



UP CLOSE AND COMMITTED

THE SOCIAL AND ECONOMIC IMPACT
OF ST. JOHN FISHER COLLEGE



JULY 2017

Up Close and Committed:

The Economic and Social Impact of
St. John Fisher College

July 2017

appleseed 

Table of Contents

Executive Summary	2
Introduction	5
Part One: St. John Fisher College as an Enterprise	7
Part Two: Contributing to the Development of New York’s Human Capital	20
Part Three: Civic and Community Engagement at Fisher	29
Part Four: A Growing Impact.....	34

Executive Summary

St John Fisher College is an independent, non-profit educational institution “in the Catholic tradition” located in Pittsford, New York (about seven miles east of Rochester). This report assesses, and where possible quantifies, St. John Fisher College’s economic and community impact on Monroe County, in the Rochester metropolitan area and throughout New York State.

St. John Fisher College as an enterprise

- In the fall of 2015, St. John Fisher College employed 923 people (excluding students), of whom 61 percent worked full-time. Salaries and wages paid to Fisher employees in fiscal year (FY) 2016 totaled nearly \$43.7 million.
- From the fall of 2005 through the fall of 2015, non-student employment at Fisher increased by more than 41 percent.
- In FY 2016, Fisher’s purchases of goods and services from Rochester-area businesses and its investment in construction and renovation of College facilities directly supported 121 full-time-equivalent (FTE) jobs with Rochester-area suppliers and contractors, with salaries and wages totaling nearly \$7.4 million.
- Taking into account both the direct and the indirect and induced (or “multiplier”) effects of College spending on payroll, purchasing and construction, as well as off-campus spending by students and by visitors to the College, we estimate that in FY 2016 Fisher directly and indirectly accounted for:
 - 1,494 FTE jobs in the Rochester area, with earnings totaling nearly \$69.3 million; and
 - \$120.7 million in regional economic output.
- Despite its tax-exempt status, in FY 2016 St. John Fisher College directly accounted for nearly \$2.1 million in state and local government revenues.

Contributing to the development of New York’s human capital

- In the fall of 2015, 3,823 students (including 2,805 undergraduate and 1,018 graduate students) were enrolled at St John Fisher College – an increase of 8.5 percent since the fall of 2005.
- More than 96 percent of all students enrolled at Fisher in the fall of 2015 were residents of New York State, including 57 percent who were residents of the Rochester area.

- In FY 2016 Fisher provided nearly \$32.3 million in College-funded financial aid to undergraduate students, including \$16.0 million to students from the Rochester area.
- Fisher offers undergraduate, graduate and professional programs in fields that are well aligned with some of New York's leading industries and occupations, such as computer science, digital media, data science, accounting, finance, nursing and pharmacy.
- As of the summer of 2015, nearly 81 percent of all Fisher alumni lived in New York State, including 15,963 Fisher graduates (61 percent of all alumni) who lived in the Rochester area.
- As of 2015, about 6.7 percent of all Monroe County residents who had earned a bachelor's or higher degree were graduates of St. John Fisher College.

Civic and community engagement at Fisher

- During the 2015-16 academic year, 2,862 St. John Fisher students spent a combined total of 393,050 hours working as volunteers in a wide range of community service programs. Many of these students work on a regular basis with one of the more than 80 schools, health care institutions and community organizations with which the College has ongoing partnerships.
- Volunteer community service at Fisher is not limited to students. In 2015-16, the College reports that 230 faculty members and staff provided approximately 20,000 hours of volunteer work.
- Based on state-by-state estimates of the value of an hour of volunteer work published by Independent Sector, Appleseed estimates the value of volunteer community service work performed by Fisher students, faculty and staff at more than \$11.59 million.
- Fisher students also engage with Rochester-area communities through service learning – courses that combine classroom learning with hands-on experience in the community. In 2015-16, 681 Fisher students participated in 45 service learning courses.
- In addition to the work that Fisher students do as volunteers, many undergraduate and graduate students in education, nursing, mental health counseling and pharmacy are required as part of their professional training to gain practical, real-world work experience. In 2015-16, Fisher students in these fields reported a total of 410,480 hours of work experience in schools, hospitals, community health and mental health centers, pharmacies and other community settings.
- Using the data from Independent Sector cited above, we estimate that in 2015-16 the value of services provided by Fisher students as part of their professional training in these fields totaled \$11.5 million.

- Fisher also helps to strengthen Rochester-area communities by working to build the capabilities of the small and mid-sized non-profit institutions and organizations that help sustain these communities. The College's Center for Community Engagement provides:
 - Training for non-profit board members
 - A five-course certificate in non-profit management, covering topics such as financial management, human resources and resource development
 - A series of reports and other publications on governance and management of non-profits

Since its founding in 2006, 1,293 managers and board members representing 269 non-profit organizations have participated in the Center's programs.

A growing impact

In the years ahead, Fisher's impact in the Rochester area and throughout the state is likely to be even greater than it is today. This is so for several reasons, including:

- Continued growth in the number of Fisher alumni living and working in the Rochester area and elsewhere in New York;
- Fisher's demonstrated ability to develop and execute new degree programs that are responsive to the needs of the state's evolving economy, and of its communities; and
- Fisher's emergence as an anchor institution, increasingly involved in collective efforts to address community needs, and to ensure that Rochester is a safe, healthy, and vibrant place to live and work.

Introduction

St. John Fisher College, located in Pittsford, New York (about seven miles east of Rochester) is an independent, non-profit educational institution “in the Catholic tradition.” The College was founded in the late 1940s by priests of the Basilian order, and enrolled its first students in 1951. Since then it has grown to become one of the ten largest independent colleges and universities in upstate New York.

Fisher offers bachelor’s, master’s and doctoral degrees through five schools:

- The School of Arts and Sciences;
- The School of Business;
- The Ralph C. Wilson, Jr. School of Education;
- The Wegmans School of Nursing; and
- The Wegmans School of Pharmacy.

This report assesses, and where possible quantifies, St. John Fisher College’s economic and community impact on Monroe County, in the greater Rochester area and throughout New York State. The report was prepared by Appleseed, a New York City-based consulting firm with extensive experience working with major colleges and universities in the U.S.

Part One of the report examines Fisher’s impact as an enterprise – as an employer, a purchaser of goods and services, and a sponsor of construction projects – as well as the impact of off-campus spending by its students and visitors to Fisher. Part Two discusses Fisher’s role in the development of the Rochester area’s human capital.

Part Three highlights the multiple ways in which Fisher helps to serve and strengthen Rochester-area communities; and Part Four briefly notes several reasons why the College’s impact in the Rochester area and throughout New York State is likely to grow in the years ahead.

A note on geography

In various sections of the report, St. John Fisher College’s impact is addressed at three different geographic levels – Monroe County, the greater Rochester area (including Monroe and six other counties: Genesee, Livingston, Ontario, Orleans, Wayne and Wyoming) and New York State. Figure 1 shows the location of the College’s campus within the greater Rochester area.

Figure 1: Map of the Rochester area showing the location of St. John Fisher College



Part One: St. John Fisher College as an Enterprise

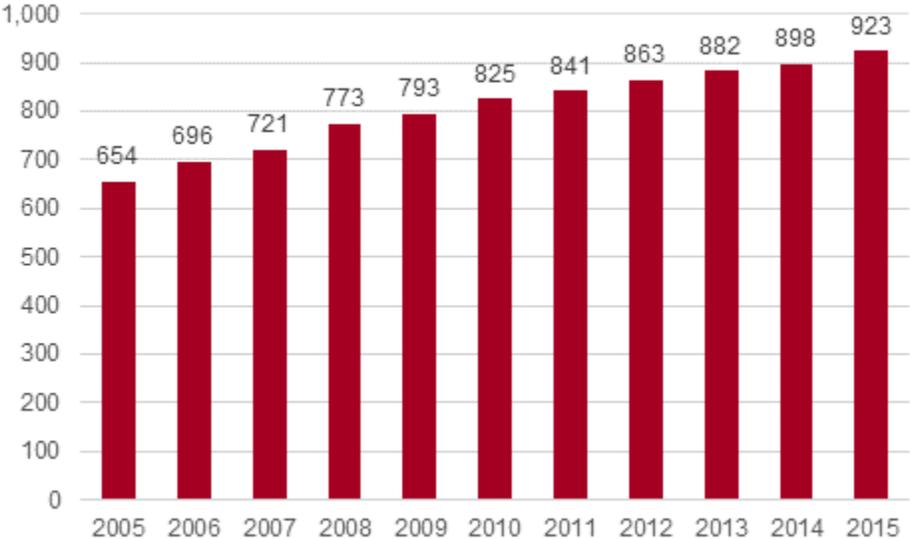
As a major institution in its own right, St. John Fisher College contributes to the economic vitality of Monroe County, the Rochester area and New York State in several ways: as a major employer; a buyer of goods and services from businesses located in Monroe County, the Rochester area and elsewhere in New York; and a sponsor of construction projects. This part of the report assesses the College’s impact as an enterprise, and estimates the economic impact of off-campus spending by Fisher students and by visitors to the College. It also assesses the College’s impact on New York state and local government revenues.

