SEDA-Council of Governments

Economic Development District

Comprehensive Economic Development Strategy

Five-Year Update

August 2020

Prepared by:
SEDA-Council of Governments
201 Furnace Road
Lewisburg, PA 17837

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SEDA-Council of Governments Economic Development District

August 2020

Executive Summary

The SEDA-COG 5-Year Comprehensive Economic Development Strategy (CEDS) was developed in coordination with the SEDA-COG Board and SEDA-COG CEDS Committee which represents the main economic interests of the Region and includes private-sector representatives as a majority of its membership. The Committee collectively provides a very broad-based range of input into the CEDS process and has the responsibility for working with staff to develop and update the Region's CEDS for review and approval by the SEDA-COG Board of Directors. In addition, the CEDS committee will continue to seek and utilize input and guidance from the Region's county industrial development organizations, the PREP Partnership, and the Heartland Partnership.

Economic Development Characteristics for the SEDA-COG Region

- Favorable geographic location; within a 360-mile radius of all major population centers in the Northeastern United States
- A good inter-regional (rail, air, and surface) transportation system
- Extensive natural resources (water, natural gas, farmland, and forest land)
- Extensive outdoor recreation and heritage resources
- Seven institutions of higher education in its borders and a number of satellite institutions
- Skilled and available workforce

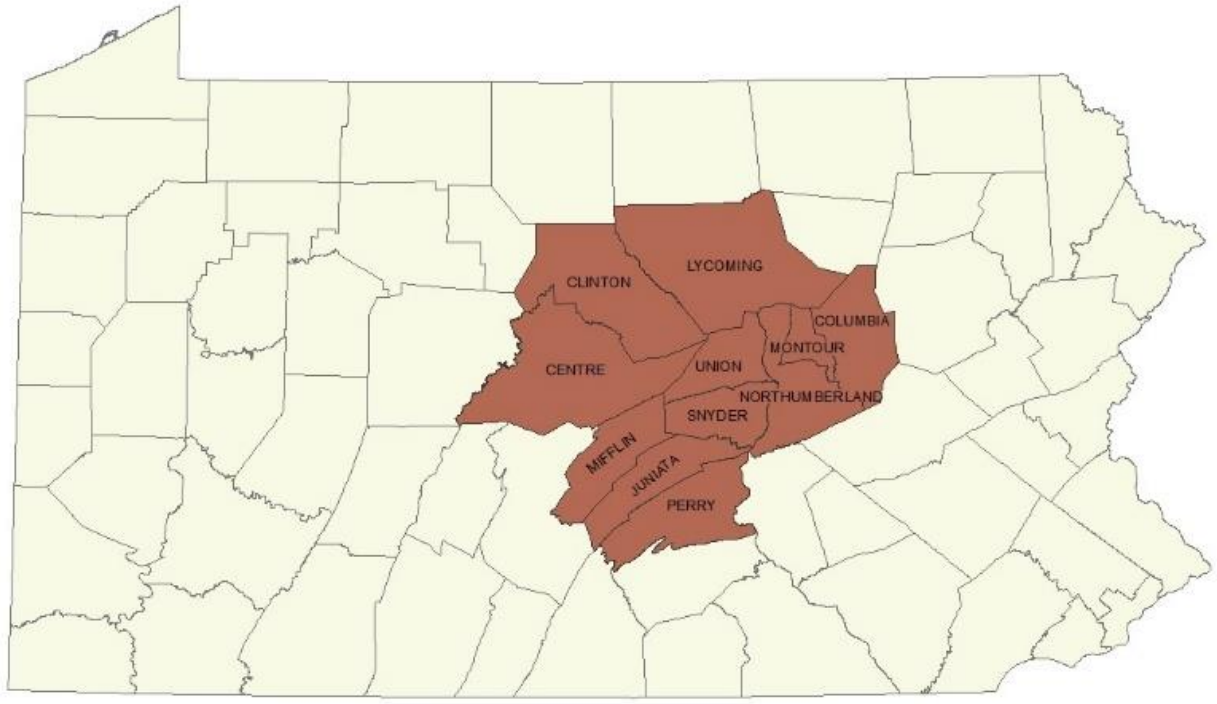
The Goals developed as part of the 5-year CEDS will be used to identify and evaluate projects and proposals in the Region.

Goals

The Strategic goals are:

1. Encourage the protection, modernization, and expansion of existing businesses and job opportunities, and where appropriate, encourage entrepreneurship and the recruitment of new business and industry consistent with the character of the Region.
2. Aggressively encourage the deployment of technology and widespread accessibility to broadband services and capabilities.
3. Encourage the upgrading of skills and talents for the Region's workforce and the creation of family-sustaining wages.
4. Encourage the prudent utilization of the Region's natural resources in an environmentally sustainable manner (including land, water, natural gas, and lumber).
5. Improve and expand infrastructure, flood resiliency, and conservation/greening efforts to enhance the older and rural centers throughout the area for business and economic development.
6. Encourage the promotion of the Region as a destination for travel, recreation, and tourism.
7. Cultivate efforts for the Region to become resilient in the face of natural disasters, pandemics, and economic downturns.

Summary Background



The SEDA-COG Economic Development District (EDD) is situated in the heart of Pennsylvania, and includes the counties of Centre, Clinton, Columbia, Juniata, Lycoming, Mifflin, Montour, Northumberland, Perry, Snyder, and Union.

Economic development activities of the SEDA-COG Economic Development District (EDD) are directed by a 22-member Board of Directors. SEDA-COG's governing body is broadly representative of the principal economic interests of the Region. A list of present Board members is included as Attachment A to this report.

The SEDA-COG Comprehensive Economic Development Strategy (CEDS) Committee represents the main economic interests of the Region and includes private sector representatives as a majority of its membership. The Committee collectively provides a broad-based range of feedback into the CEDS process and has the responsibility for working with staff to develop and update the Region's CEDS for review and approval by the SEDA-COG Board. (See Attachment B for a listing of the individuals on the CEDS Committee).

The CEDS committee will continue to seek guidance from the Region's Partnerships for Regional Economic Performance (PREP) Partners and the Heartland Partnership in completing the annual and 5-year CEDS updates (see Attachment C). These organizations have collectively provided a broad range of input into the CEDS process.

The Board and CEDS Committee continue to maintain an active involvement in EDA programs and in the identification and implementation of other economic development opportunities.

Opportunities are actively pursued to provide financing and technical assistance to business and industry in the Region. In addition, a point of emphasis for the Board and the CEDS Committee in their economic development activities continues to be the expansion and improvement of the Region's private sector.

In 2019, SEDA-COG completed a strategic planning process which was funded, in part, through the Appalachian Regional Commission. The strategic plan has guided SEDA-COG in developing a clear vision for the future of SEDA-COG so leadership can better integrate operations, align human services, and strengthen the core relationships with the businesses and communities who depend on the organization. The strategic plan has also informed the Region's 2020 5-Year Comprehensive Economic Development Strategy.

Four key strategic goals to strengthen SEDA-COG's efforts to meet the Region's current and evolving needs were developed as an outgrowth of the strategic planning process. They include:

- Expand opportunities for and eliminate obstacles to **business** development.
- Promote development of **infrastructure** to improve quality of life.
- Enhance the availability, affordability, and sustainability of suitable **housing** across the entire housing spectrum.
- Driven by the strategic plan, highlight SEDA-COG's value in the Region through **relationship building**.

The strategic plan has also played a role in guiding the Region's 2020 5-Year Comprehensive Economic Development Strategy.

PA PREP CENTRAL
Partnerships for Regional Economic Performance

The Central Region Partners for Regional Economic Performance (PREP) network coordinates economic development efforts in the Region to promote enhanced customer services to the business community and a comprehensive and efficient economic development delivery strategy. This means there is "no wrong door" for businesses -- it does not matter how the company gets into the service provider network, but how easy and direct it is to get the services and information they required. The Central PREP Program's core partners include the industrial development organizations, SEDA-COG, and the two Small Business Development Centers (SBDCs) located at Pennsylvania State University and Bucknell University.

PA Engage!

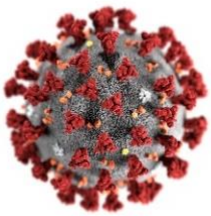
Engage! is a Pennsylvania statewide business retention and expansion program designed to regularly and proactively interact with targeted companies. The overall goal of Engage! is to retain existing businesses in a community and to help them grow and expand by building solid relationships with business owners or key decision makers and economic development partners and their representatives. The Central Region Engage! team consists of staff from

SEDA-COG, the Pennsylvania Technical Assistance Program (PennTAP), the two industrial resource centers serving the Region including the Innovative Manufacturers' Center (IMC) and The Northeastern Pennsylvania Industrial Resource Center (NEPIRC), the Berwick Industrial Development Association (BIDA), the Central Pennsylvania Workforce Development Corporation (CPWDC), the Region's two SBDCs including the Penn State SBDC and the Bucknell SBDC, and the local CareerLinks ®.

Included as Attachment D are letters of concurrence from the Boards of Commissioners of each of the counties in the Region. All counties have elected to be covered by SEDA-COG's 2020 5-Year CEDS.

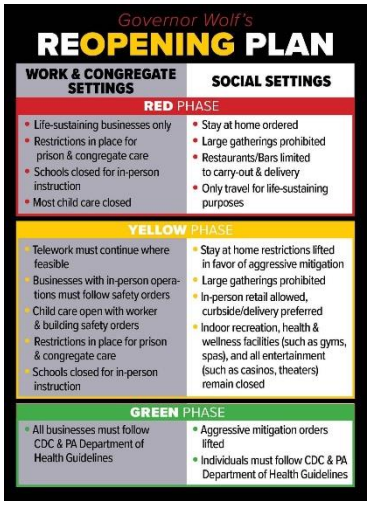
As of June 2020, SEDA-COG has a total staff of 86 persons, of whom eight people devote a major portion of their time to economic development activities. The latter figure does not include secretarial and other support personnel.

Corona Virus Disease - 2019 (COVID-19)



COVID-19

On March 19, 2020, Governor Tom Wolf ordered all non-life-sustaining businesses in Pennsylvania to close their physical locations. All nonessential businesses were required to close to slow the spread of the Coronavirus disease-2019 (COVID-19). COVID-19 is a contagious virus that has spread around the world and targets the respiratory system, has a high hospitalization rate, and a higher mortality rate than the normal influenza virus. Areas with high population densities including New York City and Philadelphia were particularly hard hit by this virus.



Pennsylvania's Phased Reopening Plan

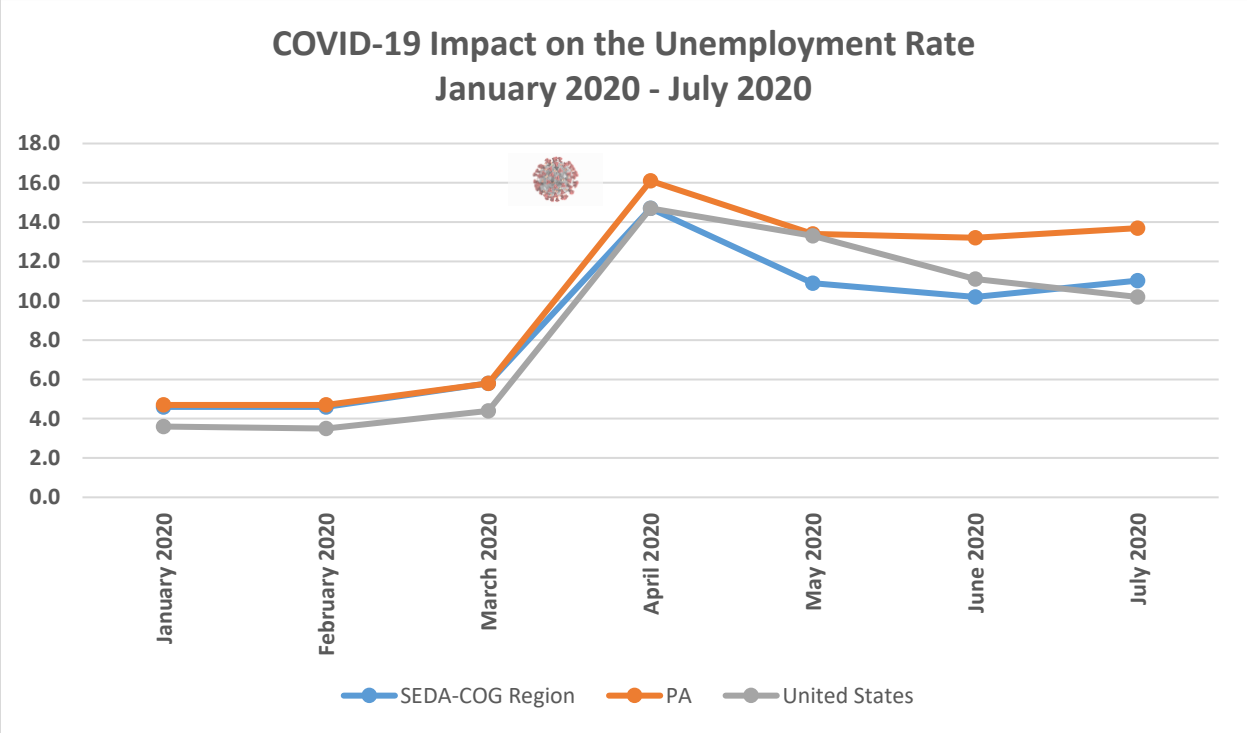
The goal with closing all non-life-sustaining businesses and urging Commonwealth residents to stay home was to "flatten the curve" and socially distance in order to slow the spread of the novel coronavirus and decrease the demand on hospitals and healthcare providers. While many schools had begun distance learning and closing their physical locations on a short term basis in mid-March, by April 9, 2020, Governor Wolf announced that all schools K-12, colleges, and universities would remain closed to in-person instruction for the remainder of the school year.

To reopen the Commonwealth, a phased approach using a combination of factors that moved counties from red, to yellow, and eventually to green. All counties started at red and slowly, as the infection and death rates decreased, they moved to yellow. Among the first counties to move to yellow in Pennsylvania were Centre, Clinton, Lycoming, Montour,

Northumberland, Snyder, and Union which moved to yellow on May 8, 2020. By May 22, 2020, the remainder of SEDA-COG counties (Columbia, Juniata, Mifflin, and Perry) moved to yellow. Centre, Montour, and Snyder were the first counties to move to green on May 29, 2020.

During the COVID-19 crisis, unemployment rates increased exponentially, and small businesses that were unable to operate remotely had closed. Among the top issues identified during this crisis were lack of adequate high-speed internet access for telemedicine, distance learning, and working from home. There was also an immediate need for working capital to keep businesses open during the shutdown. (See Chart 1 for the Pennsylvania Unemployment rate from the Department of Labor and Industry.)

Chart 1



Source: PA Department of Labor and Industry PA Work Stats, 2020

The lack of adequate broadband infrastructure was especially evident during the COVID-19 crisis that occurred in 2020 in Pennsylvania. The closing of physical locations for businesses meant that, in some instances, employees needed to work from home. However, there are areas of the SEDA-COG Region that do not have adequate highspeed internet access to work from home.

Some area schools have been attempting instruction online. Entire households with children do not have the opportunity to take part in the online instruction and some teachers are not able to provide instruction via the internet.

In March 2020, the Commonwealth opened the Pennsylvania Industrial Development Authority's (PIDA's) COVID-19 Working Capital Access (CWCA) Program to provide critical working capital financing to small businesses in the Commonwealth that are adversely impacted by the COVID-19 outbreak. This loan program was available online and all CWCA loan applications had to be submitted through a Certified Economic Development Organization (CEDO), such as SEDA-COG. This loan program closed days later due to the $75.6 million in application requests for a loan program which only had $61 million available. Several businesses did not have access to internet and had to either fax or send their application information via the U.S. Postal Service. The faster a loan application was submitted, the better chance the business had to take advantage of this loan program. The Small Business Administration (SBA) also had an Economic Injury Disaster Loan (EIDL) program and the Paycheck Protection Program (PPP) for businesses negatively impacted by COVID-19. These loan programs were also completed online and, in an effort, to help the businesses understand the program, online webinars were being held. The online application and the webinars all require high-speed internet access. The Region served by SEDA-COG was and is at a significant disadvantage in terms of having internet access to these loan programs aimed at helping businesses through the COVID-19 disaster.

This lack of adequate broadband access results in loss of income for the family and loss of productivity for the businesses. Households and even hospitals lack the ability to take advantage of telemedicine. Families are unable to work from home or work with their local school district to give children online instruction. Business owners lack the ability to apply online for COVID-19 Capital Loans and the SBA COVID-19 loans; unfortunately, it has been first-come, first-serve with these loan programs before the loan programs get oversubscribed. Lack of adequate high-speed internet access has wide-reaching negative impacts ranging from economics to healthcare and education.

The Coronavirus Aid, Relief, and Economic Security (CARES) Act was passed by Congress with bipartisan support and signed into law by President Trump on March 27th, 2020. This $2 trillion plus economic relief package was created to protect Americans from the public health and economic impacts of COVID-19.

The U.S. Small Business Administration opened the Economic Injury Disaster Loan (EIDL) and EIDL Advance for small business owners to advance of up to $10,000 to provide economic relief to businesses who were experiencing a temporary loss of revenue. As of May 8, 2020, Pennsylvania had 99,790 applications processed for $332.3 million in EIDL funds.

The SBA also opened the Paycheck Protection Program (PPP) which was designed to keep small businesses' employees on the payroll during the COVID-19 shutdown. SBA would forgive loans if all employees are kept on the payroll for eight weeks and the money is used for payroll, rent, mortgage interest, or utilities. Businesses were able to apply through any existing SBA 7(a) lender or through any federally insured bank, federally insured credit union, and Farm Credit System institution that participated. The PPP loan had a maturity of 2 years and an interest rate of 1%.

Demographics

Table 1
NUMBER OF MUNICIPALITIES BY TYPE: SEDA-COG COUNTIES and SEDA-COG REGION
2020

County/Area	CITIES	BOROUGHS	TOWNSHIPS	TOWNS	TOTAL NUMBER OF MUNICIPALITIES
Centre	0	10	25	0	35
Clinton	1	7	21	0	29
Columbia	0	8	24	1	33
Juniata	0	4	13	0	17
Lycoming	1	9	42	0	52
Mifflin	0	6	10	0	16
Montour	0	2	9	0	11
Northumberland	2	11	23	0	36
Perry	0	9	21	0	30
Snyder	0	6	15	0	21
Union	0	4	10	0	14
SEDA-COG	4	76	213	1	294

Source: 2013 Pennsylvania Department of Community and Economic Development

Included in SEDA-COG's 11-county Region are 294 municipalities, of which 76 are boroughs, 213 are townships, four are cities, and one is a town as shown in Table 1, "Number of Municipalities by Type: SEDA-COG Counties, and SEDA-COG Region."

SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats)

The SEDA–COG EDD covers a land area of 6,296 square miles, representing 14% of Pennsylvania's total land area of 44,742 square miles. In contrast, the Region's ACS 2014-2018 5-Year estimate of 694,643 represents only 5.4% of the total population of Pennsylvania. The population density in the Region is 110.3 persons per square mile, compared to a statewide density of 285.8 persons per square mile. Detailed figures by county are shown in Table 2.

Table 2
Population Density:
SEDA-COG Counties, Region, State, and Nation

County/Area	2018 Population Estimate	Land Area (Square Miles)	Persons per Square Mile
Centre	161,443	1,110	145.4
Clinton	39,074	888	44
Columbia	66,220	483	137.1
Juniata	24,562	391	62.8
Lycoming	114,859	1,229	93.4
Mifflin	46,362	411	112.8
Montour	18,294	130	140.7
Northumberland	92,325	458	201.5
Perry	45,924	551	83.3
Snyder	40,466	329	122.9
Union	45,114	316	142.7
SEDA-COG	694,643	6,296	110.3
Pennsylvania	12,791,181	44,742	285.8
United States	322,903,030	3,531,905	91.4

Source: U.S. Census Bureau: American Community Survey (2014-2018) 5 Year Estimate

Table 3 on the next page shows the population of the SEDA–COG counties, the SEDA–COG Region, and Pennsylvania for each of the past seven censuses, beginning in 1950. Also included is the population estimate from ACS 2014-2018 5-year Estimate.

