 18.1: Impediments to Growth of Operations:
Minimum Wage**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	44	40.4	100.0	100.0
No Reply	65	59.6		
Total	109	100.0		

**Table 18.2: Impediments to Growth of Operations:
Wildlife Damage**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	50	45.9	100.0	100.0
No Reply	59	54.1		
Total	109	100.0		

**Table 18.3: Impediments to Growth of Operations:
Ability to Compete in Global Market**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	17	15.6	100.0	100.0
No Reply	92	84.4		
Total	109	100.0		

**Table 18.4: Impediments to Growth of Operations:
Shortage of Farm Labor**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	70	64.2	100.0	100.0
No reply	39	35.8		
Total	109	100.0		

**Question 18.5 Impediments to Growth of Operations:
Business Succession**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	20	18.3	100.0	100.0
No Reply	89	81.7		
Total	109	100.0		

**Table 18.6: Impediments to Growth of Operations:
Finding New Markets**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	28	25.7	100.0	100.0
No Reply	81	74.3		
Total	109	100.0		

Regulatory Agencies that Adversely Impact Farming Operations

While Table 18 reflected that 67.9 of respondents found that government regulations impeded the growth of their operations, Tables 19 to 19.3 highlight the agencies. At 59.6 percent (Table 19.3) of most concern to respondents were local regulations such as zoning and the permit process for building and planning; followed by 52.3 percent (Table 19) impacted by environmental agencies including the New York State Department of Environmental Conservation and the U.S. Environmental Protection Agencies; 52.3 percent (Table 19.2) cited federal (OSHA), and state and local labor departments; and to lesser degree food safety regulatory agencies.

**Table 19: Environment Agencies Adversely Impact Operations:
NYS Dept. Environment Cons.; US Environment Protect. Agency**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	57	52.3	100.0	100.0
No Reply	52	47.7		
Total	109	100.0		

**Table 19.1: Food Safety Agencies Adversely Impact Operations:
NYS-Local Departments of Health; US Food-Drug Administration**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	21	19.3	100.0	100.0
No Reply	88	80.7		
Total	109	100.0		

**Table 19.2: Labor Agencies Adversely Impact Operations:
NYS-Local Depts of Health; US Occupation Safety Health Admin.**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	57	52.3	100.0	100.0
No Reply	52	47.7		
Total	109	100.0		

**Table 19.3: Local Agencies Adversely Impact Operations:
Local Zoning, Building, and Planning Permitting Process**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	65	59.6	100.0	100.0
No Reply	44	40.4		
Total	109	100.0		

Best Management Practices to Decrease Nitrogen and Pesticide Loading

Preserving clean water is essential to sustaining Long Island’s environment. That was acknowledged in Table 20 by 91 percent of respondents who either plan to engage in best management practices to decrease nitrogen or pesticide loading over the next five years or have already done so.

**Table 20: Plan to Engage in Best Management Practices Over
Next Five Years to Decrease Nitrogen and Pesticide Loading**

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	91	83.5	91.0	91.0
No	9	8.3	9.0	100.0
Total	100	91.7	100.0	
No Reply	9	8.3		
Total	109	100.0		

Research Question Three

What were the relationships in the Long Island agriculture sector between annual gross revenues, number of employees, dependence on technology innovation, importance of qualified employees, importance of workforce development, and whether their operations will close in five years?

A Pearson Product Moment Correlation analysis was used to examine these relationships and appears in Table 21.

Table 21: Pearson Product Correlation Matrix
(N=105)

		Correlations					
		CloseIn5Yrs	QualEmployee	TechInnovat	WfDevelImp	AnnualGrRev	Employees
CloseIn5Yrs	Pearson Correlation	1					
	Sig. (2-tailed)		.				
	N	105					
QualEmployee	Pearson Correlation	-.120	1	.			
	Sig. (2-tailed)	.224		.			
	N	105	109				
TechInnovat	Pearson Correlation	-.211*	.345**	1		.	
	Sig. (2-tailed)	.031	.000		.		
	N	104	107	107			
WfDevelImp	Pearson Correlation	-.088	.751**	.484**	1		
	Sig. (2-tailed)	.376	.000	.000			
	N	104	107	106	107		
AnnualGrRev	Pearson Correlation	-.191	.313**	.364**	.348**	1	
	Sig. (2-tailed)	.059	.002	.000	.000		
	N	98	99	98	98	99	
Employees	Pearson Correlation	-.048	.187	.217*	.143	.553**	1
	Sig. (2-tailed)	.637	.062	.030	.155	.000	
	N	99	101	100	100	97	101

*. Correlation is significant at the 0.05 level (2-tailed).