Employment at Fisher

In the fall of 2015, St. John Fisher College directly employed a total of 923 people (excluding student employees), of whom approximately 61 percent worked full-time. In fiscal year 2016, the College’s payroll for these employees totaled nearly \$43.7 million.

Between the fall of 2005 and the fall of 2015 (as shown in Figure 2), total non-student employment at Fisher increased by 41.1 percent. As the Rochester area has gone through a difficult economic transition, a severe recession and a slow recovery, Fisher and other Rochester-area colleges and universities have provided an important element of stability to the region’s economy.

Figure 2: Total non-student employment at Fisher, fall 2005 – fall 2015

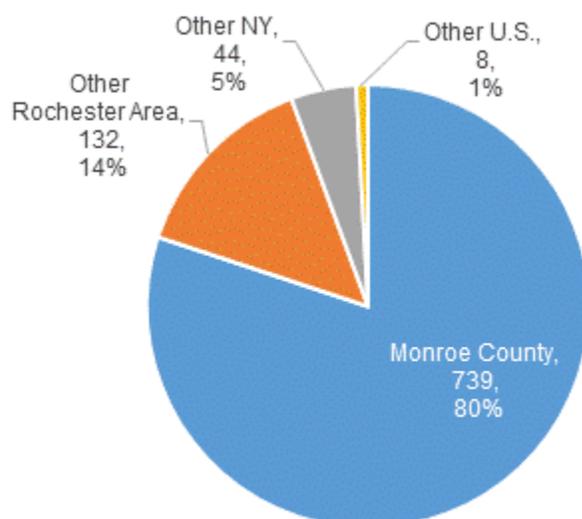


In addition to these regular full- and part-time employees, the College employed 529 undergraduate students in a variety of part-time, on-campus jobs during the fall of 2015, with wages totaling more than \$1.0 million in fiscal year 2016.

Where Fisher employees live

As shown in Figure 3, 739 Fisher employees (excluding student employees) lived in Monroe County during the fall of 2015 – 80.1 percent of all non-student employees of St. John Fisher College. An additional 132 (14.3 percent of Fisher’s non-student employees) lived elsewhere in the Rochester area; and 44 (4.8 percent) lived elsewhere in New York.

Figure 3: Fisher non-student employees by place of residence, fall 2015



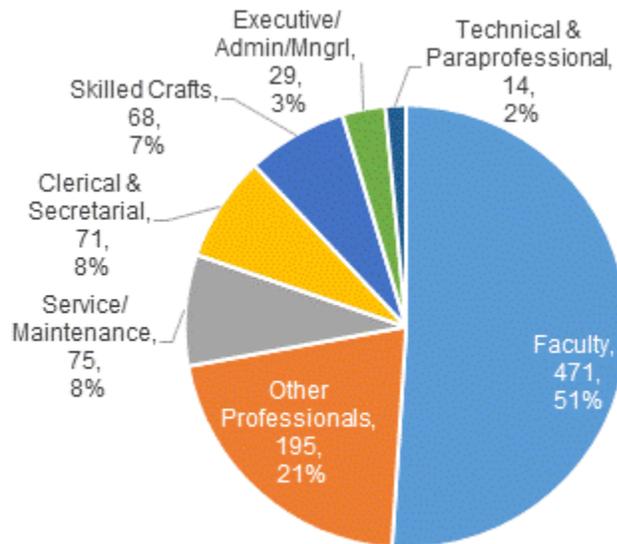
In fiscal year 2016, salaries and wages paid by St. John Fisher College to its non-student employees who live in Monroe County totaled nearly \$34.5 million (78.8 percent of Fisher’s total non-student payroll). An additional \$6.5 million (15.0 percent of Fisher’s total non-student payroll) was paid to non-student employees who live elsewhere in the Rochester Area; and nearly \$2.1 million (4.7 percent) was paid to those who live elsewhere in New York.

Diversity and quality of Fisher employment

St. John Fisher College offers a variety of high-quality jobs. As shown in Figure 4, during the fall of 2015, faculty accounted for 51.0 percent of total non-student employment at Fisher; executive,

administrative, managerial and other professionals accounted for 24.3 percent; service and maintenance staff for 8.1 percent; clerical and secretarial staff for 7.7 percent; skilled crafts staff for 7.4 percent; and technical and paraprofessional staff for 1.5 percent.

Figure 4: Fisher non-student employment by occupational category, fall 2015



Fisher also provides a wide range of benefits to its employees. They include:

- Health, dental and vision insurance
- Life, accident and disability insurance
- Flexible spending accounts
- Tax-deferred retirement plans
- Education programs

The impact of purchasing and construction

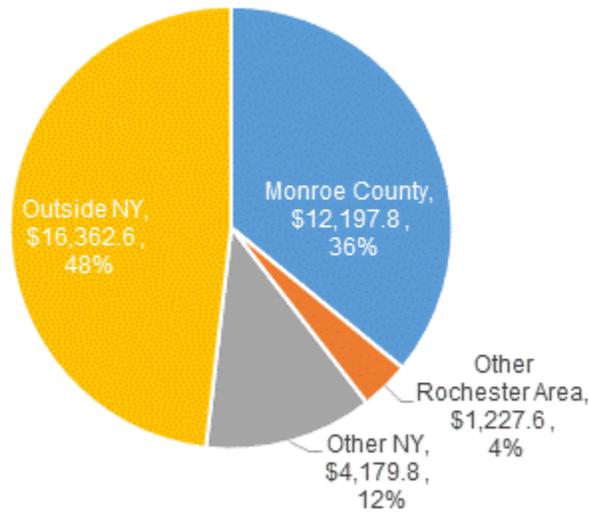
In addition to the people it employs directly, St. John Fisher College supports the economies of Monroe County, the Rochester area and New York State through its purchases of goods and services from local businesses, and through construction and renovation of its facilities.

Purchasing goods and services

In fiscal year 2016, St. John Fisher College spent nearly \$34.0 million on the purchase of goods and services (other than construction). As shown in Figure 5, of this total nearly \$12.2 million (35.9 percent of total purchasing) was spent on goods and services provided by businesses located in Monroe County; an additional \$1.2 million (3.6 percent) was spent on goods and services provided by businesses located elsewhere in the Rochester area; and nearly \$4.2 million (12.3 percent) was spent on purchases from businesses located elsewhere in New York.¹

Leading categories of goods and services purchased from businesses in New York in fiscal year 2016 include professional and technical services, employee health insurance, utilities, and building services and facilities support.

