



Economic Development District



Comprehensive Economic Development Strategy

Five Year Update

June 2015

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TABLE OF CONTENTS

LIST OF TABLES AND CHARTS	2
EXECUTIVE SUMMARY	4
SUMMARY BACKGROUND	6
<i>Background Information</i>	6
<i>Demographics</i>	8
<i>Socioeconomic</i>	13
<i>Labor Force</i>	16
<i>Natural Environment and Resources</i>	20
<i>Infrastructure</i>	34
<i>Technology</i>	35
<i>Regional Economic Sectors</i>	35
<i>Regional Economic Relationship to State</i>	35
<i>Factors Directly Affecting Economic Performance</i>	39
<i>Transportation Systems</i>	39
<i>Business Incentives</i>	43
<i>Natural Disaster/Natural/Economic Resiliency</i>	43
<i>Factors Indirectly Affecting Economic Performance</i>	47
<i>Housing</i>	47
<i>Health Services</i>	47
<i>Educational, Cultural, and Recreational Facilities</i>	49
<i>Environmental Issues</i>	51
ISSUES	52
THE STATE OF THE REGIONAL ECONOMY	52
COMMUNITY AND PRIVATE SECTOR PARTICIPATION	54
RESOURCES FOR ECONOMIC DEVELOPMENT	55
<i>Entrepreneurship and Small Business</i>	55
<i>Industry Clusters</i>	55
<i>Energy Conservation</i>	57
<i>Survey to Local Stakeholders</i>	58
ASSESSMENT	59
STRATEGIC VISION/ACTION PLAN	60
VISION STATEMENT, GOALS AND OBJECTIVES	60
ACTION PLAN: HOW DO WE GET THERE?	62
PROGRAM AND ACTIVITY PRIORITIES	62
GOALS	62
ANALYSIS	62
OBJECTIVES	65
PROJECT PRIORITIZATION	66
EVALUATION FRAMEWORK	68
ATTACHMENTS	

A - Current SEDA-COG Board Member List
 B - CEDS Committee Members
 C - County Support Letters
 D - Establishments and Jobs by County and Industry

E - Industry Sectors and Clusters for SEDA-COG
 F - Survey Results of Local Stakeholders
 G - Listing of Recent Plant Closings and Layoffs in the Region
 H - 2015 - 2016 EDA Project Priority List

LIST OF TABLES AND CHARTS

Table 1 – Number of Municipalities by Type: SEDA-COG Counties and SEDA-COG Region, 2013	8
Table 2 – Population Density: SEDA-COG Counties, Region, State and Nation.....	9
Table 3 – Population of SEDA-COG Counties, SEDA-COG Region and Pennsylvania.....	10
Table 4 – Population Projections to 2040: SEDA-COG Counties, SEDA-COG Region and Pennsylvania	10
Chart 1 – Population Projection Change 2010-2014	11
Table 5 – Age 65+ Population Projection By County in SEDA-COG Region	12
Chart 2 – Population Projection for Age 65+ By County in the SEDA-COG Region	12
Table 6 - SEDA-COG Counties and Pennsylvania Race Alone and Hispanic Origin: 2007-2011 Estimates	13
Table 7 – Median Household Income in the SEDA-COG Region: 2007-2011	14
Table 8 – People Under 18 Living in Poverty in the SEDA-COG Region: 2007-2011	14
Table 9 – Poverty in the SEDA-COG Region: 2007-2011.....	15
Table 10 – Personal Income and Per Capita Personal Income by County 2012	15
Table 11 – Jobs Dislocations 2013-2014	17
Table 12 – Annual Average Unemployment Rate SEDA-COG Region, Pennsylvania, and U.S. 2004-2013	18
Chart 3 – Annual Average Unemployment Rate 2004-2013	19
Table 13 – Number and Size of Farms: 2007 & 2012	22
Table 14 – Market Value of Production of Farms: SEDA-COG Counties, SEDA-COG Region, Pennsylvania	23
Table 15 – State Game Lands, Parks and Forests: Acreage by County in the SEDA-COG Region	24
Table 16 – Economic Contribution of Forestry to SEDA-COG Counties, SEDA-COG Region, and PA	25
Table 17 – Forestry and Wood Product Establishments and Employees: SEDA-COG Counties, SEDA-COG Region, and PA.....	26
Chart 4 – Loyalsock Township Municipal Building Electricity Consumption (kWh)	27
Table 18 – Unconventional Well Permits Issued and Wells Drilled.....	29
Chart 5 – Unconventional Well Permits Issued in SEDA-COG Counties in PA 2009-2014.....	30
Chart 6 – Unconventional Wells Drilled in SEDA-COG Counties in PA 2009-2014	30
Table 19 – Extraction & Mining Jobs, SEDA-COG Counties, PA, and Nation 2010-2012	31

Table 20 – Industrial/Business Parks and Incubators in the SEDA-COG Region.....	34
Table 21 – Electric Utility Service by County in the SEDA-COG Region	35
Chart 7 – Jobs by NAICS for SEDA-COG and PA 2012	36
Chart 8 – 2012 Manufacturing Jobs by Major Industry in the SEDA-COG Region.....	38
Table 22 – Annual Average Unemployment Rate, SEDA-COG Region, Pennsylvania, and US 2004-2013	38
Table 23 – Airports in SEDA-COG Region	42
Table 24 – Housing Units, SEDA-COG Counties, SEDA-COG Region, and Pennsylvania: 2007-2011	47
Table 25 – Hospitals & Hospital Beds in the SEDA-COG Region, 2010-2011.....	48
Table 26 – Institutions of Higher Education in the SEDA-COG Region Fall 2013.....	49
Table 27 – Education of Individuals 25 Years and Older With Less Than a High School Education in the SEDA-COG Region and PA: 2007-2011	50
Table 28 – Individuals 25 Years and Older With a Bachelor’s Degree in the SEDA-COG Region and PA: 2007-2011.....	51
Table 29 – Economic Development Projects	67

SEDA-Council of Governments Economic Development District



June 2015

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.

In order to have plans that more strongly link land use, transportation, and economic development issues and better reflect the needs of the region, SEDA-COG worked closely with the SEDA-COG Metropolitan Planning Organization to coordinate data collection and outreach efforts. At the same time SEDA-COG compiled information for the 5-year CEDS, the SEDA-COG Metropolitan Planning Organization (MPO) worked on its 4-year update of the Long Range Transportation Plan (LRTP) and Public Participation Plans. Both of these updates required SEDA-COG to collect similar economic data for the 8-county MPO area, which is a subset of the SEDA-COG Region. In addition, the CEDS requires a stakeholder outreach effort on economic development issues that strengthened the discussion on those issues in the LRTP.

This strategy discusses the work in the region and plans for the future.

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 within its borders and a number of satellite institutions;
 - Skilled and available workforce

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

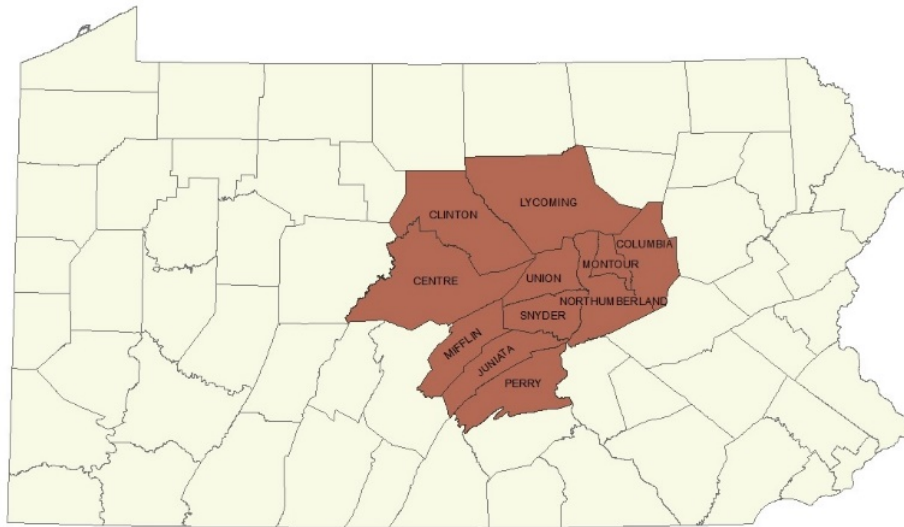
Goals

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. Encourage the prudent utilization of the area's natural resources in an environmentally sustainable manner (including land, water, natural gas, and lumber);
3. 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;
4. Actively encourage energy conservation and foster the deployment of locally-owned, locally-used energy projects;
5. Encourage the promotion of the Region as a destination for travel, recreation, and tourism.
6. Aggressively encourage the deployment of technology and widespread accessibility to broadband services and capabilities.
7. Encourage efforts to enhance a greater level of foreign direct investment and the relocation/location of U.S. companies' overseas operations to the Region.
8. Encourage the upgrading of skills and talents for the Region's workforce and the creation of family sustaining wages.

Summary Background

Background Information



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 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. (See Attachment B for a listing of the individuals on the CEDS Committee).

The CEDS committee will continue to seek and utilize input and 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 B). 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 District. 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 April 2015, a draft version of the 5-Year 2015 CEDS document was shared with the SEDA-COG CEDS Committee, Board, and regional organizations that include the Central Region PREP

Partnership, Heartland Partnership, and the Central Pennsylvania Workforce Development Corporation (CPWDC). In total, over 90 members of these organizations received a copy of the document for their review and comment. The report was also uploaded to the SEDA-COG website for review and comment. As an outgrowth of the review process, the document was revised to incorporate information on the addition of commercial and general airports as a valuable asset in the region. Additionally, based on comments, there was a greater emphasis in the revised 2015 CEDS on entrepreneurship, innovation, and workforce development. Renewable energy resources including solar, biomass, and wind were also highlighted in this revised document.

At the same time SEDA-COG was compiling information for the 5-year CEDS, the SEDA-COG Metropolitan Planning Organization (MPO) was also starting its 4-year update of the Long Range Transportation Plan (LRTP) and Public Participation Plans. Both of these updates required SEDA-COG to collect similar economic data for the 8-county MPO area which is a subset of the SEDA-COG Region. In addition, the CEDS required a stakeholder outreach effort on economic development issues that strengthened the discussion on those issues in the LRTP. As such, staff coordinated data collection and outreach efforts for these updates. As a result of combining the data collection and outreach efforts, the plans more strongly link land use, transportation, and economic development issues and better reflect the needs of the region.



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. It matters how easy and direct it is to get the services and information they required. The Central PREP Program’s core partners include the region’s Industrial Resource Centers, the IMC and NEPIRC; the industrial development organizations; SEDA-COG; and the three Small Business Development Centers (SBDC’s) located at Penn State, Lock Haven University, and Bucknell University.

Included as Attachment C are letters of concurrence from the Boards of Commissioners of each of the counties in the District. All counties have elected to be covered by SEDA-COG’s 2015 5-Year CEDS.

As of February 2015, SEDA-COG has a total staff of 91 persons, of whom approximately 12 devote a major portion of their time to economic development activities. The latter figure does not include secretarial and other support personnel.



Demographics

Table 1 NUMBER OF MUNICIPALITIES BY TYPE: SEDA-COG COUNTIES and SEDA-COG REGION 2013					
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 within SEDA-COG's 11-county region are 294 municipalities, of which 76 are boroughs, 213 are townships, 4 are cities, and 1 is a town as shown in Table 1, "Number of Municipalities by Type: SEDA-COG Counties, and SEDA-COG Region."

SWOT Analysis

The SEDA-COG EDD covers a land area of 6,296 square miles, which represents 14% of Pennsylvania's total land area of 44,742 square miles. In contrast, the region's 2011 population estimate of 690,100 represents only 5.4% of the total population of Pennsylvania. The 2011 population estimate density in the region is 109.6 persons per square mile, compared to a statewide density of 282.9 persons per square mile. Detailed figures by county are shown in Table 2.

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 for July 2011.

Between 1950 and 2011, the SEDA-COG Region's total population grew by 32.6%, with individual county growth ranging from a high of 131.6% in Centre County to Northumberland County's negative growth of -19.46%. During this 61-year period, the Commonwealth's rate of growth was 20.6%. Of SEDA-COG's 11 counties, six had a growth rate higher than the State during this time period.

Recently, between 2000 and 2011, Lycoming, Montour, and Northumberland Counties had a slight decline in their population. Centre County experienced the highest growth rate (12.4%) during the decade followed by Juniata and Union County, both with 7% growth. In all, 7 out of SEDA-COG's 11 counties had population growth higher than the state.

Table 2 Population Density: SEDA-COG Counties, Region, State, and Nation			
County/Area	Population 2011 Estimate	Land Area (Square Miles)	Persons per Square Mile
Centre	152,689	1,110	137.5
Clinton	40,178	888	45.2
Columbia	67,020	483	138.7
Juniata	24,439	391	62.5
Lycoming	116,335	1,229	94.6
Mifflin	46,671	411	113.5
Montour	18,193	130	139.9
Northumberland	94,321	458	205.9
Perry	45,785	551	83
Snyder	39,597	329	120.3
Union	44,872	316	142
SEDA-COG	690,100	6,296	109.6
Pennsylvania	12,660,739	44,742	282.9
Nation	306,603,772	3,531,905	86.8
Source: U.S. Census Bureau: American Community Survey (2007-2011) 5 Year Estimate			

5- Year Comprehensive Economic Development Strategy



June 2015

Table 3										
Population of SEDA-COG Counties, SEDA-COG Region and Pennsylvania										
County/Area	2011 Estimate	2010	2000	1990	1980	1970	1960	1950	% Change 1950-2011	% Change 2000-2011
Centre	152,689	153,990	135,758	123,786	112,760	99,267	78,680	65,922	131.62	12.47
Clinton	40,178	39,238	37,914	37,182	38,971	37,721	37,619	36,532	9.98	5.97
Columbia	67,020	67,295	64,151	63,202	61,967	55,114	53,489	53,460	25.36	4.47
Juniata	24,439	24,636	22,821	20,625	19,188	16,712	15,874	15,243	60.32	7.08
Lycoming	116,335	116,111	120,044	118,710	118,416	113,296	109,367	101,249	14.89	-3.08
Mifflin	46,671	46,682	46,486	46,197	46,908	45,268	44,348	43,691	6.82	.39
Montour	18,193	18,267	18,236	17,735	16,675	16,508	16,730	16,001	13.69	-.23
Northumberland	94,321	94,528	94,556	96,771	100,381	99,190	104,138	117,115	-19.46	-.24
Perry	45,785	45,969	43,602	41,172	35,718	28,615	26,582	24,782	84.75	5.00
Snyder	39,597	39,702	37,546	36,680	33,584	29,269	25,922	22,912	72.82	5.46
Union	44,872	44,947	41,624	36,176	32,870	28,603	25,646	23,150	93.83	7.80
SEDA-COG	690,100	681,365	662,738	638,236	617,438	569,563	538,395	520,057	32.69	4.12
Pennsylvania	12,660,739	12,702,379	12,281,054	11,881,643	11,863,895	11,793,909	11,319,366	10,498,012	20.60	3.09

Source: U.S. Census Bureau: American Community Survey (2007-2011) 5 Year Estimate

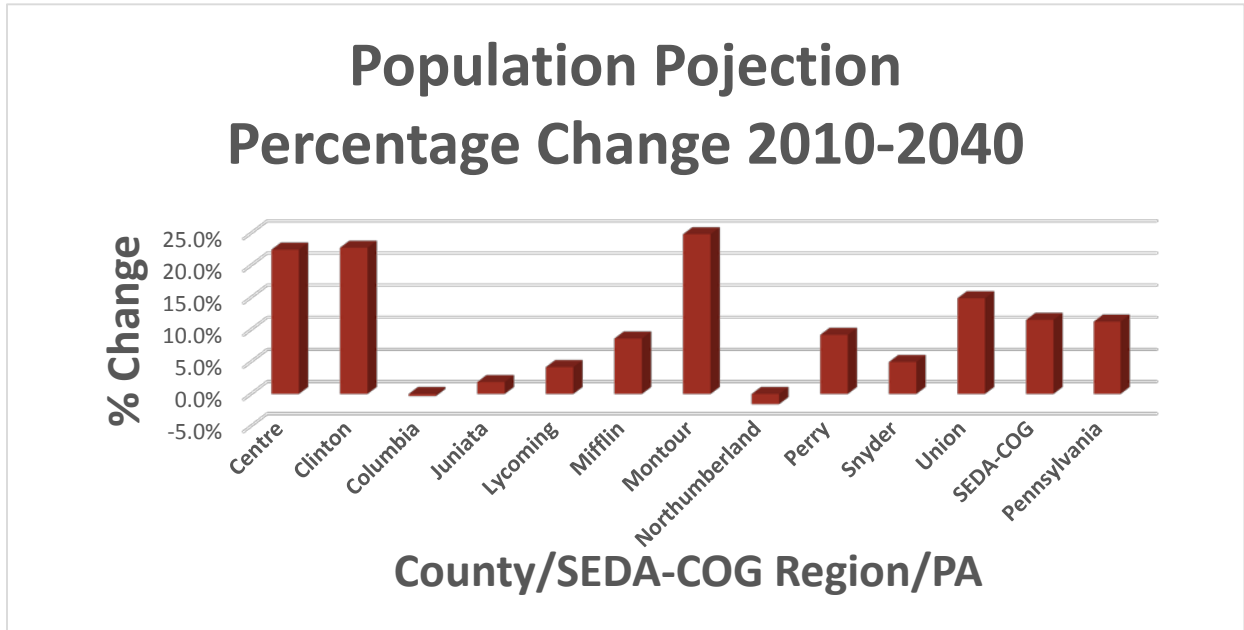
Special circumstances in a few counties should be noted. Centre County's high growth rate is driven primarily by the existence of the main campus of the Pennsylvania State University. The troublesome negative growth rate, which persists in Northumberland County, has its origins in the decline of the 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

The population projections to 2040 were developed and published by the Pennsylvania State Data Center in 2013. 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 1

Overall, the SEDA-COG region's population is estimated to grow by 78,577 people or 11.5% between 2010 and 2040. 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. This data demonstrates the region is estimated to grow at a slightly faster rate than the state as a whole.