Between 1950 and 2018, the SEDA–COG Region's total population grew by 33.6%, with individual county growth ranging from a high of 144.9% in Centre County to Northumberland County's negative growth of 21.2%. During this 68-year period, the Commonwealth's rate of growth was 21.8%. Of SEDA-COG's 11 counties, six had a growth rate higher than the state during this time period.

Recently, between 2000 and 2018, three of SEDA-COG's 11 counties had a slight decline in their population (Lycoming, Mifflin, and Northumberland). Centre County experienced the highest growth rate (18.9%) during that time, followed by Union County with an 8.4% growth rate. In all, five of SEDA-COG's counties (Centre, Juniata, Perry, Snyder, and Union) had population growth higher than the state (4.2%).

Table 3 Population of SEDA-COG Counties, SEDA-COG Region and Pennsylvania										
County/Area	2018 Estimate	2010	2000	1990	1980	1970	1960	1950	% Change 1950-2018	% Change 2000-2018
Centre	161,443	153,990	135,758	123,786	112,760	99,267	78,680	65,922	144.9%	18.9%
Clinton	39,074	39,238	37,914	37,182	38,971	37,721	37,619	36,532	7.0%	3.1%
Columbia	66,220	67,295	64,151	63,202	61,967	55,114	53,489	53,460	23.9%	3.2%
Juniata	24,562	24,636	22,821	20,625	19,188	16,712	15,874	15,243	61.1%	7.6%
Lycoming	114,859	116,111	120,044	118,710	118,416	113,296	109,367	101,249	13.4%	-4.3%
Mifflin	46,362	46,682	46,486	46,197	46,908	45,268	44,348	43,691	6.1%	-0.3%
Montour	18,294	18,267	18,236	17,735	16,675	16,508	16,730	16,001	14.3%	0.3%
Northumberland	92,325	94,528	94,556	96,771	100,381	99,190	104,138	117,115	-21.2%	-2.4%
Perry	45,924	45,969	43,602	41,172	35,718	28,615	26,582	24,782	85.3%	5.3%
Snyder	40,466	39,702	37,546	36,680	33,584	29,269	25,922	22,912	76.6%	7.8%
Union	45,114	44,947	41,624	36,176	32,870	28,603	25,646	23,150	94.9%	8.4%
SEDA-COG	694,643	681,365	662,738	638,236	617,438	569,563	538,395	520,057	33.6%	4.8%
Pennsylvania	12,791,181	12,702,379	12,281,054	11,881,643	11,863,895	11,793,909	11,319,366	10,498,012	21.8%	4.2%
Source: U.S. Census Bureau:										

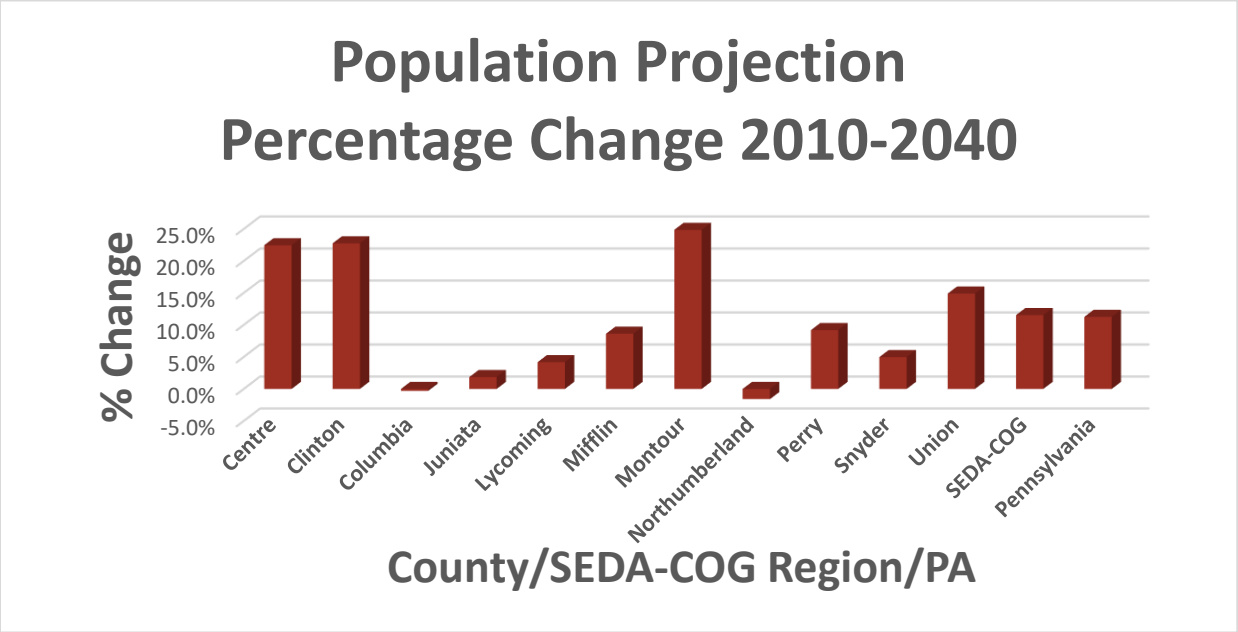
The troublesome negative growth rate, which persists in Northumberland County, has its origins in the decline of the anthracite coal industry in the middle years of the 20th Century. The spin-off effects of this initial event led to a total restructuring of the industrial economy in the county, as the county shifts now to a more service-driven economy.

Table 4 Population Projections to 2040: SEDA-COG Region and Pennsylvania							
County/Area	2010	2015	2020	2025	2030	2035	2040
Centre	153,990	161,413	168,182	174,547	180,148	184,804	188,564
Clinton	39,238	40,517	41,957	43,400	44,973	46,639	48,164
Columbia	67,295	67,523	67,759	67,951	67,922	67,661	67,091
Juniata	24,636	24,578	24,681	24,843	25,013	25,091	25,094
Lycoming	116,111	117,491	118,551	119,679	120,589	121,013	120,969
Mifflin	46,682	47,325	48,102	48,897	49,578	50,131	50,709
Montour	18,267	18,853	19,524	20,258	21,037	21,881	22,807
Northumberland	94,528	95,137	95,481	95,566	95,264	94,393	93,027
Perry	45,969	47,299	48,597	49,718	50,348	50,433	50,198
Snyder	39,702	40,714	41,438	41,936	42,156	42,110	41,678
Union	44,947	46,284	47,499	48,719	49,931	50,993	51,641
SEDA-COG	681,365	707,134	721,771	735,514	746,959	755,149	759,942
Pennsylvania	12,702,379	12,962,624	13,230,170	13,504,614	13,759,594	13,967,439	14,132,588
Source: Pennsylvania State Data Center, Population Projections 2013							

The population projections to 2040 were developed and published by the Pennsylvania State Data Center in 2013 (Table 4). According to the PaSDC, the population projections were developed by analyzing the fertility, mortality, and migration rates and trends from 1980 to 2010.

Conclusions from those rates and trends were integrated into the methodology for calculating the population projections through 2040.

Chart 2



Source: PA State Data Center, Population Projections 2013

Overall, the SEDA-COG Region's population is estimated to grow by 78,577 people or 11.5% between 2010 and 2040 (Table 4). The Commonwealth is estimated to grow by 1,430,209 people by 2040. This figure represents an 11.2% increase in population between 2010 and 2040 (See Chart 2). This data demonstrates the Region is estimated to grow at a slightly faster rate than the state.

Of the individual counties in the Region, nine counties are projected to increase in population and two counties are projected to experience a decrease in population. The counties with a projected increase include Centre, Clinton, Juniata, Lycoming, Mifflin, Montour, Perry, Snyder, and Union. Montour, Clinton, and Centre County are the fastest growing counties in the SEDA-COG Region at 24.9%, 22.7% and 22.5%, respectively.

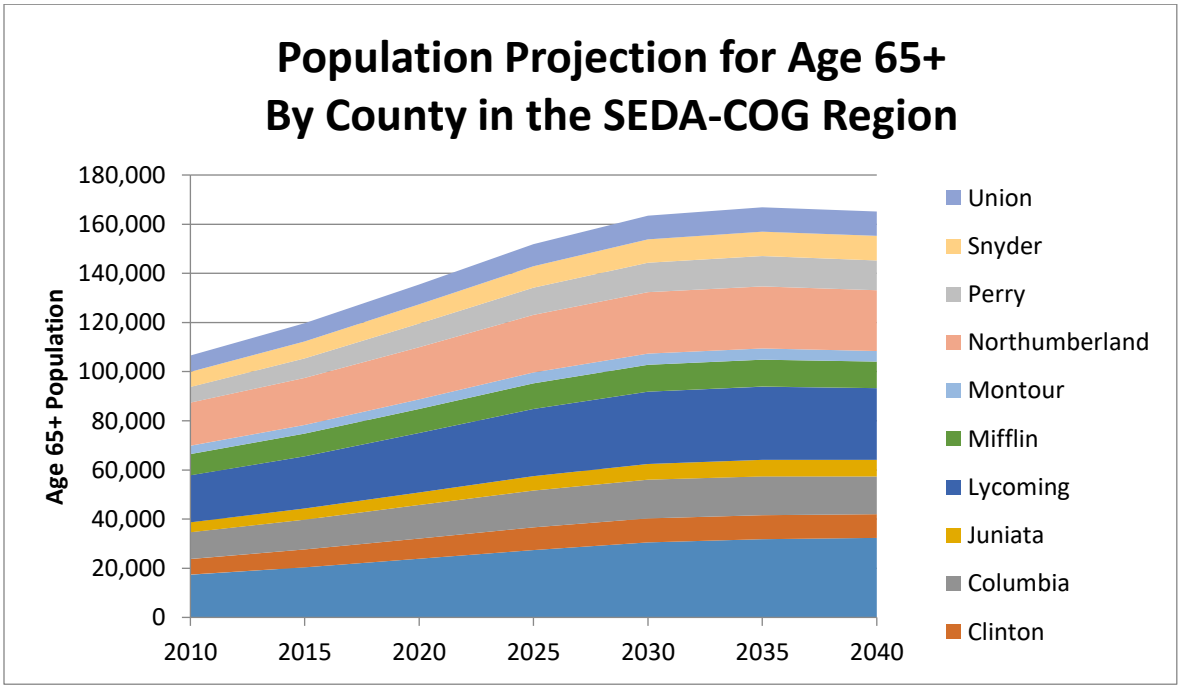
The two counties projected to decline in population by 2040 include Columbia and Northumberland. Northumberland County is expected to experience the largest decline in the Region at -1.6%. Columbia County is expected to experience a slight decline in population in the Region at -0.3%.

According to the table (Table 5) on the next page, "Age 65+ Population By County in SEDA-COG Region," the population of residents 65 years and older in the SEDA-COG Region is projected to increase by 65% between 2010 and 2040 from 106,590 to 165,091. In 2010, approximately 15.6% of the population was 65 years or older. By 2040, that number is expected to rise to 21% of the population being 65 years and older.

Table 5 Age 65+ Population Projection by County in SEDA-COG Region							
	2010	**2015**	**2020**	**2025**	**2030**	**2035**	**2040**
Centre	17,431	20,320	23,900	27,379	30,483	31,841	32,363
Clinton	6,347	7,281	8,223	9,269	9,809	9,801	9,635
Columbia	10,853	12,155	13,570	14,931	15,692	15,753	15,298
Juniata	4,053	4,570	5,143	5,847	6,454	6,763	6,873
Lycoming	19,120	21,200	24,178	27,419	29,400	29,711	29,059
Mifflin	8,656	9,219	9,761	10,425	10,885	10,989	10,853
Montour	3,406	3,614	3,935	4,361	4,648	4,561	4,268
Northumberland	17,520	19,120	21,244	23,407	24,953	25,238	24,747
Perry	6,356	7,931	9,661	11,140	12,016	12,358	12,090
Snyder	6,187	6,937	7,765	8,719	9,544	9,966	10,044
Union	6,661	7,298	8,024	8,921	9,621	9,888	9,861
SEDA-COG	**106,590**	**119,645**	**135,404**	**151,818**	**163,505**	**166,869**	**165,091**
Source: Pennsylvania State Data Center Population Projections 2010-2040							

Chart 3 below illustrates the rate of increase in the SEDA-COG population that will be 65 years and older by 2040.

Chart 3



Socioeconomic

The socioeconomic data presented in this section is derived from the U.S. Census Bureau's American Community Survey (ACS) 5-Year Estimates 2014-2018 and the Bureau of Economic Analysis, as indicated in the source section of each table.

Note that 5-Year ACS data is the most current data available for the entire SEDA-COG Region. The Montour County Data is only available at the 5-Year estimate level due to its population threshold. As such, to directly compare the counties, Region, and state figures, all of the ACS data is from the 5-Year estimates for 2007-2011. ACS is a large, continuous demographic survey that produces multi-year estimates using a smaller sample size. ACS deals with the characteristics of the population and housing and should not be considered a population count.

Table 6

SEDA-COG Counties and Pennsylvania Race Alone and Hispanic Origin: 2014-2018

		Race Alone							Ethnicity	
County/Area	Total Population	White Alone	Black of African American Alone	American Indian and Alaskan Native Alone	Asian Alone	Native Hawaiian and Other Pacific Islander Alone	Some Other Race Alone	Two or More Races	Not Hispanic or Latino	Hispanic or Latino
Centre	161,443	85.49%	3.63%	0.08%	6.3%	0.0%	0.2%	1.4%	97.1%	2.9%
Clinton	39,074	95.25%	1.45%	0.13%	0.8%	0.0%	0.0%	0.9%	98.5%	1.5%
Columbia	66,220	93.32%	1.8%	0.12%	1.1%	0.0%	0.0%	0.9%	97.3%	2.7%
Juniata	24,562	94.43%	1.04%	0.0%	0.5%	0.0%	0.0%	0.4%	96.4%	3.6%
Lycoming	114,859	90.56%	4.73%	0.2%	0.7%	0.0%	0.2%	1.6%	98.0%	2.0%
Mifflin	46,362	96.00%	0.8%	0.6%	0.2%	0.0%	0.0%	1.3%	98.5%	1.5%
Montour	18,294	91.70%	1.75%	0.03%	4.7%	0.0%	0.0%	0.8%	99.1%	0.9%
Northumberland	92,325	92.82%	2.49%	0.14%	0.3%	0.0%	0.1%	0.9%	96.7%	3.3%
Perry	45,924	95.57%	0.9%	0.2%	0.4%	0.0%	0.1%	1.0%	98.1%	1.9%
Snyder	40,466	95.07%	0.9%	.03%	0.7%	0.0%	0.0%	1.1%	97.8%	2.2%
Union	45,114	84.24%	6.11%	0.6%	1.7%	0.1%	0.2%	1.3%	94.1%	5.9%
SEDA-COG (% of Total)	694,643	90.92%	2.85%	0.1%	2.1%	0.0%	0.1%	1.2%	97.3%	2.7%
PA (% of Total)	12,799,181	76.83%	10.63%	0.1%	3.3%	0.0%	0.2%	1.8%	92.9%	7.1%

Source: U.S. Census Bureau: American Community Survey (2014-2018) 5 Year Estimate

The population of the SEDA–COG Region is 93.7% white, as shown in the table above (Table 6). Further racial/ethnic breakdown is as follows: 2.7% is Black/African American; 1.7% is Asian; and 0.1% is American Indian/Alaska Native (See Table 6). Additionally, 1.1% of the population in the SEDA-COG Region is recorded as being of two or more races, while 2.2% is Hispanic or Latino ethnicity, which can be of any race. This Region is considerably less diverse than the state as a whole, where 82.7% of the total population is white and 10.7% are Black/African-American. The lack of diversity in the SEDA–COG Region can be perceived as a barrier that impedes economic development.

In Table 7, the statewide median household income stood at $59,445, with 10 of the 11 SEDA–COG counties having income levels lower than the state's. Only Perry County had an income level higher than the state at $62,266. Perry County's proximity to the state's capitol of Harrisburg in Dauphin County plays a role in the higher median income as one of the top employers of the county is in public administration.

Table 7 Median Household Income in the SEDA-COG Region 2014-2018	
County/Area	Median Household Income
Centre	$58,055
Clinton	$49,234
Columbia	$49,889
Juniata	$52,765
Lycoming	$52,407
Mifflin	$47,526
Montour	$57,183
Northumberland	$47,063
Perry	$62,266
Snyder	$57,638
Union	$56,026
Pennsylvania	$59,445

Source: U.S. Census Bureau, American Community Survey (2014-2018) 5-Year Estimate

Per capita personal income figures for 2018, as estimated by the Bureau of Economic Analysis (See Table 8), indicate that the overall per capita income for the SEDA–COG Region is 80% of that for the nation and 77.6% for the state. There is a substantial disparity among the individual SEDA–COG counties, ranging from a low of $39,716 in Clinton County to a high of $57,426 in Montour County. Clinton County's per capita income is 72.9% of the nation's per capita income and 70.6% of the state's per capita income. In addition, of the 11 SEDA–COG counties, only Montour County has a per capita income higher than the state and national average.

The relatively high per capita personal income in Montour County is attributable, in large measure, to the presence of Geisinger Medical Center, one of the nation's premier medical research and healthcare centers. The concentration of highly educated medical professionals in the county results in a high per capita personal income.

Table 8 Personal Income and Per Capita Personal Income by County 2018		
County/Area	Personal Income	Per Capita Personal Income
United States	$17,580,778,371,380	$54,446
Pennsylvania	$719,184,151,725	$56,225
Centre	$7,520,504,000	$46,193
Clinton	$1,536,361,000	$39,716
Columbia	$2,762,955,000	$42,211
Juniata	$1,118,516,000	$45,277
Lycoming	$4,981,132,000	$43,823
Mifflin	$1,836,771,000	$39,738
Montour	$1,047,443,000	$57,426
Northumberland	$3,799,290,000	$41,712
Perry	$2,062,082,000	$44,693
Snyder	$1,720,900,000	$42,449
Union	$1,847,200,000	$41,246
SEDA-COG	**$30,233,154,000**	**$43,669**

Source: Bureau of Economic Analysis, Regional Economic Accounts, Local Area BEARFACTS, Published November 14, 2019

Labor Force

Table 9 (Page 20) shows the closing and downsizing of businesses in the SEDA-COG Region from the Rapid Response Log of the Central Pennsylvania Workforce Development Corporation. While this table does not capture every company downsizing and closing, it does

give a sense of how the Region has changed over the last three years: 2018, 2019, and year-to-date 2020.

In total, over 2,000 jobs were lost in the Region since 2018. While the businesses reporting job dislocations range from retail to healthcare and manufacturing, the majority of job loss reported through Rapid Response is in the manufacturing industry. The largest layoff in the Region was Wood Mode Inc., a custom cabinetry manufacturer in Snyder County. Wood Mode closed in May 2019, leaving 938 people without jobs.

Healthcare also had several notable layoffs and closings. University of Pittsburgh Medical Center (UPMC) Sunbury and Mount Nittany Medical Center together reported over 450 jobs lost. In early December 2019, UPMC announced the closing of the Sunbury Hospital in Northumberland County by March 31, 2020. UPMC had purchased the hospital in 2017. At the time of its closing, Sunbury Hospital had 60 beds and over 150 employees. The closest nearby hospital is Evangelical Community Hospital located in Lewisburg, Union County, a distance of 10.5 miles.

It should be noted that this list does not account for companies that have temporary layoffs as a result of COVID-19.

See Attachment E, “Industry Sector Summary report from the Central Pennsylvania Workforce Development Corporation.”