Figure 5: Fisher purchasing of goods and services by location of vendor, FY 2016 (in \$000s)



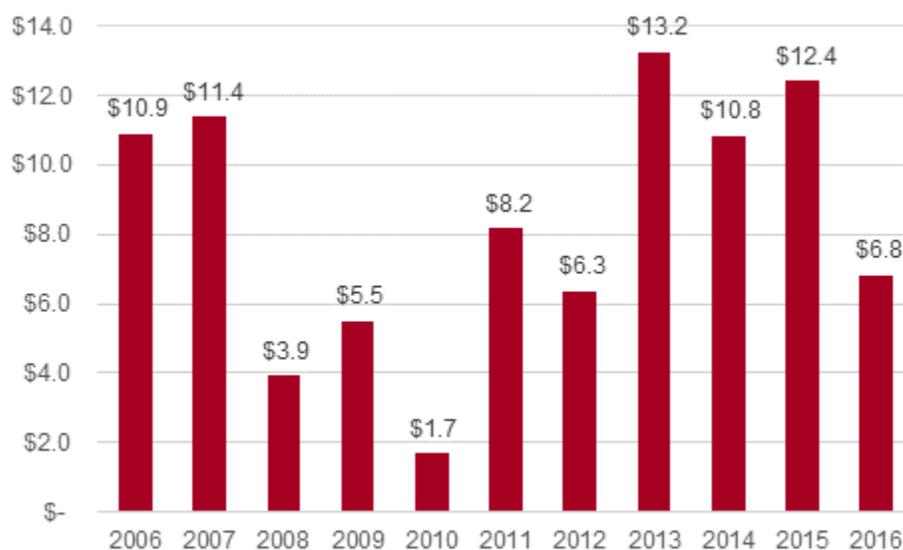
Using the IMPLAN input-output economic modeling system – a modeling tool commonly used in economic impact analyses – we estimate that in fiscal year 2016, St. John Fisher College’s purchases of goods and services directly supported 87 full-time-equivalent (FTE) jobs in Monroe County, 9 additional FTE jobs elsewhere in the Rochester area, and 21 additional FTE jobs elsewhere in New York.

¹ For purposes of calculating the economic impact of St. John Fisher College spending, employee health insurance is treated as a purchased service, allocated according to employee’s place of residence.

Investing in campus facilities

In addition to generating jobs and economic activity through its purchases of goods and services, Fisher also does so through its investments in its College facilities. As shown in Figure 6, between fiscal year 2006 and fiscal year 2016, St. John Fisher College invested a total of nearly \$91.2 million in facility construction and renovation.

Figure 6: Fisher construction spending, FY 2006 – FY 2016 (in \$ millions)



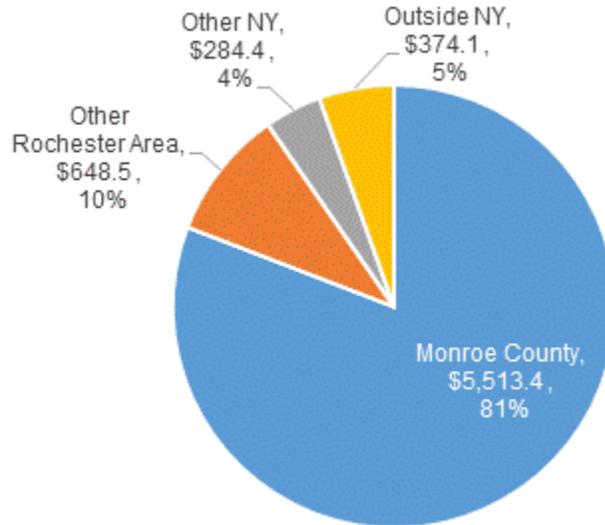
In fiscal year 2016 (as shown in

Figure 7), Fisher spent more than \$6.8 million on construction and renovation projects, of which more than \$5.5 million (80.8 percent of total construction spending) was paid to contractors and other vendors located in Monroe County. Examples of major projects completed or underway during fiscal year 2016 include:

- The ***Integrated Science and Health Sciences Building***, a new 31,000 square-foot academic facility that includes two 100-seat classrooms, teaching laboratories, a lab prep room, faculty offices, collaborative learning spaces and a two-story living wall. The \$14 million building, opened in the fall of 2015, supports the threefold increase in enrollment in the natural sciences that has occurred since 2006, and provides greater opportunities for the cross-disciplinary learning and research.
- The ***Hernance Family Chapel of St. Basil the Great***, a new 9,000 square-foot chapel located adjacent to Kearney Hall, is expected to be completed in the summer of 2017. With an estimated cost of \$4.25 million, the project is being funded entirely by philanthropic

efforts, led by a lead gift from the Hermance Family Foundation. The chapel will be able to accommodate 250 people.

Figure 7: Fisher construction spending by location of contractor, FY 2016 (in \$000s)



Using IMPLAN, we estimate that in fiscal year 2016, Fisher’s spending on construction and renovation of facilities directly supported 23 FTE jobs with companies in construction and related industries in Monroe County, and 2 additional FTE jobs with construction and related firms companies elsewhere in the Rochester area.

Over the next five years, from fiscal year 2017 to fiscal year 2021, St. John Fisher College estimates that it will spend a total of \$39.9 million on construction and renovation projects.

Measuring the multiplier effect

The jobs and economic activity generated by St. John Fisher College’s spending on non-student payroll, purchasing and construction are not limited to the direct impacts cited above. Using a tool of economic analysis called an input-output model, we can also estimate the indirect and induced (or “multiplier”) effects of spending by Fisher – the economic activity resulting from:

- Spending within the Rochester area and elsewhere in New York by the local suppliers and contractors from whom Fisher buys goods and services (the indirect effect); and
- Household spending within the Rochester area and elsewhere in New York by Fisher employees, and by employees of the College’s suppliers and contractors (the induced effect).

Using IMPLAN, we estimate that in Monroe County, spending by St. John Fisher College on non-student payroll, purchasing and construction in fiscal year 2016 indirectly accounted for:

- 272 FTE jobs in Monroe County, with earnings totaling nearly \$12.7 million; and
- Nearly \$39.1 million in countywide economic output.

In the Rochester area (including Monroe County), Fisher’s spending indirectly accounted for:

- 301 FTE jobs in the Rochester area, with earnings totaling nearly \$13.7 million; and
- Nearly \$42.9 million in regional economic output.

Statewide (including the Rochester area), Fisher’s spending indirectly accounted for:

- 325 FTE jobs in New York, with earnings totaling \$15.2 million; and
- \$47.1 million in statewide economic output.

Combining these indirect and induced effects with the direct effects cited previously, we estimate that in fiscal year 2016, spending by St. John Fisher College on non-student payroll, purchasing and construction directly and indirectly accounted for:

- 1,305 FTE jobs in Monroe County, with earnings totaling \$63.2 million; and
- More than \$100.0 million in countywide economic output.

In the Rochester area (including Monroe County), Fisher’s spending directly and indirectly accounted for:

- 1,345 FTE jobs in the Rochester area, with earnings totaling nearly \$64.8 million; and
- Nearly \$105.7 million in regional economic output.

Statewide (including the Rochester area), Fisher’s spending directly and indirectly accounted for:

- 1,392 FTE jobs in New York, with earnings totaling nearly \$67.8 million; and
- \$113.3 million in statewide economic output.

Table 1,

Table 2 and Table 3 summarize the total impact of St. John Fisher College’s spending on non-student payroll, purchasing and construction in Monroe County, the Rochester area (including Monroe County) and New York (including the Rochester area).

**Table 1: Direct, indirect and induced impacts of Fisher’s spending in Monroe County, FY 2016
(jobs in FTE, wages and output in \$000s)**

	Jobs	Wages	Output
Direct spending impact			
Payroll	923	\$43,698.7	\$43,698.7
Purchasing/construction	110	\$6,832.8	\$17,285.3
<i>Subtotal, direct impact</i>	<i>1,033</i>	<i>\$50,531.6</i>	<i>\$60,984.1</i>
Indirect and induced effects			
Employee spending	192	\$8,739.6	\$27,184.4

Contractor and vendor spending	80	\$3,939.2	\$11,875.6
<i>Subtotal, indirect/induced effects</i>	<i>272</i>	<i>\$12,678.8</i>	<i>\$39,059.9</i>
Total	1,305	\$63,210.3	\$100,044.0

Table 2: Direct, indirect and induced impacts of Fisher’s spending in the Rochester area, FY 2016 (jobs in FTE, wages and output in \$000s)