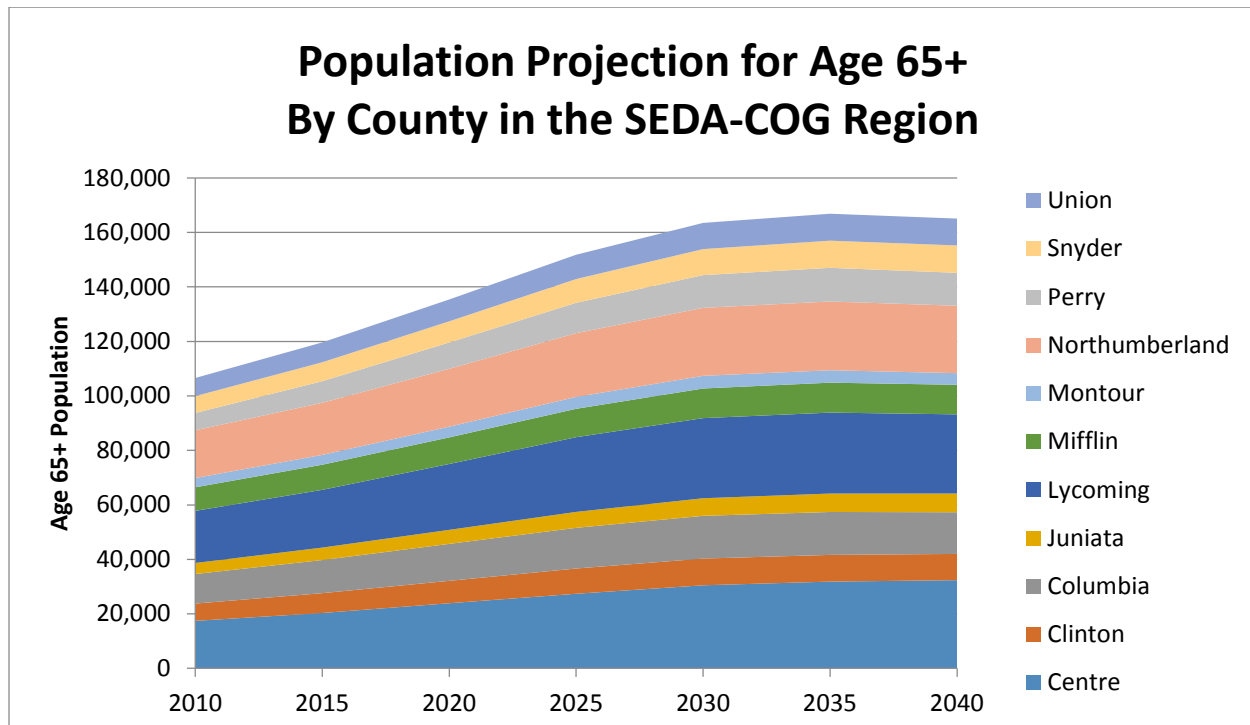
Of the individual counties in the region, 9 counties are projected to increase in population and 2 counties are projected to experience a decrease in population. The counties with a projected increase include Centre, Clinton, Juniata, Lycoming, Mifflin, Montour, Perry, Snyder, and Union. Montour, Clinton, 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 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 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							

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

Chart 2

Socioeconomic

The socioeconomic data presented in this section is derived from the U.S. Census Bureau's American Community Survey (ACS) 5-Year Estimates 2007-2011 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 considered to be 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: 2007-2011										
County/Area	Total Population	Race Alone							Ethnicity	
		White Alone	Black or African American Alone	American Indian and Alaska 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	152,689	89.4%	3.1%	0.2%	5.3%	0.1%	0.8%	1.1%	97.5%	2.5%
Clinton	40,178	96.80%	1.1%	0.1%	0.4%	0.0%	0.3%	1.3%	98.9%	1.1%
Columbia	67,020	96.0%	1.8%	0.2%	0.9%	0.0%	0.4%	0.7%	97.9%	2.1%
Juniata	24,439	97.40%	0.5%	0.2%	0.4%	0.1%	0.5%	0.9%	97.7%	2.3%
Lycoming	116,335	92.9%	4.4%	0.2%	0.6%	0.0%	0.2%	1.7%	98.7%	1.3%
Mifflin	46,671	97.9%	0.6%	0.1%	0.3%	0.0%	0.1%	1.0%	98.8%	1.2%
Montour	18,193	95.4%	1.5%	0.1%	1.8%	0.0%	0.4%	0.8%	98.3%	1.7%
Northumberland	94,321	95.5%	2.2%	0.2%	0.3%	0.0%	1.0%	0.8%	97.7%	2.3%
Perry	45,785	97.4%	0.7%	0.1%	0.2%	0.0%	0.7%	0.9%	98.7%	1.3%
Snyder	39,597	97.2%	0.9%	0.1%	0.6%	0.1%	0.4%	0.7%	98.4%	1.6%
Union	44,872	87.3%	7.4%	0.3%	1.2%	0.1%	2.1%	1.6%	94.9%	5.1%
SEDA-COG (% of Total)	690,100	93.7%	2.7%	0.1%	1.7%	0.0%	0.7%	1.1%	97.8%	2.2%
PA (% of Total)	12,660,739	82.7%	10.7%	.1%	2.7%	0.1%	2.0%	1.7%	94.5%	5.5%

Source: U.S. Census Bureau: American Community Survey (2007-2011) 5 Year Estimate

The population of the SEDA-COG region is 93.7% white, as shown in the table above. 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. 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.

Table 7

Median Household Income in the SEDA-COG Region 2007-2011

County/Area	Median Household Income
Centre	\$48,262
Clinton	\$39,696
Columbia	\$44,136
Juniata	\$45,496
Lycoming	\$43,788
Mifflin	\$38,892
Montour	\$46,421
Northumberland	\$39,605
Perry	\$54,626
Snyder	\$46,184
Union	\$46,269
Pennsylvania	\$51,651

Source : U.S. Census Bureau, American Community Survey (2007-2011) 5 Year Estimate

The statewide median household income stood at \$51,651, with ten of the eleven SEDA-COG counties having income levels lower than the state's. Only Perry County had an income level higher than the state at \$54,626. Perry County's close 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.

The ACS 5-Year Estimates (2007-2011) for people under the age of 18 living in poverty (See Table 8 below) indicate the four counties of Clinton (18.3%), Lycoming (22.1%), Mifflin (24.0%), and Northumberland (21.5%) had a higher percentage of people under the age of 18 in poverty than the statewide percentage of 17.7%.

Table 8

People Under 18 Living in Poverty in the SEDA-COG Region: 2007-2011

County/Area	People Under 18 In Poverty	Total Population*	% of Population Under 18 in Poverty
	Number	Number	Percentage
Centre	2,842	23,825	11.9%
Clinton	1,429	7,806	18.3%
Columbia	1,880	12,251	15.3%
Juniata	922	5,788	15.9%
Lycoming	5,298	24,019	22.1%
Mifflin	2,575	10,710	24.0%
Montour	626	3,802	16.5%
Northumberland	3,999	18,641	21.5%
Perry	1,607	10,380	15.5%
Snyder	1,442	8,637	16.7%
Union	1,291	8,124	15.9%
Pennsylvania	488,855	2,757,475	17.7%

* For Whom Poverty Status is Determined

Source: U.S. Census Bureau, American Community Survey (2007-2011) 5 Year Estimate

Table 9			
Poverty in the SEDA-COG Region 2007-2011			
County/Area	People of All Ages In Poverty	Total Population*	% of Population in Poverty
	Number	Number	Percentage
Centre	25,336	134,388	18.9%
Clinton	5,726	36,211	15.8%
Columbia	9,535	62,804	15.2%
Juniata	2,546	24,075	10.6%
Lycoming	15,834	111,118	14.2%
Mifflin	6,991	45,973	15.2%
Montour	1,842	17,641	10.4%
Northumberland	12,364	90,135	13.7%
Perry	4,306	45,097	9.5%
Snyder	4,137	37,052	11.2%
Union	4,270	35,500	12.0%
Pennsylvania	1,548,869	12,246,520	12.6%
* For Whom Poverty Status is Determined			
Source: U.S. Census Bureau, American Community Survey (2007-2011) 5 Year Estimate			

In terms of overall poverty in the SEDA-COG Region, six of the eleven counties in the region including Centre, Clinton, Columbia, Lycoming, Mifflin, and Northumberland County all had a higher percentage of people in poverty than the statewide rate of 12.6%. (See Table 9)

Per capita personal income figures for 2012, as estimated by the Bureau of Economic Analysis (see Table 10), indicate that the overall per capita income for the SEDA-COG region is 84% of that for the nation and 81% for the state. There is a substantial disparity among the individual SEDA-COG counties, ranging from a low of \$32,078 in Mifflin County to a high of \$45,733 in Montour County. Mifflin

Table 10		
Personal Income and Per Capita Personal Income by County 2012		
County/Area	Personal Income	Per Capita Personal Income
United States	\$13,729,063,000,000	\$43,735
Pennsylvania	\$575,424,657,000	\$45,083
Centre	\$6,345,487,000	\$40,894
Clinton	\$1,375,930,000	\$34,819
Columbia	\$2,219,677,000	\$33,185
Juniata	\$814,481,000	\$32,705
Lycoming	\$4,480,329,000	\$38,239
Mifflin	\$1,500,383,000	\$32,078
Montour	\$839,475,000	\$45,733
Northumberland	\$3,412,976,000	\$36,144
Perry	\$1,715,918,000	\$37,547
Snyder	\$1,312,162,000	\$33,075
Union	\$1,525,156,000	\$33,929
SEDA-COG	\$25,541,974,000	\$36,790
Source: Bureau of Economic Analysis, Regional Economic Accounts, Local Area BEARFACTS, Published May 30th 2014		

County's per capita income is 73% of the nation's per capita income and 71% of the state's per capita income. In addition, of the 11 SEDA-COG counties, only Montour County has a per capita income equal to or 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.

Labor Force

The table on the next page 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 two years. In total, over 1,130 jobs were lost in the region since 2013. While the businesses reporting job dislocations range from hospitality to the building industry, and to manufacturing, the majority of job loss reported through Rapid Response is in the manufacturing industry.

5- Year Comprehensive Economic Development Strategy



June 2015

Table 11
Jobs Dislocations 2013-2014

Initial Report Date	Company	County	Closure or Downsizing	Number of Employees Effected
2014				
4/15/2014	Sykes	COLUMBIA	DOWNSIZING	67
6/6/2014	Healthcare Administrative Partners	COLUMBIA	CLOSURE	40
4/30/2014	B.J.s in Danville	MONTOUR	CLOSURE	50
11/19/2014	Merck Cherokee Pharmaceuticals	NORTHUMBERLAND	DOWNSIZING	25
5/28/2014	Catawissa Wood Company	NORTHUMBERLAND	DOWNSIZING	50
10/1/2014	Bimbo Bakeries	NORTHUMBERLAND	DOWNSIZING	30
4/28/2014	Pepsi	SNYDER	DOWNSIZING	3
5/14/2014	Sunbury Generation	SNYDER	CLOSURE	111
2013				
4/4/2013	South Hills School of Business and Technology	CENTRE	CLOSURE	7
6/26/2013	Arris	CENTRE	CLOSURE	56
7/19/2013	Windsor	COLUMBIA	CLOSURE	141
1/31/2013	Ames True Temper	MIFFLIN	CLOSURE	175
1/23/2013	First Savings Financial Insurance	MONTOUR	CLOSURE	Not Reported
2/4/2013	Fenco	NORTHUMBERLAND	CLOSURE	53
4/8/2013	West Point Mining	NORTHUMBERLAND	CLOSURE	20
5/29/2013	Milton Steel	NORTHUMBERLAND	DOWNSIZING	38
8/31/2013	Merck Cherokee Pharmaceuticals	NORTHUMBERLAND	DOWNSIZING	44
11/8/2013	Crafco	NORTHUMBERLAND	CLOSURE	9
10/25/2013	Furmanos	NORTHUMBERLAND	DOWNSIZING	18
2/13/2013	Alpha Mills Corporation	SNYDER	CLOSURE	20
2/13/2013	National Beef	SNYDER	DOWNSIZING	150
4/24/2013	Ram Industrial Services (aka Wagners Sales)	SNYDER	CLOSURE	Not Reported
6/1/2013	Gilberts Garden Center	SNYDER	CLOSURE	Not Reported
3/13/2013	Joe Sharp Builder	UNION	CLOSURE	20
4/10/2013	TPX Thermal Product Solutions	UNION	DOWNSIZING	12

Source: Central Pennsylvania Workforce Development Corporation, Rapid Response

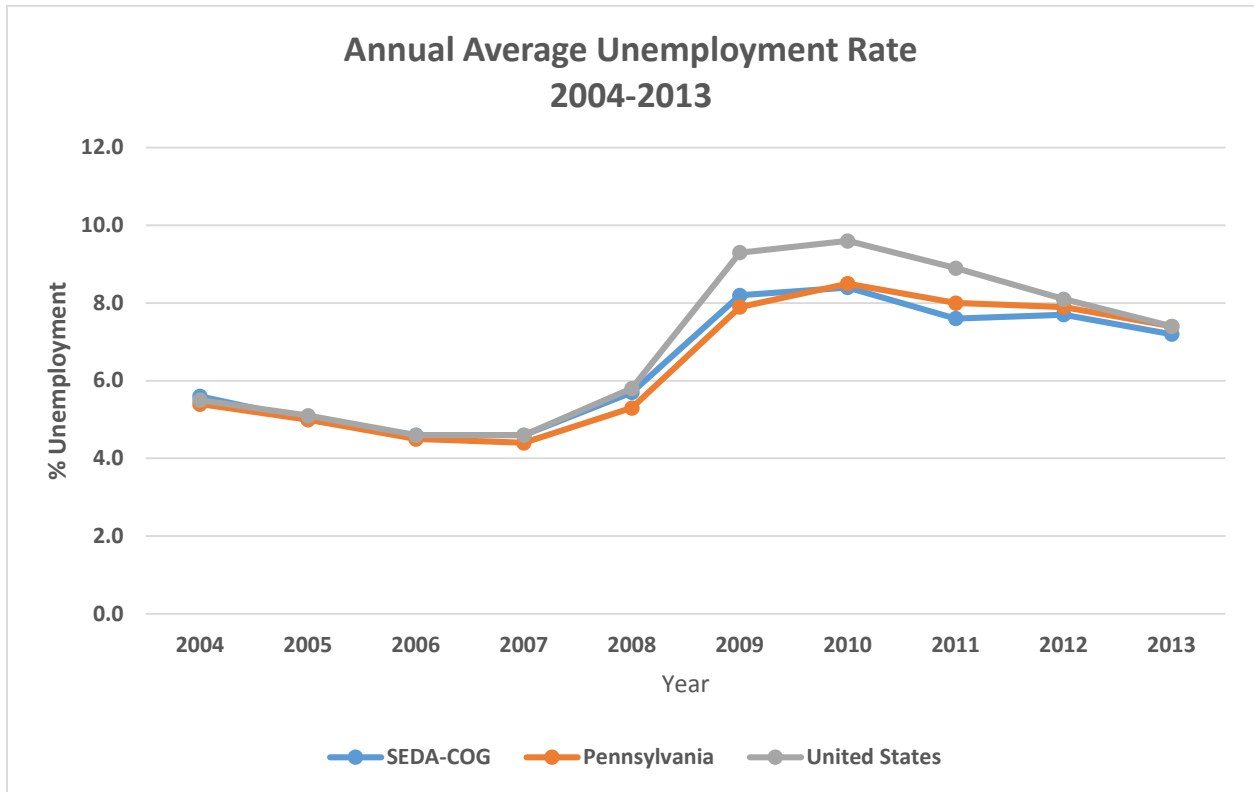
The chart below shows the trend for the past 10 years of average annual unemployment rates for the SEDA-COG region, Pennsylvania, and the United States. Prior to 2004, the SEDA-COG rate tended to be slightly higher than the other two. During 2008, the United States unemployment rate was higher than both the state and the region. Most recently, however, the three rates have been very close.

For the year 2013, the annual average unemployment rate for the SEDA-COG region stood at 7.2%. This figure is slightly lower than the Commonwealth and nation's rate of 7.4% (See Table 12.) For the individual counties in the SEDA-COG region, the 2013 annual rate ranged from a low of 5.5%, in Montour County, to a high of 8.6%, in Clinton County. Of the 11 counties in the SEDA-COG Region, 6 counties had annual average unemployment rates the same as or higher than the state and the nation.

Table 12										
Annual Average Unemployment Rate SEDA-COG Region, Pennsylvania, and U.S. 2004-2013										
County/Area	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Centre	4.5	4.0	3.7	3.5	4.3	5.7	6.2	5.7	5.8	5.6
Clinton	6.6	6.1	5.5	5.2	6.2	8.7	9	8	8.6	8.6
Columbia	6.6	5.9	5.4	5	5.9	8.4	8.9	8.2	8	7.1
Juniata	4.6	4.2	4.2	4.2	5.4	7.8	7.7	7.2	7.3	7.1
Lycoming	6.1	5.4	5.2	4.9	5.9	8.7	8.8	7.6	7.8	7.8
Mifflin	6.6	5.8	5.0	5.2	6.6	9.8	9.5	8.3	8.2	7.6
Montour	5.2	4.4	4.0	3.8	4.8	6.5	6.6	6.3	5.9	5.5
Northumberland	6.4	5.5	5.2	5	6.6	9.5	9.6	8.9	9	8.5
Perry	4.9	4.2	3.8	4	5.3	7.8	8.4	7.9	7.8	7
Snyder	4.6	4.4	4.0	4.6	6.1	8.9	8.7	8	8.1	7.4
Union	5.5	5.4	5.1	5.2	6.3	8.9	8.9	7.9	7.7	7.5
SEDA-COG	5.6	5.0	4.6	4.6	5.7	8.2	8.4	7.6	7.7	7.2
Pennsylvania	5.4	5.0	4.5	4.4	5.3	7.9	8.5	8	7.9	7.4
United States	5.5	5.1	4.6	4.6	5.8	9.3	9.6	8.9	8.1	7.4

Source: Bureau of Economic Analysis, Regional Economic Accounts, Local Area BEARFACTS, Published May 30th 2014

Chart 3



According to William Berry, Research Coordinator at the Central Pennsylvania Workforce Development Corporation (CPWDC), the business landscape in the Region has changed since 2008. The Region is nearly back to pre-recession levels in terms of total employment 2007 (295,400 employed) and 2014 (295,200 employed). However, the gains and losses in each of the industries vary. Healthcare increased by 5,100 while manufacturing lost 8,900 jobs during the same timeframe.