**. Correlation is significant at the 0.01 level (2-tailed).

The correlation table indicates the importance of finding qualified employees and the importance of workforce development to their operations. Finding qualified employees strongly correlate with the importance of workforce development (56 percent of the variance).

Other strong correlations exist between annual gross revenues and number of employees (31 percent of the variance) and importance of workforce development and dependence on technology innovation (23 percent of the variance),

Somewhat weaker correlations were found between annual gross revenues and the dependence on technology innovation (13 percent of the variance), importance of workforce development with annual gross revenues (12 percent of the variance), finding qualified employees with dependence on technology innovation (12 percent of the variance), and finding qualified employees and gross revenues (10 percent of the variance).

Weak correlations exist between dependence on technology innovation and number of employees (5 percent of the variance), and a negative correlation exists between dependence on technology innovation and operations closing in five years (4 percent of the variance).

Research Question Four

How did Long Island agriculture sector’s gross revenues, number of employees, technology innovation predict whether operations will close in five years?

Table 22 presents a stepwise multiple regression model that was used to calculate the extent that Long Island agriculture sector’s gross revenues, number of employees, technology innovation predict that operations will close in five years?

Indicated in Table 22 was that years farmed predicted 5 percent of the variance of operations closing in five years and the annual gross revenues predicted 10 percent of the variance.

Table 22: Stepwise Multiple Regression: Operations Will Close During Next Five Years

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.211 ^a	.045	.034	1.529
2	.316 ^b	.100	.080	1.492

a. Predictors: (Constant), YrsFarmed

b. Predictors: (Constant), YrsFarmed, AnnualGrRev

SUMMARY AND CONCLUSIONS

Of the 109 farms who responded to the survey, equivalent responses (7.5 percent) strongly disagreed that the agriculture economy had improved during the past year and would improve over the next five years, while between 53.7 percent and 58.5 percent somewhat agreed and somewhat disagreed that the agriculture economy respectively had improved during the past year and would improve over the next five years.

While respondents were basically split about whether the agriculture economy had improved during the past year and would improve over the next five years, respondents felt strongly about the future of their farming on Long Island with 73.3 percent strongly disagreeing to somewhat disagreeing that their operations would close during the next five years.

Despite strong disagreement that their farm operations would close during the next five years, 61.7 percent strongly disagree to somewhat disagree that Long Islands agricultural sector will expand over the next five years. This corresponds with 65.4 percent who indicated that they somewhat agree to strongly agree that the agricultural sector will contract over the next five years.

As for the importance of qualified employees, technology innovation and workforce development, 85.3 percent agree to strongly agree that finding qualified employees are important to the growth of their farms, nearly 63 percent of respondents somewhat agree to strongly agree that growth of their operations depend on technology innovation while 79.4 percent somewhat agree to strongly agree that workforce development was integral to the growth of their operations.

Understanding the importance of having succession plans that provide for continuous use of farmland for agricultural production 64.4 percent somewhat agree to strongly agree that they had such succession plans in place, while 54.9 percent somewhat agree to strongly agree that their succession plans include a land preservation program.

The business strategies that can improve their operations over the next 12 months, included 41.3 percent wanting to expand their business offerings; 50.5 percent for educating Long Islanders on the importance of farming; 38.5 percent for expanding market area; and to a lesser degree 27.5 percent wanting training in current marketing techniques, 23.9 percent seeking assistance with regulation compliance and 21.1 percent seeking outside capital infusion.

Reflecting the importance placed on capital and bank lending, the financial resources that can improve the working capital of their operations over the next 12 months are 34.9 percent indicating

banks; 33.9 percent citing cash management; and 26.6 percent seeking capital infusions from both private and public sources.

The impediments to the growth facing the agricultural community cited were 67.9 percent government regulations, 64.2 percent shortage of farm labor, 45.9 percent wildlife damage, and 40.4 percent minimum wage. Finding new markets and the ability to compete in global markets were a concern of an aggregate 41.3 percent of respondents, with 18.3 percent citing business succession as an impediment to farming operations.

As for regulatory agencies that adversely impact farming operations, 67.9 responded that government regulations impeded the growth of their operations, 59.6 percent were most concerned about local regulations such as zoning and the permit process for building and planning, 52.3 percent were impacted by environmental agencies including the New York State Department of Environmental Conservation and the U.S. Environmental Protection Agencies, 52.3 percent cited federal (OSHA), and state and local labor departments and to lesser degree food safety regulatory agencies.