JOB DISLOCATIONS 2018-2020

Table 9

Employer Name	County	Date Received	Actual and Projected Layoffs	Industry Category
Bon Ton	Centre	02/01/2018	40	Retail Trade (Category 44)
ThermoFisher Scientific	Centre	8/21/2018	54	Manufacturing (Category 31)
Keystone Central School District	Clinton	05/21/2018	34	Educational Services
Woolrich Incorporated	Clinton	10/31/2018		Manufacturing (Category 31)
The Bon Ton	Columbia	03/14/2018	46	Retail Trade (Category 45)
Toys R Us (Closed April 2018)	Lycoming	01/25/2018		Retail Trade (Category 45)
Littman Jewelers	Lycoming	07/09/2018	10	Retail Trade (Category 44)
Phoenix Trim Works	Lycoming	10/23/2018	10	Manufacturing (Category 31)
The Bon Ton	Mifflin	04/20/2018	40	Retail Trade (Category 44)
Glen Raven Custom Fabrics Llc	Northumberland	03/19/2018	18	Manufacturing (Category 31)
Nfi Interactive Logistics	Northumberland	11/20/2018	55	Transportation And Warehousing (Category 48)
Bon-Ton Stores, Inc	Snyder	02/01/2018	48	Retail Trade (Category 45)
Weis Markets	Snyder	04/19/2018		Retail Trade (Category 44)
Payless Shoes	Centre	02/15/2019	4	Retail Trade (Category 44)
Keane Frac Lp	Clinton	03/21/2019	24	Mining, Quarrying, And Oil And Gas Extraction
Lootcrate	Clinton	10/04/2019	15	Retail Trade (Category 45)
Milco Industries, Inc.	Columbia	01/02/2019	10	Manufacturing (Category 31)
K-Mart #9161 (Berwick) - Transform Holdco, Llc (Formerly Sears Holdings Corp.)	Columbia	11/01/2019		Retail Trade (Category 45)
Payless Shoe Store	Lycoming	02/15/2019	6	Retail Trade (Category 44)
Payless Shoes	Lycoming	02/15/2019	4	Retail Trade (Category 44)
A.C. Moore Arts And Crafts	Lycoming	12/19/2019	27	Retail Trade (Category 45)
Kmart	Lycoming	11/07/2019	45	Retail Trade (Category 45)
Payless Shoe Source	Mifflin	02/15/2019	5	Administrative And Support And Waste Management And Remediation Services
Glick Shoe Store	Mifflin	03/22/2019	4	Retail Trade (Category 44)
Fabtex	Montour	06/11/2019	15	Manufacturing (Category 33)
Acf Industries	Northumberland	08/16/2019	203	Manufacturing (Category 33)
Upmc Susquehanna	Northumberland	01/23/2020	154	Health Care And Social Assistance
Staples (Selinsgrove)	Snyder	01/02/2019	11	Retail Trade (Category 44)
Bed Bath & Beyond	Snyder	01/02/2019	10	Retail Trade (Category 45)
Payless Shoe Store	Snyder	02/15/2019	6	Administrative And Support And Waste Management And Remediation Services
Wood-Mode Inc.	Snyder	05/13/2019	938	Wood Kitchen Cabinet and Countertop Manufacturing
Macy S Nittany Mall	Centre	01/13/2020	72	Retail Trade (Category 45)
Collegiate Hotel Group	Centre	04/02/2020	67	Accommodation And Food Services
Mount Nittany Medical Center	Centre	06/02/2020	300	Health Care And Social Assistance
Croda, Inc	Clinton	01/22/2020	26	
Melick Aquafeed, Inc.	Columbia	02/17/2020	15	Manufacturing (Category 31)
Cheetah Chassis Corporation	Columbia	05/07/2020		Manufacturing (Category 33)
A&I Products	Lycoming	02/25/2020	7	Manufacturing (Category 33)
Sunbury Community Health And Rehab Center	Northumberland	02/20/2020	30	Health Care And Social Assistance
Sunbury Textile Mills	Northumberland	06/04/2020	101	Manufacturing (Category 31)

Source: Central Pennsylvania Workforce Development Corporation, Rapid Response

The table below (Table 10) and the chart on the next page (Chart 4) show the trend for the past 10 years of average annual unemployment rates for the SEDA–COG Region, Pennsylvania, and the United States. From 2010-2015, the SEDA–COG rate tended to be slightly lower than or the same as the state and the nation. From 2016 on, the SEDA-COG unemployment rate was slightly higher than the nation.

For the year 2019, the annual average unemployment rate for the SEDA–COG Region stood at 4.5%. This figure is slightly higher than the Commonwealth (4.4%) and nation's rate of 3.7% (See Table 10.) For the individual counties in the SEDA–COG Region, the 2019 annual rate ranged from a low of 3.3%, in Centre County, to a high of 5.6%, in Northumberland County. Of the 11 counties in the SEDA-COG Region, 9 counties had annual average unemployment rates the same as or higher than the nation.

Table 10
Annual Unemployment Rate: SEDA-COG Region, Pennsylvania, and U.S.2010-2019

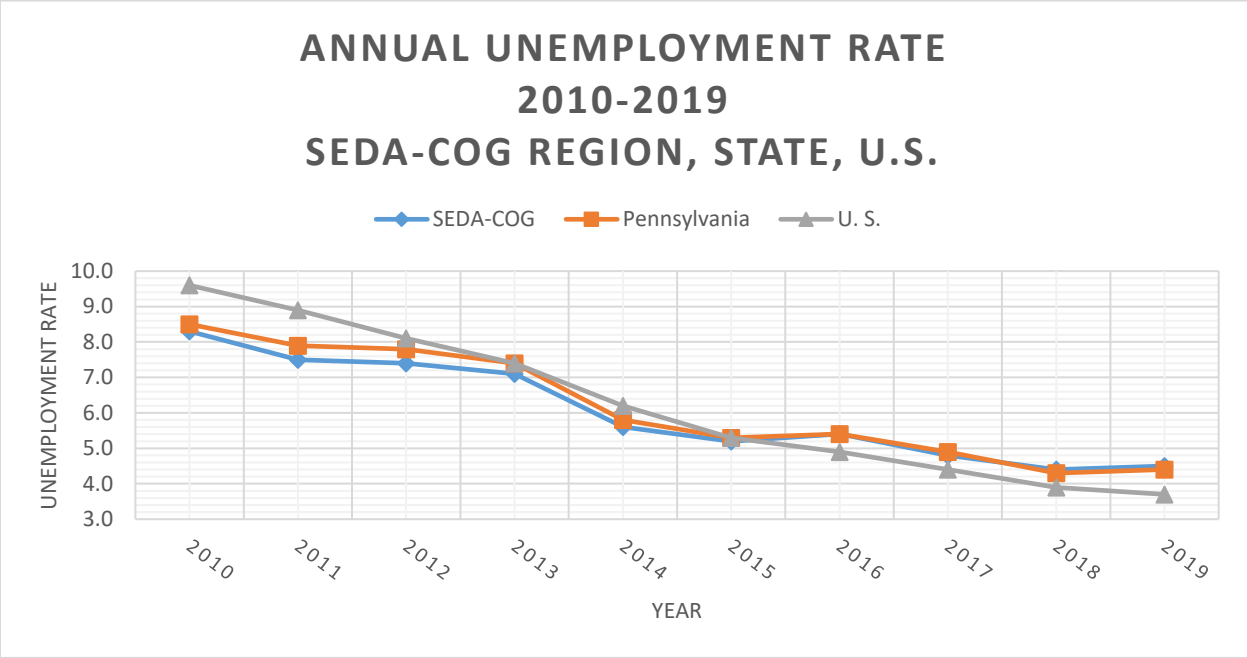
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Centre	5.9	5.4	5.5	5.3	4.3	4.0	4.2	3.7	3.2	3.3
Clinton	9.4	8.4	8.8	9.0	7.3	6.9	7.1	6.2	5.3	5.4
Columbia	9.3	8.6	8.3	7.7	6.2	5.7	5.6	5.2	4.8	4.8
Juniata	8.0	7.4	7.3	7.1	5.6	5.0	5.4	4.6	4.0	4.4
Lycoming	8.9	7.7	7.9	7.8	6.1	6.0	6.7	5.6	4.8	4.8
Mifflin	10.2	8.9	8.7	8.1	6.4	5.8	5.8	5.3	4.7	4.7
Montour	6.7	6.2	5.8	5.5	4.6	4.3	4.3	3.9	3.5	3.6
Northumberland	9.9	9.2	9.1	8.7	6.7	6.1	6.3	5.7	5.2	5.6
Perry	8.1	7.4	7.3	6.5	5.1	4.5	4.7	4.3	3.7	3.7
Snyder	8.4	7.7	7.6	6.9	5.1	4.7	4.7	4.4	3.9	5.4
Union	7.7	6.8	6.4	6.3	5.0	4.5	4.8	4.4	3.7	4.0
SEDA-COG	**8.3**	**7.5**	**7.4**	**7.1**	**5.6**	**5.2**	**5.4**	**4.8**	**4.4**	**4.5**
Pennsylvania	**8.5**	**7.9**	**7.8**	**7.4**	**5.8**	**5.3**	**5.4**	**4.9**	**4.3**	**4.4**
U. S.	**9.6**	**8.9**	**8.1**	**7.4**	**6.2**	**5.3**	**4.9**	**4.4**	**3.9**	**3.7**

The high unemployment rate in Snyder County is primarily attributed to the closing of Wood-Mode, Inc. in May 2019 where 983 people lost their jobs. Wood Mode, Inc. was a custom cabinetry manufacturer. While the company has been purchased by a local business owner, and being run under Wood-Mode, LLC, prior to the COVID-19 crisis, 235 employees who had lost their jobs were rehired by Wood-Mode, LLC. According to the Central Pennsylvania Workforce Development Corporation, approximately 180 former Wood-Mode, Inc. employees had been hired by other companies. This equates to over 55% of the employees who lost their jobs at Wood-Mode, Inc. remain unemployed as of December 2019.

The high unemployment rate in Northumberland County is, in large part, due to the decline in the coal industry over the last several decades. The Anthracite Region which includes Northumberland County, has been suffering the impacts of the reduction in coal. Northumberland County continues to suffer from higher than average unemployment, stagnant or decreasing population, blight, low educational attainment, and low per capita income brought about by the decline in the coal mining industry and the slow and steady reduction in the use of anthracite coal in the Region. In June 2014, the City of Shamokin in Northumberland

County was designated by the Pennsylvania Department of Community and Economic Development (DCED) as a financially distressed community (Act 47).

Chart 4



According to William Berry, Research Coordinator at the Central Pennsylvania Workforce Development Corporation (CPWDC), the business landscape in the Region has changed since 2009. The gains and losses in each of the industries vary. Healthcare increased by 7,713 while Government, including public education, lost 6,008 jobs during the same timeframe.

Jobs steadily increased in the SEDA-COG Region (Centre, Clinton, Columbia, Juniata, Lycoming, Mifflin, Montour, Northumberland, Perry, Snyder, and Union counties) over the past 10 years. Since 2009, local jobs increased from 296,800 to 303,400, an overall increase of 6,600 jobs (2.3%). While there was an overall increasing trend in jobs, the Region did see an annual decrease in jobs in 2014 (-300 jobs), 2015 (-700 jobs), and 2019 (-700 jobs).

The top 3 increasing industry sectors from 2009 to 2019 are:

Health Care and Social Assistance: +7,713 (+19.4%)

Accommodation and Food Services: +1,947 (+9.2%)

Administrative and Support and Waste Management and Remediation Services: +1,647 (+21.3%)

The top 3 decreasing industry sectors are:

Government (including public education): -6,008 (-9.0%)

Retail Trade: -1,698 (-5.0%)

Wholesale Trade: -975 (-13.6%)

Local jobs reached a maximum of 304,100 jobs in 2018.

Goods-producing jobs account for 59,100 (19.5%) local jobs, while service-providing jobs account for 244,300 (80.5%). This distribution of jobs remained fairly constant during the 10-year time period.

Natural Environment and Resources

Susquehanna River

The 11-county SEDA-COG Region is predominately rural, and is situated in the heartland of Pennsylvania. Scattered across the Region are a number of small urban centers. Its topography, chiefly the Susquehanna River system and the ridges of the Appalachian Mountains, have influenced the Region's economic development. The urban centers are overwhelmingly found along the Susquehanna and its tributaries, where most of the Region's economic activity, development, and growth have occurred in the form of industry, commerce, and services.

The Susquehanna River has also influenced economic development over the years by its pattern of recurrent, though irregular flooding. Originating in the low rolling hills of the Allegheny Mountains in Pennsylvania, the West Branch flows northeast, passing through an area of steep hillsides. At Renovo, shortly after entering the SEDA–COG Region, the West Branch turns southeast and cuts through the Allegheny Front, entering a Region of broad valleys separated by long, high ridges. Following the northern flank of Bald Eagle Mountain northeastward, the West Branch turns south to its confluence with the Susquehanna River near Sunbury.

Susquehanna River from the Shikellamy Lookout

Six times over almost five decades, the Region has suffered from flooding of catastrophic proportions, in which many of the communities were inundated with flood waters. The Tropical Storm Agnes flood of June 1972 remains one of the greatest flooding events known in

the Susquehanna River basin in regard to both the area affected and the magnitude of the flood flow. Peak flows were often 1.5 times greater than the previous known maximum flood.

The winter flood of 1996 began January 18 and 19 ahead of a strong cold front. In the day leading up to the floods, strong southerly winds and dew points reaching into the 50s created ideal conditions to melt the snowpack that was covering the entire Mid-Atlantic Region. As the cold front moved through the area on January 19 and 20, intense rainfall accelerated the snowmelt even further, causing massive amounts of runoff to enter the rivers and streams. Pennsylvania cities experienced their worst flooding since Hurricane Agnes in 1972, and some smaller streams (including Lycoming Creek in Lycoming County) broke their all-time flood records.

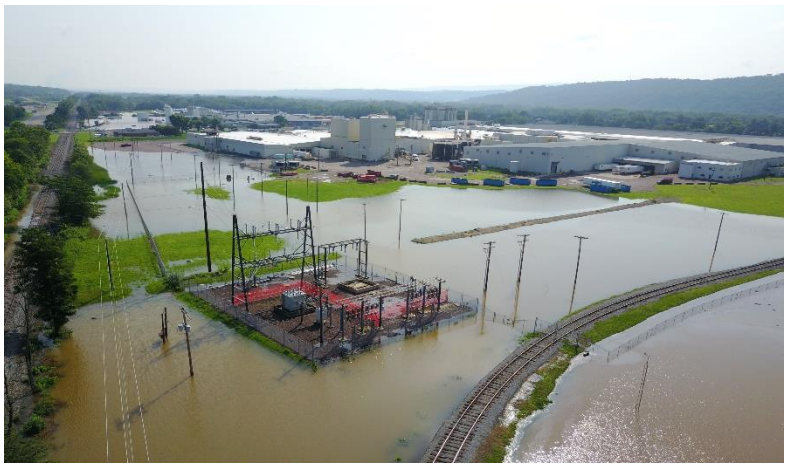
Hyner View, Clinton County, PA

Columbia County is a largely rural county located at the confluence of the North Branch of the Susquehanna River and Fishing Creek. The confluence of these two waterways was once the stimulus for the County's economic and demographic growth, when commerce moved through this Region by canal boat, bringing people and goods to what was then a remote area of the Commonwealth. However, for much of the past century, the presence of these two waterways has burdened the area with frequent and devastating floods. Since 1901, the greater Bloomsburg area has endured numerous flooding events, the flooding in turn has had a crippling effect on the County's economy, the most recent flooding occurring in September 2011.

Nine out of 11 counties in the SEDA-COG Region, including Columbia County, were designated federally declared disaster areas as a result of the flooding from Tropical Storm Lee in September 2011, where 10 to over 13 inches of rainfall over several days was recorded. Local streams and creeks overflowed their banks and were followed by the Susquehanna River cresting at record stages along its banks. Additionally, in some areas, localized flooding was caused by inadequate storm sewer systems and/or the increase of surface water runoff due to impervious surfaces such as pavement and buildings.

Disaster declarations were again announced for several counties in the SEDA-COG Region in 2016 and in 2018.

In 2018, the Federal Emergency Management Agency (FEMA) released a public notice stating "its intent to reimburse eligible applicants for eligible costs to repair and/or replace facilities damaged by severe storms and flooding (FEMA-4408-DR-PA) occurring from August 10 through 15, 2018. This notice applies to the Public Assistance (PA) and Hazard Mitigation Grant (HMGP) programs implemented under the authority of the Robert T. Stafford Disaster Relief and Emergency Assistance Act, 42 U.S.C. §§ 5121-5206." The notice goes on to state, "Under a major disaster declaration (FEMA-4408-DR-PA) signed by the President on November 27, 2018, the following counties have been designated adversely affected by the disaster and eligible PA only: Bradford, Columbia, Lackawanna, Lycoming, Montour, Schuylkill, Sullivan, Susquehanna, Tioga and Wyoming. Northampton County was designated on February 1, 2019. Additional counties may be designated at a later date. All counties in the Commonwealth of Pennsylvania are eligible for HMGP."



Flooding in the SEDA-COG Region

Although the timing of such events remains unpredictable, this pattern of serious periodic flooding is likely to continue and will have a major impact on the Region's economic development potential. It is this recognition that has prompted the Region's longstanding effort to enhance and encourage flood warning and preparedness as a way to lessen the overall impacts of these inevitable and unpredictable events.

The Biggert-Waters Flood Insurance Reform Act of 2012 (BW-12) was passed by Congress on July 6, 2012 and called for changes to the National Flood Insurance Program to make it more sustainable and actually reflect the real risk of flooding. Up to this point, the National Flood Insurance Program was not fiscally sound. This act was implemented to keep the program funded; however, it had many unintended consequences. As a result of this Act, those properties, which included businesses and residences with flood insurance, saw a marked increase in insurance premiums or a large cost to renovate the buildings to make the structures flood resilient.

In March 2014, Congress amended the Biggert-Waters Act with the Homeowner Flood Insurance Affordability Act. This Act essentially postpones some of the costly policies while a costs analysis/affordability study is conducted by Congress. Since much of the Region's development is along the Susquehanna River and its tributaries, the Biggert-Waters Flood Insurance Reform Act could have wide-ranging and negative impacts on the Region's

community and economic development. It is a concern that increasing flood insurance rates could lead to abandonment and blight in flood prone areas.

The Region has been favored with a geographical location that is near 50% of the U.S. population. It also has an abundance of land potentially available for development, seven institutions of higher education, and significant deposits of mineral resources. Portions of the SEDA-COG Region are also home to the Marcellus and Utica Shale, geological formations that contain high concentrations of natural gas deposits. Forest resources are extensive and increasing, providing timber for an expanding wood industry as well as a natural setting that favors the increasingly important tourism and recreation sectors of the economy.

Farmland

Another valuable natural resource in the Region is farmland. Agriculture continues to be one of the largest industries in Pennsylvania. Agricultural/farming activities have historically been an important part of the culture and economy of Central Pennsylvania. The USDA 2017 Census of Agriculture shows that there are 7,774 farms in the SEDA-COG Region. The total farmland acreage is 1,091,617, with the average size of a farm, approximately 140 acres. (See Table 11) The total number of farms decreased by 1,324 from 2012 to 2017; additionally, the total acreage of farmland decreased by 78,419 acres. However, the average size of a farm in the Region increased by 11 acres during that same time.

Every county in the SEDA-COG Region saw a decrease in the number of farms from 2012 to 2017. However, Lycoming and Snyder counties had an increase in the number of acres in farmland during that same time period. Centre, Columbia, Juniata, Lycoming, Mifflin, Montour, Northumberland, and Snyder all had an increase in the average size of farms (acres). While there is an overall decrease in the number of farms in the Region, the average size of the farmland is increasing.