Largest increases from 2007-2014:

- Health Care and Social Assistance: +5,100, +14%
- Mining, Quarrying, and Oil and Gas Extraction: +2,300, +393%
- Management of Companies and Enterprises: +1,900, +35%

Largest decreases:

- Wholesale Trade: -800, -10%
- Construction: -1,900, -12%
- Manufacturing: -8,900, -19%

Source: Central Pennsylvania Workforce Development Corporation (CPWDC), William E. Berry, Research Coordinator

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 mostly 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.



A panoramic view of the North Branch of the Susquehanna River and the Borough of Northumberland from the Shikellamy Lookout.

Four times over the past four decades, the Region has suffered from flooding of catastrophic proportions, in which many of the communities were inundated with flood waters. The Agnes flood of June 1972 remains one of the greatest flooding events known in the Susquehanna River basin in regards to both the area affected and the magnitude of the flood flow. Only the extreme upper headwaters escaped disastrous flooding. Peak flows were often 1.5 times greater than the previous known maximum flood. Major flooding was also observed on all tributaries downstream of the West Branch Susquehanna River, as far as the Juniata River.

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 50's, 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.

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 anywhere from 10 to over 13 inches and more 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 up and down 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.

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 District'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 in close proximity to 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 Shale, a geological formation that contains 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.

Table 13

Number and Size of Farms 2007 & 2012
SEDA-COG Counties, SEDA-COG Region, Pennsylvania

County/Area	Year	Number of Farms	Land in Farms (Acreage)	Avg. Size of Farm (Acres)
Centre	2007	1,146	148,464	130
	2012	1,192	162,041	136
Clinton	2007	537	56,626	537
	2012	469	52,715	469
Columbia	2007	962	122,621	127
	2012	944	122,743	130
Juniata	2007	788	97,681	124
	2012	737	91,032	124
Lycoming	2007	1,211	160,456	132
	2012	1,207	158,462	131
Mifflin	2007	1,024	94,133	92
	2012	808	90,554	112
Montour	2007	583	50,252	86
	2012	459	43,493	95
Northumberland	2007	936	147,660	158
	2012	847	129,501	153
Perry	2007	1,002	144,375	144
	2012	889	135,075	152
Snyder	2007	998	100,179	100
	2012	933	91,179	98
Union	2007	575	63,795	111
	2012	613	93,241	152
SEDA-COG	2007	9,762	1,186,242	122
	2012	9,098	1,170,036	129
Pennsylvania	2007	63,163	7,809,244	124
	2012	59,309	7,704,444	130

Source: United States Department of Agriculture, "2012 Census of Agriculture"

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 2012 Census of Agriculture shows that there are 9,098 farms in the SEDA-COG Region. The total farmland acreage is 1,170,036, with the average size of a farm, approximately 129 acres. (See Table 13) The total number of farms decreased by 664 from 2007 (the year of the previous agricultural census) to 2012; additionally, the total acreage of

farmland decreased by 16,206 acres. However, the average size of a farm in the Region increased by 7 acres during that same time period.

Table 14

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	2007	\$69,661,000	\$60,786
	2012	\$91,581,000	\$76,829
Clinton	2007	\$43,661,000	\$81,305
	2012	\$60,558,000	\$129,123
Columbia	2007	\$45,874,000	\$47,687
	2012	\$74,351,000	\$78,761
Juniata	2007	\$91,658,000	\$116,318
	2012	\$101,440,000	\$137,639
Lycoming	2007	\$53,381,000	\$44,080
	2012	\$72,202,000	\$59,819
Mifflin	2007	\$86,818,000	\$84,783
	2012	\$94,023,000	\$116,365
Montour	2007	\$36,193,000	\$62,081
	2012	\$47,425,000	\$103,323
Northumberland	2007	\$110,978,000	\$118,566
	2012	\$154,339,000	\$182,219
Perry	2007	\$105,052,000	\$104,842
	2012	\$140,401,000	\$157,932
Snyder	2007	\$109,041,000	\$109,259
	2012	\$165,493,000	\$177,377
Union	2007	\$90,497,000	\$157,386
	2012	\$135,970,000	\$221,811
SEDA-COG	2007	\$842,814,000	\$86,336
	2012	\$1,001,813,000	\$110,113
Pennsylvania	2007	\$5,808,803,000	\$91,965
	2012	\$7,400,781,000	\$124,783

SOURCE: United States Department of Agriculture, "2012 Census of Agriculture"

Centre and Union were the only counties in the Region to experience an increase in the number of farms. Centre County went from 1,146 farms in 2007 to 1,192 farms in 2012, a 4% increase in the number of farms. Union County went from 575 farms in 2007 to 613 in 2012, a 6.6% increase in the number of farms. Nine counties in the Region reported a decrease in the total amount of acreage of farmland - Clinton, Columbia, Juniata, Lycoming, Mifflin, Montour, Northumberland, Perry, and Snyder.

While the total amount of farms in the Region is decreasing, the average size of the farms are increasing. Four counties including, Clinton, Lycoming, Northumberland, and Snyder have all experienced a slight decrease in the average size of the farms. However, seven counties have either remained the same or had an increase in the average size of the farms in their counties.

The total market value of production for farms in the SEDA-COG Region for 2012 is \$1,001,813,000, up 19% from the previous agricultural census performed in 2007. The average

market value of production per farm in the Region is \$110,113. This figure is up 27.5% from 2007. Pennsylvania registered increases as well, in both the total market value of production and the average per farm.

All of the counties in the Region experienced an increase in the market value of products sold. Snyder County experienced the largest increase of all of the counties at \$56,452,000 (or 52%), going from \$109,041,000 in 2007 to \$165,493,000 in 2012.

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, 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 15 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	75,872.4	10,130	158,912.2	244,915	34.53%
Clinton	570,240	26,008	9,486.1	294,651.6	330,146	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	219,912.4	24,145.2	882,972	1,127,031	27.88%
*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 (Pennsylvania Game Commission, Bureau of Forestry, Pennsylvania State Parks)						

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.

According to the Penn State Forestry Extension, 66% of the acreage in the SEDA-COG Region is forestland compared to 58% of forestland in the state. Clinton County has the largest percentage of forestland in the Region at 82% and Centre County has the second largest percentage of forestland at 75% with Lycoming County not far behind with 74% forestland. (See Table 16 on the next page)

Although Clinton County has the largest percentage of forestland, its estimated value of standing timber is the third largest in the Region at \$423,230,000, coming in behind Lycoming County (\$636,360,000) and Centre County (\$451,870,000). The value of the standing timber in the SEDA-COG Region and Pennsylvania is estimated at \$2,435,650,000 and \$17,271,870,000, respectively.

Table 16 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. 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 County and Mifflin County 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 iron and 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.

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.

Renewable Energy

Opportunities (not yet fully explored) exist in our region to develop and own renewable energy that can be used to replace a portion of the energy needs of our region. Solar, ground source heat, wind, and biomass from agricultural waste are significantly untapped resources in our region.

Table 17

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

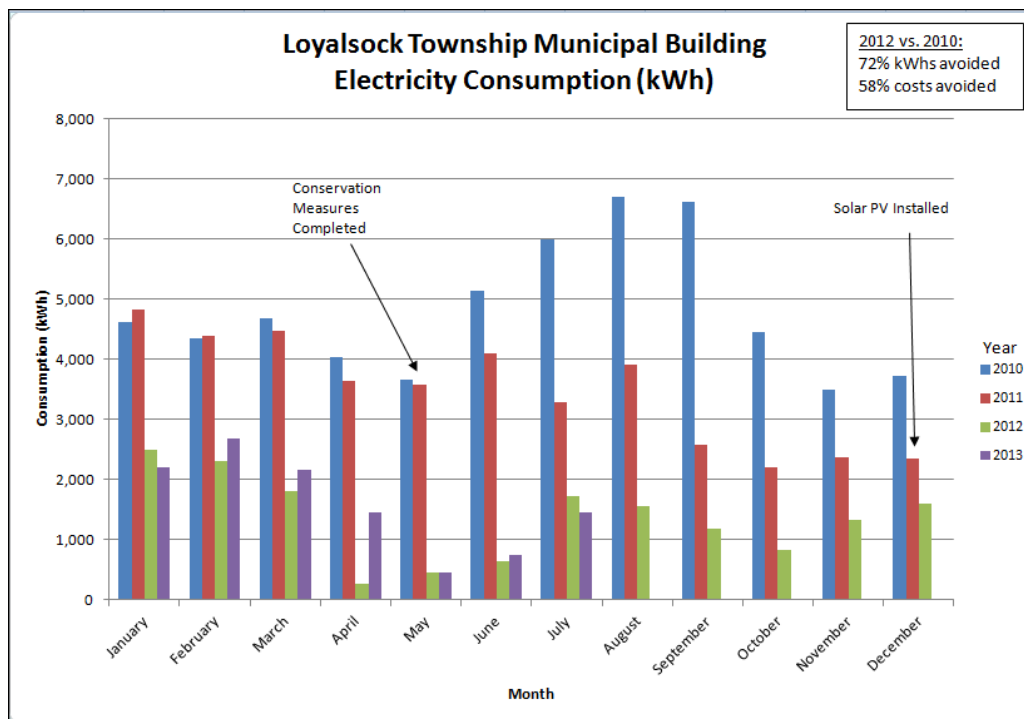


Source: SUNY/Albany U.S. Model (1998-2005) & Joint Research Centre of the European Commission (1981-1990)

Illustration of Solar intensity, courtesy of <http://www.directenergysolar.com/solar-by-state/pennsylvania-pa>

A common misconception is that the Mid-Atlantic United States does not get enough sunlight or have enough solar intensity for solar arrays to produce sufficient quantities of electricity. In reality, PA gets 80% of the sun's intensity of Florida. This is roughly 10% more than Germany, the nation that leads the world in solar usage.

Chart 4



The chart on page 27 illustrates the energy reduction achieved by reducing electricity use through air sealing and retrofit to energy efficiency lighting of the Loyalsock Township municipal building (Lycoming County), followed by the installation of a 17 kW photovoltaic solar array on the building's south-facing rooftop. Forty percent (40%) of the energy used in the United States is used in its buildings. The adoption in our region of greater energy efficiency and conservation, coupled with renewable energy to replace a portion of energy produced from fossil fuels, creates not yet widely understood or utilized opportunities to retain wealth in the region. Also not yet widely understood or utilized are the opportunities to create greater wealth through new business and job creation, resulting from both energy reduction and the development and ownership of renewable energy at a community-scale, which can be used to replace a portion of the region's energy needs.

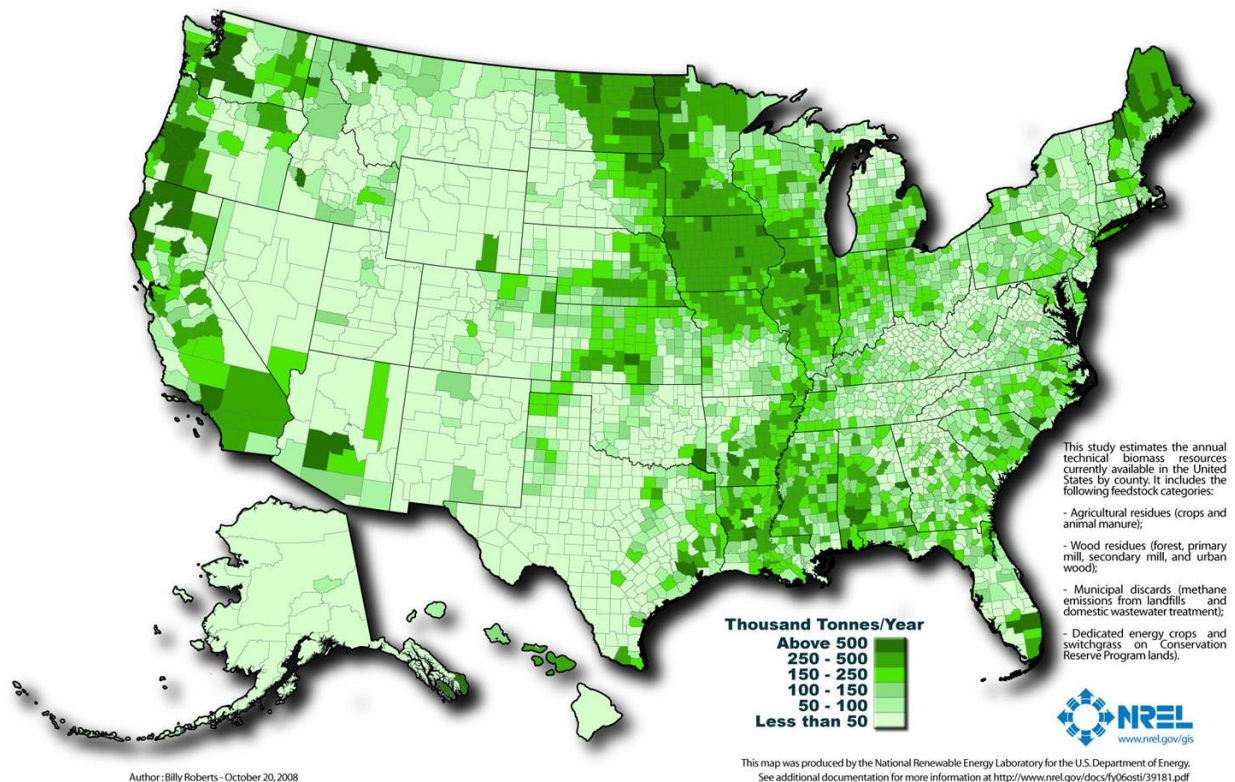


Illustration courtesy of the National Renewable Energy Laboratory for the U.S. Department of Energy, Author Billy Roberts.

The use of biomass to replace transportation and heating fuel in our region is underutilized. The map above illustrates the nation's, and more specifically, Pennsylvania's biomass resources from agricultural residues, including crops and manure, wood residues from mills and forests, municipal discards including landfills and wastewater treatment, and energy crops such as switch grass.

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 less expensively extract the natural gas, which is now in high demand across the nation. What was once considered too expensive for the amount of 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.

According to the Pennsylvania Department of Environmental Protection's (PA DEP) Bureau of Oil and Gas Management, the following counties in the SEDA-COG Region experienced activity related to the Marcellus Shale Play in 2009 through September 30, 2014. See the table below and the charts on the next page.

Table 18

Unconventional Well Permits Issued and Wells Drilled												
Counties in the SEDA-COG Region and Statewide Totals												
Area	Permits Issued	Permits Issued	Permits Issued	Permits Issued	Permits Issued	Permits Issued	Wells Drilled*	Wells Drilled*	Wells Drilled*	Wells Drilled*	Wells Drilled*	Wells Drilled*
	Jan-Dec 2009	Jan -Dec 2010	Jan-Dec 2011	Jan-Dec 2012	Jan-Dec 2013	Jan-Dec 2014	Jan-Dec 2009	Jan-Dec 2010	Jan-Dec 2011	Jan-Dec 2012	Jan-Dec 2013	Jan-Dec 2014
Centre	41	97	29	6	4	3	7	41	8	2	0	1
Clinton	42	49	58	8	8	11	9	35	39	10	3	2
Columbia	2	9	7	0	0	0	0	1	2	0	0	0
Lycoming	107	254	376	354	325	209	23	119	301	202	162	86
Total in PA	2,003	3,361	3,561	2,662	2,976	2,455	816	1,598	1,963	1,351	1,207	1,372
Source: Pa DEP, Bureau of Oil and Gas Management												
* As reported by operators												

****As of the passing of Act 13 of 2012 PA DEP considers any well producing from a shale formation below the ELK Sandstone Formation an unconventional well. These shale formations include but are not limited to the Marcellus, Utica, Mandata, Huron, Rhinestreet, and miscellaneous Upper Devonian formations such as the Dunkirk, Pipe Creek, Middlesex, Geneseo, and Burkett.**