Preserving clean water is essential to sustaining Long Island's environment. That was acknowledged by 91 percent of respondents who either plan to engage in best management practices to decrease nitrogen or pesticide loading over the next five years or have already done so.

A Pearson Moment Correlation Analysis found that qualified employees strongly correlate with the importance of workforce development. Other strong correlations were found between annual gross revenues and number of employees, while the importance of workforce development correlated with dependence on technology innovation. Somewhat weaker correlations were found between annual gross revenues and the dependence on technology innovation; importance of workforce development with annual gross revenues; finding qualified employees with dependence on technology innovation: and finding qualified employees and gross revenues. Weak correlations exist between dependence on technology innovation and number of employees, and a negative correlation exists between dependence on technology innovation and operations closing in five years.

A stepwise multiple regression model was used to calculate the extent that Long Island agriculture sector's gross revenues, number of employees, technology innovation predict that operations will close in five years. It was found that years farmed predicted 5 percent of the

variance of operations closing in five years and the annual gross revenues predicted 10 percent of the variance.

APPENDIX A

August 1, 2017

Dear Long Island Farm Bureau Member:

Your participation is requested with the enclosed survey that is being conducted by the Long Island Farm Bureau (LIFB). The purpose of this study is to evaluate the current and future needs of Suffolk County's agriculture sector and its economic impact on the Suffolk County economy. The benefit of this study is that it will identify the needs of Long Islands agriculture community and the agencies that support them in development, training and financing opportunities to serve those businesses, agencies, individuals and families. Participation in this study involves no risks.

While your participation in this study is voluntary, we ask that you respond. To preserve anonymity and confidentiality, the survey responses will not identify the respondents, and will only be seen by Long Island Farm Bureau and economic consultant Dr. Martin R. Cantor, CPA. You will never be referred to by individual company. The survey responses are completely confidential and anonymous.

If you decide to participate in this study, and we urge you to do so, your role will involve completing the enclosed study survey and returning it using the provided self-addressed envelope to Dr. Cantor. Anonymity of your survey response is assured. Your completed survey will indicate consent to participate in the study. At the conclusion of this study, the results will be analyzed and evaluated by the end of 2017.

If you have any questions about this study, you may contact us at LIFB or Dr. Martin R. Cantor, CPA at 631-491-1388 or at ecodev1@aol.com. Thank you.

Thank you for your cooperation.

Robert Carpenter
Administrative Director

Jessica Anson
Director of Public Policy

Long Island Farm Bureau
 104 Edwards Avenue
 Calverton, New York
 631-727-3777

Survey: Needs of Long Islands Agricultural and Aquaculture Communities

Part 1

Please indicate (by circling the appropriate number based on the scale below) the degree to which you agree or disagree with the needs and strategic plan of your company.

Strongly Disagree	Disagree	Somewhat Disagree	Somewhat Agree	Agree	Strongly Agree
1	2	3	4	5	6

- | | | |
|-----|---|-------------|
| 1. | Long Island’s agricultural economy has improved during the past year. | 1 2 3 4 5 6 |
| 2. | Long Island’s agricultural economy will improve over the next five years. | 1 2 3 4 5 6 |
| 3. | My operations will close during the next five years. | 1 2 3 4 5 6 |
| 4. | Long Island’s agricultural economic sector will expand during the next five years. | 1 2 3 4 5 6 |
| 5. | Long Island’s agricultural economic sector will become smaller during the next five years. | 1 2 3 4 5 6 |
| 6. | Finding qualified employees is important to my operations | 1 2 3 4 5 6 |
| 7. | The growth of my business depends on technology innovation. | 1 2 3 4 5 6 |
| 8. | Workforce development is important to my company’s growth. | 1 2 3 4 5 6 |
| 9. | A succession plan is in place providing for the continuous use of the farmland for agriculture production | 1 2 3 4 5 6 |
| 10. | My farm succession plan includes a land preservation program | 1 2 3 4 5 6 |

Part 2

Please answer the following questions by filling in the blank.