Table 11 Number and Size of Farms 2012 & 2017 SEDA-COG Counties, SEDA-COG Region, Pennsylvania				
County/Area	**Year**	**Number of Farms**	**Land in Farms (Acreage)**	**Avg. Size of Farm (Acres)**
Centre	2012 2017	1,192 1,023	162,041 149,858	136 146
Clinton	2012 2017	469 267	52,715 40,057	469 150
Columbia	2012 2017	944 779	122,743 106,748	130 137
Juniata	2012 2017	737 670	91,032 85,640	124 128
Lycoming	2012 2017	1,207 1,043	158,462 186,130	131 178
Mifflin	2012 2017	808 711	90,554 80,970	112 114
Montour	2012 2017	459 356	43,493 38,635	95 109
Northumberland	2012 2017	847 728	129,501 124,136	153 171
Perry	2012 2017	889 759	135,075 114,746	152 151
Snyder	2012 2017	933 864	91,179 98,978	98 115
Union	2012 2017	613 574	93,241 65,719	152 114
SEDA-COG	2012 2017	9,098 7,774	1,170,036 1,091,617	129 140
Pennsylvania	2012 2017	59,309 53,157	7,704,444 7,278,668	130 137
Source: United States Department of Agriculture, "2017 Census of Agriculture"				

Table 12 Market Value of Production of Farms: SEDA-COG Counties, SEDA-COG Region, Pennsylvania			
County/Area	Year	Market Value of Production ($)	Market Value of Production (Avg. per Farm) ($)
Centre	2012	$91,581,000	$76,829
	2017	$91,478,000	$89,422
Clinton	2012	$60,558,000	$129,123
	2017	$45,561,000	$170,639
Columbia	2012	$74,351,000	$78,761
	2017	$67,287,000	$86,377
Juniata	2012	$101,440,000	$137,639
	2017	$126,760,000	$189,194
Lycoming	2012	$72,202,000	$59,819
	2017	$63,713,000	$61,086
Mifflin	2012	$94,023,000	$116,365
	2017	$139,994,000	$196,897
Montour	2012	$47,425,000	$103,323
	2017	$60,225,000	$169,170
Northumberland	2012	$154,339,000	$182,219
	2017	$154,583,000	$212,339
Perry	2012	$140,401,000	$157,932
	2017	$172,758,000	$227,613
Snyder	2012	$165,493,000	$177,377
	2017	$200,352,000	$231,889
Union	2012	$135,970,000	$221,811
	2017	$147,420,000	$256,830
SEDA-COG	2012	$60,558,000	$110,113
	2017	$1,270,131,000	$171,951
Pennsylvania	2012	$7,400,781,000	$124,783
	2017	$7,758,884,000	$145,962
SOURCE: United States Department of Agriculture, "2017 Census of Agriculture"			

The total market value of production for farms in the SEDA-COG Region for 2017 is $1,270,131,000 up $1,209,570,000 from the previous agricultural census performed in 2012 (See Table 12). The average market value of production per farm in the Region is $171,951.

This figure is an increase of $61,838 from 2012. Pennsylvania registered increases as well, in both the total market value of production and the average per farm.

Juniata, Northumberland, Mifflin, Montour, Perry, Snyder, and Union counties experienced an increase in the market value of products sold. In terms of the average market value of products sold per farm, all counties in the Region experienced an increase.

Game Lands/Forests

As shown in the table below (Table 13), over one million acres, more than one quarter of the SEDA–COG Region is owned by the Commonwealth of Pennsylvania as State Game Lands, State Parks, or State Forests.

Table 13
State Game Lands, Parks, and Forests
Acreage by County in the SEDA-COG Region

County/Area	Total Acreage	Game Lands	State Parks	State Forests*	State Total	State Land % of Total Land
Centre	709,120	104,440	9,931	349,234	463,605	65.38%
Clinton	570,240	49,451	16,672	511,822	577,945	57.89%
Columbia	311,040	21,390.9	73.46	6,612.5	28,077	9.02%
Juniata	250,880	10,688.2	0	17,608.6	28,297	11.27%
Lycoming	790,400	46,253.9	2,184	202,367.2	250,805	31.73%
Mifflin	263,040	3,294.7	220	58,899.8	62,415	23.72%
Montour	83,840	255.8	0	0	255.8	0.3%
Northumberland	294,400	12,158.5	131	2,698.5	14,988	5.09%
Perry	354,560	17,367.6	1,141	44,171.6	62,680	17.67%
Snyder	211,840	3,627.6	0	29,875.2	33,503	15.81%
Union	202,880	2,994.8	779.6	67,174.4	70,949	34.97%
SEDA-COG	4,042,240	288,813.9	31,164.0	887,628	1,207,606	29.87%

*Data is based off GIS acreage provided by the Bureau of Forestry. Legal acreage is not available to the public.

Source: PA Department of Conservation and Natural Resources (Bureau of Forestry, Pennsylvania State Parks); Pennsylvania Spatial Data Access (State Game Lands)

This abundance of public land is a valuable recreation resource as well as—in the case of State Forests and Game Lands—a source of high quality timber for the Region's hardwood industry (See Table 14).

Table 14 Economic Contribution of Forestry to SEDA-COG Counties, SEDA-COG Region, and Pennsylvania				
County/Area	Acres of Forestland	% of Forestland	Estimated Volume of Standing Timber (In Millions of Board Feet)	Estimated Value of Standing Timber ($ Million)
Centre	546,079	75%	2,259.36	$451.87
Clinton	444,750	82%	2,116.14	$423.23
Columbia	139,983	47%	899.22	$179.85
Juniata	151,399	60%	757.564	$151.51
Lycoming	609,502	74%	3,181.79	$636.36
Mifflin	166,409	58%	578.075	$115.62
Montour	25,069	27%	30.47	$6.09
Northumberland	142,951	48%	634.365	$126.87
Perry	203,216	57%	1,159.28	$231.86
Snyder	105,289	48%	561.936	$112.39
Union	105,224	55%	860.73	$172.15
SEDA-COG	2,639,871	66%	11,689	$2,435.65
Pennsylvania	16,599,563	58%	110,775.7	$17271.87
Source: Penn State Forestry Extension, Economic Contribution of Forestry to PA				

According to the Penn State Forestry Extension, Snyder County has the highest number of employees (4,423) in the forestry and wood product industry (See Table 15). Snyder County's employment is nearly 27% of the total of forestry and wood product employees in the Region and 5% of the statewide total of employees. Coming in a distant second in terms of employment in the forestry and wood product industry is Clinton County with 2,334 employees. Lycoming County has the third largest number of employees in the industry, with 2,227.

Even though Lycoming County has the third highest number of employees in the Region, the county is the highest in the number of forestry and wood product establishments (49). Juniata and Mifflin counties come in second and third in the Region with 43 and 40 establishments, respectively.

Mineral/Timber Resources

Mineral resources found in the SEDA-COG Region in economically significant quantities include stone. Limestone is the principal crushed stone produced in the Region and is produced in most of the Region's counties.

Hardwood timber is an economically significant and renewable natural resource if properly managed. Existing resources and professional expertise in the Region should provide the critical mass necessary to ensure the further development of the forest products industry in the SEDA-COG Region. A problem associated with such development is that the wood industry has historically and most recently shown itself to be volatile and susceptible to sudden and severe fluctuations in response to changing market conditions. This fluctuation was evident during the recent economic recession where the housing and related industries, including modular housing, furniture, and cabinetry, showed a sharp decline in both sales and employment. This trend reinforces the importance of continuing efforts to diversify the Region's economic base.

Table 15

Forestry and Wood Product Establishments, and Employees: SEDA-COG Counties, SEDA-COG Region, and PA

County/Area	# of Forestry and Wood Product Establishments	# of Forestry and Wood Product Employees
Centre	23	586
Clinton	24	2,334
Columbia	11	690
Juniata	43	999
Lycoming	49	2,227
Mifflin	40	1,063
Montour	3	70
Northumberland	23	1,339
Perry	13	478
Snyder	39	4,423
Union	14	1,783
SEDA-COG Region	282	15,992
Pennsylvania	2,490	80,309

Source: Penn State Forestry Extension, Economic Contribution of Forestry to PA

However, the natural resource value of standing timber requires its harvesting to be carefully managed. Standing timber serves as an important Regional flood reduction-related natural resource, preventing soil erosion and water runoff to our streams, tributaries, and rivers. The standing timber also plays an active role in mitigating climate change, by naturally absorbing carbon in the atmosphere through the chlorophyll process.

Natural Gas Resources

The northeast, north central and northwest portions of the SEDA-COG Region are home to Marcellus and Utica Shale - geological formations that contain high concentrations of natural gas deposits. This area continues to receive a considerable amount of attention as technologies have been developed to extract the natural gas less expensively, which is now in high demand across the nation. What was once considered too expensive for natural gas extracted is now

possible due to technologies that include horizontal drilling and hydraulic fracturing, which require large amounts of water, sand, and chemicals.

Although the number of new permits and actual wells drilled are generally declining annually, the actual production (and therefore, amount produced per well) keeps going upward steadily. This is in large part because of technical advances and efficiencies that have been developed for extracting gas, including being able to drill deeper and horizontally. See the charts below (Chart 5, Chart 6, and the graph titled"Pennsylvania Shale Well Inventory, Production & Consumption Summary") provided by the Department of Environmental Protection and Penn State's Marcellus Center for Outreach and Research, respectively.

Chart 5

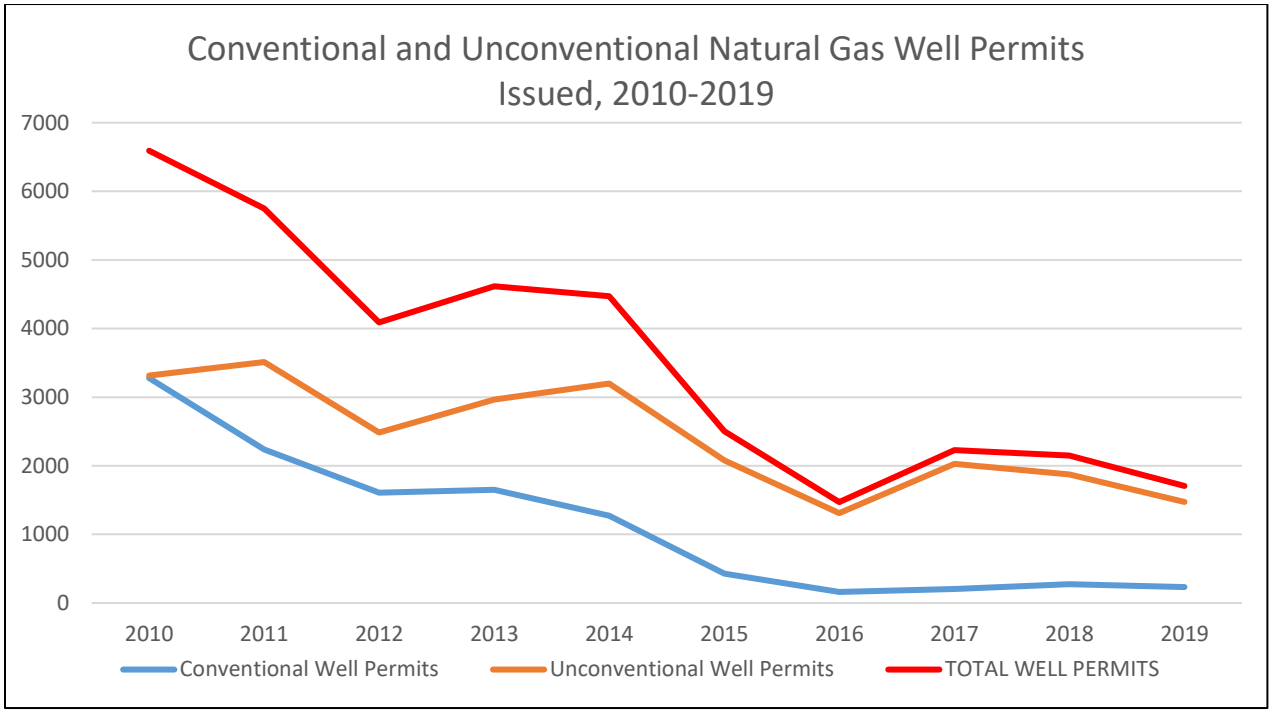
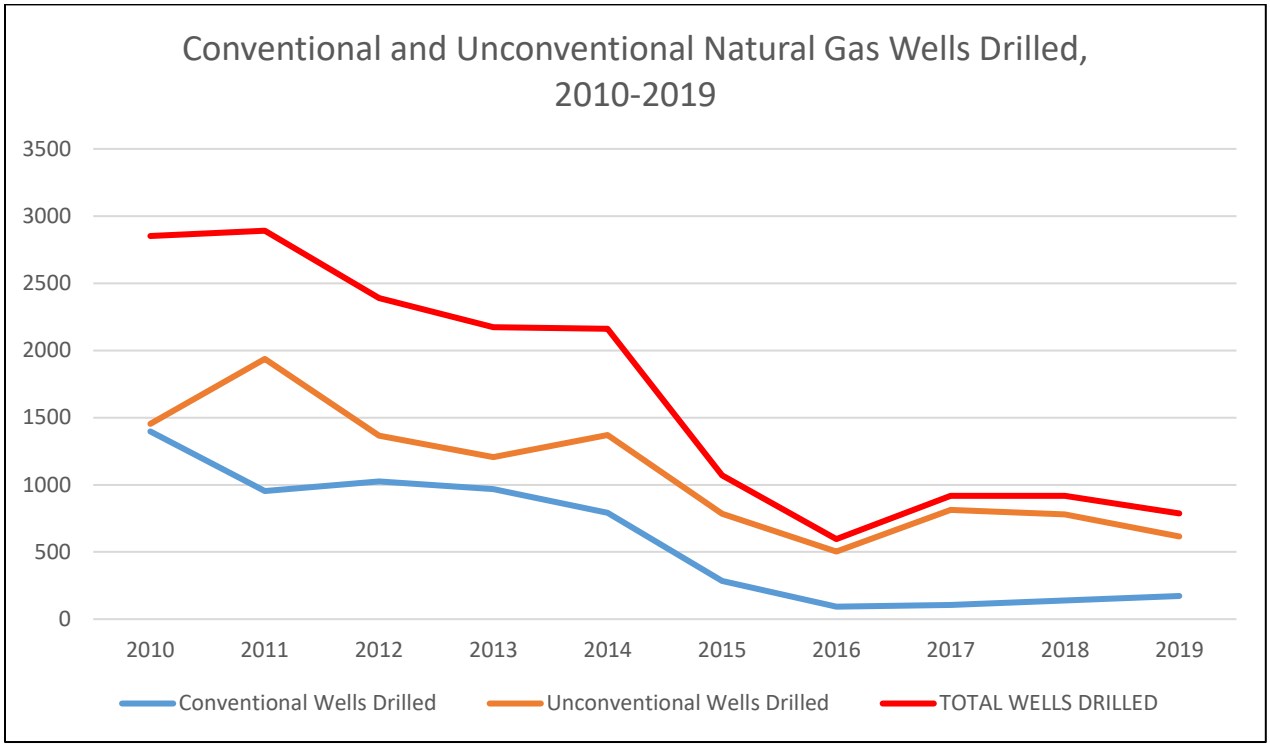
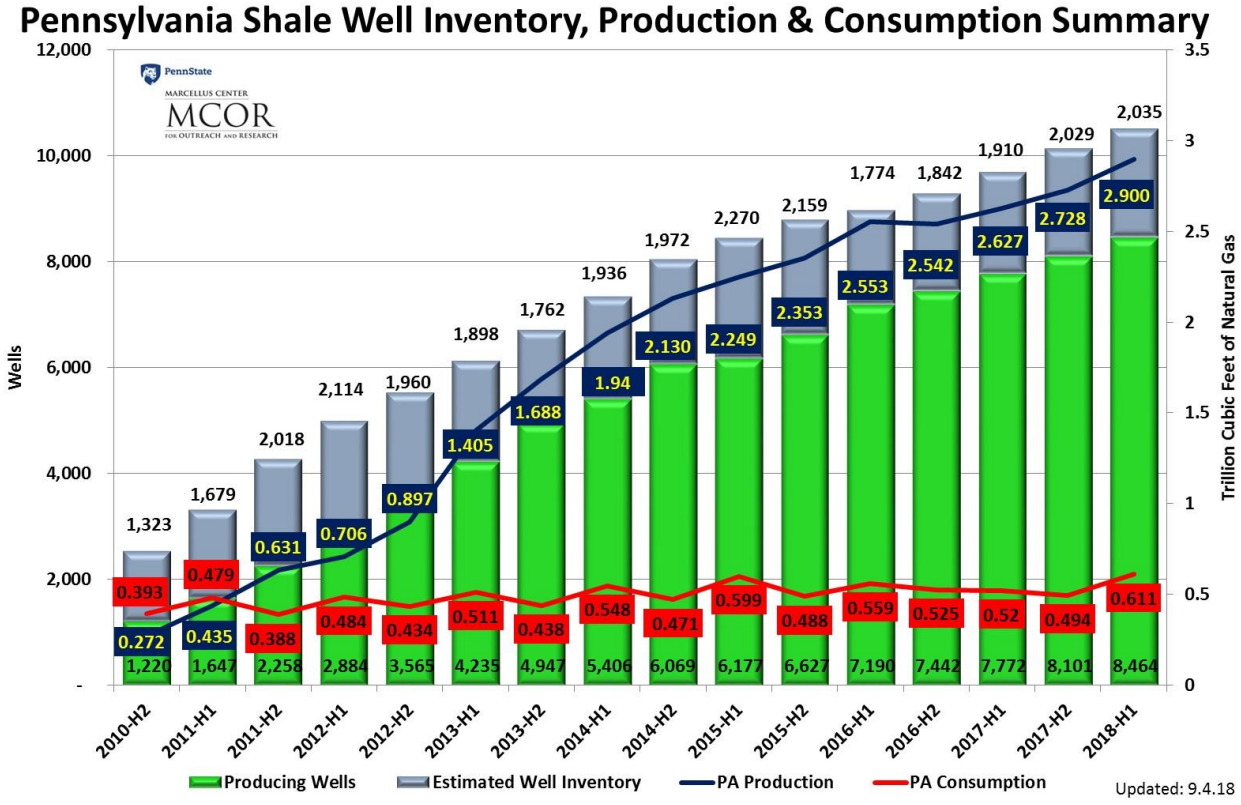


Chart 6


Conventional and Unconventional Natural Gas Wells Drilled, 2010-2019
3500
3000
2500
2000
1500
1000
500
0
2010
2011
2012
2013
2014
2015
2016
2017
2018
2019
Conventional Wells Drilled
Unconventional Wells Drilled
TOTAL WELLS DRILLED


Pennsylvania Shale Well Inventory, Production & Consumption Summary
PennState
MARCELLUS CENTER
MCOR
FOR OUTREACH AND RESEARCH
Wells
Trillion Cubic Feet of Natural Gas
12,000
10,000
8,000
6,000
4,000
2,000
-
3.5
3
2.5
2
1.5
1
0.5
0
1,323
1,679
2,018
2,114
1,960
1,898
1,762
1,936
1,972
2,270
2,159
1,774
1,842
1,910
2,029
2,035
0.272
0.435
0.631
0.706
0.897
1.405
1.688
1.94
2.130
2.249
2.353
2.553
2.542
2.627
2.728
2.900
0.393
0.479
0.388
0.484
0.434
0.511
0.438
0.548
0.471
0.599
0.488
0.559
0.525
0.52
0.494
0.611
1,220
1,647
2,258
2,884
3,565
4,235
4,947
5,406
6,069
6,177
6,627
7,190
7,442
7,772
8,101
8,464
2010-H2
2011-H1
2011-H2
2012-H1
2012-H2
2013-H1
2013-H2
2014-H1
2014-H2
2015-H1
2015-H2
2016-H1
2016-H2
2017-H1
2017-H2
2018-H1
Producing Wells
Estimated Well Inventory
PA Production
PA Consumption
Updated: 9.4.18

Shale gas is driving down energy costs which makes our Region more attractive to manufacturers and provides an inexpensive feedstock alternative for plastics manufacturers.