Chart 5

Unconventional Well Permits Issued in SEDA-COG Counties and PA 2009-2014

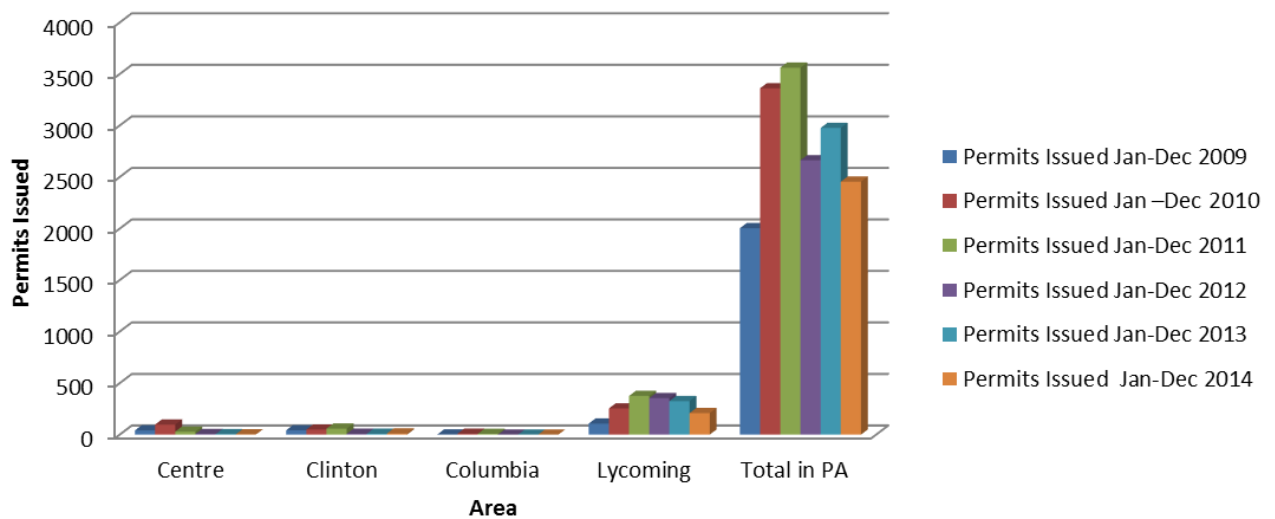
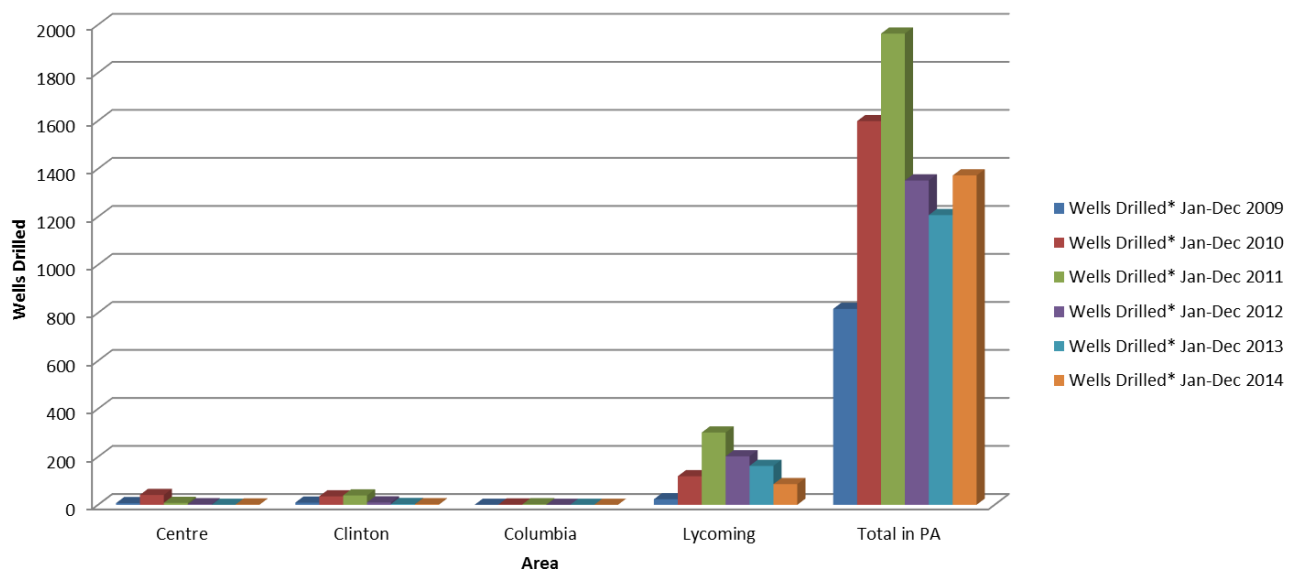


Chart 6

Unconventional Wells Drilled in SEDA-COG Counties and PA 2009-2014





The rapid expansion of this industry has been labeled as a significant economic opportunity. Economic benefits to the Region have included an increase in available job opportunities and an increase in retail and hotel establishments as an influx of out-of-state workers have migrated to the Region.

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

According to the Extraction & Mining Jobs Table, the majority of mining and extraction jobs are occurring in Clinton and Lycoming County. The ACS 3-Year estimates for Extraction and Mining jobs in the Region show that Clinton County tops the Region (1.9%) in the percentage of mining jobs compared to the total jobs for all sectors. Lycoming County is also a focal point for the natural gas mining and extraction industry, with 1.4% of the total jobs related to the mining and extraction industry. The percentage of mining and extraction jobs in both of these counties are higher than the state (0.5%) and the nation (0.6%).

Table 19 Extraction & Mining Jobs SEDA-COG Counties, Pennsylvania, and Nation 2010-2012			
County/Area	Total Employees for Mining, Quarrying, and Oil and Gas Extraction	Total for All Sectors	% of Total
Centre	365	72,928	0.5%
Clinton	316	17,067	1.9%
Columbia	92	31,047	0.3%
Juniata	50	11,232	0.4%
Lycoming	726	53,687	1.4%
Mifflin	96	19,279	0.5%
Montour	N/A		
Northumberland	403	40,952	1.0%
Perry	49	22,164	0.2%
Snyder	76	18,710	0.4%
Union	71	17,138	0.4%
Pennsylvania	28,820	5,881,610	0.5%
United States	783,999	140,919,860	0.6%
Source: U.S. Census Bureau, American Community Survey (2010-2012) 3 Year Estimate			

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 seaboard, and ports for exporting to the world market continues to rise.

REGIONAL GAS UTILIZATION INITIATIVE STUDY

The SEDA-COG Regional Gas Utilization Initiative (RGUI) EDA application for Local Technical Assistance funds was awarded funding on September 25, 2013. This project will conduct a feasibility study that looks at the concerns and requirements for setting up an authority or other public entity that would focus on expanding natural gas service to communities in and around the shale region, with a goal to attract long term industrial sector growth, reduce housing and manufacturing costs, and build the infrastructure necessary to allow widespread adoption of natural gas vehicle fueling. The objective of which is to provide for long-term job opportunities that will remain long after the initial exploration boom.

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.



Foreign Direct Investment

In 2013, SEDA-COG, along with the Workforce Investment Boards and Industrial Resource Centers that serve Pennsylvania, submitted an application for the Make It In America (MIIA) Challenge which involves three federal funding sources: Economic Development Administration (EDA), Employment and Training Administration (ETA), and the Manufacturing Extension Partnership (NIST MEP). The Economic Development Administration portion of the project proposed to increase the visibility of the Region to potential investors in the international arena to increase foreign direct investment and promote job creation. This three year project involves numerous partners including the Commonwealth's Office of International Business Development and Team Pennsylvania, along with 5 other Economic Development Districts, and many chambers of commerce, industrial development corporations, and regional marketing groups covering a 53-county Region. On September 30, 2013, EDA announced the award of \$500,000 for the Make It In America Challenge to be matched with an additional \$500,000 of cash and in kind match. CORE PA Global, as it is now called, is the centerpiece of a Pennsylvania initiative established to increase the visibility of the 53-county footprint of Pennsylvania to international and domestic investors and reshoring prospects.

The targeted Region for this proposal is a 53-county area of the Commonwealth of Pennsylvania known locally as the "T Region", named after its general shape. The targeted Region includes the majority of the state, except for the greater Philadelphia and greater Pittsburgh areas, and was selected in order to focus the federally funded portion of the initiative on the more rural parts of the Commonwealth, where public and private resources for economic, industrial and workforce development activities are often scarce.

Much of the economic development activity undertaken in the Region prior to this project being approved focused on working with existing firms and primarily involves job retention.

Foreign Direct Investment (FDI) efforts have been sporadic at best, largely fragmented and uncoordinated. As a result, the Region has not been able to develop a coordinated regional presence or theme that can aggressively compete for the limited reverse investment opportunities that emerge.

Through participation in the Region's Foreign Direct Investment/Reshoring training, translation of existing marketing materials, international trade missions, inbound familiarization tours, and other activities as it relates to this project, the project partners will build capacity to market the Region in the international arena and compete for foreign direct investment opportunities. For more information on the Core PA Global Program visit <http://www.corepaglobal.org/>.

Infrastructure

Industrial/Business Parks There are at 52 industrial/business parks in the SEDA-COG Region.

Table 20 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
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

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.

It must also be noted that many of the industrial/business parks in the District were developed in the late 1960s and early 1970s. Since these parks are generally at or near capacity, it is expected that another round of continuing industrial/business park development will inevitably occur. Moreover, while some areas may seem to have an abundance of parks, the parks themselves, in many cases, are catering to specific market segments - a strategy which, in many instances, is largely justifiable.

Electric Utilities Shown in table 21 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 21											
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											
PA Electric Co.											
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											

Technology

Broadband Although major telephone carriers are required by law to provide broadband access to every subscriber by the end of 2015, the prospects of this actually being accomplished are not yet clear. Many places scattered across the rural areas of the SEDA-COG Region are still without access to any broadband and more have access only to expensive and/or volume-limited connections such as cellular modems. Without access to reasonably-priced broadband, many parts of the Region will remain unserved or underserved and residents and small businesses will lag behind the rest of the country. This will undoubtedly affect the economic prospects of those businesses that rely on adequate broadband access.

Technology Adoption Hand in hand with the broadband issue is the issue of technology adoption. The key to participating in the global economy is being able to participate. If connectivity is not available, if the computer systems and software in use are not compatible, or if the residents are not competent with technology, then full participation will not happen. Without that full participation, the economic benefits will not be realized.

Regional Economic Sectors

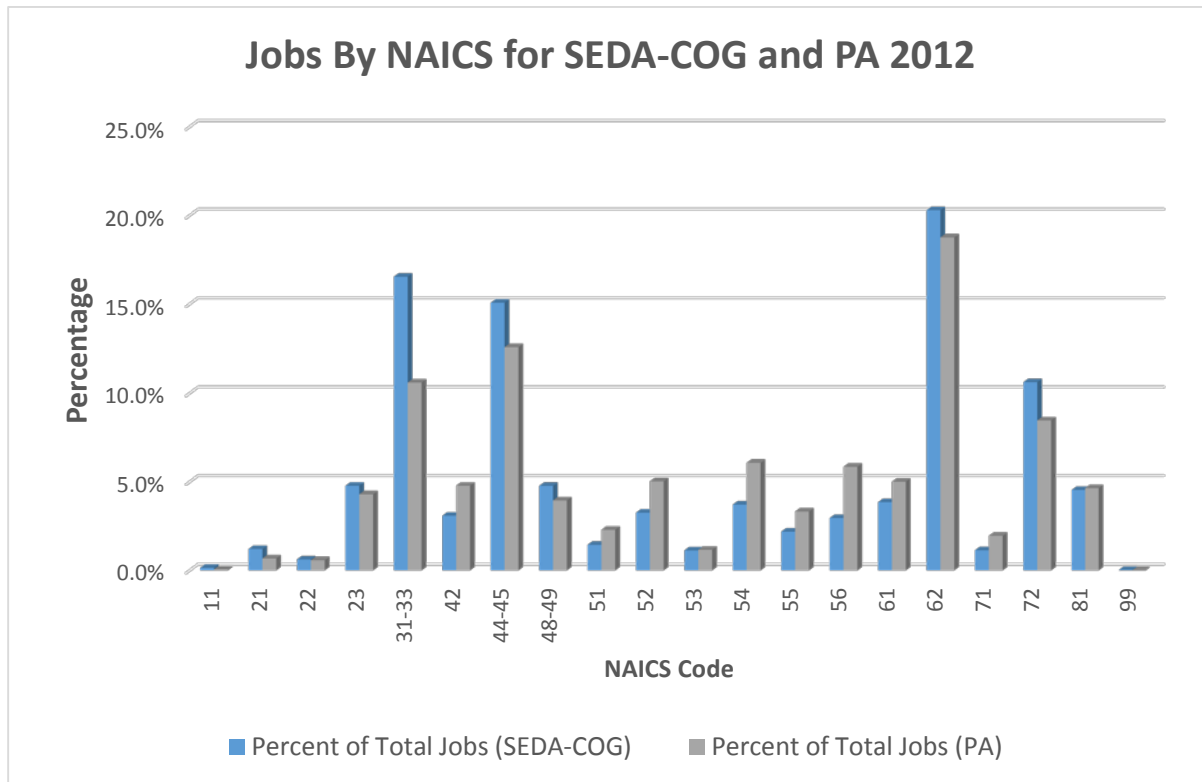
Included as Attachment D are tables showing the number of establishments and the number of employees for major industrial categories by county in the SEDA-COG Region. Also shown are the totals for the SEDA-COG Region as a whole and for the Commonwealth of Pennsylvania.

Regional Economic Relationship to State

As the bar graph on the next page 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,

2012 County Business Patterns indicate that 10.6% 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), Accommodation and Food Services (NAICS 72), and healthcare (NAICS 62). As the CPWDC indicated earlier, the business landscape in the Region has changed since 2008. While the Region is nearly back to pre-recession levels in terms of total employment, the gains and losses in each of the industries varies. The service industry jobs have increased while the manufacturing jobs have decreased between 2007 and 2014.

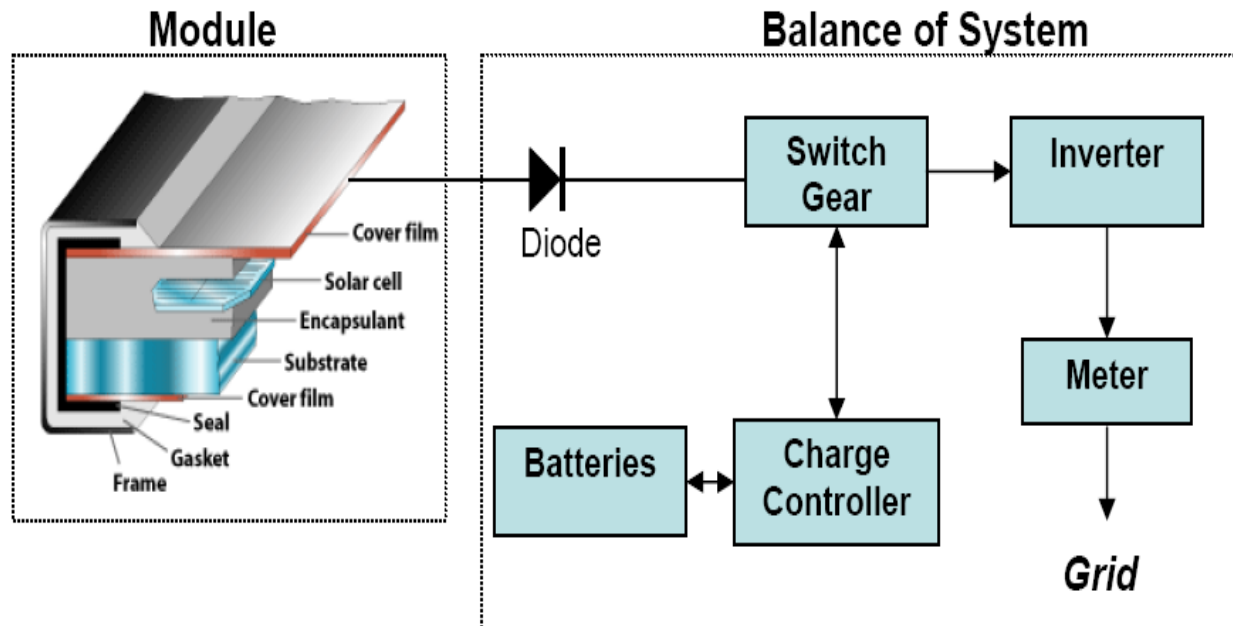
Chart 7



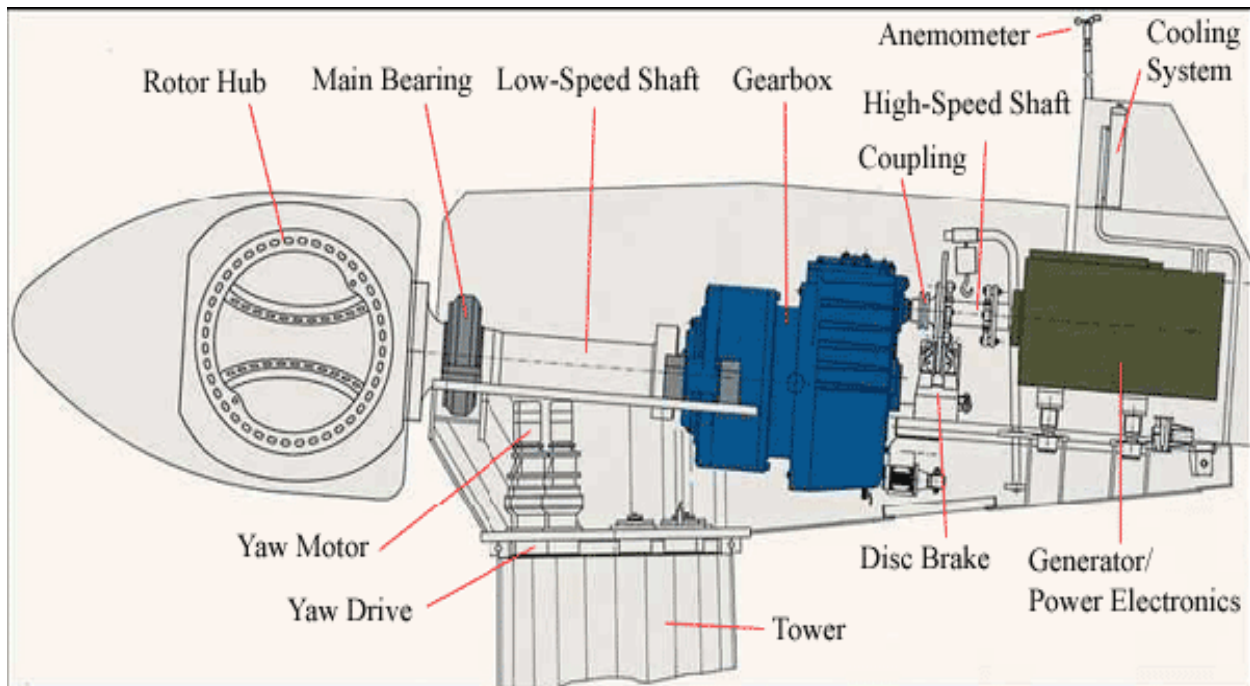
Source: U.S. Census Bureau, 2012 County Business Patterns

Within the NAICS 31-33 manufacturing sector is a subset of existing manufacturers in our region that have the potential to produce solar and wind technology components and are therefore, potential contributors to the renewable energy technology supply chain. By assisting manufacturers in the region to apply their products to the wind and solar components market, there is potential to increase the companies' market base and create jobs within our region. The diagram on the next page illustrates components used in the manufacturing of photovoltaic solar arrays and wind turbine technology.