	Jobs	Wages	Output
Direct spending impact			
Payroll	923	\$43,698.7	\$43,698.7
Purchasing/construction	121	\$7,391.3	\$19,126.5
<i>Subtotal, direct impact</i>	<i>1,044</i>	<i>\$51,090.1</i>	<i>\$62,825.2</i>
Indirect and induced effects			
Employee spending	215	\$9,542.8	\$30,209.0
Contractor and vendor spending	86	\$4,145.8	\$12,651.4
<i>Subtotal, indirect/induced effects</i>	<i>301</i>	<i>\$13,688.6</i>	<i>\$42,860.4</i>
Total	1,345	\$64,778.7	\$105,685.7

Table 3: Direct, indirect and induced impacts of Fisher’s spending in New York, FY 2016 (jobs in FTE, wages and output in \$000s)

	Jobs	Wages	Output
Direct spending impact			
Payroll	923	\$43,698.7	\$43,698.7
Purchasing/construction	144	\$8,859.5	\$22,495.9
<i>Subtotal, direct impact</i>	<i>1,067</i>	<i>\$52,558.3</i>	<i>\$66,194.7</i>
Indirect and induced effects			
Employee spending	226	\$10,185.5	\$31,979.8
Contractor and vendor spending	99	\$5,047.7	\$15,164.9
<i>Subtotal, indirect/induced effects</i>	<i>325</i>	<i>\$15,233.1</i>	<i>\$47,144.7</i>
Total	1,392	\$67,791.4	\$113,339.3

The impact of student and visitor spending

In addition to the impact of its spending on non-student payroll, purchasing and construction, St. John Fisher College contributes to the economic vitality of Monroe County through off-campus spending by Fisher students and by out-of-town visitors to Fisher’s campus.

The impact of student spending

The impact of student spending is determined in part by whether students live on campus or off-campus in Monroe County and the surrounding Rochester area. In the fall of 2015, 2,805 undergraduate and 1,018 graduate students were enrolled at St. John Fisher College. Approximately 49.3 percent of all undergraduate students lived in College-owned housing while virtually all graduate students lived off-campus in Monroe County and the surrounding Rochester area.

In analyzing the impact of off-campus student spending in Monroe County, this report counts only spending by full-time undergraduate and graduate students from outside of Monroe County; at the regional level, only spending by full-time undergraduate and graduate students from outside of the Rochester area; and at the state level, only spending by full-time undergraduate and graduate students from outside of New York. While relatively conservative, this approach helps ensure that we are not claiming as part of the College's impact spending that could still have occurred within Monroe County or elsewhere in New York even if these students had not been attending St. John Fisher College.

Based on data provided by St. John Fisher College on the average annual cost of living for students – on housing, food, transportation, books, supplies and personal expenses – we estimate that during fiscal year 2016, off-campus spending by full-time Fisher students from outside of Monroe County totaled nearly \$12.5 million, most of which was spent in Monroe County. Using IMPLAN, we estimate that this spending directly and indirectly accounted:

- 124 FTE jobs in Monroe County, with earnings totaling nearly \$3.7 million; and
- \$13.6 million in countywide economic output.

We similarly estimate that in fiscal year 2016, off-campus spending by full-time Fisher students from outside of the Rochester area totaled \$9.6 million. Using IMPLAN, we estimate that this spending directly and indirectly accounted for:

- 96 FTE jobs in Monroe County, with earnings totaling \$2.8 million; and
- \$10.5 million in countywide economic output.

For students who came to Fisher from outside of New York, we estimate that during fiscal year 2016, off-campus spending in Monroe County totaled nearly \$1.1 million. Using IMPLAN, we estimate that this spending directly and indirectly accounted for:

- 10 FTE jobs in Monroe County, with earnings totaling \$308,131; and
- Nearly \$1.2 million in countywide economic output.

The impact of visitor spending

St. John Fisher College also attracts visitors to its campus who then spend money within the local economy. As shown in Table 4, Fisher estimates that during the 2015-16 academic year,

approximately 86,066 people visited the Fisher campus – for admissions visits, commencement, alumni events, athletic events, the Buffalo Bills Training Camp and other purposes.

Table 4: Visitors to Fisher by purpose of visit, 2015-16 academic year

Purpose of visit	Total visitors
Pre-enrollment visits	8,550
Admitted student visits	2,675
Other Admissions programs	151
Alumni visits/homecoming	2,155
Commencement	7,010
Academic conferences/lectures	1,500
Entertainment/performances	3,800
Museum/exhibitions	100
Community events	1,000
Athletic events	17,625
Buffalo Bills Training Camp	41,500
Total	86,066

Of these visitors, we estimate that approximately 46,775 (approximately 54.3 percent of all visitors) came from outside of Monroe County, including approximately 21,666 (25.2 percent of all visitors) from elsewhere in the Rochester area, approximately 21,212 (24.6 percent) from elsewhere in New York, and approximately 3,897 (4.5 percent) from outside of New York.

Using data on visitor spending compiled by Visit Rochester, we estimate that during fiscal year 2016, off-campus spending in Monroe County by visitors to Fisher from outside of Monroe County – on hotel accommodations, food, shopping, entertainment and transportation – totaled approximately \$5.4 million. Using IMPLAN, we estimate that this spending directly and indirectly accounted for:

- 84 FTE jobs in Monroe County, with \$2.5 million in earnings; and
- Nearly \$7.0 million in countywide economic output.

We similarly estimate that in fiscal year 2016, off-campus spending in Monroe County by visitors to Fisher from outside of the Rochester area totaled approximately \$3.5 million. Using IMPLAN, we estimate that this spending directly and indirectly accounted for:

- 53 FTE jobs in Monroe County, with \$1.6 million in earnings; and
- \$4.5 million in countywide economic output.

For visitors to Fisher who came from outside of New York, we estimate that during fiscal year 2016, off-campus spending in Monroe County totaled approximately \$785,700. Using IMPLAN, we estimate that this spending directly and indirectly accounted for:

- 12 FTE jobs in Monroe County, with approximately \$373,400 in earnings; and
- \$1.0 million in countywide economic output.

Adding it all up

When the impact of St. John Fisher College’s spending on non-student payroll, purchasing and construction is combined with the impact of student and visitor spending, we estimate that in fiscal year 2016, Fisher directly and indirectly accounted for:

- 1,513 FTE jobs in Monroe County, with earnings totaling \$69.4 million; and
- \$120.6 million in countywide economic output.

In the Rochester area, we estimate that spending by Fisher, its students and visitors to the College in fiscal year 2016 directly and indirectly accounted for:

- 1,494 FTE jobs in the Rochester area, with earnings totaling nearly \$69.3 million; and
- \$120.7 million in regional economic output.

Statewide, we estimate that spending by Fisher, its students and visitors to the College in fiscal year 2016 directly and indirectly accounted for:

- 1,414 FTE jobs in New York, with earnings totaling nearly \$68.5 million; and
- Nearly \$115.6 million in statewide economic output.

These combined impacts in Monroe County, the Rochester area and New York are summarized below in Table 5, Table 6 and Table 7.

Table 5: Total impact of spending by St. John Fisher College, students and visitors in Monroe County, FY 2016 (jobs in FTE, wages and output in \$000s)

	Jobs	Wages	Output
Impact of Fisher spending			
Direct	1,033	\$50,531.6	\$60,984.1
Indirect/induced	272	\$12,678.8	\$39,059.9
<i>Subtotal, Fisher spending impact</i>	<i>1,305</i>	<i>\$63,210.3</i>	<i>\$100,044.0</i>
Impact of student spending			
Direct	94	\$2,218.8	\$9,133.9
Indirect/induced	30	\$1,472.2	\$4,507.9
<i>Subtotal, student spending impact</i>	<i>124</i>	<i>\$3,691.0</i>	<i>\$13,641.9</i>
Impact of visitor spending			

Direct	66	\$1,612.2	\$4,151.6
Indirect/induced	18	\$925.4	\$2,802.4
<i>Subtotal, visitor spending impact</i>	<i>84</i>	<i>\$2,537.6</i>	<i>\$6,954.0</i>
Total	1,513	\$69,438.9	\$120,639.9

Table 6: Total impact of spending by St. John Fisher College, students and visitors in the Rochester area, FY 2016 (jobs in FTE, wages and output in \$000s)²