11. Farming Sector: Agriculture _____; Aquaculture_____

12. How many years have you farmed on Long Island? _____

13. What are the annual gross revenues for 2016?

Less than \$1 million _____ Between \$1 and \$3 million _____ More than \$3 million

This is an Increase ___ Decrease ___ from 2015. This is an Increase ___ Decrease ___ from 2010

14. How many employees did your company employ in 2016? Employees _____

This is an Increase ___ Decrease ___ from 2015. This is an Increase ___ Decrease ___ from 2010

15. Your farm, either owned or leased is: less than 60 acres _____, more than 60 acres _____.

16. Over the next 12 months, which of these business strategies can improve my operation?

Outside Capital Infusion _____ Expand Business Offerings _____
Expansion of Market Area _____ Training in current Marketing techniques _____
Compliance with regulations _____ Education to Long Islanders on the importance of farming _____

17. Indicate from the following financial resources those that can improve your company's working capital:

Capital Infusion-Public/Private _____ Banks _____
Crowd Source Funding _____ Cash Management _____
Other (Please Explain) _____

18: Which of the following are impediments to growth of your operation?

Government Regulations _____ Shortage of farm labor _____
Minimum wage _____ Business succession _____
Wildlife damage _____ Finding new markets _____
Ability to compete in global market _____

19: Which of the following regulations regulatory agencies adversely impact your operation?

Environment: DEC, EPA _____ Labor/OSHA: state and local _____
Food Safety? DOH, FDA _____ Local zoning/building/planning/permitting process _____

20: I plan to engage in Best Management Practice (s) to decrease nitrogen or pesticide loading over the next 5 years Yes ___ No ___

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Martin R. Cantor has a Bachelor of Science Degree in Accounting from Brooklyn College of the City University of New York, a Master of Arts Degree in Interdisciplinary Studies from Hofstra University focusing on the socio-economic relationships between education, household income, community and workforce development, and a Doctor of Education Degree from Dowling College. He has served as Suffolk County Economic Development Commissioner (New York State's largest suburban county), brought Computer Associates to Suffolk County, and created over 23,000 jobs with an estimated \$1.4 billion annual payroll economic impact. He has served as: Vice-Chair-Suffolk County Industrial Development Agency; Chief Economist-New York State Assembly Subcommittee for the Long Island Economy; Senior Fellow at the White Plains, New York based Institute for Socioeconomic Studies - a public policy think tank concentrating on poverty in America and senior citizen quality of life; Chair and Chief Economist of the Long Island Development Corp; a building trades labor/management arbitrator; a consultant to the Nassau Interim Financial Authority; a faculty member in the Brooklyn College Department of Economics; Executive Director of the Patchogue Village Business Improvement District; and Director of Economic Development and Chief Economist for Sustainable Long Island, and the Long Island Fund for Sustainable Development, providing financial, technical assistance to businesses and not-for-profit organizations His work is included in the *National Tax Rebate-A New America With Less Government*, and has prepared downtown revitalization plans for Long Island and New York City neighborhoods featuring arts districts, economic restructuring, waterfront projects and community organizing. He was the architect of the Nassau County Comptroller's debt restructuring plan for resolving Nassau County's fiscal crisis; has been a Long Island Business Journal columnist; has authored: federal, state and local legislation; economic impact analyses; analysis of Long Island's economic, demographic, employment, tax, and educational bases; a convention center feasibility study; taxpayer cost of acquiring open space; and health care reform; and Director of Dowling College's Long Island Economic and Social Policy Institute; and an Adjunct Associate Professor of Economics

He is a Certified Public Accountant in private practice; Director of the Long Island Center for Socio-Economic Policy, chief economist for Destination LI, a consulting economist and economic development consultant to public officials, counties, towns, villages, Industrial Development Agencies, and communities; and Chairman of the Suffolk County Judicial Facilities Agency which financed the acquisition of the Cohalan State Court Complex, oversaw the construction of the Suffolk County Jail in Yaphank and financed the \$70 million purchase/leaseback of the Dennison Building to Suffolk County. He provides economic and business commentary on television and radio; was Co-host of Focus 55, a public affairs program on Channel 55, is a columnist for the Long Island Business News, Long Island's largest business weekly, and Networking Newspaper for Women, has appeared in the New York Times, Newsday, and LI Pulse, and has been syndicated nationally by Newsday, Bridge News and Knight-Ridder/Tribune News Service. He is an Honorary Member of Delta Mu Delta - The National Honor Society in Business Administration and has been recognized by the National Association of Counties for innovative uses of Industrial Revenue Bonds, for international trade promotion initiatives, for downtown revitalization policies, and for minority business incubator initiatives. He was invited by Dr. William Julius Wilson of Harvard University's John F. Kennedy School of Government to present his paper entitled *Race Neutral Sustainable Economic Development*. He is the author of the recently published *Long Island, The Global Economy and Race: The Aging of America's First Suburb*.