Photovoltaic Solar Arrays

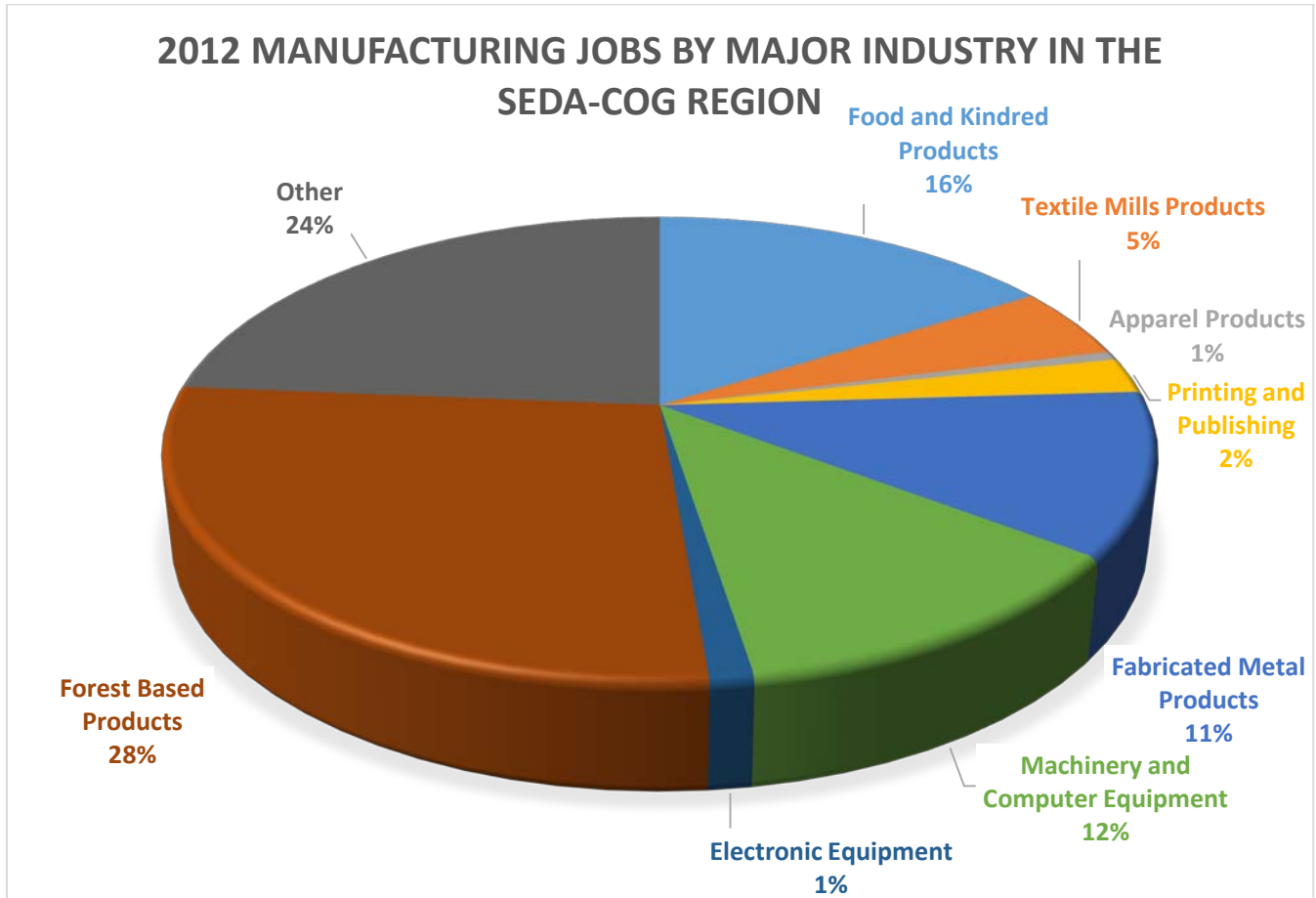


Wind Turbine Technology



Source: *Renewable Energy Potential: A Case Study of Pennsylvania*, by George Sterzinger, executive director of the Renewable Energy Policy Project in Washington DC, October 2006.

The pie chart below 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 2013, the SEDA-COG Region's annual average unemployment rate stood at 7.2%. The Region's rate was slightly lower than the Commonwealth's and the nation's 2013 annual average unemployment rate at 7.4%. 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 22										
Annual Average Unemployment Rate SEDA-COG Region, Pennsylvania, and U.S. 2004-2013										
Area	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
SEDA-COG	5.6	5.0	4.6	4.6	5.7	8.2	8.4	7.6	7.7	7.2
Pennsylvania	5.4	5.0	4.5	4.4	5.3	7.9	8.5	8	7.9	7.4
United States	5.5	5.1	4.6	4.6	5.8	9.3	9.6	8.9	8.1	7.4

Source: Bureau of Economic Analysis, Regional Economic Accounts, Local Area BEARFACTS, Published May 30th 2014

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. In addition, Norfolk Southern, Canadian Pacific/Delaware & Hudson, and the SEDA-COG Joint Rail Authority (SCJRA)

provide rail freight service to the Region.

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, provides for increased North/South interstate access.

There are a number of important regional transportation projects in the Region that have been included on SEDA-COG's EDA Project Priority List FY 2015-2016. While these projects are considered important regional projects, these do not match as well with funding available through EDA. Inclusion on this list indicates projects of regional significance and inclusion on this list may help these projects secure funding from other 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 in the Region is the completion of the four-lane U.S. Rt. 322. This project would connect the Harrisburg market with the State College area and the I-99 Corridor.

The Interstate 80/Interstate 99 Interchange project in Centre County which is estimated at \$162 million proposes to construct two interchanges to improve safety and traffic flow. The first involves a high speed interchange in Marion Township to connect I-80 and I-99 and a second interchange that would give local traffic access to the highways.

Completion of 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 Interstate 80, through the western portion of the state.

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 a project designed to improve safety, reduce the amount of congestion, and provide for future growth on Routes 11 & 15.

The CSVT is yet another important regional project and proposes a 13-mile, four-lane, limited access highway extending from the existing Selinsgrove Bypass (just north of the Borough of Selinsgrove) in Snyder County to PA Route 147 in Northumberland, south of Montandon (Northumberland County). Current cost estimates for the CSVT Project top \$615 million with more than \$28 million already spent on pre-construction activities including engineering and property acquisition. In November 2013 the Commonwealth passed a \$2.3 billion transportation funding plan that includes this project.



Routes 11 & 15 are the major North-South arteries through Central Pennsylvania, stretching from the Mason-Dixon Line to New York. Current traffic volumes for the existing Rts. 11 & 15 are 48,000 vehicles daily with a projected increase to 80,000 by 2020. Additionally, over 50% of the cars and 90% of the truck traffic do not have an origination or destination in the Valley.



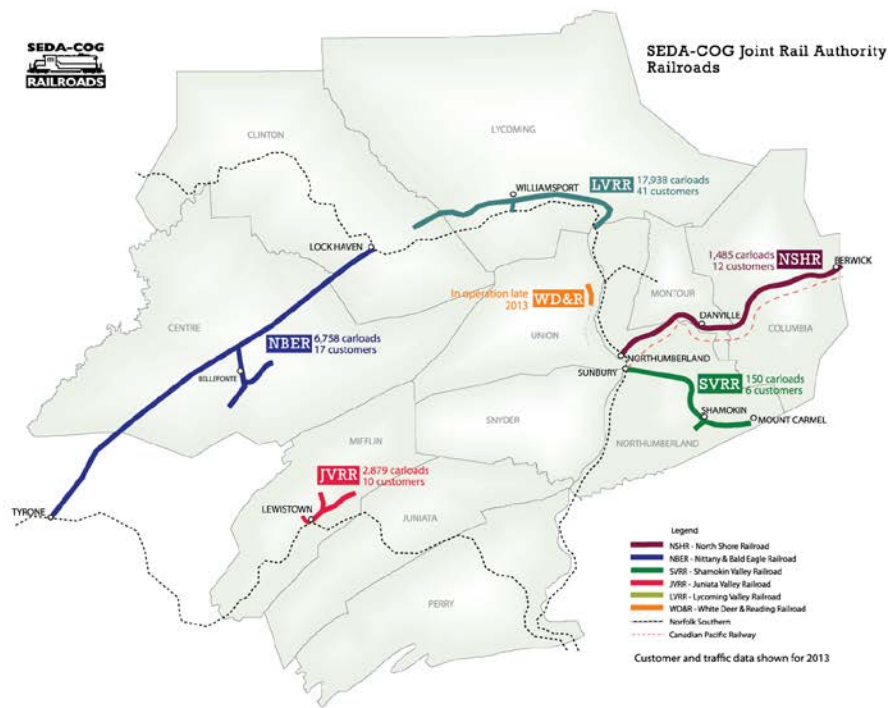
SEDA-COG has continued to take part in the regional Central Susquehanna Valley Transportation (CSVT) Task Force housed at the Greater Susquehanna Valley Chamber of Commerce in Shamokin Dam. The task force is focused on securing funding for the 11-county Region's largest transportation/economic development project – the Central Susquehanna Valley Transportation Project (CSVT).

The SEDA-COG MPO (Metropolitan Planning Organization) has amended the Region's Long Range Transportation Plan to include the CSVT as a funded project. The Department of Transportation is working towards approval of a financial plan and updates to the Final Environmental Impact Statement, and letting for the first contracts in the project is anticipated to occur in the summer of 2015.

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.

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 70 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.



Airports

Airports are an important part of the Region's transportation infrastructure. The SEDA-COG Region is served by fifteen (15) general and (2) commercial aviation airports. Locations for these airports are shown in the table on the next page. The nearest commercial airports are located in State College, Williamsport, and Harrisburg (outside of the SEDA-COG Region).

Table 23
Airports in the SEDA-COG Region

Airport	County	Airport Class	Based Aircraft	Total General Aviation	Runway Type	Runway Length
Bellefonte Airport	Centre	General	21	12,260	Paved	3,585
Bloomsburg Municipal Airport	Columbia	General/Basic	20	9,150	Paved	2,800
Centre Airpark	Centre	General	8	1,100	Turf	3,100
Danville Airport	Northumberland	General/Basic	38	13,100	Paved	3,000
Jersey Shore Airport	Lycoming	General	12	3,800	Grass	3,000
Mid-State Airport	Centre	General	7	1,500	Paved	5,711
Mifflin County Airport	Mifflin	General/Advanced	42	14,400	Paved	5,001
Northumberland County Airport	Northumberland	General/Intermediate	16	21,050	Paved	3,300
Penn's Cave Airport	Centre	General	1	350	Paved	2,500
Penn Valley Airport	Snyder	General/Advanced	36	20,900	Paved	4,760
Stottle Memorial Airport	Juniata	Public Heliport	0	10	Turf	100
Mifflintown Airport	Juniata	General/Limited Use	20	3,800	Paved	2,650
Sunbury Airport	Northumberland	General/Limited Use	6	2,600	Turf	3,250
Sunbury Seaplane Base	Northumberland	General/Limited Use	2	20	Water	5,000
University Park Airport	Centre	Commercial	58	40,400	Paved	6,701
William T. Piper Memorial Airport	Clinton	General/Basic	55	26,400	Paved	3,806
Williamsport Regional Airport	Lycoming	Commercial	35	20,806	Paved	6824

Source: PennDOT Bureau of Aviation

Business Incentives



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. Currently, the Central Region has over 4,150 acres designated in nine out of eleven counties comprising the SEDA-COG Region.



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 KIZ's help foster innovation by being in close proximity to the technical assistance and other business related resources from the colleges and universities. KIZ's also grant tax breaks and other financial incentives to start-ups or out-of-state

companies who locate within the zone. This program contributes to job creation and helps to reduce the out-migration of young college graduates from the Region. Three KIZ's are located in the SEDA-COG Region - they include: I-99 Corridor KIZ, Williamsport/Lycoming KIZ, and the Greater Susquehanna KIZ. In 2014, 20 companies located in the KIZ's in the SEDA-COG region were awarded over \$1.2 million in KIZ Tax Credits.

Natural Disaster/Economic Resiliency

Disaster mitigation, and specifically, flood mitigation, has been a policy priority in the SEDA-COG 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:

- 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.
 - Providing assistance to the Town of Bloomsburg and Selinsgrove Borough in utilizing 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 two-hundred 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.
 - Working through the River Towns program to help local communities through visioning, capital planning, and funding source identification processes, helping them to build resiliency features into ongoing capital projects and connect with the river in the way that helps to build a resilient and sustainable economy.
 - Planning for an interconnected series of trails, bikeways, parks and greenways along 500 miles of the Susquehanna River that will help mitigate flooding, contribute to sustainable use of the floodplain, and help build a resilient, active transportation network.
 - Assisting communities in identifying impacts of changes in the national flood insurance program at the community level, and developing mitigation strategies for use at the family and community level.
 - Conducting an eight-county inventory of locally owned structures too small to be included in the National Bridge Inspection program, identifying structures of concern for owners and local stakeholders.

-
- Developing a multi-county map of state and local transportation facilities subject to frequent closures due to flooding, winter storms, rock slides, and other causes.
 - Developing and sharing mapping that shows pending changes to flood plain designations at a multi-county level.

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

- 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 Small Business Development Centers, access to low-interest disaster loans through the Small Business Administration, and other services to prepare for and recover from 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.
- Providing utility bill analysis and an electronic tracking system to municipalities to assist them in identifying, tracking and managing energy use and consumption over time.
- Providing consulting services to businesses, municipalities and non-profits to evaluate the financial and technical feasibility of locally owned solar projects.
- Conducting renewable energy, high performance building and energy management seminars attended by more than 3,000 public and private facility owners and renewable and energy reduction technical service providers.
- Designing and delivering community-wide energy independence projects to reduce the reliance on fossil fuels by all sectors of the community and supporting community exploration and delivery of renewable energy options, and documenting the process in a “how to” manual *Energizing Small Communities: A Guide to Greater Energy Independence and Economic Resiliency* and it’s Appendix of document templates and methodology for communities and consultants to cost-effectively implement community-wide energy reduction programs.
- Providing fee for service residential energy audits by Building Performance Institute certified technicians.
- 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:



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- Regional discussions on the impact of pending 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.
 - Developing and administering a pilot program for the EPA Smart Growth Approaches for Disaster-Resilient Communities, and providing a “train the trainer” program as part of the first outreach.
 - Replicating and expanding the community wide energy independence programs.
 - Implementing and expanding projects identified through the Regional Gas Utilization Initiative.
 - Facilitating the deployment of locally owned and used renewable energy projects.
 - Development of a regional carbon offset purchase program to facilitate and finance energy conservation and renewable energy use and ownership.

Factors Indirectly Affecting Economic Performance

Housing As shown in the table below, the housing vacancy rate for the SEDA-COG Region is 11.9% compared to a rate of only 10.8% for the Commonwealth. The rates vary considerably within the SEDA-COG Region, from a low of 9.2% in Montour and Union County to a high of 19.8% in Clinton County.

Table 24				
Housing Units, SEDA-COG Counties, SEDA-COG Region and Pennsylvania: 2007-2011				
			Vacant Housing Units	
	Total Housing Units	Occupied Housing Units	Number	Percent
Centre	62,682	56,134	6,548	10.4
Clinton	19,054	15,282	3,772	19.8
Columbia	29,403	25,906	3,497	11.8
Juniata	10,937	9,103	1,834	16.7
Lycoming	52,583	46,604	5,979	11.3
Mifflin	21,541	18,987	2,554	11.8
Montour	7,935	7,200	735	9.2
Northumberland	44,992	39,293	5,699	12.6
Perry	20,354	18,098	2,256	11.0
Snyder	15,965	14,320	1,645	10.3
Union	16,869	15,310	1,559	9.2
SEDA-COG	302,215	266,237	36,078	11.9
Pennsylvania	5,554,939	4,952,566	602,373	10.8

Source: U.S. Census Bureau: American Community Survey (2007-2011) 5 Year Estimate

Housing concerns in the SEDA-COG 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 jobs-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 The following table shows the number of hospitals, number of general hospital beds, and number of beds per 1,000 population for the SEDA-COG counties, the SEDA-COG Region and the Commonwealth of Pennsylvania. Overall, SEDA-COG has 13 general hospitals with a total of 1,573 beds, for a rate of 2.3 beds per 1,000 population, which is slightly below

the state's rate of 2.6 beds per 1,000 population. Additionally, 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 269 and 456 beds, respectively, although the Lycoming total is spread among three hospitals, while Montour's is found in a single general hospital. This translates to 24.9 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 SEDA-COG 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 has provided and continues to provide 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. The Geisinger facility in Montour County is somewhat analogous in terms of its economic impact to the role played by Penn State University in Centre County. Geisinger offers a number of opportunities for entrepreneurial activities designed to provide services that fill needs generated by medical center activities.

Table 25					
Hospitals & Hospital Beds in the SEDA-COG Region, 2010-2011					
		Hospitals (#)			
County/Area	2011 Population Estimate	General	Other	Number of Beds*	Number of Beds per 1,000 Pop.
Centre	154,722	1	2	205	1.3
Clinton	39,208	2	0	68	1.7
Columbia	67,476	2	0	173	2.6
Juniata	24,400	0	0	0	0
Lycoming	116,747	3	1	269	2.3
Mifflin	46,858	1	0	123	2.6
Montour	18,296	1	3	456	24.9
Northumberland	94,558	2	0	144	1.5
Perry	46,042	0	0	0	0
Snyder	39,819	0	0	0	0
Union	44,847	1	0	135	3.0
SEDA-COG	692,973	13	6	1,573	2.3
Pennsylvania	12,742,886	160	95	33,603	2.6
*Set up and staffed (general Hospitals)					
Source: PA Department of Health, County Profiles, 2013					

Educational, Cultural, and Recreational Facilities The SEDACOG 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, "Institutions of Higher Education in the SEDACOG Region," are the names, locations, and enrollment of the seven institutions of higher education in the Region, as of fall 2013.