	Jobs	Wages	Output
Impact of Fisher spending			
Direct	1,044	\$51,090.1	\$62,825.2
Indirect/induced	301	\$13,688.6	\$42,860.4
<i>Subtotal, Fisher spending impact</i>	<i>1,345</i>	<i>\$64,778.7</i>	<i>\$105,685.7</i>
Impact of student spending			
Direct	73	\$1,708.2	\$7,043.4
Indirect/induced	23	\$1,133.8	\$3,471.8
<i>Subtotal, student spending impact</i>	<i>96</i>	<i>\$2,842.0</i>	<i>\$10,515.2</i>
Impact of visitor spending			
Direct	41	\$1,041.6	\$2,720.6
Indirect/induced	12	\$598.3	\$1,808.1
<i>Subtotal, visitor spending impact</i>	<i>53</i>	<i>\$1,639.8</i>	<i>\$4,528.7</i>
Total	1,494	\$69,260.5	\$120,729.6

Table 7: Total impact of spending by St. John Fisher College, students and visitors in New York State, FY 2016 (jobs in FTE, wages and output in \$000s)

	Jobs	Wages	Output
Impact of Fisher spending			
Direct	1,067	\$52,558.3	\$66,194.7
Indirect/induced	325	\$15,233.1	\$47,144.7
<i>Subtotal, Fisher spending impact</i>	<i>1,392</i>	<i>\$67,791.4</i>	<i>\$113,339.3</i>
Impact of student spending			
Direct	8	\$184.1	\$812.6
Indirect/induced	2	\$124.1	\$380.1
<i>Subtotal, student spending impact</i>	<i>10</i>	<i>\$308.1</i>	<i>\$1,192.7</i>

² As might be expected, the impact of the College's spending on payroll, purchasing and construction is somewhat greater at the regional level than at the Monroe County level, and greater at the state level than at the regional level. However, since in analyzing the impact of student spending we include only spending by students from outside Monroe County (at the county level), from outside the greater Rochester area (at the regional level) or from outside New York State (at the state level), the impact of student spending is greater at the county level than at the regional and state levels. As a result, the combined impacts of College, student and visitor spending shown in Tables 5, 6 and 7 are slightly greater at the county level than at the regional and state levels.

Impact of visitor spending			
Direct	9	\$237.1	\$632.9
Indirect/induced	3	\$136.3	\$410.7
<i>Subtotal, visitor spending impact</i>	12	\$373.4	\$1,043.6
Total	1,414	\$68,472.9	\$115,575.7

Contributing to state and local revenues

Despite its tax-exempt status, St. John Fisher College contributes in a variety of ways to state and local government finances. As shown in Table 8, state and local taxes and fees paid by Fisher in fiscal year 2016 included:

- More than \$1.9 million in state and local income taxes withheld from the salaries and wages of Fisher employees;
- \$25,936 in unemployment insurance taxes;
- \$84,967 in water and sewer fees; and
- \$13,958 in other taxes and fees to state and local governments.

Overall, in fiscal year 2016, St. John Fisher College directly accounted for nearly \$2.1 million in state and local government revenues.

Table 8: Taxes and fees paid by Fisher to state and local governments, FY 2016

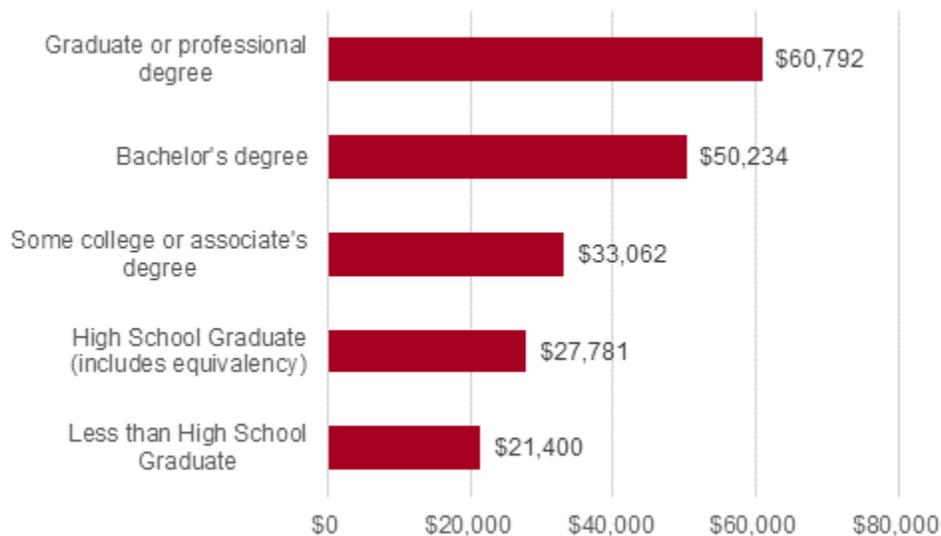
Type of tax/fee	Amount
Payments to state government:	
State income taxes withheld	\$1,931,168
Unemployment insurance taxes	\$25,936
Other state taxes and fees	\$5,665
<i>Subtotal, state revenues</i>	<i>\$1,962,769</i>
Payments to local governments:	
Local income taxes withheld	\$1,151
Real property taxes on non-exempt property	\$2,975
Water/sewer fees	\$84,967
Other taxes and fees	\$5,318
<i>Subtotal, local government revenues</i>	<i>\$94,410</i>
Total	\$2,057,179

Part Two: Contributing to the Development of New York’s Human Capital

Human capital – the totality of knowledge, skills and experience accumulated over time by a region’s or a city’s workforce – is perhaps the single most important contributor to economic growth.

Data published by the U.S. Census Bureau highlight the impact of education on individual workers’ earnings. As Figure 8 shows, in 2015 the median annual earnings of adult Monroe County residents who had completed four-year college degrees were 80.8 percent higher than the median earnings of those who had only a high school diploma; and the median earnings of those with graduate or professional degrees were 118.8 percent higher than the earnings of those with no education beyond high school.

Figure 8: Median earnings by educational attainment for Monroe County residents age 25 years and older, 2015



Source: 2015 American Community Survey (1-Year Estimates), (Social Explorer); U.S. Census Bureau

The economic benefits of higher education, however, are not limited to those who earn degrees. A study published by the Milken Institute in 2013 found that in U.S. metropolitan areas, adding one year of schooling to the educational attainment of workers who already had a high school

diploma increased average GDP per capita by 17.4 percent and average real wages by 17.8 percent.³

Even non-college educated workers benefit from this effect. University of California economist Enrico Moretti has shown that “the earnings of a worker with a high school education rise by about 7 percent as the share of college graduates in his [metropolitan area] increases by 10 percent.”⁴

Student enrollment at Fisher

In the fall of 2015, a total of 3,823 students were enrolled in for-credit programs at St. John Fisher College, including 2,805 undergraduate and 1,018 graduate students. As shown in Table 9, 40.6 percent of all Fisher undergraduates were enrolled in the School of Arts and Sciences, 25.8 percent were enrolled in the School of Business, 24.7 percent in the Wegmans School of Nursing, and 5.5 percent in the School of Education. Among graduate students, 32.7 percent were enrolled in the Wegmans School of Pharmacy, 27.8 percent were enrolled in the School of Education, 22.9 percent in the Wegmans School of Nursing, 15.3 percent in the School of Business, and 1.3 percent in the School of Arts and Sciences.