The COVID-19 pandemic has caused oil and gas usage to drop dramatically leading to lower prices. However, once the recovery begins, those prices for oil are expected to increase again, making natural gas a cheaper alternative.

There has been some discussion and observation that the gas companies consider the "wet" gas in Ohio and the western portions of PA to be of greater value in the world marketplace. According to some industry experts, although the drilling activity in Pennsylvania for "dry" gas appears to be slowing, the investment in natural gas infrastructure, which includes distribution facilities, pipelines to eastern seaboards, and ports for exporting to the world market continues to rise.

The SEDA-COG Natural Gas Cooperative was formed in June 2016 to promote and provide natural gas service to unserved and underserved customers in its central Pennsylvania service area. Objectives of the Cooperative include:

- Plan, Design, Build, and Maintain Delivery Infrastructure.
- Seek Available Project Funding.
- Facilitate Economic Growth.
- Deliver Safe and Reliable Utility Services.
- Provide Cost Savings and Competitive Rates.
- Address Local Needs.
- Maintain Financial Viability and Promote a Self-Sustaining Revenue Stream for New Services.
- Consider New and Evolving Technology.
- Be a Responsible Steward of Resources.

Currently, the Cooperative has eight member counties – Centre, Clinton, Juniata, Mifflin, Montour, Northumberland, Perry, and Union – with operations overseen by a 21-member Board of Directors, including two from SEDA-COG, and is supported by SEDA-COG staff through an administrative services agreement.

The Region's close proximity to the Eastern Seaboard's major populations, coupled with the Region's many renewable and clean energy resources (natural gas, agricultural and forested biomass resources, wind, sun and open space) present both challenges and opportunities in response to the energy economy. Responsibly and pro-actively managing the use of these resources to enable sustainable use of these natural resources both locally and nationally will require new attention to the value and use of these resources.

Natural Gas Synthesis Plant

Keystate Agri is a joint venture by KeyState and Frontier Natural Resources. Together, these groups, along with assistance from industry consultants, propose to utilize Marcellus Natural

Gas as a feedstock for manufacturing products via a vertical integration of onsite natural gas from Frontier Natural Resources with gas reserves of 250 billion cubic feet (bcf).

Frontier Natural Resources is an independent oil and natural gas producer based in central Pennsylvania, with a primary focus on conventional and unconventional resources across the Appalachian Basin. Frontier Natural Gas recently constructed a natural gas well at the Winner Tract site in Clinton County. Together, KeyState and Agri can supply gas to the plant for 20 years at cost.

The proposed KeyState Agri Natural Gas Synthesis Plant has the ability to provide natural gas feedstock for the production of hydrogen, nitrogen, and ammonia for industrial, medical, agriculture, and transportation uses; granulated urea fertilizer for agricultural grade urea animal feed; and automotive grade urea for diesel exhaust fluid. This feedstock will be provided through a vertically integrated natural gas supply system that sits atop the Marcellus Shale Play in West Keating Township, Clinton County. West Keating Township is a very rural area in the western most portion of Clinton County and is about 38.5 square miles. The plant would be in a federal opportunity zone that provides tax benefits for investing capital gains in low-income community census tracts. The incentive offers deferral, reduction, and potential elimination of certain federal capital gains taxes.

Should this project be proved feasible, the KeyState Plant would be the only ammonia/urea production facility in a 13-state Northeast and Central Atlantic region. The plant's construction could be upward of $375 million and once completed, employ 150-200.

Infrastructure

Table 16
Industrial/Business Parks and Incubators in the SEDA-COG Region

County	*Industrial Park*
Centre	Penn Eagle Industrial Park, Bellefonte Toftrees Technology Park, State College Science Park, State College Cato Park, State College Innovation Park at Penn State, State College Airport Park, State College Moshannon Valley Incubator, Philipsburg Nittany Mountain Industrial Park, State College Moshannon Valley Regional Business Park, Philipsburg Bristol Research Park, State College Benner Commerce Park, Bellefonte Moshannon Valley Enterprise Center, Philipsburg Moshannon Valley Regional Business Center, Philipsburg
Clinton	Beech Creek Industrial Park, Beech Creek Clinton County Industrial Park, McElhattan Lock Haven Industrial Park, Lock Haven Renovo Industrial Park, Renovo Piper Airport Business Park, Lock Haven Lamar Township Business Park, Lamar Township
Columbia	BIDA Complex, Berwick Columbia County Industrial Park, Bloomsburg Briar Creek Business Park, Berwick Columbia County Business Park, Scott Township Bloomsburg Regional Technology Center, Bloomsburg
Juniata	Juniata County Industrial Park, Mifflintown
Lycoming	Jersey Shore Industrial Park, Jersey Shore Muncy Industrial Park, Muncy Williamsport Industrial Park, Williamsport Timber Run Industrial Park, Montgomery Wahoo Industrial Park, Williamsport River Valley Commerce Park/Park South, Montgomery Fairfield Business Park, Montoursville Montgomery Area Development Corporation Sites, Montgomery Marcellus Energy Park, Muncy
Mifflin	Mifflin County Industrial Park, Lewistown MCIDC Industrial Plaza, Lewistown Armagh Business Center, Milroy Greater Lewistown Corporate Center, Lewistown Mifflin County Industrial Park East, Lewistown Life Science Complex , Burnham
Montour	Startup Danville (Bucknell University)
Northumberland	Milton Industrial Park, Milton Reed Industrial Park, Elysburg Mill Road Square, Shamokin SEEDCO/Coal Township Industrial Park, Coal Township
Perry	Perry County Business Campus One
Snyder	Peachey Industrial Park, Route 522, Selinsgrove Pawling Station Business Park, Selinsgrove
Union	East Buffalo Township Industrial Parkway, Lewisburg Great Stream Commons Business Park, Allenwood Mifflinburg Industrial Park, Mifflinburg Bieber's Industrial Complex, West Milton Maclyn Business Park, New Berlin StartUp Lewisburg (Bucknell University)

Industrial/Business Parks

There are over 50 industrial/business parks in the SEDA-COG Region (See Table 16). Most of the SEDA-COG counties currently have at least one industrial park. It should be noted that the apparent abundance of industrial parks in the SEDA-COG Region is in fact deceptive, since the actual fully serviced, available acreage in those parks is limited.

The existence of entrepreneurial incubators and makerspaces have increased over the last several years.

Electric Utilities Shown in Table 17 are the electric companies that provide service to various parts of the SEDA–COG Region, along with the county or counties served by each company.

Table 17
Electric Utility Service by County in the SEDA-COG Region

County/Area	CEN	CLI	COL	JUN	LYC	MIF	MON	NOR	PER	SNY	UNI
Electric Provider											
Citizens Electric Co. of Lewisburg								■			■
Duncannon Borough									■		
PPL Electric Utilities Corp.		■	■	■	■		■	■	■	■	■
West Penn Power Co.	■	■			■						

County Codes: Cen=Centre, CLI=Clinton, COL=Columbia, JUN=Juniata, LYC=Lycoming, MIF=Mifflin, MON=Montour, NOR=Northumberland, PER=Perry, SNY=Snyder, UNI=Union

Source: US Census Bureau: Population Division

Broadband

SEDA-COG has been working with the Region to address the lack of broadband infrastructure in the Region. Economic developers and Chambers of Commerce have identified broadband connectivity as a key indicator for economic opportunities within the Region. FCC data, the 2018 Broadband Penn State Study, data from Regional broadband assessment reports, and field work have identified areas in each of the SEDA-COG counties that are unserved or underserved.

Businesses rely on highspeed internet for basic business activities including email, social media marketing, website maintenance, credit card processing, online banking, payroll, and more. A greenhouse in the Region relies on high speed internet for keeping its computer controlled growing system updated and relies on Wi-Fi for environmental controls for its greenhouse. Other businesses rely on high speed internet access for security systems. Some agri-business owners in the Region use highspeed internet for precision farming which involves satellite and GPS equipment for site specific crop management to increase crop yields and profitability.

The lack of adequate broadband infrastructure was especially evident during the Coronavirus Disease-2019 (COVID-19) crisis that occurred in 2020 in Pennsylvania. As stated previously, on March 16, 2020, Governor Tom Wolf ordered all non-life sustaining businesses in Pennsylvania to close their physical locations. All nonessential businesses were required to close to slow the spread of the Coronavirus. The closing of physical locations for these businesses meant that, in some instances, employees needed to work from home. However, there are entire areas of the SEDA-COG Region that do not have adequate highspeed internet access to work from home.

Some area schools have been attempting instruction online. Entire households with children did not have the opportunity to take part in the online instruction and some teachers are not able to provide instruction via the internet.

As mentioned previously, after the onset of COVID-19, the Commonwealth as well as the Small Business Administration had several grant and loan programs available to business. However, several businesses did not have access to internet and had to either fax or send their application information via U.S. Postal Service. The faster a loan application was submitted, the better chance businesses had to take advantage of these loan programs. These loan programs were completed online and, in an effort, to help the businesses understand the programs, online webinars were being held. The online application and the webinars all require high-speed internet access. The Region served by SEDA-COG was and is at a significant disadvantage in terms of having access to these loan programs aimed at helping them through the COVID-19 disaster.

This lack of adequate broadband access results in loss of income for the family and loss of productivity for the businesses. Lack of adequate high-speed internet access has negative impacts ranging from economics to healthcare and education.

Potential solutions for bringing broadband to underserved and unserved areas may include but is not limited to fiber installation, fixed-wireless by providing tower fit-up/upgrades and/or providing stand-alone community poles in order to accommodate ISP wireless equipment. SEDA-COG is working with the counties to establish broadband incentive programs to encourage internet service providers (ISPs) in expanding their services into underserved areas where it may not be financially feasible for a traditional buildout.

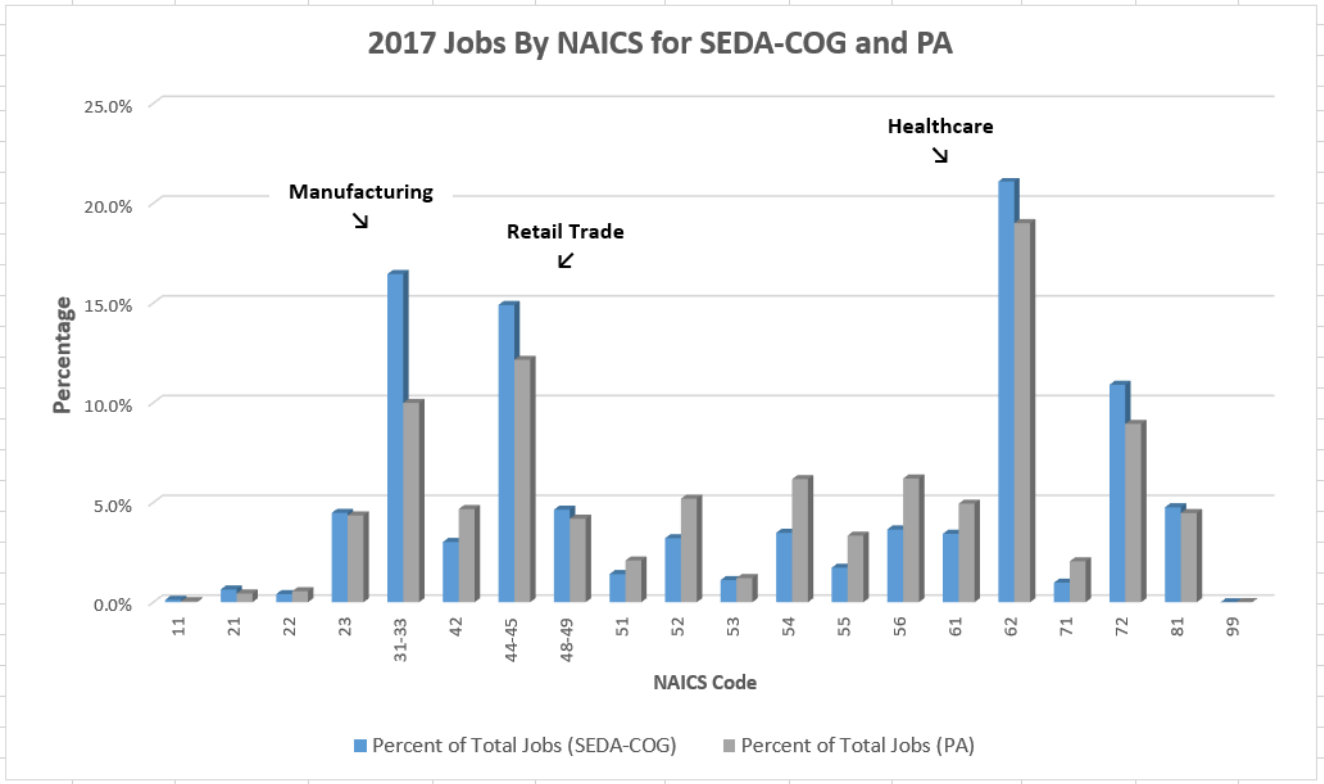
Regional Economic Sectors

Included as Attachment F are tables showing the number of establishments and the number of employees for major industrial categories by county in the SEDA–COG Region. Also shown are the totals for the SEDA–COG Region as a whole and for the Commonwealth of Pennsylvania.

Regional Economic Relationship to State

As the bar graph on the next page (Chart 7) demonstrates, the SEDA-COG Region relies more heavily on manufacturing (NAICS 31-33) than the state as a whole. According to the U.S. Census Bureau, 2017 County Business Patterns indicate that 9.9% of the jobs in the state are in the manufacturing sector. Nearly 16.5% of the jobs in the SEDA-COG Region rely on the manufacturing sector. Other industries that are more prevalent in the Region as compared to the state include retail (NAICS 44-45) and healthcare (NAICS 62).

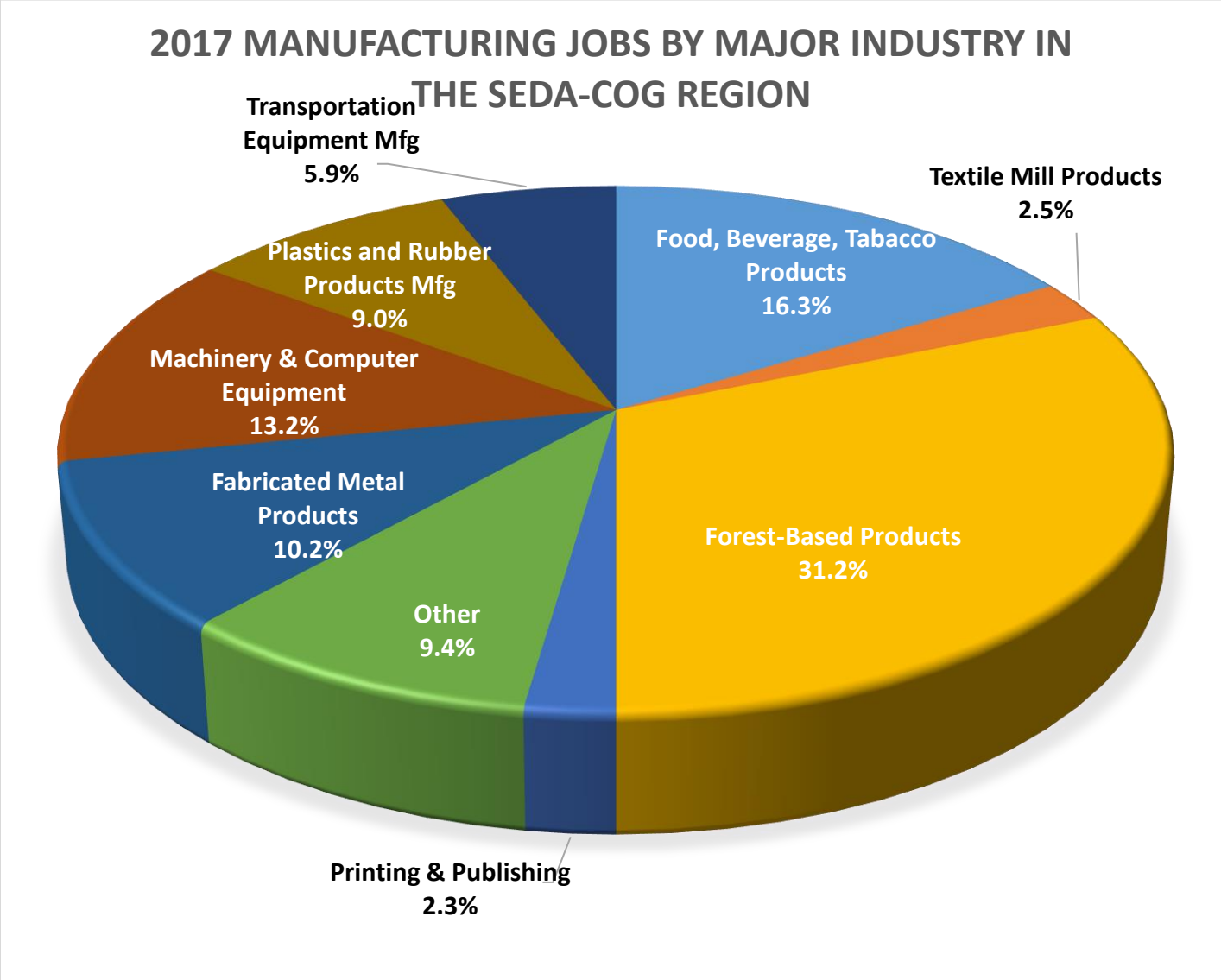
Chart 7



Source: U.S. Census Bureau, 2017 County Business Patterns

Chart 8 breaks out the manufacturing industry by major industry group. The Forest-Based Products comprise nearly one-third of the total manufacturing sector.

Chart 8



Even though the Central Region relies more heavily on the manufacturing sector than the state, the Central Region has tended to have unemployment rates that are equal to or slightly lower than the state, as evidenced in the table below.

As of 2019, the SEDA-COG Region's annual average unemployment rate stood at 4.5% (See Table 18). The Region's rate was slightly higher than the Commonwealth's at 4.4% and higher than the nation's 2019 annual average unemployment rate at 3.7%. This data shows that

despite the Region's reliance on manufacturing, there has not been a disproportionate affect in terms of the Region's unemployment rate.

Table 18
Annual Unemployment Rate: SEDA-COG Region, Pennsylvania, and U.S.2010-2019

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
SEDA-COG	8.3	7.5	7.4	7.1	5.6	5.2	5.4	4.8	4.4	4.5
Pennsylvania	8.5	7.9	7.8	7.4	5.8	5.3	5.4	4.9	4.3	4.4
U. S.	9.6	8.9	8.1	7.4	6.2	5.3	4.9	4.4	3.9	3.7

Factors Directly Affecting Economic Performance

Transportation Systems

The Region is located within a 360-mile radius of all major population centers in the Northeastern United States, a radius that encompasses about 50% of the nation's population. Much of this consumer market is within four to eight hours driving distance from the heart of the Region. Major transportation corridors pass through or near the Region, further enhancing its strategic location in relation to the Eastern Seaboard and Midwest markets. See Attachment G for a map of the major transportation corridors in the SEDA-COG Region. In addition, Norfolk Southern, Canadian Pacific/Delaware & Hudson provide rail freight service to the Region, and the North Shore Railroad provides service on lines owned by the SEDA-COG Joint Rail Authority (SCJRA).

Interstate 80 bisects the Region from east to west. This major highway, running from New York City to San Francisco, is a significant asset because it permits easy access to major metropolitan areas throughout the east coast of the United States. Interstate 99, a portion of which has been constructed through State College in Centre County, provides for increased North/South interstate access between Interstate 76 (PA Turnpike) and Interstate 80.