Table 26

Institutions Of Higher Education In The SEDACOG Region Fall 2013

County/Area	Community	County	Number of Undergraduate Students	Number of Graduate Students	Number of Full-Time Faculty
Bloomsburg University	Bloomsburg	Columbia	9,416	711	417
Bucknell University	Lewisburg	Union	3,532	76	399
Lock Haven University	Lock Haven	Clinton	4,855	405	228
Lycoming College	Williamsport	Lycoming	1,307	0	81
Pennsylvania College of Technology	Williamsport	Lycoming	5,678	0	290
Pennsylvania State University	State College	Centre	40,085	6,530	3,295
Susquehanna University	Selinsgrove	Snyder	2,187	0	142

Source: National Center for Education Statistics and IPEDS

In addition to the seven institutions of higher education listed above with main campuses within the 11-county Central Pennsylvania Region, there are also satellite sites for the Luzerne County Community College located in Northumberland County in the Borough of Kulpmont and the City of Shamokin and Columbia County in the Borough of Berwick. A satellite site for Pennsylvania State University's Continuing Education Centers also exists in the Borough of Lewistown, Mifflin County. 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, they also provide adult education courses and certifications. The technical institutions in the Region 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 13.6%. This number is

slightly higher than the statewide percentage of 12.1%. Only Centre and Montour County have percentages lower than the statewide average, 7.1% and 10.9%, 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 19.2% is more than 7 percentage points higher than the state level.

Table 27

Education of Individuals 25 Years and Older With Less Than a High School Education in the SEDA-COG Region and PA: 2007-2011

	Less Than High School Education	Total Population 25 Years and Older	% of Population 25 Years and Older with Less than High School Education
	<i>Number</i>	<i>Number</i>	<i>Percentage</i>
Centre	5,912	83,268	7.1%
Clinton	3,524	25,171	14.0%
Columbia	5,712	43,605	13.1%
Juniata	3,212	16,730	19.2%
Lycoming	10,945	79,310	13.8%
Mifflin	6,176	32,336	19.1%
Montour	1,410	12,937	10.90%
Northumberland	10,276	67,607	15.2%
Perry	4,680	31,619	14.8%
Snyder	4,376	25,590	17.1%
Union	4,955	30,398	16.3%
SEDA-COG	61,178	448,571	13.6%
Pennsylvania	1,041,947	8,611,136	12.1%
Source: U.S. Census Bureau: American Community Survey (2007-2011) 5 Year Estimate			

Even more troubling is the percentage of residents age 25 and older who have at least a Bachelor of Arts degree. At 20.9%, the regional rate is below the statewide level of 26.7%. Only Centre County has a rate that exceeds the statewide average. 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 Juniata County with 11.4%. On the basis of this data, it appears that the wealth of educational assets in the SEDA-COG Region are educating students who subsequently leave the area to seek employment elsewhere.

Table 28

Individuals 25 Years and Older With a Bachelor's Degree in the SEDA-COG Region and PA: 2007-2011

	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
	<i>Number</i>	<i>Number</i>	<i>Percentage</i>
Centre	33,141	83,268	39.8%
Clinton	4,128	25,171	16.4%
Columbia	8,198	43,605	18.8%
Juniata	1,907	16,730	11.4%
Lycoming	14,910	79,310	18.8%
Mifflin	3,654	32,336	11.3%
Montour	3,312	12,937	25.6%
Northumberland	9,397	67,607	13.9%
Perry	4,680	31,619	14.8%
Snyder	4,171	25,590	16.3%
Union	6,596	30,398	21.7%
SEDA-COG	94,094	448,571	20.9%
Pennsylvania	2,299,173	8,611,136	26.7%

Source: U.S. Census Bureau: American Community Survey (2007-2011) 5 Year Estimate

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

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.

Environmental Issues

Air Quality. Air quality in the SEDA-COG Region is generally excellent. For the six principal pollutants that make up the National Ambient Air Quality Standards (ground-level ozone, particulate matter, sulfur dioxide, carbon monoxide, nitrogen dioxide, and lead) all SEDA-COG counties are classified as being in attainment.

Brownfield Re-use. Many of the older industrial facilities in the Region tend to be located in older urban areas in the river valleys where there is periodic flooding that regularly occurs. The Region supports the redevelopment of these brownfields but also recognizes the need to pursue the development of some greenfield sites outside of the floodplain in order to maintain a full range of available sites for business development. It is clear that industrial re-use is without a doubt the preferred course whenever possible, and should be vigorously promoted. The Region's KOZ program can help to provide the incentives to enhance reinvestment in vacant or underutilized sites. Still, it must be recognized that it will need to be accompanied by some level of greenfield development to accommodate the needs of certain businesses whose requirements cannot be made to fit any of the existing sites. If a brownfield is in a floodplain, redevelopment as a community park or greenway can create an asset that makes the community more attractive to residents, visitors and businesses. A workable combination for development of brownfields and greenfields needs to be established to make prudent use of the resources in our Region.

Issues

The State of the Regional Economy

Within the SEDA-COG Region, two Economic Development Centers (EDC's) have been designated by the EDD--the Bellefonte-State College EDC (Centre County) and the Central Susquehanna EDC, including portions of Columbia, Lycoming, Montour, Northumberland, Snyder, and Union counties. Municipalities and counties within the two EDC's continue to participate in the District's economic development programs.

Although both EDC's 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 and the Commonwealth, with population growth from 2000 to 2011 of 12.47%. For the six counties of the Central Susquehanna EDC, on the other hand, the population is estimated to have increased only 4.12% for the same period. Three of those counties in the Central EDC - Lycoming, Montour, and Northumberland had population decreases during that time period. For the Commonwealth as a whole, the growth rate from 2000 to 2011 was 3.09%. As noted previously, one of the strategies being employed increasingly 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.

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.

Historically, the unemployment rate for the State College-Bellefonte Labor Market Area (LMA), in which the EDC is situated, has tended to run below the EDD and national average, while the Central Susquehanna EDC counties have been generally higher. This pattern seems to be

continuing as indicated in the unemployment rates, shown in the table on page 18. Centre County's 2013 annual average unemployment rate of 5.6% is below the Region, state, and national rates, which stood at 7.2 and 7.4, respectively. Of the six Central Susquehanna EDC counties, however, only Montour and Columbia are below the Region, state, and national rates. Montour County is the smallest of the six counties and its economy is bolstered by the presence of the Geisinger Medical Center.

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 SEDA-COG Region, but not necessarily so compared to the traditional manufacturing segment of the EDC's economy.

Although in the EDD overall, manufacturing employment predominates, it is primarily durable goods manufacturing, a sector that tends to be disproportionately vulnerable to interest rate fluctuations and national economic cycles.

SEDA-COG continues to pursue a strategy of encouraging the growth of technology based industry and businesses in the District. The EDD has sought to define more clearly the connection between the District'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 areas future development. At present, technology industry in the SEDA-COG EDD is concentrated in Centre County, and more specifically, in the State College/Bellefonte area.

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 who 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 activity in the District and to diversifying that activity throughout 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.

Portions of the Central Susquehanna EDC and the Bellefonte-State College EDC have been identified as both potential growth centers and major areas in need of an economic catalyst. Further analysis of these EDCs is expected to show that they will continue to serve as centers of employment and growth for the EDD, and that 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

These organizations collectively provide a very broad based range of input into the CEDS process. The SEDA-COG Staff, Board of Directors, and CEDS Committee utilize review and input from 3 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 doesn't matter how the company gets into the service provider network - it matters how easy and direct it was to get the services and information they require.

(Members include: SEDA-COG, Innovative Manufacturers' Center (IMC), Northeast PA Industrial Resource Center (NEPIRC), the three Small Business Development Centers (SBDC's) located at Penn State, Lock Haven University, and Bucknell University, Berwick Industrial Development Association (BIDA), 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 Corporation, Susquehanna Industrial Development Corporation (SIDCO), Union County Industrial Development Corporation, 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 that will nurture an innovative economy that enhances the quality of life in the Pennsylvania Heartland.

(Members 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

Entrepreneurs and small businesses are among the largest employers in the region. As such, supporting these small business start-ups is important for the economic future of the region. According to the U.S. Census Bureau's 2013 County Business Patterns, over 85% of the businesses in the 11-county Region have less than 20 employees. Almost half of the businesses have less than 5 employees. As previously mentioned, the SEDA-COG region is home to 7 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 three Small Business Development Centers, the Ben Franklin Technology Partners, and Keystone Innovation Centers.

One recent 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 eco-system within the university system. The idea of entrepreneurship is high on the minds of university students. According to the Bucknell University Small Business Development Center, 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 has and will continue to support 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.

Industry Clusters

An industry cluster is, "a group of industries that are closely linked by common product markets, labor pools, similar technologies, supplier chains and/or other economic ties." The Central Pennsylvania Workforce Development Corporation (CPWDC) provides data on the prominent industries in the Region and highlights those clusters that can serve as targets for future development. See Attachment E for the "*Industry Sectors and Clusters for SEDA-COG*" document which analyzes the 11-county Region's economy by industry sector and by industry cluster. The Advanced Manufacturing; Wood, Wood Products, and Publishing; Education; Healthcare, Logistics and Transportation; and Energy industry clusters are highlighted below:

The total regional employment for the *Advanced Manufacturing* industry cluster reached 19,500 in 2014. This figure represents 6.4% of the total regional employment. This cluster experienced a 12.6% increase in employment between 2009 and 2014 and is projected to increase 3.7% between 2014 and 2019. The Location Quotient (LQ) for the Advanced Manufacturing cluster, which compares the concentration of employment from the SEDA-COG

Region to the state is 1.01. This LQ for the Region implies a slightly greater than proportionate concentration of employment for advanced manufacturing in the SEDA-COG Region as compared to the state. Annual earnings in this cluster are estimated at \$52,700 based on 2014 estimates.

The total regional employment for the *Wood, Wood Products, and Publishing* industry cluster reached 10,800 in the year 2014. This figure represents 3.5% of the total regional employment. Unfortunately this cluster experienced a 9.5% decrease in employment between 2009 and 2014 and is projected to decrease 2.7% between 2014 and 2019. As stated previously the wood industry has historically and shown itself to be volatile and susceptible to fluctuations in the economy. This fluctuation was evident during the recession where the housing and related industries including furniture experienced a sharp decline in both sales and employment. The Location Quotient (LQ) for the *Wood, Wood Products, and Publishing* cluster, which compares the concentration of employment from the SEDA-COG Region to the state is 2.08. This LQ for the Region implies a greater than proportionate concentration of employment for *Wood, Wood Products, and Publishing Cluster* as compared to the state. Annual earnings in this cluster are estimated at \$48,600 based on 2014 estimates.

The total regional employment for the *Education* industry cluster reached 53,700 in 2014. This figure represents 17.5% of the total regional employment. This cluster experienced a 3.8% decrease in employment between 2009 and 2014, however, it is projected to increase 3.1% between 2014 and 2019. The Location Quotient (LQ) for the *Education* industry cluster, which compares the concentration of employment from the SEDA-COG Region to the state is 1.66. This LQ for the Region implies a greater than proportionate concentration of employment for advanced manufacturing in the SEDA-COG Region as compared to the state. Annual earnings in this cluster are estimated at \$57,800 based on 2014 estimates. The SEDA-COG Region is fortunate in having within its borders seven institutions of higher education, which represents a large portion of the education industry, including the Commonwealth's largest, such facility, Penn State University.

Health Care, has also been identified as a prominent industry cluster in the SEDA-COG Region. The total regional employment for the Healthcare industry cluster reached 42,500 in 2014. This figure represents 13.9% of the total regional employment. The Location Quotient (LQ) for the *Healthcare* industry cluster, which compares the concentration of employment from the SEDA-COG Region to the state is 0.89. This LQ for the Region implies a smaller concentration of employment for *Healthcare* in the SEDA-COG Region as compared to the state. However, this cluster experienced a 10.9% increase in employment between 2009 and 2014 and it is projected to increase 11.5% between 2014 and 2019. Annual earnings in this cluster are estimated at \$58,000 based on 2014 estimates. The Geisinger Medical Center in Danville, Montour County, a special case, reflects a major impact both medically and economically in the Region. This institution has provided Montour County with one of the highest rates of physicians per capita in the nation. This high technology facility has provided and continues to provide 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.

The total regional employment for the *Logistics and Transportation* industry cluster reached 8,400 in 2014 and represents 2.7% of the total regional employment. This cluster experienced a 2.4% increase in employment between 2009 and 2014 and is projected to increase 10.4% between 2014 and 2019. The Location Quotient (LQ) for the *Logistics and Transportation* cluster, which compares the concentration of employment from the SEDA-COG Region to the state is .75. This LQ for the Region indicates a smaller concentration of employment for *Logistics and Transportation* in the SEDA-COG Region as compared to the state. While the concentration of this industry as compared to the state is less, the industry is expected to grow over the next several years and the historical change in employment shows that this industry continued to increase despite the recession. With the Region being 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 vast consumer market is within four to eight hours driving distance from the heart of the SEDA-COG Region. Additionally a number of major transportation corridors pass through or near the Region, further enhancing its strategic location in relation to the Eastern Seaboard and Midwest markets, which also contributes to the prominence of this industry cluster. Annual earnings in this cluster are estimated at \$52,800 based on 2014 estimates.

The total regional employment for the *Energy* industry cluster reached 6,200 in 2014 and represents 2% of the total regional employment. This cluster experienced a 77.4% increase in employment between 2009 and 2014, which is the largest increase in any industry cluster during that time period. Energy employment is projected to increase 21.5% between 2014 and 2019, which is again the largest projection of any industry cluster during the projected time period. The Location Quotient (LQ) for the *Energy* cluster, which compares the concentration of employment from the SEDA-COG Region to the state is 1.02. This LQ for the Region implies a greater than proportionate concentration of employment for the *Energy* cluster in the SEDA-COG Region as compared to the state. Annual earnings in this cluster are estimated at \$78,400 based on 2014 estimates. This data suggests that rapid expansion of the natural gas is resulting in a significant economic opportunity at the present time. Economic benefits to the Region have included a substantial increase in the total output of the Region's economy and an increase in available job opportunities. However, there is recognition within the region that the production of natural gas is closely tied to the product's market price.

Energy Conservation

Organizations, residents and communities as a whole can retain wealth by simply using less energy. Renewable energy feedstock (resources) available in rural areas provide opportunities for rural communities to meet a portion of remaining energy needs, after conservation through renewable energy that is sourced, produced and owned locally. There are many opportunities to create greater wealth and recirculate that wealth within our Region through new business and job creation resulting from both energy reduction and the development and ownership of renewable energy at both the individual project and at community-scale.

While simply using less energy is widely recognized as the cheapest and fastest way to reduce energy costs, it is not always the easiest. Real barriers exist to reducing energy use, including a lack of connection with qualified expertise, a lack of awareness of what activities to undertake, a lack of community-based renewable energy projects, and others. The collective energy savings achieved by many small communities can change our Region's energy paradigm from its current one of escalating energy use and cost uncertainty to one of abundance, increased comfort and improved local economic resiliency.

Survey to local stakeholders

In the spring of 2014, a survey of local stakeholders was conducted to determine the issues and opportunities important to their county or Region. See Attachment F for a copy of the results of the survey. Of the 93 individuals receiving the survey invite, 49 people or 53% responded. The groups selected for the survey included SEDA-COG Board members, County Commissioners, The Heartland Partnership, CEDS Committee members, and the local PREP Partners, which include local Chambers of Commerce, Industrial Development Corporations, Industrial Development Authorities, and Small Business Development Centers. The Region's Metropolitan Planning Organizations were also invited to complete the survey.

According to the survey, the primary issue (68%) facing the region is the lack of quality job opportunities. The next issue, coming in second (51%), was a lack of adequate infrastructure. Finally, workforce issues and lack of adequate broadband services tie (46.8%) to round out the list. The most urgent transportation infrastructure needs for the county/region in order of importance include highway (32.5%), public transportation (20.9%), bridge (18.6%), and air transportation (11.6%). In terms of air transportation, a 2014 survey of the local SEDA-COG MPO, which is a subset of the SEDA-COG EDD Region, determined that Federal Aviation Administration's treatment of approach hazards and changes in navigation ranked high as common operator issues. Financing for expanding hanger facilities was also an issue.

The most pressing infrastructure needs of the Region rank telecommunications/broadband (65.9%) as the most important need, Gas (63.8%) comes in at a close second, and transportation rounds out the list of the top three infrastructure needs. The results of the stakeholder survey reinforce the Region's support for the Gas Utilization Initiative. Currently, the Region is served by natural gas from sources outside of Pennsylvania, including Texas and Louisiana. Additionally, the bulk of the natural gas produced in Pennsylvania appears to be headed for locations outside of Pennsylvania. Two such examples of natural gas being exported outside of PA include the Mariner 2 and Atlantic Sunrise pipeline projects, which are currently underway. As such, regional communities are not receiving the full benefits of a locally produced natural resource as a cost-effective alternative to other forms of energy.

The types of industry, business or other economic activity that our stakeholders would like to attract to the Region include manufacturing (91.8%), technology based enterprises (75.5%), and agriculture and/or agribusiness (59.1%). In terms of industry they would like to retain in the county/region, manufacturing again tops the list (89.5%). Agriculture/agribusiness is the

second most voted industry to retain (81.2%). Finally, technology based enterprises and tourism related business tied for the third most favored industry to retain in the county/region.

The results of the survey have been included at the end of this report as Attachment F.

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); and
- 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 and active stewardship of the 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. 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 District 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 that have been 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;

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- The low population density in the District 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 District, 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; and
 - As is true of many other largely rural areas, the telecommunications infrastructure in the SEDACOG Region is not adequate. Such capability could well prove crucial to the Region's ability to compete successfully with other regions in the future.
 - Lack of sustained public policy that supports energy reduction and distributed renewable energy projects limits the resources available and the scale of technical assistance available to assist the region to participate in the emerging renewable energy economy.

Strategic Vision/Action Plan

Our vision for the future of the SEDACOG region encompasses an area where unemployment levels are reduced; where a diversity of employment opportunities offers jobs for everyone 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. The shale gas, as well as the emerging energy efficiency and renewable energy markets appear to provide opportunities for expansion of existing manufacturing and new jobs and businesses.

Included within the twelve sub-zones of the SEDACOG 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 here.

The Central Region PREP Program's Service Provider Network, which includes the Region's Small Business Development Centers, 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 KIZ's help foster innovation by being in close proximity to the technical assistance and other business related resources from the colleges and universities. KIZ's also grant tax breaks and other financial incentives to start-ups or out-of-state companies who locate within the zone. This program contributes to job creation and helps reduce the out-migration of young college graduates from the Region.