Table 9: Total for-credit enrollment at Fisher by school, fall 2015

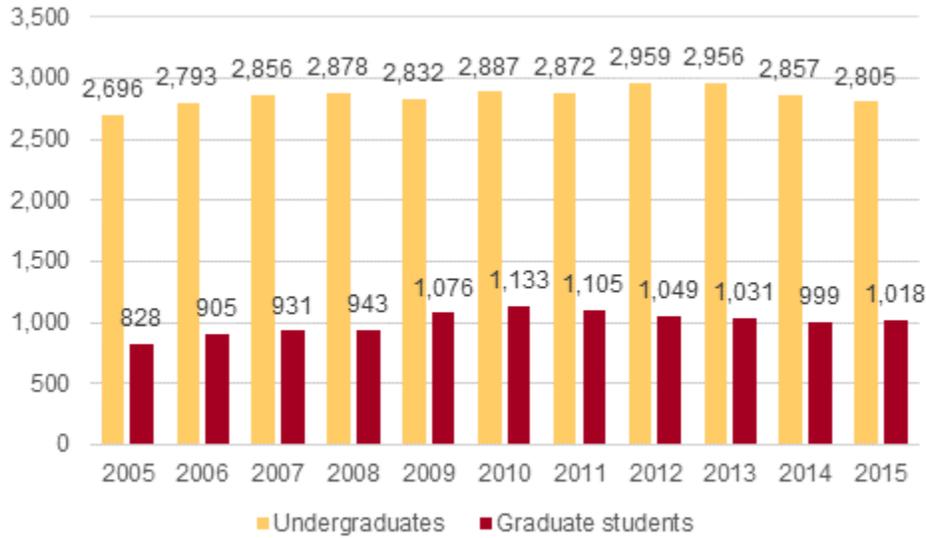
School	Undergraduate students	Graduate students
School of Arts and Sciences	1,138	13
School of Business	723	156
School of Education	153	283
Wegmans School of Nursing	692	233
Wegmans School of Pharmacy	–	333
Undeclared/non-matriculated	99	–
Total	2,805	1,018

Between the fall of 2005 and the fall of 2015 (as shown in Figure 9), total for-credit enrollment at St. John Fisher College grew by 8.5 percent. Undergraduate enrollment grew by 4.0 percent (an increase of 109 students), while graduate student enrollment grew by 22.9 percent (an increase of 190 students).

³ Ross DeVol et al., *A Matter of Degrees: The Effect of Educational Attainment on Regional Economic Prosperity*, The Milken Institute, February 2013, p.1.

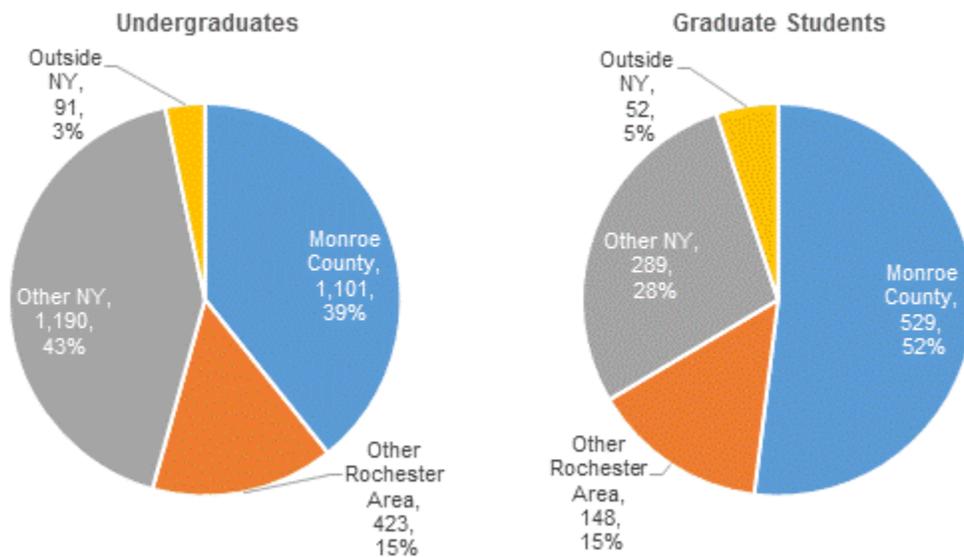
⁴ Enrico Moretti, *The New Geography of Jobs*, (Houghton Mifflin Harcourt, 2012), p. 98.

Figure 9: Total for-credit enrollment at Fisher, fall 2005 – fall 2015



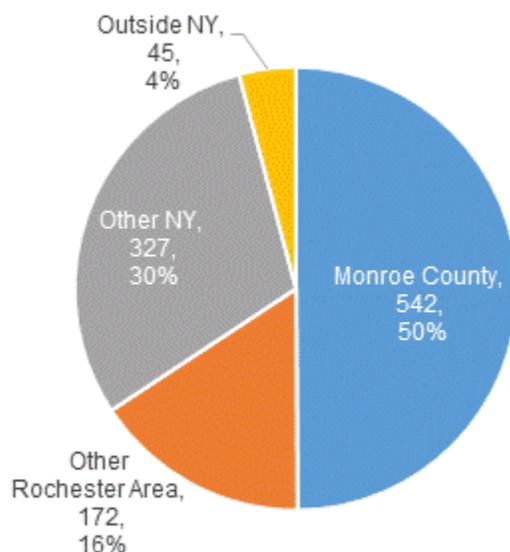
In the fall of 2015, 3,680 of Fisher’s undergraduate and graduate students (96.3 percent of total enrollment) were residents of New York, of whom 1,630 students (42.6 percent of total enrollment) were from Monroe County, 571 students (14.9 percent of total enrollment) were from elsewhere in the Rochester area, and 1,479 students (38.7 percent) were from elsewhere in New York. Figure 10 shows the distribution of Fisher undergraduate and graduate students by place of residence.

Figure 10: Enrollment at Fisher by student’s permanent place of residence, fall 2015



During the 2015-16 academic year, St. John Fisher College awarded a total of 1,086 degrees and certificates, including 734 undergraduate degrees and certificates and 352 graduate degrees and certificates. As shown in Figure 11, 49.9 percent all degrees and certificates were awarded to residents of Monroe County, an additional 15.8 percent were awarded to residents of other communities in the Rochester area, and an additional 30.1 percent were awarded to other residents of New York State.

Figure 11: Total Fisher degrees and certificates awarded by student’s place of residence, 2015-16 academic year



Making a Fisher education more affordable and accessible

Financial aid that St. John Fisher College provides from its own resources helps to ensure that students can get access to the educational opportunities Fisher offers. In fiscal year 2016, Fisher provided nearly \$32.3 million in College-funded financial aid to undergraduate students, including \$11.8 million to students from Monroe County, nearly \$4.2 million to students from elsewhere in the Rochester area, and \$15.0 million to students from elsewhere in New York.

Fisher is particularly committed to providing opportunities for “first-generation” students. More than 20 percent of Fisher’s undergraduate population are first-generation students. Created in 1998 to mark the 50th anniversary of the College’s founding, the **Fannie and Sam Constantino First Generation Scholarship** program each year selects up to 24 high-potential, highly motivated high school seniors whose parents did not graduate from college. The program provides yearly financial assistance up to half-tuition and half of on-campus room and board. First Generation Scholars also participate in a “learning community” designed to help them succeed in making the transition from high school to college.

Fisher also enrolls a significant number of low-income students. Approximately 30 percent of its undergraduate students are eligible for Pell grants, which typically go to students in the bottom 40 percent of the income distribution. Fisher is not only committed to enrolling low-income and first-generation students, but also to ensuring their success. Over the past five years, retention and graduation rates for first-generation and low-income students have closely matched, and in some cases exceed, retention and graduation rates for all students.

Preparing Fisher students for tomorrow's economy

Undergraduate education at St. John Fisher College combines a strong grounding in the liberal arts with opportunities for students to pursue their career interests. The College offers a wide range of undergraduate programs that are closely aligned with some of New York's leading (and in some cases, fastest-growing) industries. The following are just a few examples.

- Fisher's School of Arts and Sciences offers a **major in Computer Science**. Students can choose among concentrations in programming, computer systems design, analysis and information security.
- The Wegmans School of Nursing's **BS in Nursing** combines classroom learning, a focus on patient- and family-centered care and evidence-based practice, practical training in the School's nursing simulation center and at least 840 hours of clinical experience with Rochester-area health care providers. In 2015-16, 143 of the program's 145 graduates (98.6 percent) passed the National Council Licensure Exam (NCLX) for registered nurses.
- The School of Arts and Sciences offers a **BA in Digital Cultures and Technologies**, with courses in website programming and design, video game design and social media.
- The School of Arts and Sciences offers a **BS in Media Management**, a program that spans communications theory, public relations, advertising, marketing and business management. Students gain practical experience working for College media outlets, for Rochester-area firms and for the PRIMA Group, Fisher's student-run integrated marketing firm.
- The School of Business offers a **major in Accounting**. Each year, nearly 100 percent of the School's Accounting graduates are either employed or accepted into graduate programs within three months of graduation.
- The School of Business also offers a **major in Finance**, with concentrations available in either corporate finance or financial planning. Students belonging to the School's Investment Club have the opportunity to manage a real-world investment portfolio.
- Fisher is offering a new **minor in Data Science**, with courses in programming, statistics, quantitative analysis, and building predictive models. Students are required to complete a "mini-capstone" project in which they apply the techniques of data science to their major fields of study.