Metropolitan Planning Organizations (MPOs) and Rural Planning Organizations (RPOs) are federally funded, transportation policy-making organizations that help guide regions to safety and data-based transportation logistic decisions. This type of planning body is composed of both appointed and elected officials representing local, state, and federal governments. The SEDA-COG Region contains four MPOs. The Williamsport Area Transportation Study (WATS) serves all of Lycoming County. The Centre County Metropolitan Planning Organization (CCMPO) serves all of Centre County. The Harrisburg Area Transportation Study (HATS) serves Perry County which resides in the SEDA-COG Region and serves Cumberland and Dauphin counties, as well. Finally, the SEDA-COG MPO serves the remaining eight counties including Clinton, Columbia, Juniata, Mifflin, Montour, Northumberland, Snyder, and Union.

Important regional transportation projects have been included on SEDA-COG's EDA Project Priority List FY 2020-2021. While these projects are considered important Regional projects, these do not match as well with funding available through EDA. Including these projects of Regional significance may help the projects secure funding from potential funding sources other than EDA. Some of these projects are summarized below.

The US Route 322 highway, which connects the northwestern and southeastern sections of Pennsylvania with the state capital of Harrisburg, is a major transportation artery serving the Region. This highway bisects the Region and offers access to Harrisburg, State College, and Philadelphia.

An important regional transportation project is the improvement of U.S. Route 322 in south central Centre County, connecting the Harrisburg market through Perry, Juniata, Mifflin, and Centre counties with Interstates 80 and 99 in the State College area.

Completion of the Interstate 99 Regional Transportation project is also listed as a prioritized project in the SEDA-COG Region. This project which would include completion of a continuous four-lane link from Interstate 180 in Lycoming County, linking Williamsport and the Northern Tier to the Centre Region and the western portion of the state via Interstate 80.

One important link in this system, the Interstate 80/Interstate 99 Interchange in Centre County, is now fully funded. The project includes the construction of a new high-speed interchange between Interstates 80 and 99, and a new local access interchange between Interstate 80 and PA Route 26. The local access interchange is being funded in part with a $35 million in discretionary funding from the federal Infrastructure for Rebuilding America (INFRA) grant program awarded in June 2018. PennDOT has committed the remaining funding for the $54 million project, and construction began in summer 2020. PennDOT has also committed $127 million for construction of the high-speed interchange, which is scheduled to begin in 2022.

US Routes 11 & 15 extends the length of the Region carrying traffic North/South. The Central Susquehanna Valley Transportation Project (CSVT), which is currently in progress, is the region's largest transportation/economic development project. It's designed to improve safety, reduce the amount of congestion, and provide for future growth on Routes 11 & 15. The CSVT is an important regional project and proposes a 13-mile, four-lane, limited access highway extending from the existing Selinsgrove Bypass (just north of Selinsgrove Borough) in Snyder County to PA Route 147 in Northumberland, south of Montandon (Northumberland County). Current cost estimates for the CSVT Project top $865 million with construction of the northern section well underway and construction of the southern section in design. In November 2013, the Commonwealth passed a $2.3 billion transportation funding plan that includes this project. The northern section is expected to open in 2022, and the full project is expected to be complete by 2027.

New CSVT construction over the Susquehanna River

SEDA-COG has continued to take part in the regional CSVT Task Force housed at the Greater Susquehanna Valley Chamber of Commerce in Shamokin Dam. The task force is focused on securing funding for the CSVT.

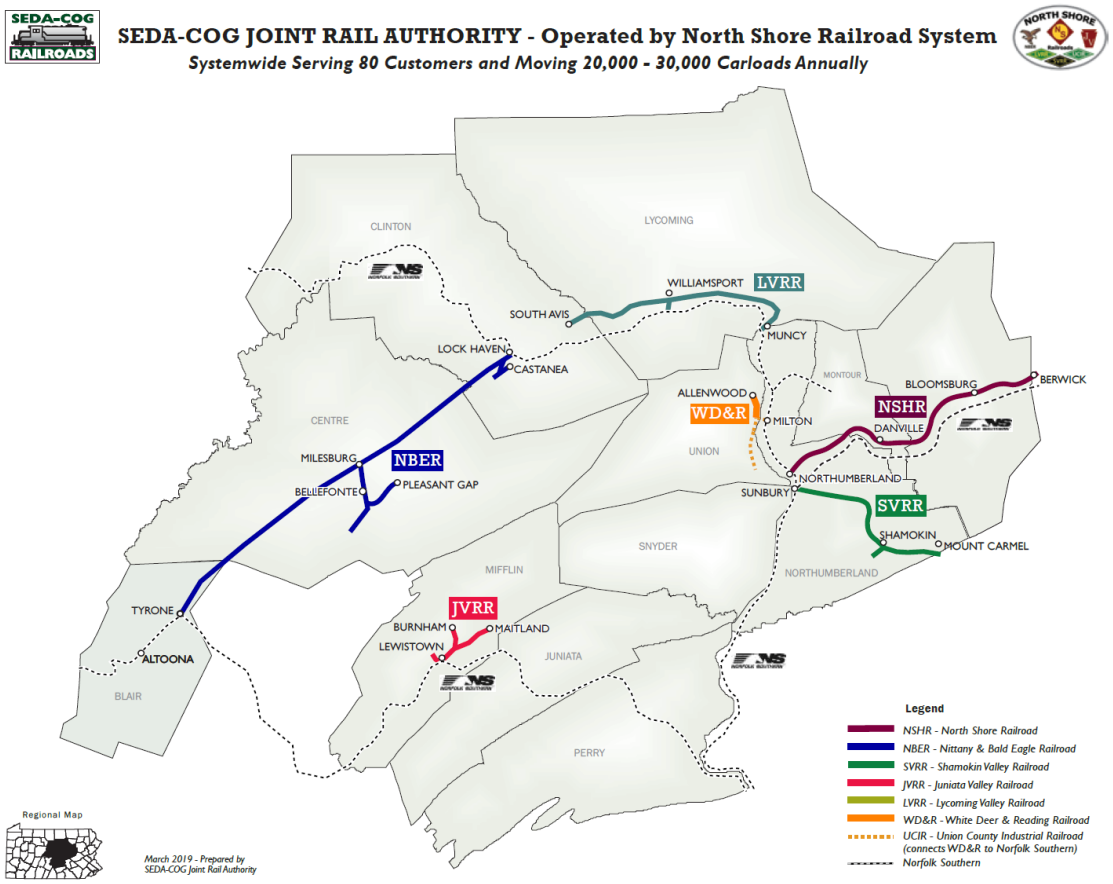
SEDA-COG is continuing to work with Department of Transportation staff, the Chambers of Commerce, the Susquehanna Greenway Partnership, and other local stakeholders to identify and capitalize on opportunities for economic development presented by the project, and worked with the Warrior Run Community Corporation and other regional stakeholders to present a series of discussions for local municipalities on the topic through late 2018 and early 2019.

SEDA-COG MPO is also working with the WATS MPO on a CSVT Special Impact Study looking at traffic changes likely to emerge in the US 15 and I-180 corridors as a result of completing the CSVT. The goal of the study will be to create an action plan that will ensure orderly land development patterns, smart growth, and a safe and efficient multimodal transportation system.

SEDA-COG Joint Rail Authority

The SEDA-COG Joint Rail Authority (JRA) owns five short line railroads comprising nearly 200 miles in the SEDA-COG Region. Freight services to the JRA's 80 customers is provided under a contract by an operator in the private sector. The JRA serves the counties of Centre, Clinton, Columbia, Lycoming, Mifflin, Montour, Northumberland, and Union, and Blair County in the Southern Alleghenies Region.

See Attachment H for the SEDA-COG Joint Rail Authority Partnerships for Economic Development Projects that details past and present rail projects that promote economic development in the Region.



Airports

Airports are an important part of the Region's transportation infrastructure. The SEDA-COG Region is served by 14 general and two commercial aviation airports. Locations for these airports are shown in the table on the next page (Table 19). The nearest commercial airports are in State College, Williamsport, and Harrisburg (outside of the SEDA-COG Region).

Table 19 Airports in the SEDA-COG Region						
Airport	**County**	**Airport Class**	**Based Aircraft**	**Total General Aviation**	**Runway Type**	**Runway Length**
Bellefonte Airport	Centre	General/Basic	23	8,050	Paved	3,632
Bloomsburg Municipal Airport	Columbia	General/Basic	23	10,600	Paved	3,200
Centre Airpark	Centre	General/Limited Use	12	1,600	Turf	3,100
Danville Airport	Northumberland	General/Basic	39	9,125	Paved	3,000
Jersey Shore Airport	Lycoming	General/Limited Use	13	1,500	Turf (Grass)	3,000
Mid-State Airport	Centre	General/Basic	3	1,500	Paved	5,711
Mifflin County Airport	Mifflin	General/Advanced	43	14,250	Paved	5,001
Northumberland County Airport	Northumberland	General/Intermediate	18	23,000	Paved	3,300
Penn's Cave Airport	Centre	General/Limited Use	1	350	Paved	2,500
Penn Valley Airport	Snyder	General/Advanced	26	21,900	Paved	4,760
Stottle Memorial Airport	Juniata	Public Heliport	0	30	Turf	100
Mifflintown Airport	Juniata	General/Limited Use	20	3,850	Paved	2,650
Sunbury Airport	Northumberland	General/Limited Use	6	1,600	Turf	3,250
Sunbury Seaplane Base	Northumberland	General/Limited Use	2	40	Water	5,000
University Park Airport	Centre	Commercial	53	33,580	Paved	6,701
William T. Piper Memorial Airport	Clinton	General/Basic	32	17,520	Paved	3,806
Williamsport Regional Airport	Lycoming	Commercial	46	15,350	Paved	6825

Source: PennDOT Bureau of Aviation, Airnav.com, http://airnav.com/airports/, accessed 6/15/2020.

Business Incentives

- ***Qualified Federal Opportunity Zones***

Qualified Federal Opportunity Zones are economically distressed communities where new investments may be eligible for preferential tax treatment. The federal tax bill passed at the

end of December 2017 enabled the governor to designate certain census tracts as Opportunity Zones. Investments made by individuals through special funds in these zones would be allowed to defer or eliminate federal taxes on capital gains. The SEDA-COG Region has 15 Qualified Federal Opportunity Zones. See the list of census tracts designated as Federal Opportunity Zones below and Attachment I for maps of the federal opportunity zones in the Region.

Qualified PA Federal Opportunity Zones

FIPS	Tract ID	County	Municipality(s)
42027010300	103	Centre	Phillipsburg
42027010400	104	Centre	Rush Twp.
42027011100	111	Centre	Bellefonte
42027012500	125	Centre	State College
42035030100	301	Clinton	Chapman, Leidy, West Keating, Noyes, East Keating Twps
42035030600	306	Clinton	Lock Haven
42035030700	307	Clinton	Lock Haven
42037050600	506	Columbia	Berwick Borough
42037051200	512	Columbia	Bloomsburg
42081000400	4	Lycoming	Williamsport
42081000600	6	Lycoming	Williamsport
42081000900	9	Lycoming	Williamsport
42093050300	503	Montour	Danville
42097081500	815	Northumberland	Shamokin
42097082000	820	Northumberland	Sunbury

- ***Keystone Opportunity Zones***

The KOZ program provides the opportunity to waive local property and selected state taxes for companies that locate in these zones and create or retain jobs. Since 1999, SEDA-COG has been designated as the administrator of the Central Region Keystone Opportunity Zone (KOZ). The KOZ program continues to be a valuable economic development tool for Central Pennsylvania.

KOZ designations were achieved through a series of partnerships between state and local taxing bodies including school districts, counties, local governments, economic development agencies, and community-based organizations that worked cooperatively to maintain this tax incentive program in central Pennsylvania. As of 2020, the Central Region has over 4,000 acres designated in nine out of 11 counties comprising the Region.

- ***Keystone Innovation Zones***

Another economic development tool, the Commonwealth's Keystone Innovation Zone (KIZ) program, designates zones in or near college and university communities to create entrepreneurial opportunities. The KIZs foster innovation by being near technical assistance and other business-related resources from colleges and universities. KIZs also grant tax credits and other financial incentives to start-ups or out-of-state companies who locate in the zone. This program contributes to job creation and helps to reduce the out-migration of young college graduates from the Region. Three KIZs are in the Region - they include: I-99 Corridor KIZ, Williamsport/Lycoming KIZ, and the Greater Susquehanna KIZ. In 2019, 19 companies located in the KIZs in the Region were awarded over $1.1 million in KIZ Tax Credits.

Natural Disaster/Economic Resiliency

Disaster mitigation, and specifically, flood mitigation, has been a policy priority in the Region since the Tropical Storm Agnes Flood of 1972. In the years since Agnes, SEDA-COG has learned that achieving resiliency requires the integration of local, regional and state policy objectives, action plans, spending, and investment strategies. Preparation that takes place both before and immediately after a disaster is integral to a resilient economy.

As a regional entity, SEDA-COG is well positioned to bridge the gap between state and federal agency program managers and communities, institutions and businesses throughout the area affected by frequent and recurring flooding, winter storms, and other major events.
While SEDA-COG recognizes that there is an unmet need for comprehensive planning efforts to address resiliency at a regional level on a continuing basis, several programs at SEDA-COG work to address these issues. Following is a list of activities that directly address issues of resiliency and hazard mitigation at SEDA-COG:

- A dedicated Flood Resiliency Program at SEDA-COG since 2019, where this department applies, administers, and seeks the following grant sources:
  - Flood Mitigation Assistance (FMA) 2017 – Advanced Assistance
  - FMA 2019 – Town of Bloomsburg and Selinsgrove Borough Elevations
  - Hazard Mitigation Grant Program (HMGP) – Montour County for Derry and Anthony townships, and Danville Borough
  - Flood Mitigation Program (FMP)
  - Commonwealth Financing Authority (CFA) through the Department of Community and Economic Development (DCED)
- Assisting Columbia County by administering the Bloomsburg Flood Protection Project, a $29 million system of improvements that will protect a major employer and developable industrial sites.
- Assisting the Town of Bloomsburg as a participant in the Commonwealth of Pennsylvania's application for the National Disaster Resilience Competition.

- Further assisting the Town of Bloomsburg in undertaking a planning study leading to a comprehensive flood resilience strategy.
- Assisting the Town of Bloomsburg and Selinsgrove Borough in using Community Development Block Grant Disaster Relief Funds to design and undertake a comprehensive housing rehabilitation/flood resiliency programs for properties impacted by recent flood events.
- Assisting communities in obtaining and implementing Federal Emergency Management Agency hazard mitigation projects, including elevating structures and utilities, demolishing repetitive flood structures, and clearing flood plains and floodways to reduce flooding impacts.
- Providing education and outreach sessions on changes to storm water regulations and storm water control programs.
- Coordinating with local municipalities to construct drainage and trail improvements that will mitigate persistent flooding issues. Incorporating resiliency into general maintenance practices for a 200-mile railway network, including consistently working with local municipalities and stakeholders to address drainage issues, decrease hydrological impacts of structures through rehabilitation projects, and implement erosion control practices along railway stream banks.
- Incorporating design features in railroad bridge projects to remove the structure from any induced flooding and protect the bridge from future flood damage. An example is designing the Loyalsock Creek railroad bridge project, with the bottom chord of the bridge 3 feet above the 100-year flood plain elevation and using a center truss design to allow for future flood waters at unprecedented levels.
- Assisting communities in identifying impacts and changes in the National Flood Insurance Program (NFIP) at the community level and developing mitigation strategies for use at the family and community level.
    - A part of the NFIP is the Community Rating System (CRS), which is a voluntary incentive program that recognizes and encourages community floodplain management activities that exceed the minimum NFIP requirements. When a community undertakes approved CRS activities (reducing flood damage to insurable property, strengthen and support the insurance aspects of the NFIP, and encourage a comprehensive approach to floodplain management), they receive a designated class rating between 10-1. Residents of a participating CRS community then benefit by seeing a discount on their flood insurance premium, dependent of that community's class rating – Class 10 being no discount and Class 1 being the maximum premium discount of 45%.
        - SEDA-COG's Flood Resiliency program is contracted and assists Milton and Lewisburg boroughs with the implementation of their CRS program.

In addition to direct on-the-ground activities, programs at SEDA-COG engage in contributing activities that help communities and the Region address root issues and build knowledge and awareness of issues related to resiliency and climate change:

- In 2019, SEDA-COG assisted Mount Carmel Borough to obtain a Letter of Map Revision (LOMR) and held a public meeting to educate residents.
- Engage with the City of Shamokin to help secure funding to conduct a Hydrologic and Hydraulic (H&H) Study, which will include recommendations from a professional engineer, to help the City identify how the water moves (volume and rate of the flow) and what can be done to move forward to address the potential issues. Dependent upon the study's findings, we will move forward with a Letter of Map Revision (LOMR) or other mitigation measures as developed through the study and report, and then educate their residents accordingly.
- Developing and managing multi-family housing facilities utilizing renewable energy and employing construction techniques that meet Certified Home Energy Rating Standards, Passive House, and Green Standards.
- Acting as a local repository for business assistance services, including referrals to agencies and services that help a business provide resources for continuity planning and data security through SBDCs, access to low-interest disaster loans through the SBA, and other services to prepare for and recover from pandemics and natural disasters.
- Serving as a resource to help local sponsors manage and coordinate public/private teams in the development of complicated public projects to address resiliency.
- Developing projects for small and medium scale utility gas line extensions to promote local use of natural gas extracted from Marcellus Shale.

In addition to these ongoing activities, leadership at SEDA-COG has noted the following promising opportunities for expanding resiliency on a Regional level:

- Regional discussions on the impact of changes to the Flood Insurance Program, to help municipal, county, and statewide stakeholders understand the impacts, and plan for positive outcomes.
- Regional discussion of flood and hazard protection, developing consensus on what areas can and should be protected at the county and community level, and paving the way for future construction funding programs.
- Implementing and expanding projects identified through the Regional Gas Utilization Initiative.

Factors Indirectly Affecting Economic Performance

Housing

As shown in the table below (Table 20), the housing vacancy rate for the SEDA-COG Region is 13.6% compared to a rate of only 11.4% for the Commonwealth. The rates vary considerably within the Region, from a low of 8.5% in Montour and Union County to a high of 23.2% in Clinton County.

Table 20
Housing Units, SEDA-COG Counties, SEDA-COG Region and Pennsylvania: 2014-2018

			Vacant Housing Units	
	Total Housing Units	Occupied Housing Units	Number	Percent
Centre	66,321	57,908	8,404	12.67
Clinton	19,215	14,744	4,471	23.27
Columbia	30,081	26,582	3,499	11.63
Juniata	11,152	9,404	1,748	15.67
Lycoming	53,340	45,897	7,443	13.95
Mifflin	21,815	19,094	2,721	12.47
Montour	8,178	7,482	696	8.51
Northumberland	45,427	39,132	6,295	13.86
Perry	20,784	18,091	2,693	12.96
Snyder	16,378	14,320	1,662	10.15
Union	17,303	15,310	2,564	14.82
SEDA-COG	309,994	267,964	42,196	13.61
Pennsylvania	5,673,599	5,025,132	648,467	11.43

Source: U.S. Census Bureau: American Community Survey (2014-2018) 5 Year Estimate

Housing concerns in the Region include educating the low income, elderly, and disabled on housing support services available in the Region. Increasing the availability of affordable housing and maintenance of older rental housing is another concern. A high percentage of housing in the Region was built pre-1950. By providing quality housing for people of all income levels, communities can mitigate the environmental costs of auto-dependent development, use their infrastructure resources more efficiently, ensure a better job-housing balance, and generate a strong foundation of support for neighborhood transit stops, commercial centers, and other services. Increasing flood insurance rates are also a concern that could lead to abandonment and blight.

Health Services

Table 21 on the next page shows the number of hospitals, general hospital beds, and beds per 1,000 population for the SEDA-COG counties and the Region. Overall, SEDA-COG has a total of

1,549 beds, for a rate of 2.9 beds per 1,000 population. As the table below illustrates, the SEDA-COG total is distributed unevenly across the Region's 11 counties.