Advanced Technology

The SEDACOG EDD has sought to define more clearly the connection between the District's industries and its overall economy. At present, technology-based industry in the SEDACOG 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 diversification of advanced technology industry throughout the rest of the Region. SEDACOG remains committed to fostering the growth of high technology activity in the District and to diversifying that activity throughout the Region.

Manufacturing Diversification

In much of the SEDACOG 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. The lumber and wood products sector is starting to make a comeback as housing manufacturers, cabinet makers, and furniture makers rehiring.

As stated previously, shale gas is driving down energy costs which makes our region more attractive to manufacturers and also provides an inexpensive feedstock alternative for the plastics industry. As such, the Region is beginning to see a sort of manufacturing renaissance.

The EDD continues to be impacted in recent years by plant closings. Attachment G 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 available 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.

Included as Attachment H is the 2015-2016 project priority listing.

Goals

The Strategy 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;

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2. Encourage the prudent utilization of the area's natural resources in an environmentally sustainable manner (including land, water, natural gas, and lumber);
 3. 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;
 4. Actively encourage energy conservation and foster the deployment of locally-owned, locally-used energy projects;
 5. Encourage the promotion of the Region as a destination for travel, recreation, and tourism.
 6. Aggressively encourage the deployment of technology and widespread accessibility to broadband services and capabilities.
 7. Encourage efforts to enhance a greater level of foreign direct investment and the relocation/location of U.S. companies' overseas operations to the Region.
 8. Encourage the upgrading of skills and talents for the Region's workforce and the creation of family sustaining wages.

Analysis

Goal 1. Because of the high unemployment rate in the District over the past decade and more, it is clear that first priority must be given to protecting the jobs that already exist here. 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. 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 remains to be the most significant. If managed in a sustainable manner, these can be utilized to nourish and expand a regional forest products industry and also includes 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 and environment in their present state while also giving consideration to growing bio-diversity concerns.

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 and national 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 3. 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. 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 4. In common with most of the rest of the state and nation, the SEDA-COG Region is overly dependent on imported oil as an energy source. To foster energy (and economic) self-sufficiency, it is important that this energy dependency be reduced. Within the SEDA-COG EDD, the dependency reduction can take two complementary forms. The indigenous energy resources of natural gas should be encouraged within the constraints of sound environmental practice. (See Goal 2) In addition, more important in the long run, improved energy efficiency, deployment of locally owned and used renewable energy, and sound conservation practices will provide the opportunity for our region to participate in the emerging renewable energy economy.

Goal 5. 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 6. Availability of broadband continues to be a problem in the Region. 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 7. Much of the economic development activity undertaken in the Region focuses on working with existing firms and primarily involves job retention. Foreign Direct Investment (FDI) efforts have been sporadic at best, largely fragmented, and uncoordinated. As a result, the Region has not been able to develop a coordinated regional presence or theme that can aggressively compete for the limited reverse investment opportunities that emerge. The Region should build capacity to market the Region in the international arena and compete for foreign direct investment opportunities.

Goal 8. 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.

Objectives

Derived from the goals listed above are the following objectives:

- Continue to foster economic development activities through the various components of the Central Region PREP Program, 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.
- 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.
- In an effort 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.
- Cooperate with the IMC, NEPIRC, Small Business Development Centers, and other programs of the Central PREP region's economic development service delivery network.
- Cooperate with the Central Pennsylvania Workforce Development Corporation and other workforce providers in targeting resources at identified training needs for the region.

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- Foster energy efficiency, energy conservation, locally owned and used renewable energy, and the prudent development of the region's indigenous energy resources such as natural gas.
 - Build the infrastructure necessary to allow widespread adoption of natural gas utilization thereby providing for long-term job opportunities that will remain long after the initial exploration boom has tapered off and diminished.
 - Seek means to further the development and adoption of advanced telecommunications and other related infrastructure.
 - Cooperate with local tourist promotion agencies, the Commonwealth, and other interests to promote the region as a tourist and recreation destination.
 - Encourage park and trail development to foster increased recreational and heritage tourism.
 - Assure that ongoing and emerging economic development activities do not diminish the attractiveness of the region to tourists.
 - Cooperate with the Commonwealth in its efforts to coordinate and provide service and assistance to existing and new business through the Partnerships for Regional Economic Performance (PREP) program.
 - Expand the number of Central Pennsylvania businesses participating in the global market by providing technical assistance in the form of counseling, tradeshow, and financial assistance will be provided to businesses interested in expanding their market overseas.
 - Through participation in the region's Foreign Direct Investment/Reshoring training, translation of existing marketing materials, international trade missions, inbound familiarization tours and other activities as it relates to reverse investment, build capacity to market the region in the international arena and compete for foreign direct investment opportunities.
 - Encourage education to industry partnerships to ensure training is being developed in accordance with industry demands.
 - Foster better coordination among the region's PREP Partners, institutions of higher learning and our vocational-technical schools with existing employers and the CPWDC to focus resources where they are most urgently needed.

Project Prioritization

The table on the following two pages contain the project and description for economic development activities for the SEDA-COG region. See Attachment H for a detailed listing of projects that includes information regarding total project cost, funding sources, and jobs creation and retention.

Table 29
Economic Development Projects

Goals	Description & Location	Other Comments
<u>PUBLIC WORKS</u>		
1,3	Trenton Avenue and West Fourth Street Water Transmission Main and Distribution System Improvements	Installation of approximately 6,500 L.F. of 24" water main and 6,100 L.F. of 12" water main to allow for the expansion of business and industry as well as attract new businesses in this industrialized area of Williamsport.
1,3,4	MCIDC Business Center Renovations (Mifflin County)	Modernization and rehabilitation of 112,000 s.f. of multi-tenant industrial space owned and managed by MCIDC. The proposed improvements include roof, floor, docks, parking lot, and energy upgrades, such as insulation and alternative energy provisions.
1,3	Philipsburg Hospital Property Redevelopment Project (Centre County)	Demolition, clearing, and infrastructure development on the former Philipsburg Hospital Property for use as a future business site. Securing site control and developing a financing package is necessary for this project to progress.
1,3	Juniata County Industrial Park Infrastructure Development Project (Juniata County)	Infrastructure development to include water, sewer, and access road for a site in Juniata County. Securing site control and developing a financing package is necessary for this project to progress.
1,3	Life Sciences Center (Mifflin County)	Infrastructure extensions and site development at the proposed 50 acre Life Sciences Complex off of the Rt. 322 Burnham Interchange.
3	Central Susquehanna Valley Transportation Project (CSVT)	Important regional project to address the current and future transportation needs of the Central Susquehanna Valley Corridor. Improvements will address congestion, safety problems, and promote development on existing PA Routes 11, 15, and 147.
3	Completion of Four-Lane U.S. Rt. 322	Important regional transportation project which involves the completion of the four-lane limited access system for US Route 322 which would connect the Harrisburg market with the State College area and the I-99 Corridor.
3	Interstate 80/Interstate 99 Interchange (Centre County)	Important regional project to construct two interchanges to improve safety and traffic flow. The first involves a high speed interchange in Marion Township to connect I-80 and I-99 and a second interchange that would give local traffic access to the highways.
3	Completion of Interstate 99 (Regional)	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.
1,3	MCIDC Plaza Modernization (Mifflin County)	Demolition, redevelopment, and infrastructure improvements for Bldg.5 and adjacent parcels at the MCIDC Plaza.
1,3	Timber Run Industrial Park (Lycoming County)	Infrastructure development of a 300-acre industrial site.
1,3	Great Stream Commons (Phase II) (Union County)	Infrastructure expansion to include gas, water, sewer, and access road for Phase II of the KOZ designated park that includes 300+ acres. Significant development of the EDA funded Phase 1 must occur before project could seek additional EDA funding.

5- Year Comprehensive Economic Development Strategy



June 2015

1,3	Montour County Business Park	Infrastructure development to include gas, water, sewer, and access road for a site yet to be determined in Montour County.
1,3,6	Regional Telecommunications Implementation Project (Wireless)	Provide broadband technology to under-served areas throughout the SEDA-COG region.
Description & Location		Other Comments
<u>TECHNICAL ASSISTANCE</u>		
2,3,4	Gas Utilization Expansion Initiative	To develop and formalize a replicable process model to identify and prioritize suitable targeted investment areas ("TIAs") for natural gas distribution line extensions to commercial, industrial, and residential areas that are currently unserved or underserved.
1	Manufacturer Energy Assessment Program	Assist manufacturers in the 11-county region to reduce energy costs by offering technical assistance and low cost energy assessments by qualified contractors. These assessments will focus on both energy efficiency and renewable energy measures.
1	Revolving Loan Fund Recapitalization	Recapitalize the SEDA-COG EDA Revolving Loan Fund, which will serve as an integral part of the region's ongoing PREP Financing Program. Without additional funding for the SEDA-COG RLF, the ability to provide financial assistance to businesses considering growth and expansion in the District will be limited.
1,3,4,7	Regional PREP Program	Funds are needed to continue regional technical assistance to small- and medium-sized businesses in export development, loan packaging, and procurement outreach and other activities.

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 originally developed by the Commonwealth. This reporting system tracks the type of technical assistance utilized by companies, their sales figures, and employee creation and retention.

SEDA-COG will also utilize the Industry Cluster analysis reports from the Central Pennsylvania Workforce Development Corporation (CPWDC) as a basis for allocating project and program resources.

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.

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. All EDA 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 Priority listing. Again, all EDA funded projects will be tracked on a yearly basis to record the measure of economic activity generated by each project.

Actively encourage energy conservation and foster the deployment of locally-owned, locally-used energy projects.

The extraction and use of the indigenous energy resources of natural gas, coal, and wood, within the constraints of sound environmental practice will be necessary as our region and nation move towards an energy plan more reliant on low cost energy, conservation and renewable energy sources. The energy aspects of our region's natural resources of natural gas, agricultural and forest biomass, wind, and solar potential are expected to grow in importance given both their abundance and close proximity to major energy demands along our eastern seaboard.

Currently, the region is served by natural gas from sources outside of Pennsylvania. The bulk of the natural gas produced in our region appears to be headed for locations outside of Pennsylvania via the Atlantic Coast Pipeline. Regional communities should receive the full benefits of a locally produced natural resource as a cost-effective alternative to other forms of energy.

Performance of this goal can be measured over a period of time by reviewing the use of these alternate energy resources in the region.

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.

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. Several projects on SEDA-COG's priority list consist 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 EDA Priority listing. Again, all EDA funded projects will be tracked on a yearly basis to record the measure of economic activity generated by each project.

Encourage efforts to enhance a greater level of foreign direct investment and the relocation/location of U.S. companies' overseas operations to the region.

SEDA-COG will focus its efforts to increase the visibility of the 53-county footprint of Core Pennsylvania which includes the SEDA-COG region; to international and domestic investors and reshoring prospects. The region has recently developed a coordinated regional presence to aggressively compete for the limited reverse investment opportunities that emerge in Pennsylvania.

Performance measurement in this area is evident when viewing the number of domestic companies that have re-shored their operations and foreign owned businesses that locate and succeed in the region.

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 Investment Boards (WIBs) 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 that are trained for a family sustaining job.

Current SEDA-COG Board Member List

CERTIFICATION/RECERTIFICATION OF SEDA-COG BOARD MEMBERS - 2015

Each County in the SEDA-COG region appoints one Commissioner and a second Representative to serve on the SEDA-COG Board. The Board consists of 22 Members.

The County Commissioners from each County recommended the following individuals for certification/recertification to the SEDA-COG Board. A motion is requested to accept the appointments as presented.

COUNTY	REPRESENTATIVES
Centre	Commissioner C. Chris Exarchos
	Adam Brumbaugh, College Township
Clinton	Commissioner Joel Long
	Steve Stevenson, Lock Haven City Council
Columbia	Commissioner Richard Ridgway
	George Forese, S&B Foundry
Juniata	Commissioner Jeffrey M. Zimmerman
	Martin L. Dreibelbis, Self-employed
Lycoming	Commissioner Anthony Mussare
	Howard W. Fry III, Fry's Fire Systems
Mifflin	Commissioner Mark Sunderland
	James Shilling Jr., Kish Bank
Montour	Commissioner Jerry Ward
	Brian Wiktor, Members Choice Financial Credit Union
Northumberland	Commissioner Stephen Bridy
	Anthony Fiorenza, retired
Perry	Commissioner Brenda K. Benner
	Larry Reisinger, retired
Snyder	Commissioner Malcolm L. Derk III
	Dennis Van Benthuyzen, Colonial Furniture
Union	Commissioner Preston R. Boop
	Larry Seibert, Ben Franklin Tech. Partners

OFFICERS

President – Commissioner C. Chris Exarchos
 First Vice President – Commissioner Joel Long
 Second Vice President – Commissioner Jerry Ward
 Secretary – Commissioner Brenda K. Benner
 Treasurer – Larry Seibert

CEDS Committee Members

SEDA-COG CEDS Committee Members

NAME		OCCUPATION	SECTOR REPRESENTATION
First Name	Last Name		
Donita	Rudy	Compass Advisory Partners, LLC	Private/service
George	Forese	Owner, S&B Foundry	Private /manufacturing, business
Karen	Hackman	Attorney, Rudnitsky and Hackman, LLP	Private/service
Preston	Boop	Preston Boop Masonry Construction and Briar Patch Organic Farms/County Commissioner	Elected official/small business owner, industrial development
Jim	Shilling	Executive Vice President and Senior Lending Officer, Kish Bank	Private/service
Teri	MacBride	Community Relations Director, PPL, Inc./ CPWDC Workforce Investment Board Member	Private/energy/WIB
Malcolm	Derk	Commissioner	Elected Official
Martin	Dreibelbis	Petroleum Consulting/Tax and Accounting	Private/Service
Justin	Dunkleberger	CEO, Penn Wind, LLC/Environmental Srvs.	Private/Service
Robert	Stoudt	Director, Montour Area Recreation Authority	Service
Steve	Stevenson	Assistant County Manager for PennDOT District 2-0 (Retired)	Service
Bob	Walker	President, Primus Technology	Private/manufacturing/technology
Corbett	Monica	Senior Vice President, The Juniata Valley Bank	Private/service
Stephen	Phillips	Executive Director, Berwick Industrial Development Authority	Private/industrial development
Harold	Hurst	District Office Manager, Rep. Kurt Masser	Service
Brian	Wiktor	Director of Lending, MC Federal Credit Union	Private/Service
Larry	Seibert	Regional Manager, Ben Franklin Technology Partners	Service/Technology
Jeff	Hollenbach	Commercial Relationship Manager, West Milton State Bank	Private/Service
Joel	Long	Commissioner	Elected Official



The Central Region PREP Program is comprised of 18 funded partners that serve 10 counties in Central Pennsylvania. They include:

1 -Local Development District:

SEDA-Council of Governments

www.seda-cog.org

Mr. Dennis Robinson, Executive Director

3 -Small Business Development Centers:

Bucknell University SBDC

www.bucknell.edu/sbdc

Mr. Steve Stumbris, Director

Lock Haven University SBDC

www.lhup.edu/sbdc

Mr. Tim Keohane, Director

Penn State SBDC

www.sbdc.psu.edu

Ms. Heather Fennessey, Director

2 -Industrial Resource Centers:

Innovative Manufacturers' Center (IMC)

www.imcpa.com

Mr. Jim Shillenn, Executive Director

Northeast PA Industrial Resource Center (NEPIRC)

www.nepirc.com

Mr. Eric Esoda, CPA, Executive Director

12 -Industrial Development Organizations:

Centre County

Centre County Industrial Development Corporation (CCIDC)

www.cbicc.org

Mr. Vern Squier, President/CEO & Mary Resides, Economic Development Team Specialist

Moshannon Valley Economic Development Partnership (MVEDP)

www.mvedp.org

Mr. Stan LaFuria, Executive Director

Clinton County

Clinton County Economic Partnership (CCEP)
<http://clintoncountyinfo.com/>
Mr. Michael Flanagan, President and CEO

Columbia County

Columbia Alliance for Economic Growth
www.ChooseColumbiaMontour.com
Mr. Fred Gaffney, Contractor

Berwick Industrial Development
Association, Inc. (BIDA)
www.bida.com
Mr. Stephen Phillips, Executive Director

Juniata County

Juniata Business and Industry (JBI)
www.jbi.org
Mr. Fred Naylor, Secretary

Lycoming County

Williamsport/Lycoming Chamber of Commerce
www.williamsport.org
Mr. Jason Fink, Executive Vice President

Mifflin County

Mifflin County Industrial Development Corporation (MCIDC)
www.mcide.org
Mr. Robert Postal, President

Montour County

Columbia Alliance for Economic Growth
www.ChooseColumbiaMontour.com
Mr. Stephen Phillips, Contractor

Northumberland County

Northumberland County Industrial Development Corporation (NCIDC)
www.northumberlandco.org
Mr. Pat Mack, Executive Director

Snyder County

Susquehanna Industrial Development Corporation (SIDCO)

www.gsvcc.org

Mr. Donald Stringfellow, Interim President/CEO

Union County

Union County Economic Development Corporation (UCEDC)

www.unioncoidc.org

Mr. Don Alexander, President

County Support Letters



Board of Commissioners

STEVEN G. DERSHEM, *Chair*

C. CHRIS EXARCHOS

MICHAEL PIPE

BOC@CentreCountyPA.Gov

ADMINISTRATOR

TIM BOYDE

FINANCIAL MANAGEMENT

DENISE L. ELBELL

SOLICITOR

LOUIS T. GLANTZ

May 21, 2015

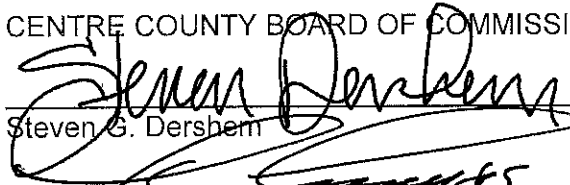
U.S. Department of Commerce
Economic Development Administration
Philadelphia Regional Office
The Curtis Center, Suite 140 South
Philadelphia, PA 19106

Please consider this letter from the Commissioners of Centre County as evidence of their commitment to support and participate in the Economic Development Administration activities of SEDA-Council of Governments.