Fisher's graduate and professional programs similarly prepare students for high-demand, rewarding and critically important careers.

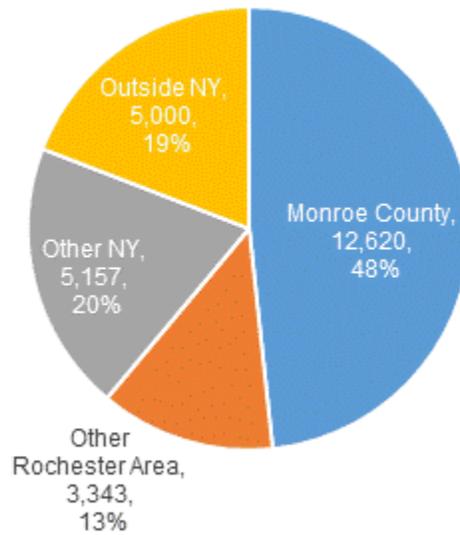
- Fisher's School of Business offers an **MBA** program with concentrations in accounting, general management, health services and pharmaceutical industry management. The School also offers a "4+1" option, under which students who earn a BS in Business at Fisher can earn an MBA in one additional year.
- The Wegmans School of Pharmacy is one of only four pharmacy colleges in upstate New York, and the only such program in the greater Rochester area. The School's **Doctor of Pharmacy** degree is a four-year, full-time program integrating studies in disciplines such as physiology, medicinal chemistry and pharmacology with 2,000 hours of hands-on practical experience.
- The Wegmans School of Nursing offers an **MS in Nursing** that prepares students to work as nurse practitioners. Students can choose to specialize in family primary care, adult primary or acute care, or psychiatric care.
- Launched in 2008, the School of Nursing's **Doctor of Nursing Practice (DNP)** degree is designed to prepare students for advanced nursing practice, clinical scholarship and leadership positions in health care organizations.
- The Ralph C. Wilson, Jr. School of Education offers an **MSEd in Educational Leadership** designed to prepare teachers and other school professionals for leadership positions at either the school or the school district level.

Since 2006 the School has also offered an **EdD in Executive Leadership**, an innovative doctoral program, designed for working professionals, in which classes are held every other weekend. Strong demand for this program led Fisher in 2009 to begin offering it in Syracuse as well, in partnership with Onondaga Community College; and in 2017, to begin offering it at Iona College in New Rochelle.

Where Fisher alumni live

As of the summer of 2015, St. John Fisher College had 26,120 living alumni, of whom 21,120 (80.9 percent of all living alumni) lived in New York. As shown in Figure 12, 12,620 alumni (48.3 percent of all living alumni) lived in Monroe County, 3,343 alumni (12.8 percent of all living alumni) lived elsewhere in the Rochester area, and an additional 5,157 (19.7 percent) lived elsewhere in New York.

Figure 12: Fisher alumni by place of residence, as of summer 2015



Based on 2015 American Community Survey data, we estimate that graduates of St. John Fisher College account for approximately 6.7 percent of all residents of Monroe County who have at least a bachelor's degree.⁵ Fisher alumni are widely represented among Western and Central New York's business and civic leaders. Table 10 offers a few notable examples.

⁵ 2015 American Community Survey (1-Year Estimates), (Social Explorer); U.S. Census Bureau.

Table 10: Western and Central New York business and civic leaders who are Fisher graduates – selected examples

Alumni name	Position, company/organization	Industry	Location
Ronald Billitier	President, Billitier Electric	Electrical contractor	Rochester
Russell Brandon	Managing Partner & President, Buffalo Bills & Sabres	Professional sports	Buffalo
Dr. Leonard Brock	Director, Rochester-Monroe Anti-Poverty Initiative	Community services	Rochester
James Burns	President, J.W. Burns & Company	Investment advisors	Syracuse
Jack A. DePeters	Senior Vice President of Store Operations, Wegmans Food Markets, Inc.	Food retailing	Rochester
John DiMarco, Sr.	Owner, DiMarco Constructors	General contractor	Rochester
Mark Gionta	President, Rochester Colonial Manufacturing	Windows and doors	Rochester
Donald Jeffries	President & CEO, Visit Rochester	Tourism promotion	Rochester
Janice Loss	President & Owner, Dermatology Associates of Rochester	Health care	Rochester
Kenneth McAlpin	President, McAlpin Industries	Sheet metal	Rochester
Martin Mucci	President & CEO, Paychex	Payroll services	Rochester
Neal P. Elli	President, Empire Precision Plastics	Precision plastic parts	Rochester
Ronald A. Pluta	Managing Partner, Calkins Corporate Park	Real estate	Rochester
Victor E. Salerno	CEO, O'Connell Electric	Electrical contractor	Victor
Scott Socha	President, Delaware North Parks & Resorts	Hotels	Buffalo
Michael Stapleton	President & CEO, Thompson Health	Health care	Canandaigua
Dr. Joseph Zambon	Dean, University at Buffalo Dental School	Higher education	Buffalo

The value of a Fisher education

The value of a St. John Fisher College degree is reflected in survey data on post-graduation experiences of Fisher undergraduate students. As of one year after graduation, 90 percent of the class of 2015 reported that they were either employed, continuing their education, working in post-grad internships, fellowships or service programs, or in military service.⁶ Of the class of 2015 survey respondents:

- 89 percent reported their employment was related or somewhat related to their program of study at St. John Fisher College;

⁶ St. John Fisher College Career Center, *The Outcomes Survey*, 2015.

- 90 percent reported their employment was related or somewhat related to their career goals;
- 88 percent reported that they were satisfied with their employment; and
- 92 percent reported that it was important that their employment related to their program of study.⁷

The value of a Fisher undergraduate education is also reflected in the earnings of its graduates. According to PayScale's annual report on the earnings of college graduates, in 2016:

- The median early career salary of Fisher alumni who only received a bachelor's degree was \$40,000; and
- The median mid-career salary of Fisher alumni who only received a bachelor's degree was \$74,100.⁸

⁷ St. John Fisher College Career Center, *The Outcomes Survey*, 2015.

⁸ PayScale, *2016-2017 College Salary Report*.

Part Three: Civic and Community Engagement at Fisher

Strong local and regional economies are built on a foundation of strong communities. The quality of life that local communities offer, the quality of local schools and other community institutions, and the local structure of opportunity – all profoundly affect a region’s ability to attract, develop and retain highly-skilled workers, and attract investment. Communities with deep reserves of “social capital” are also far more resilient, and better equipped to respond effectively to the forces of economic change, than those where communal bonds have eroded.

Since its founding, St John Fisher College has been committed to serving and strengthening Rochester-area communities. In 2015, the Carnegie Foundation for Teaching recognized St. John Fisher College’s high level of community engagement across Schools and programs through its Community Engagement Classification. Below we describe some of the multiple ways in which Fisher manifests its commitment to the communities it serves.

Community service at Fisher: Students, faculty and staff

During the 2015-16 academic year, 2,862 St. John Fisher College students spent a combined total of 393,050 hours working as volunteers in a wide range of community service programs. Many of these students work on a regular basis with one of the more than 80 schools and community organizations with which the College has ongoing partnerships. Examples include:

- Advent House, a residence in Fairport for terminally ill patients who can no longer be cared for in their own homes
- Camp Good Days and Special Times, a non-profit organization that provides a range of programs and services for children with cancer and their families
- Catholic Family Center, Rochester
- East Rochester Youth Recreation Center
- Foodlink, a regional food hub and food bank serving ten counties in central and western New York
- Pittsford Volunteer Ambulance
- The Rochester Museum and Science Center
- Sojourner House, a shelter and service provider for homeless women and children
- St. Joseph’s Neighborhood Center
- The University of Rochester Medical Center
- Fourteen public schools in Rochester

Fisher students also serve the community through a variety of special events. For example:

- The ***Teddi Dance for Love*** – an annual 24-hour dance marathon at Fisher, started in 1982 – raises funds for Camp Good Days and Special Times (described above). Each year about 400 dancers and other volunteers take part in the event, which in 2017 raised more than \$70,000 for the Camp.
- ***Color the Roc*** is an annual event in which St. John Fisher students spend two Saturdays painting, cleaning and otherwise fixing up public schools in Rochester.