Three counties – Juniata, Perry, and Snyder – have no hospitals. Lycoming and Montour both have the highest amount of beds with 261 and 533 beds, respectively. This translates to 29.2 beds per 1,000 population for Montour County, while Lycoming has only 2.3 beds per 1,000 population.

As previously mentioned, the population aged 65 years and older is expected to increase 65% between 2010 and 2040 in the Region. This growth in the elderly population could have an impact on the need for hospital beds and medical services.

Montour County is clearly a special case, reflecting the major impact, both medically and economically, of the Geisinger Medical Center in Danville. This high-technology facility provides opportunities for spin-off economic development opportunities in connection with the establishment of research and development and other businesses related to medical treatment and care. Geisinger is somewhat analogous in terms of its economic impact to the role played by Penn State University in Centre County. Geisinger offers opportunities for entrepreneurial activities designed to provide services that fill needs generated by medical center activities.

In early December 2019, the University of Pittsburgh Medical Center (UPMC) announced the closing of the Sunbury Hospital located in Northumberland County by March 31, 2020. UPMC had purchased the hospital in 2017. At the time of its closing, Sunbury Hospital had over 60 beds and over 150 employees. The closest nearby hospital is Evangelical Community Hospital located in Lewisburg, Union County, a distance of 10.5 miles.

Table 21

Hospitals & Hospital Beds in the SEDA-COG Region, 2019

County/Area	2017 Population Estimate	Number of Hospital Beds	Number of Beds per 1,000 Pop.
Centre	162,660	260	1.6
Clinton	38,998	24	0.6
Columbia	65,932	166	2.5
Juniata	24,514	0	0.0
Lycoming	113,841	261	2.3
Mifflin	46,388	123	2.7
Montour	18,272	533	29.2
Northumberland	92,029	50	0.5
Perry	46,127	0	0.0
Snyder	40,801	0	0.0
Union	44,595	132	3.0
SEDA-COG	**694,157**	**1,549**	**2.9**

Source: PA Department of Health, County Profiles, 2019

Educational, Cultural, and Recreational Facilities

The SEDA-COG Region is fortunate in having within its borders seven institutions of higher education, including the Commonwealth's largest such facility, Penn State University. Shown on the following table (Table 22), "Institutions of Higher Education in the SEDA-COG Region," are the names, locations, and enrollment of the seven institutions of higher education in the Region as of fall 2018.

Table 22
Institutions Of Higher Education In The SEDA-COG Region Fall 2018

County/Area	Community	County	Number of Undergraduate Students	Number of Graduate Students	Number of Full-Time Faculty
Bloomsburg University	Bloomsburg	Columbia	8,238	671	405
Bucknell University	Lewisburg	Union	3,597	71	412
Lock Haven University	Lock Haven	Clinton	3,060	358	195
Lycoming College	Williamsport	Lycoming	1,142	0	88
Pennsylvania College of Technology	Williamsport	Lycoming	5,322	0	284
Pennsylvania State University	State College	Centre	40,363	6,447	3,422
Susquehanna University	Selinsgrove	Snyder	2,393	3	146

Source: National Center for Education Statistics and IPEDS

In addition to the seven institutions of higher education listed above with main campuses in the 11-county central Pennsylvania Region, there are also satellite sites for the Luzerne and Lackawanna Community College in Northumberland County in the Borough of Kulpmont and the City of Shamokin and Columbia County in the Borough of Berwick. Additionally, numerous other trade schools and private for-profit educational institutions exist throughout the Region.

There are eight career and technology institutions that serve the school districts in the Region. These institutions not only serve the school districts, but also provide adult education courses and certifications. Technical institutions include:

- Keystone Central Area Vocational Technical School
- Cumberland-Perry Area Vocational Technical School
- Central Pennsylvania Institute of Science and Technology
- Columbia-Montour Area Vocational Technical School
- Lycoming Career and Technology Center
- Mifflin County Academy
- Northumberland County Career and Technology Center
- SUN Area Technical Institute

Unfortunately, the abundance of educational opportunities in the Region appears not to have resulted in a comparably high level of educational attainment. The percentage of residents in the Region age 25 or older who have not completed high school is 10.8% (See Table 23). This number is slightly higher than the statewide percentage of 9.8%. Only Centre and Montour counties have percentages lower than the statewide average, 5.7% and 9.3%, respectively. The highest percentage among SEDA-COG counties for those that have not completed high school is found in Juniata County, where the rate of 17% is more than 7 percentage points higher than the state level.

Table 23
Education of Individuals 25 Years and Older with Less Than a High School Education in the SEDA-COG Region and PA: 2018

	Less Than High School Education	Total Population 25 Years and Older	% of Population 25 Years and Older with Less than High School Education
	Number	*Number*	*Percentage*
Centre	5,538	97,616	5.7%
Clinton	2,847	25,257	11.3%
Columbia	4,394	43,862	10.0%
Juniata	2,919	17,197	17.0%
Lycoming	8,224	80,595	10.2%
Mifflin	4,801	32,456	14.8%
Montour	1,247	13,414	9.3%
Northumberland	8,667	67,364	12.9%
Perry	4,056	32,538	12.5%
Snyder	3,876	26,998	14.4%
Union	4,159	30,538	13.6%
SEDA-COG	50,728	467,835	10.8%
Pennsylvania	874,018	8,921,363	9.8%

Source: U.S. Census Bureau: American Community Survey (2018) 5 Year Estimate

Even more troubling is the percentage of residents age 25 and older who have at least a Bachelor of Arts degree (See Table 24). At 24.9%, the Regional rate is below the statewide level of 30.8%. Only Centre County has a rate that exceeds the statewide average at 44.7%. In the case of Centre County, it is the major impact of Penn State University that accounts for the high B.A. rate there. Lowest among SEDA-COG counties in its level of B.A. attainment is Mifflin County with 12.5%. Based on this data, it appears that the wealth of educational assets in the Region are educating students who subsequently leave the area to seek employment elsewhere.

Table 24 Individuals 25 Years and Older With a Bachelor's Degree in the SEDA-COG Region and PA: 2018			
	Individuals 25 Years Old and Older with Bachelor's Degree	**Total Population 25 Years and Older**	**% of Population 25 Years and Older with Bachelor's Degree**
	Number	***Number***	***Percentage***
Centre	43,673	97,616	44.7%
Clinton	4,793	25,257	19.0%
Columbia	9,871	43,862	22.5%
Juniata	2,446	17,197	14.2%
Lycoming	18,359	80,595	22.8%
Mifflin	4,050	32,456	12.5%
Montour	4,406	13,414	32.8%
Northumberland	10,808	67,364	16.0%
Perry	5,350	32,538	16.4%
Snyder	4,960	26,998	18.4%
Union	7,800	30,538	25.5%
SEDA-COG	116,516	467,835	24.9%
Pennsylvania	2,745,317	8,921,363	30.8%
Source: U.S. Census Bureau: American Community Survey (2018) 5 Year Estimate			

There is a movement to develop a higher education/community college option that will serve a multi-county area in the Region. Community colleges are seen as a low-cost option that contributes to the local economy and provides scheduling flexibility for classes, especially for nontraditional students. Community colleges are also perceived as being more responsive to the needs of the community for areas of study.

A group called the Susquehanna Valley Community Education Project aims to create a higher education/community college option that will serve Columbia, Montour, Northumberland, Snyder, and Union counties. Several needs assessments or studies that have been conducted in these counties indicate a community college could be supported in these counties.

While this community college initiative represents a fiscal challenge, efforts targeted at improving the quality of the Region's workforce will be critical to ensure the competitiveness of the Region for maintaining and attracting family-sustaining jobs.

Issues

The State of the Regional Economy

In the SEDA-COG Region, two Economic Development Centers (EDCs) have been designated by the EDD--the Bellefonte-State College EDC in Centre County and the Central Susquehanna EDC,

including portions of Columbia, Lycoming, Montour, Northumberland, Snyder, and Union counties. Municipalities and counties in the two EDCs continue to participate in the Region's economic development programs.

Although both EDCs are taking advantage of the same economic development programs, the economic activities of the two centers have fared quite differently. Centre County continues to appear, on the surface, as one of the economically healthier areas in the Region. In analyzing the population total for Centre County, however, it is important to remember the distorting effects of Penn State University, where the student population, faculty, and other workers total well over 50,000. Employment in the Bellefonte-State College EDC is dominated by the government/education sector, whereas manufacturing is the principal category in the Central Susquehanna EDC.

Manufacturing firms in the Bellefonte-State College EDC, unlike those in the Central Susquehanna EDC, include a significant number of advanced technology companies. Several of these manufacturing firms have the potential to participate in the solar and/or wind supply chain. Nonetheless, old-line businesses continue to be an important factor in the EDC. It should be emphasized that the proportion of technology firms here is high in comparison to the rest of the Region, but not necessarily so compared to the traditional manufacturing segment of the EDC's economy.

As noted previously, one of the strategies being employed is the establishment of what often amounts to specialized business parks or buildings designed to take advantage of particular industry clusters that may either already exist, or which show promise of emerging. One example of this is the partnership between DRIVE and the Bucknell University Small Business Development Center's creation of Start-Up Danville, an incubator that aims to be a resource for entrepreneurs specializing in the healthcare industry. Start-Up Danville is near Geisinger Medical Center, one of the premier medical research and healthcare facilities in the nation.

SEDA-COG continues to pursue a strategy of encouraging the growth of technology-based industry and businesses in the Region. The EDD has sought to define more clearly the connection between the Region's industries and its overall economy. For example, a development strategy for the Bellefonte-State College EDC focuses on the recognition that technology-based firms will play a major role in that area's future development. At present, the technology industry in the SEDA-COG EDD is concentrated in State College and Bellefonte in Centre County.

The presence in Centre County of Penn State University has served to attract technology-based firms seeking highly skilled, research-oriented personnel. Penn State is home to a Research Park that has increased the attraction of this area to technology-based firms. The Research Park's marketing staff coordinates efforts closely with the Chamber of Business and Industry of Centre County (CBICC), and both groups work closely with the EDD which has provided grant funding support in the past for projects and activities designed to enhance the County's attractiveness as a preferred location for technology-based companies.

SEDA-COG is firmly committed to fostering the growth of technology and diversifying that activity in the Region.

In the Central Susquehanna EDC, however, where the manufacture of durable goods is the primary source of employment, the development strategy must also emphasize the diversification of manufacturing activity. Efforts are also proceeding to enhance the growth of the service and retail sectors. In both EDCs, it will be necessary to promote continued improvement of public services and infrastructure.

Further analysis of these EDCs is expected to show they will continue to serve as centers of employment and growth for the EDD, and they will increasingly support a more diversified mix of manufacturing, service, and retail activity. Efforts must be made to maintain the exiting menu of enterprise development technical assistance services and to increase entrepreneurship opportunities and assistance.

Community and Private Sector Participation

The following organizations provide a broad-based range of input into the CEDS process. SEDA-COG staff, Board of Directors, and CEDS Committee utilize, review, and input from three separate advisory groups that include:

- ***Central Region Partnerships for Regional Economic Performance***

Central Region Partners for Regional Economic Performance (PREP) Network coordinates economic development efforts in the Region to promote enhanced customer service to the business community and a comprehensive and efficient economic development delivery strategy. This means there is “no wrong door” for businesses. It does not matter how the company gets into the service provider network. What is important is how easy and direct it was to get the services and information they require. Funded and Non-funded Members in the PREP Network include: SEDA-COG, Innovative Manufacturers’ Center (IMC), Northeast PA Industrial Resource Center (NEPIRC), the two Small Business Development Centers (SBDC’s) located at Penn State and Bucknell University, DRIVE, Centre County Industrial Development Corporation (CCIDC), Clinton County Economic Partnership (CCEP), Columbia Montour Chamber of Commerce, Greater Susquehanna Valley Chamber of Commerce (GSVCC), Juniata Business and Industry, Inc., Mifflin County Industrial Development Corporation (MCIDC), Northumberland County Industrial Development Authority (NCIDA), Susquehanna Industrial Development Corporation (SIDCO), Union County Industrial Development Corporation, and the Williamsport/Lycoming Chamber of Commerce.

- ***The Pennsylvania Heartland Partnership***

The Heartland Partnership is a network of Regional organizations with a common interest in education, workforce, and economic development. The Partnership was created to promote the effective use of resources, nurturing an innovative economy while enhancing the quality of life in the Pennsylvania Heartland. Members in The Heartland Partnership include: Ben Franklin

Technology Partners, Central Pennsylvania Workforce Development Corporation, IMC, Penn State University, Pennsylvania College of Technology, Governor's Action Team, and SEDA-COG.)

- ***Central Pennsylvania Workforce Development Corporation***

The Central Pennsylvania Workforce Development Corporation (CPWDC) is a workforce investment board authorized under the Workforce Investment Act of 1998. CPWDC establishes workforce development policy for a nine-county region of central Pennsylvania (Centre, Clinton, Columbia, Lycoming, Mifflin, Montour, Northumberland, Snyder, and Union counties).

Resources for Economic Development

Entrepreneurship and Small Business

As previously mentioned, the SEDA-COG Region is home to seven major colleges and universities and a number of satellite and branch campuses. Services which include business planning, funding and loan programs, counseling, and more to entrepreneurs and innovators are available through the colleges and universities, the area's two SBDCs, the Ben Franklin Technology Partners, and Keystone Innovation Zones.

One example of this support in the Region by the area's universities is Penn State's *Invent Penn State* initiative where the university has committed over $30 million to promote a strong entrepreneurial ecosystem in the university system. The idea of entrepreneurship is high on the minds of university students. According to the Bucknell University SBDC, the 2013 Higher Education Research Institute survey indicated that over one-third of incoming Bucknell University students felt that "becoming successful in a business of my own," was important to them.

In terms of entrepreneurship, the Region supports projects such as the Columbia Alliance for Economic Growth's renovation of the former Elks building into an incubator that is now at full capacity, the Moshannon Valley's project to construct a multi-tenant building in Centre County, and the Centre of Business and Industry of Centre County/Penn State Technology Center which is an incubator located at Penn State's main campus in State College.

Strategic Plan/Survey to Local Stakeholders

In late 2018, Dering Consultants was hired by SEDA-COG to conduct a Strategic Plan for the organization. Throughout 2019, the consultants designed and administered two targeted surveys to staff and board members which included a review of SEDA-COG and its services and a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats). The majority of staff and board members completed the surveys.

SEDA-COG 2019 Planning Session Report

Session Date: January 22, 2019

DERING

To bolster the surveys, Dering then conducted five focus group meetings reaching various sectors of the community throughout the SEDA-COG Region, including a focus group of county commissioners in the Region that are not board members. They were held in Juniata, Centre, Montour, and Union counties. The focus groups focused less on SEDA-COG's services and more on the Region's strengths and opportunities. The discussions were robust with the impressive caliber and number of attendees, ranging from heads of hospitals and universities to businesses and community members.

After again meeting with the Coordinating and Strategic Plan committees, Dering Consulting Group conducted a full SEDA-COG staff data-gathering debrief and input session.

The objectives of the session were to:

- Share feedback received through the employee survey and the sub-Regional focus groups.
- Engage all employees in interpreting the data received and its implications for the organization.
- Gather staff perspective on the most promising opportunities for SEDA-COG over the next several years.
- Discuss staff's ideas on how best to keep staff engaged as the strategic plan is developed and throughout its implementation.

Dering then conducted a visioning session with SEDA-COG. This step represented the culmination of the data-gathering process in a facilitated session with the Coordinating and Strategic Plan committees to validate the findings and define their implications for the long-term vision of SEDA-COG. In a full-day session, committee members worked through all survey and focus group results (having received them prior to the session for preliminary review). The design of the session focused first on the prioritization of opportunities related to SEDA-COG functioning in a more "synergistic" manner, taking advantage of common strengths, working in a more integrated manner, where appropriate, and strengthening the unity of SEDA-COG's message and team presence in the communities served.

With the organizational goals in place for SEDA-COG as a whole, Dering conducted a half-day Coordinating Committee session that engaged department leaders in "cascading" these higher-level goals to specific departments and other critical functions by generating objectives, the building blocks for accomplishing the goals. Objectives were specific enough to be measured, but still at a strategic level – not the specifics of personnel assignments and calendar dates, but clear and compelling statements of what will be done.

Following that session, Dering submitted a compilation/report of the last two planning sessions.

The results of the strategic plan as well as the list of attendees from the regional focus groups have been included at the end of this report as Attachment J.

The strategic plan also provided guidance for the Region's 2020 5-Year Comprehensive Economic Development Strategy.

Assessment

Strength In assessing the Region, positive potential seems to exist in the following areas:

- Favorable geographic location
- Quality of life
- A good inter-regional (rail, air, and surface) transportation system
- Extensive natural resources (significant natural gas deposits, extensive fertile farmland, and 2.6 million acres of forest land)
- A high-quality labor force resulting, in part, from the presence of seven colleges/universities and a strong network of satellite campuses and vocational-technical schools

The most promising areas for economic development among the factors listed above appear to be in sustainable development of natural resources, including the Region's maturing hardwood forests and the natural gas deposits in the Marcellus/Utica Shale, and in finding ways to capitalize on the excellent educational system that is one of this Region's major assets. In addition, tourism is a steadily growing economic sector in this Region, as in the state as a whole. The good transportation system in the Region should be an added benefit in connection with all development strategies.

In promoting the prudent utilization of regional natural resources, care must be taken to do so in an environmentally sensitive manner. This is particularly important in connection with preserving the high quality of life that is consistently listed as the top attraction of the Region, relative to the increased value of our Region's renewable energy resource such as hardwoods. Additionally, tourism is an important economic activity in the Region and any environmental degradation could have a negative impact on that activity.

A significant number of advanced technology businesses in the Region have been attracted here, in part, by the combination of high quality of life and good educational and research resources. Efforts should continue to attract more such enterprises.

Weaknesses Among the constraints identified are the following:

• Almost 17% of the Region's employment is in the manufacturing sector, dominated in this Region by industries that are generally in decline nationwide.

• Industrial and commercial development has tended to occur in the river valleys where repeated flooding has caused serious problems.

• Major demand needs along the eastern seaboard for the Region’s natural resources.

• The low population density in the Region has inhibited the development of an infrastructure needed for industrial and commercial development.

• The modular housing and wood products industries, together with their complex of supporting enterprises, are major job creators in the Region, but ones notably prone to job loss whenever the overall economy falters.

• The shortage of available, fully serviced industrial/business park space is an impediment to further industrial expansion in many parts of the Region.

• As is true of many other largely rural areas, the telecommunications infrastructure in the Region is not adequate. Such capability could well prove crucial to the Region's ability to compete successfully with other regions in the future.

Strategic Vision/Action Plan

The vision for the future of the SEDA-COG Region encompasses an area where unemployment levels are reduced; where a diversity of employment opportunities offers jobs for anyone willing to work; where existing manufacturing enterprises are made competitive enough for the global marketplace; where existing manufacturing jobs are upgraded and appropriate training provided; where the Region can compete in the international arena for foreign direct investment opportunities; and where natural amenities are safeguarded and cultural amenities enhanced. We see a Region with a finely tuned, integrated service delivery capability.

Vision Statement, Goals, and Objectives

Central Pennsylvania is endowed with an abundance of natural amenities and natural resources, which help to provide a quality of life, unsurpassed anywhere else in the Commonwealth.

The Region needs to increase the number of good, family-sustaining jobs to a level sufficient to provide employment for those residents of the area who are currently unemployed or underemployed. Shale gas, as well as the energy efficiency and renewable energy markets, appear to provide opportunities for expansion of existing manufacturing and new jobs and businesses.

Included within the 12 sub-zones of the SEDA-COG Region Keystone Opportunity Zone are areas that are well suited for industrial and business development. The Keystone Opportunity Zone program can provide incentives to increase the pace of site development. The new jobs that

will be created by businesses should have a measurable beneficial impact on the Region's unemployment level.