Fisher students also engage with Rochester-area communities through service learning – courses that combine classroom learning with hands-on experience in the community. During the 2015-16 academic year, 681 Fisher students participated in 45 service learning courses. For example:

- As part of a course on Adolescent Development, students provided mentoring, academic support and college awareness programs for a group of fifth-grade students.
- As part of a course on Environmental Issues, students conducted research for the Center for Environmental Initiatives in Rochester, and helped update the Center’s educational and marketing materials.

Fisher encourages students to embrace service not just as part of their college experience but as a longer-term commitment. Through its ***Service Scholars*** program, the College each year selects 24 high school seniors who have already done outstanding community service work through their school, their church or a local community organization. Those selected receive scholarships equal to half the cost of tuition, fees and room and board for four years. Service Scholars are expected to do at least 130 hours of volunteer work during their first year at Fisher, and 200 hours in each of the next three years. They also take at least one service learning course, and participate in other courses and seminars on service to the community.

First Generation Scholars are similarly required to do at least 30 hours of community service work each semester, with a particular focus on tutoring, mentoring and other youth services.

Community service at Fisher is not limited to students. In 2015-16, the College reports that 230 faculty members and staff provided approximately 20,000 hours of volunteer work. Adding this to the 393,050 hours of student volunteer work cited above, we estimate that the number of hours of volunteer work performed by the “Fisher family” totaled 413,050.

The value of the Fisher family’s volunteer work

Each year, a national organization called Independent Sector publishes state-by-state estimates of the average value of an hour of volunteer work. For 2016, Independent Sector pegged the average value of an hour of volunteer work in New York State at \$28.06. Using the previously-cited total of 413,050 hours of Fisher student, faculty and staff volunteer time, we can estimate that in 2016, the value of those hours totaled more than \$11.59 million.

The Fisher family's commitment to community is not limited to the Rochester area. For example:

- Every other year, a group of Fisher students, faculty and staff spend ten days in Kingston, Jamaica, volunteering at a sports camp sponsored by Jamaican Advantage through Sports for Youth (JASY), a local non-profit.
- Through the Wegmans School of Pharmacy's domestic service trips and international medical missions, Fisher pharmacy students and faculty have the opportunity to work on health care teams at local health clinics in underserved communities. Since the program was started in 2006, Fisher students have participated in medical missions and clinical rotations in five countries, including El Salvador, Kenya and India; as well as participated in a service trips to the Blackfeet Indiana Reservation in Montana.

Strengthening community institutions and organizations

Local institutions and organizations – schools, churches, civic groups, health and social service agencies and others – play a central role in meeting community needs and addressing common problems; and on a deeper level, they provide the reserves of “social capital” that help hold communities together.

Through its Center for Community Engagement, St. John Fisher College provides programs and services aimed at strengthening non-profit institutions and organizations, with a particular emphasis on management and board leadership in small to medium-sized organizations. The Center's programs include:

- A five-course, non-credit certificate in non-profit management, covering topics such as budgeting, financial management, human resources and resource development;
- Workshops and seminars aimed at helping board chairs and other board members understand their roles and responsibilities, and how they can improve their overall performance in areas such as governance, financial oversight, fund-raising and inclusiveness;
- A series of reports and other publications on governance and management of non-profits.

Since its founding in 2006, 1,293 managers and board members representing 269 non-profit organizations have participated in the Center's programs.

Developing the region's school and health professionals

Through its Ralph C. Wilson, Jr. School of Education, Wegmans School of Nursing and Wegmans School of Pharmacy, St. John Fisher College helps meet the region's (and the state's) continuing need for highly-skilled, well-prepared education and health care professionals. Table 11 provides

estimates of the number of Fisher alumni working in the Rochester area and elsewhere in New York State who are working as teachers and other education professionals, nurses, counselors and pharmacists.

Table 11: Fisher alumni working as school and health care professionals in New York State, as of summer 2016

	Rochester area	Other New York	Total NYS
Teachers/other school professionals	500	300	800
Nurses	1,000	300	1,300
Counselors	100	100	200
Pharmacists	200	150	350

Along with its alumni, Fisher contributes to the region’s school and health care workforce through the work done by education, nursing, mental health counseling and pharmacy students in the course of their training – student teaching, nursing students’ clinical rotations, counseling internships and pharmacy experience.

Through an ongoing program called Fisher Prime Care at St. Joseph’s, for example, a nurse practitioner and a group of nursing students from the Wegmans School of Nursing regularly provide new patient services, primary and acute care and follow-up services at St. Joseph’s Neighborhood Center in Rochester. The program, launched in 2013, is supported by a grant from Excellus BlueCross BlueShield.

The hours of practical experience required for Fisher students earning degrees in these fields are shown below in Table 12.

Table 12: Hours of practical experience required in selected Fisher degree programs

Degree	Hours of practical experience required
BS in Education	150
MS in Educational Leadership	680
BS in Nursing	840
MS in Mental Health Counseling	1,000
PharmD	2,000

As Table 13 shows, undergraduate and graduate education, nursing, counseling and pharmacy students at Fisher worked a combined total of 410,480 hours in 2015-16 in schools, hospitals, physician’s offices, community health and mental health programs, pharmacies and in other

settings. While some of this work was done elsewhere in New York, in other states or in other countries, more than 92 percent of the total hours reported (about 379,000 hours) represents work done in the Rochester area.

Table 13: Total hours of practical experience performed by Fisher education, nursing, counseling and pharmacy students, 2015-16 academic year

School/program	Hours of practical experience reported
Education	15,120
Nursing	174,990
Mental Health Counseling	63,300
Pharmacy	157,070
Total	410,480

If we apply Independent Sector’s estimate of the value of volunteer time to the hours worked by these students, their services to the community can be valued at \$11.5 million.

Part Four: A Growing Impact

Since its founding nearly seventy years ago, St. John Fisher College has been a significant contributor to the greater Rochester area, and to all of New York State. In the years ahead, its contribution is for several reasons likely to be even greater.

As of the summer of 2015 (as noted in Part Two), St. John Fisher College had 26,120 living alumni, of whom 61 percent lived in the greater Rochester area, with another 20 percent living elsewhere in New York State.

Student enrollment and the number of degrees granted at Fisher have grown substantially during the past twenty years; as a result, alumni who have graduated since 2000 now account for half of all Fisher alumni. This has two implications for the future:

- Fisher graduates are especially well-represented among the region's and the state's younger adult workforce – the well-educated 25-to-45-year-old workers so critical to the vitality and adaptability of New York's economy.
- During the next five to ten years (at least), the number of Fisher graduates living and working in the greater Rochester area and elsewhere in New York is likely to keep growing.

Fisher's contribution to the ongoing development of the region's and the state's human capital is not, however, simply a matter of overall numbers. During the past fifteen years the College has repeatedly demonstrated its readiness and its capacity to expand its existing offerings and to develop new programs that are attuned to the needs of both the state's economy and its communities – and to the opportunities that an evolving economy presents to the College's students.

From the founding of the Wegmans School of Pharmacy to the development of new graduate programs in the Wegmans School of Nursing to the introduction of new undergraduate programs in areas such as media management and data science, Fisher is providing students with the knowledge, skills and experience they need to help build New York's economy, to sustain its communities and to be successful in their own lives.

At the same time, St. John Fisher College is emerging as one of Monroe County's and the greater Rochester area's anchor institutions – a significant enterprise in its own right, and an active participant in efforts to strengthen the region's economy, to address community needs, and to ensure that the Rochester area is a safe, healthy, and vibrant place to live and work.