By targeting the recruitment efforts for these sub-zones, it will be possible to bring greater diversity to the pool of employers in the Region. Included will be a high proportion of technology-based businesses, which are likely to be attracted by the cluster of higher education institutions in this Region, and which tend to bring higher paying jobs, which will further enhance employment opportunities.

The Central Region PREP Program's Service Provider Network, which includes the Region's SBDCs, Pennsylvania's Technology Assistance Program (PennTAP) and Ben Franklin Technology Partners offer programs and services to innovators, entrepreneurs, early stage companies, and small-to-medium sized businesses with technical assistance and funding.

Another economic development tool, the Commonwealth's Keystone Innovation Zone (KIZ) program, designates zones in or near college and university communities to create entrepreneurial opportunities. The KIZs help foster innovation by being near the technical assistance and other business-related resources from the colleges and universities. KIZs also grant tax breaks and other financial incentives to start-ups or out-of-state companies who locate in the zone. This program contributes to job creation and helps reduce the out-migration of young college graduates from the Region.

Advanced Technology

The SEDA-COG EDD has sought to define more clearly the connection between the Region's industries and its overall economy. At present, technology-based industry in the SEDA-COG EDD tends to be concentrated in Centre County, and more specifically, in the State College/Bellefonte area.

The presence here of Penn State University has served to attract advanced technology firms seeking highly skilled, research-oriented personnel. Penn State has an established Research Park, which further increases the attraction of this area to high-tech firms.

Another strategy that will be simultaneously pursued calls for the expansion of advanced technology industry throughout the rest of the Region. SEDA-COG remains committed to fostering the growth of high technology activity in the Region and to expanding that activity throughout the Region.

Manufacturing Diversification

In much of the SEDA-COG EDD, the manufacture of durable goods continues to be the primary source of employment.

Concentration of jobs in certain manufacturing sectors, however, has created problems. For example, although the lumber and wood products sector benefits from the availability of a large Regional timber resource, and provides many jobs in the Region, it is also a sector that has historically shown itself to be highly vulnerable in times of an economic downturn. This vulnerability has become even more evident during the last economic recession.

As stated previously, shale gas has driven down energy costs which makes our Region more attractive to manufacturers and provides an inexpensive feedstock alternative for other industries. As such, the Region is beginning to see a manufacturing renaissance.

The EDD continues to be impacted in recent years by plant closings. Attachment K gives a listing of recent plant closings and layoffs in the Region, with the date of the action as well as the number of workers affected.

Labor Pool

The unemployment level in the SEDA-COG Region offers the hope of renewal. For any business or industry seeking a site for a new facility, this existing labor pool offers readily available workers. These are, moreover, workers whose commitment to giving full value for their wages has been honed by years of ups-and-downs and uncertainty. Accordingly, this capable and talented work force should be made a highlight of all efforts directed at recruiting new businesses for the Region. Efforts must be redoubled to enhance and upgrade the quality of our workforce.

Infrastructure and Public Services

If growing local industries are to be able to expand when needed, and if new businesses are to be attracted to the Region, it will be necessary to promote continued improvement of the Region's infrastructure and public services, including telecommunications infrastructure.

Action Plan: How do we get there?

Program and Activity Priorities

The priority listing of programs, activities, and projects for the SEDA-COG EDD is a document continually under review. It is periodically examined to eliminate projects that have been implemented and others that are no longer feasible or that have been determined to be no longer desirable. Priority listings are adjusted to reflect the status, readiness, and viability of pending projects. In addition, new projects that fit the goals and objectives of the EDD and which are otherwise desirable and feasible are added to the list and assigned a priority ranking. SEDA-COG's CEDS Committee and Board of Directors review all these actions. They are the final authority in approving each year's revised list.

Goals

The strategic goals are:

1. Encourage the protection, modernization, and expansion of existing businesses and job opportunities, and where appropriate, encourage entrepreneurship and the recruitment of new business and industry consistent with the character of the Region.
2. Aggressively encourage the deployment of technology and widespread accessibility to broadband services and capabilities.

3. Encourage the upgrading of skills and talents for the Region's workforce and the creation of family sustaining wages.
4. Encourage the prudent utilization of the Region's natural resources in an environmentally sustainable manner (including land, water, natural gas, and lumber).
5. Improve and expand infrastructure, flood resiliency, and conservation/greening efforts to enhance the older and rural centers throughout the area for business and economic development.
6. Encourage the promotion of the Region as a destination for travel, recreation, and tourism.
7. Cultivate efforts for the Region to become resilient in the face of natural disasters, pandemics, and economic downturns.

Analysis

Goal 1. Because of the high unemployment rate in the Region over the past decade and more, it is clear that first priority must be given to protecting the jobs that already exist. Furthermore, since it is now well established that greater growth can be achieved by encouraging existing companies to expand, such homegrown expansion should be given top priority. The recruitment of appropriate industry from outside the Region need not be neglected and can contribute to the Region's healthy economic growth.

Goal 2. Availability of broadband continues to be a problem in the Region and became increasingly evident during the COVID-19 pandemic where the Region was forced to socially distance and remotely work. Broadband is a tool that requires infrastructure, which is not available in all areas of rural Pennsylvania. Those communities that have access to affordable broadband will grow, will compete in a global market, and will have productive, efficient workers. Those communities that do not have access to affordable broadband will suffer. A focus on these rural communities to encourage a more rapid build-out of telecommunications infrastructure providing services necessary for long-term success in e-commerce, e-government, and telemedicine initiatives along with a program to educate those communities in the use of the technology is necessary.

Goal 3. There is a gap in the availability of skilled workers. Employers have also expressed concerns about addressing the need to develop the leaders of tomorrow. Building a strong pipeline of skilled and diverse workers throughout the Region in key industries will be important to compete for companies on a national and global level. Investment in education can go beyond those traditional 4-year universities and community colleges to include technical training and on-site apprenticeship opportunities. Assessing the level of education needed for the resident workforce will be critical to meeting needs in emerging industry sectors.

Goal 4. The SEDA-COG EDD is fortunate in having an abundance of natural resources, both renewable and non-renewable. These resources should be used in a prudent manner that neither harms the environment nor diminishes the attractiveness of the Region for residents, tourists, and others.

Of the non-renewable resources, it is natural gas that probably has the greatest economic significance. Natural gas can be used to help reduce the Region's and the nation's reliance on imported energy sources. In extracting the natural gas, however, it is important that its extraction not result in water contamination or in the creation of an unsightly landscape.

Of the Region's renewable natural resources, the extensive hardwood forests remain the most significant. If managed in a sustainable manner, these can be utilized to nourish and expand a Regional forest products industry and energy produced from woody biomass waste. Care must be taken, however, to ensure the continued health of this resource and its contribution to the sustainability of our Region's economy.

Tourism, the second largest industry in the state, is an increasingly important economic sector in the SEDA-COG EDD. Much of the tourist attraction of this Region is attributable to the scenic beauty of our forested hillsides, state parks, clean air and water and to recreational and heritage tourism, which requires accessibility via trails and parks. Tourism also adds to the local economy. Hotel room taxes are often allocated for tourism development in the Region. Consideration for tourism must be kept in mind in planning for the economic use of the Region's forests.

Agriculture, another valuable resource in the Region, continues to be one of the largest industries in Pennsylvania and a major economic contributor to our Region. Agricultural/farming activities have historically been an important part of the culture and economy of central Pennsylvania. Working agricultural land should be retained to preserve the rural landscape and assure that farmers in the Region have sufficient acreage available to support economically viable operations.

Goal 5. Like many areas of Pennsylvania, the basic infrastructure of the SEDA-COG EDD needs to be upgraded. Water and sewer service facilities are in urgent need of rehabilitation throughout much of the Region. In addition, non-traditional forms of infrastructure, such as telecommunications need to be made available in the Region. Without reliable needed infrastructure, not only is it inherently impossible to recruit new business and industry to the Region, but existing industry is inhibited from expansion. At its worst, the mere survival of industry at existing levels can be threatened if infrastructure is inadequate.

Apart from its direct impacts on business and industry, a solid infrastructure base is important to maintaining the livability of the Region's urban and rural centers. Housing affordability is often addressed as a community development issue and not an economic development issue. However, a variety of housing types across a range of price points offers a resident workforce the opportunity to live and work in the same community, thus reducing household transportation costs and decreasing Region-wide impacts on the transportation system. One of the key assets of this Region is the quality of life that is prized in part because of the small town atmosphere in many of its communities; walkable and bike-able communities that connect residential, businesses, parks, etc. These communities cannot maintain that quality without functioning, reliable infrastructure.

Goal 6. Travel and tourism continue to grow in economic importance in the SEDA-COG EDD, with the Region growing in popularity as a travel destination. This trend should be supported. Moreover, other economic development activities should be implemented in such a way that does not detract from the attractiveness of this Region in the eyes of potential tourists.

Goal 7. Take steps to ensure the Region's resiliency to recover quickly from natural disasters, economic downturns, and pandemics which can cripple economies and communities. Promote planning and development efforts to prepare for and recover from such events.

Objectives

Derived from the goals listed above are the following objectives:

OBJECTIVES	ECONOMIC DEVEOLOPMENT PARTNERS
Continue to foster economic development activities through the various components of the Central Region PREP and Engage! programs, including business finance assistance, export marketing, and government procurement technical assistance. In accordance with Goal 1, primary emphasis will be on fostering the maintenance and expansion of the Region's existing industrial base.	▪ SEDA-COG ▪ IRCs ▪ SBDCs ▪ County economic development partners ▪ CPWDC ▪ PennTAP
Cooperate with industrial development groups throughout the Region to expand industrial/business parks or establish new parks wherever such need is determined to exist, with particular attention to promoting the tax-free Keystone Opportunity Zones that have been established in this Region by the Commonwealth of Pennsylvania.	▪ SEDA-COG ▪ County economic development partners
Encourage streamlined and expedited land development procedures to ease new business entry and expansion.	▪ County economic development partners ▪ SEDA-COG
To support entrepreneurship and innovation, provide support and assistance to the Keystone Innovation Zones, Ben Franklin Technology Centers, and Small Business Development Centers throughout the Region.	▪ SBDCs ▪ Ben Franklin Technology Partners ▪ SEDA-COG ▪ County economic development partners ▪ Local universities

Promote development in Federal Opportunity Zones around the Region. Area-wide tax incentives and tax deferrals in federal qualified opportunity zones should be used to the greatest extent possible by giving priority to projects in the OZs where Region-wide economic benefits can be reaped.	▪ County economic development partners ▪ SEDA-COG
Cooperate with the IMC, NEPIRC, SBDCs, and other programs of the Central PREP Region's economic development service delivery network.	▪ SEDA-COG ▪ IRCs ▪ SBDCs ▪ County economic development partners ▪ CPWDC ▪ PennTAP
Promote sharing of resources between partner counties, economic development agencies, and SEDA-COG.	▪ SEDA-COG ▪ IRCs ▪ SBDCs ▪ County economic development partners ▪ CPWDC ▪ PennTAP
Cooperate with the Central Pennsylvania Workforce Development Corporation and other workforce providers in targeting resources at identified training needs for the Region.	▪ County Economic Development Partners ▪ CPWDC ▪ SBDCs ▪ SEDA-COG ▪ Local Universities
Develop relationships with universities, colleges, and technical schools in coordination with career development professionals to identify course work/curriculum gaps for the future workforce.	▪ SEDA-COG ▪ IRCs ▪ SBDCs ▪ County economic development partners ▪ CPWDC ▪ PennTAP ▪ Local universities
Build a strong foundation for economic success and shared prosperity by investing in education.	▪ Local universities ▪ CPWDC ▪ SEDA-COG ▪ SBDC ▪ IRCs ▪ County economic development partners

Promote niche economies and business clustering.	▪ County economic development partners ▪ SEDA-COG ▪ CPWDC ▪ IRCs ▪ SBDCs ▪ Ben Franklin Technology partnerships ▪ Local universities
Foster better coordination among the Region's PREP partners, institutions of higher learning, and vocational-technical schools with existing employers and the CPWDC to focus resources where they are most urgently needed.	▪ County economic development partners ▪ SEDA-COG ▪ CPWDC ▪ IRCs ▪ SBDCs ▪ Ben Franklin Technology partnerships ▪ Local universities
Build the infrastructure necessary to allow widespread adoption of natural gas utilization thereby providing for long-term job opportunities that will endure after the exploration boom tapers off and diminishes.	▪ Private industry/developers ▪ SEDA-COG Natural Gas Cooperative ▪ County economic development partners
Encourage affordable housing as necessary to support the resident workforce and influence a healthy, balanced economy by addressing barriers to affordability.	▪ County economic development partners ▪ SEDA-COG ▪ County and local government
Cooperate with local visitors' bureaus, the Commonwealth, and other interests to promote the Region as a tourist and recreation destination.	▪ Visitors bureaus ▪ County economic development partners ▪ SEDA-COG ▪ County and local government ▪ Susquehanna Greenway Partnership ▪ SBDCs

Encourage park and trail development to foster increased recreational and heritage tourism.	▪ Visitors bureaus ▪ County economic development partners ▪ SEDA-COG ▪ County and local government ▪ Susquehanna Greenway Partnership
Ensure ongoing and emerging economic development activities do not diminish the attractiveness of the Region to tourists.	▪ Visitors bureaus ▪ County economic development partners ▪ SEDA-COG ▪ County and local government ▪ Susquehanna Greenway Partnership
Encourage highspeed broadband buildout in areas unserved or underserved by working with and incentivizing internet service providers.	▪ Internet Service Providers ▪ SEDA-COG ▪ County economic development partners ▪ Rural electric cooperatives
Participate and support the CPWDC's Next Generation Sector Partnerships for Manufacturing and Healthcare.	▪ CPWDC ▪ County economic development partners ▪ IRCs ▪ SBDCs ▪ Private sector ▪ Healthcare sector ▪ Manufacturing sector

Project Prioritization

The table (Table 25) on the following two pages contain the project and description for economic development activities for the SEDA-COG Region.

Table 25

SEDA-COG Region FY 2021-2022 Economic Development Administration (EDA) Project Priority List

Rank	Description & Location	CEDS Goals	Other Comments
1.	The City of Williamsport Dewey Avenue I-Wall Improvement Project	1, 5, 7	This project proposes to provide engineering and construction to improve the existing flood wall in the City of Williamsport by replacing the I-wall with a T-wall and raise the earthen levee embankment with additional T-wall.
2.	Multi-purpose Outdoor Sports Facility (Lycoming County)	1, 6	Construction of a multi-purpose outdoor sports facility in Williamsport, PA that will include baseball fields, concession stands, storage buildings, dugouts, batting cages, and scoreboards.
3.	Route 504 Business Park	1, 5	Infrastructure development to include water, sewer, clearing and grading, and access road for a site in the Moshannon Valley Area. Site control and development of a financing package will be necessary for this project to progress.
4.	Regional Telecommunications Implementation Project	1, 2, 7	Provide broadband technology to under-served areas throughout the SEDA-COG Region.
5.	Natural Gas Pipeline Infrastructure Project	1, 4	Construction of natural gas infrastructure to serve existing businesses and vacant industrial space at a yet unnamed project in the SEDA-COG Natural Gas Cooperative, Inc. territory.
6	State College Area Connector, Route 322/144/45 Corridors	1, 5	Important Regional transportation project in south central Centre County intended to improve the link between the Harrisburg market and Interstates 80 and 99 in the State College area, via a connection with eh US Route 322 Potters Mills Gap project that is scheduled to open in fall 2020. The SCAC Preliminary Engineering work will start in summer 2020 and be completed in 2-3 years.
7	Completion of Interstate 99 (Regional)	1, 5	Important Regional transportation project which would include completion of a continuous four lane link from Interstate 180 in Lycoming County, linking Williamsport and the Northern Tier to the Centre Region and Interstate 80 through the western portion of the state.
8.	MCIDC Plaza Modernization (Mifflin County)	1, 5	Demolition, redevelopment, and infrastructure improvements for Bldg.5 and adjacent parcels at the MCIDC Plaza.

Evaluation Framework

Encourage the protection, modernization, and expansion of existing businesses and job opportunities, and where appropriate, encourage the recruitment of new business and industry consistent with the character of the Region.

The PREP program provides technical assistance to businesses in the areas of export development, loan packaging, and procurement outreach to protect, modernize, and expand existing businesses and job opportunities.

Performance measures in this area will be tracked by the Impact reporting system that was developed by the Commonwealth. This reporting system tracks the type of technical assistance used by companies, their sales figures, and employee creation and retention.

Performance measures in this area will be evident in the number of businesses that locate in the Region. Future industry cluster analysis studies will also provide a measure of performance when they are compared to previous studies.

Aggressively encourage the deployment of technology and widespread accessibility to broadband services and capabilities.

SEDA-COG continues to focus its efforts on improving the Region's telecommunications infrastructure and deployment of technology. SEDA-COG's Regional Telecommunications Implementation Project consists of developing and improving communications infrastructure in the Region. These improvements to infrastructure for the new economy include broadband and other telecommunication activities.

Performance of this goal can be measured by the successful completion of the projects on the Priority listing. Again, all federally funded projects will be tracked on a yearly basis to record the measure of economic activity generated by each project.

Encourage the upgrading of skills and talents for the Region's workforce and the creation of family-sustaining wages.

SEDA-COG, in cooperation with PREP Partner Service Provider Network and the Workforce Development Boards (WDBs) and Careerlinks, will continue to focus on efforts to identify and evaluate businesses and individuals in need of workforce training. Emphasis will be on education to industry partnerships to ensure training is being developed in accordance with industry demands.

Performance measures in this area will be evident in the number of employees and individuals who are trained for family sustaining jobs.

Encourage the prudent utilization of the area's natural resources in an environmentally sustainable manner (including land, water, natural gas, and lumber).

All economic development projects go through a rigorous environmental review as required by their respective federal and state funding sources. Additionally, SEDA-COG staff, the

SEDA-COG Board of Directors, and CEDS committee, review all projects to ensure prudent utilization of the area's natural resources.

Performance of this goal can be measured by the approval of the economic development projects submitted to Federal funding agencies such as EDA and ARC. All EDA- and ARC-funded projects will be tracked on a yearly basis to record the measure of economic activity generated by each project.

Improve and expand infrastructure, flood resiliency, and conservation/greening efforts to make the older and rural centers throughout the area more attractive to business and economic development.

SEDA-COG continues to focus its efforts on maintaining and developing the Region's community and industrial infrastructure. Most projects included on SEDA-COG's priority list contain some level of infrastructure improvements.

Performance of this goal can be measured by the successful completion of the projects on the EDA and ARC Priority listing. Again, all EDA and ARC funded projects will be tracked on a yearly basis to record the measure of economic activity generated by each project.

Encourage the promotion of the Region as a destination for travel, recreation, and tourism.

Careful consideration by SEDA-COG staff and the CEDS Committee ensure that local economic development does not hinder the travel and tourism industry. These development activities will not diminish the attractiveness of the Region to tourists. Economic development projects must follow a thorough historical and environmental evaluation before approval from federal funding agencies.

Performance measurement of this goal is evident when viewing the success rate of approvals of economic development projects by federal funding agencies. Additionally, measurement can be obtained by the local tourist promotion agencies to measure the amount of tourist dollars injected into the Region.

Cultivate efforts for the Region to become resilient in the face of natural disasters, pandemics, and economic downturns.

Over the past decade, the Region has experienced several catastrophic flooding events, the economic recession, and now the COVID-19 global pandemic. These events have shown that, now more than ever, the Region needs to be prepared for these types of events to recover faster and stronger.

Performance of this goal will be measured by the successful completion of the projects that address economic and community resiliency.

SEDA COG

SEDA-Council of Governments

201 Furnace Road

Lewisburg, PA 17837

tel. 570-524-4491

or

800-332-6701

Find us on the web:

www.seda-cog.org