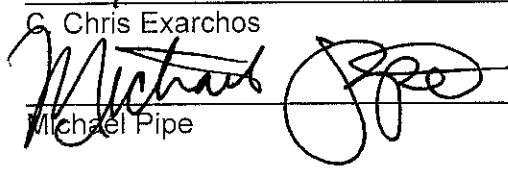
Our participation in the Economic Development District Program will maintain the eligibility of our area for assistance from the Economic Development Administration. Please be advised that we elect to be covered by SEDA-COG's 2015 5-Year CEDS, and that we will continue to support these efforts as long as they are in the best interest of our constituents.

Sincerely,

CENTRE COUNTY BOARD OF COMMISSIONERS

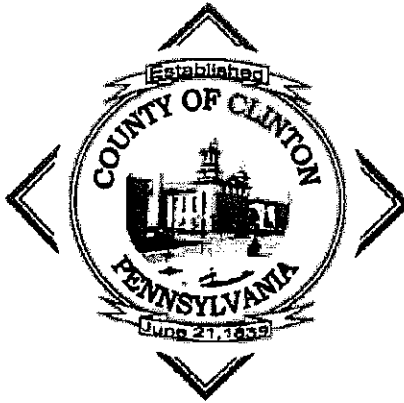

Steven G. Dershem


C. Chris Exarchos


Michael Pipe

Board of Commissioners

Robert B. "Pete" Smeltz, Jr.
Chairman
Jeffrey A. Snyder
Vice Chairman
Joel Long
Commissioner



Amy G. Dicello, Chief Clerk
Lewis G. Steinberg, Solicitor

Phone: (570) 893-4000
(800) 509-6697
Fax: (570) 893-4041

June 5, 2015

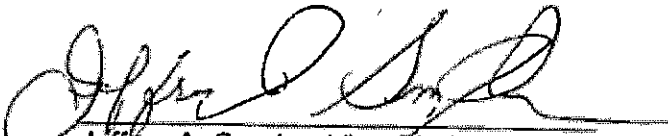
U.S. Department of Commerce
Economic Development Administration
Philadelphia Regional Office
The Curtis Center, Suite 140 South
Philadelphia, PA 19106

Please consider this letter from the Commissioners of Clinton County as evidence of their commitment to support and participate in the Economic Development Administration activities of SEDA-Council of Governments.

Our participation in the Economic Development District Program will maintain the eligibility of our area for assistance from the Economic Development Administration. Please be advised that we elect to be covered by SEDA-COG's 2015 5-Year CEDS, and that we will continue to support these efforts as long as they are in the best interest of our constituents.

Sincerely,


Robert B. Smeltz, Jr., Chairman


Jeffrey A. Snyder, Vice Chairman


Joel Long, Commissioner

CLINTON COUNTY COMMISSIONERS
225 EAST MAIN STREET, PHILADELPHIA, PA 19106
LOCAL AREA DEVELOPMENT DISTRICT

Chris E. Young
Rich Ridgway
David M. Kovach
Commissioners



Gail S. Kipp
Chief Clerk
Anthony McDonald
Solicitor

Commissioners of Columbia County

Court House, P.O. Box 380, Bloomsburg, Pennsylvania 17815

570-389-5600 (TDD: 570-389-5745) Fax: 570-784-0257

June 9, 2015

U.S. Department of Commerce
Economic Development Administration
Philadelphia Regional Office
The Curtis Center, Suite 140 South
Philadelphia, PA 19106

Please consider this letter from the Commissioners of Columbia County as evidence of their commitment to support and participate in the Economic Development Administration activities of SEDA-Council of Governments.

Our participation in the Economic Development District Program will maintain the eligibility of our area for assistance from the Economic Development Administration. Please be advised that we elect to be covered by SEDA-COG's 2015 5-Year CEDS, and that we will continue to support these efforts as long as they are in the best interest of our constituents.

Very truly yours,

Chris E. Young

Chairman/Commissioner

Richard Ridgway
Commissioner

David Kovach
Commissioner

COUNTY COMMISSIONERS JUNIATA COUNTY

Commissioners
JEFFREY M. ZIMMERMAN
ALICE J. GRAY
TERESA J. O'NEAL



County Administrator
S. JAMES BAHORIK

Solicitor
ANDREW WINDER

26 NORTH MAIN STREET • P.O. BOX 68
MIFFLINTOWN, PENNSYLVANIA 17059
Phone: (717) 436-7704 • Fax: (717) 436-7766

May 21, 2015

U.S. Department of Commerce
Economic Development Administration
Philadelphia Regional Office
The Curtis Center, Suite 140 South
Philadelphia, PA 19106

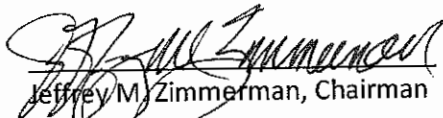
Re: Letter of Commitment

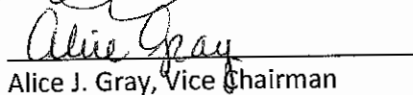
Please consider this letter from the Commissioners of Juniata County as evidence of their commitment to support and participate in the Economic Development Administration activities of SEDA-Council of Governments.

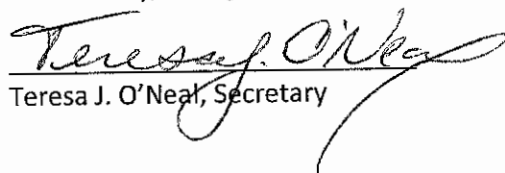
Our participation in the Economic Development District Program will maintain the eligibility of our area for assistance from the Economic Development Administration. Please be advised that we elect to be covered by SEDA-COG's FY 2015 5-Year CEDS, and that we will continue to support these efforts as long as they are in the best interest of our constituents.

Sincerely,

Juniata County Commissioners


Jeffrey M. Zimmerman, Chairman


Alice J. Gray, Vice Chairman


Teresa J. O'Neal, Secretary

COMMISSIONERS
TONY R. MUSSARE
Chairman
ERNEST P. LARSON
Vice-Chairman
JEFF W. RAUFF
Secretary



COUNTY of LYCOMING
48 WEST THIRD STREET
WILLIAMSPORT, PA 17701

MATTHEW A. McDERMOTT
Director of Economic Development
J. DAVID SMITH
Assistant Director

Telephone (570) 320-2124
Fax (570) 320-2127

www.lyco.org
county.commissioners@lyco.org

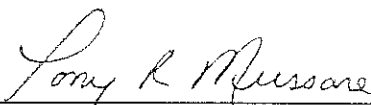
May 20, 2015

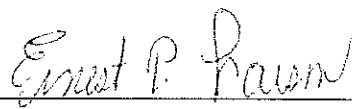
U.S. Department of Commerce
Economic Development Administration
Philadelphia Regional Office
The Curtis Center, Suite 140 South
Philadelphia, PA 19106

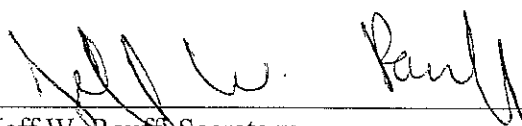
Please consider this letter from the Commissioners of Lycoming County as evidence of their commitment to support and participate in the Economic Development Administration activities of SEDA-Council of Governments.

Our participation in the Economic Development District Program will maintain the eligibility of our area for assistance from the Economic Development Administration. Please be advised that we elect to be covered by SEDA-COG's 2015 5-Year CEDS, and that we will continue to support these efforts as long as they are in the best interest of our constituents.

Very truly yours,


Tony R. Mussare, Chairman


Ernest P. Larson, Vice-Chairman


Jeff W. Rauff, Secretary

Commissioners of Mifflin County



COMMISSIONERS
MARK A. SUNDERLAND
OTIS E. RIDEN, JR
KEVIN P. KODISH

**20 NORTH WAYNE STREET
LEWISTOWN, PENNSYLVANIA 17044-1797**
Telephone: 717-248-6733
Fax: 717-248-3695

CHIEF CLERK
CATHY L. ROMIG
SOLICITOR
PATRICIA A. GARDNER

May 21, 2015


U.S. Department of Commerce
Economic Development Administration
Philadelphia Regional Office
Curtis Center, Suite 140-S
Philadelphia, PA 19106

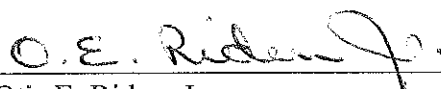
Please consider this letter from the Commissioners of Mifflin County as evidence of our commitment to support and participate in the Economic Development Administration activities of SEDA-Council of Governments.

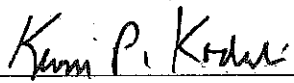
Our participation in the Economic Development District Program will maintain the eligibility of our area for assistance from the Economic Development Administration. Please be advised that we elect to be covered by SEDA-COG's 2015 5-Year CEDS, and that we will continue to support these efforts as long as they are in the best interest of our constituents.

Very truly yours,

MIFFLIN COUNTY COMMISSIONERS


Mark A. Sunderland


Otis E. Riden, Jr.


Kevin P. Kodish

Commissioners of Montour County

COURTHOUSE • 29 MILL STREET • DANVILLE, PENNSYLVANIA 17821 • (570) 271-3000 • FAX (570) 271-3088

COUNTY COMMISSIONERS

Trevor S. Finn, Chairman

John J. Gerst, Vice-Chairman

Jerry R. Ward



Home of the First "T" Rail in America

CHIEF CLERK

Holly A. Brandon

SOLICITOR

Robert L. Marks



June 9, 2015

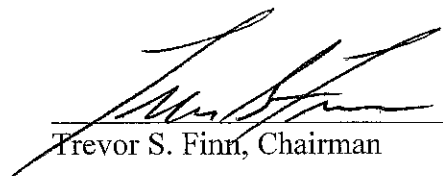
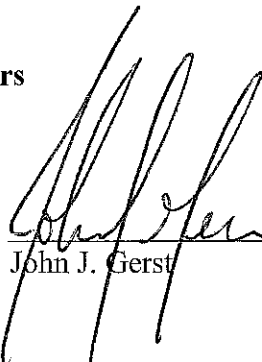
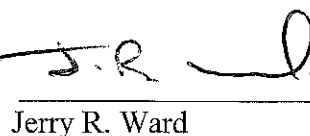
U.S. Department of Commerce
Economic Development Administration
Philadelphia Regional Office
Curtis Center, Suite 140-S
Philadelphia, PA 19106

Please consider this letter from the Commissioners of Montour County as evidence of our commitment to support and participate in the Economic Development Administration activities of SEDA-Council of Governments.

Our participation in the Economic Development District Program will maintain the eligibility of our area for assistance from the Economic Development Administration. Please be advised that we elect to be covered by SEDA-COG's FY 2015 five-year CEDS, and that we will continue to support these efforts as long as they are in the best interest of our constituents.

Sincerely,

Montour County Commissioners


Trevor S. Finn, Chairman
John J. Gerst
Jerry R. Ward

COMMISSIONERS

County of Northumberland

Vinny Clausi, Chairman
Stephen Bridy, Vice Chairman
Richard J. Shoch



Frank W. Garrigan, Solicitor
John P. Muncer,
Acting Chief Clerk/Ass't Solicitor

Voice 570 988-4564
Fax 570 988-4445

www.northumberlandco.org

Office of the Commissioners

Administration Center
399 S. Fifth Street
Sunbury, PA 17801

May 21, 2015


U.S. Department of Commerce
Economic Development Administration
Philadelphia Regional Office
The Curtis Center, Suite 140 South
Philadelphia, PA 19106

Please consider this letter from the Commissioners of Northumberland County as evidence of our commitment to support and participate in the Economic Development Administration activities of SEDA-Council of Governments.

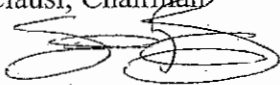
Our participation in the Economic Development District Program will maintain the eligibility of our area for assistance from the Economic Development Administration. Please be advised that we elect to be covered by SEDA-COG's FY 2015 5-Year CEDS, and that we will continue to support these efforts as long as they are in the best interest of our constituents.

Very truly yours,


**NORTHUMBERLAND COUNTY
BOARD OF COMMISSIONERS**



Vinny Clausi, Chairman



Stephen Bridy, Vice Chairman



Richard J. Shoch

COMMISSIONERS

BRENDA K. BENNER
CHAIRMAN

STEPEHN C. NAYLOR
VICE- CHAIRMAN

PAUL L. RUDY
SECRETARY

PERRY COUNTY COMMISSIONERS

PO BOX 37

NEW BLOOMFIELD, PA 17068-0037

PHONE (717) 582-2131

FAX (717) 582-5162

WILLIAM R. BUNT
SOLICITOR

KATHY BURKHOLDER
CHIEF CLERK



May 21, 2015


U.S. Department of Commerce
Economic Development Administration
Philadelphia Regional Office
The Curtis Center, Suite 140 South
Philadelphia, PA 19106


We, the Perry County Commissioners, write to lend our support and commitment to participate in the Economic Development Administration activities of SEDA-Council of Governments.

Our participation in the Economic Development et Program will maintain the eligibility of our area for assistance from the Economic Development Administration. Please be advised that we elect to be covered by SDEA-COG's 2015, 5-Year CEDS, and that we will continue to support these efforts as long as they are in our best interest.

Sincerely,


Brenda K Benner


Stephen C Naylor

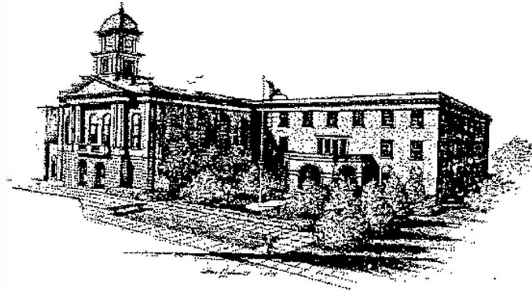

Paul L Rudy, Jr

COUNTY COMMISSIONERS

JOSEPH E. KANTZ
Chairman

MALCOLM L. DERK III
Vice Chairman

PEGGY CHAMBERLAIN ROUP
Secretary



LEE E. KNEPP
Chief Clerk

ROBERT M. CRAVITZ
Solicitor

Snyder County Board of Commissioners

Snyder County Courthouse • P.O. Box 217 • Middleburg, Pennsylvania 17842-0217
(570) 837-4207 • FAX (570) 837-4282

June 9, 2015

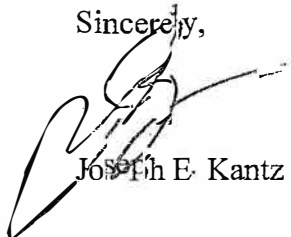
Regional Director
U.S. Department of Commerce
Economic Development Administration
Philadelphia Regional Office
The Curtis Center, Suite 140 South
Philadelphia, PA 19106

Dear Regional Director:


Please consider this letter from the Commissioners of Snyder County as evidence of their commitment to support and participate in the Economic Development Administration activities of SEDA-Council of Governments.

Our participation in the Economic Development District Program will maintain the eligibility of our area for assistance from the Economic Development Administration. Please be advised that we elect to be covered by SEDA-COG's 2015 5-Year CEDS, and that we will continue to support these efforts as long as they are in the best interest of our constituents.

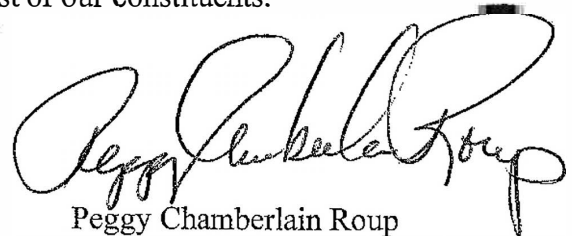
Sincerely,



Joseph E. Kantz



Malcolm L. Derk, III



Peggy Chamberlain Roup

COUNTY of UNION

P E N N S Y L V A N I A

OFFICE OF COMMISSIONERS

COUNTY COMMISSIONERS

Preston R. Boop, Chairman

John R. Showers, Vice Chairman

John H. Mathias, Secretary

SOLICITOR

Ryan M. Tira

COUNTY ADMINISTRATOR/CHIEF CLERK

Diana L. Robinson

FINANCE DIRECTOR

Jeffrey P. McClintock

May 22, 2015

U.S. Department of Commerce
Economic Development Administration
Philadelphia Regional Office
The Curtis Center, Suite 140 South
Philadelphia, PA 19106

Please consider this letter from the Commissioners of Union County as evidence of their commitment to support and participate in the Economic Development Administration activities of SEDA-Council of Governments.

Our participation in the Economic Development District Program will maintain the eligibility of our area for assistance from the Economic Development Administration. Please be advised that we elect to be covered by SEDA-COG's 2015 5-Year CEDS, and that we will continue to support these efforts as long as they are in the best interest of our constituents.

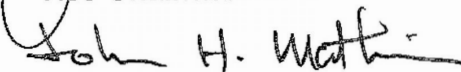
Very truly yours,
UNION COUNTY COMMISSIONERS



Preston Boop
Chairman



John Showers
Vice Chairman



John H. Mathias
Secretary

Establishments and Jobs By County and Industry

2012 Total Establishments By County and Industry																					
NAICS Code	11	21	22	23	31-33	42	44-45	48-49	51	52	53	54	55	56	61	62	71	72	81	99	Total
Centre	11	13	11	274	146	101	488	91	72	212	130	368	20	149	57	365	61	312	360	4	3,245
Clinton	5	5	7	92	47	19	121	30	13	31	37	49	2	38	3	71	9	83	106	0	768
Columbia	7	3	8	128	73	50	237	43	21	74	43	93	4	67	16	165	27	158	175	1	1,393
Juniata	4	1	1	58	59	19	68	24	9	24	6	22	1	10	3	33	6	31	80	0	459
Lycoming	5	27	7	255	161	120	501	117	40	178	89	203	14	125	18	287	38	294	381	1	2,861
Mifflin	4	2	2	82	87	36	162	46	20	50	23	37	4	31	11	128	9	83	133	1	951
Montour	1	0	7	25	19	14	56	25	5	28	6	34	14	13	1	101	9	41	54	1	454
Northumberland	1	21	12	151	77	61	276	101	20	80	37	104	5	70	14	206	17	175	253	1	1,682
Perry	2	2	3	124	36	17	134	35	8	41	10	49	0	31	8	80	8	72	125	0	785
Snyder	4	1	1	79	62	30	197	24	11	55	13	44	1	31	6	83	18	85	110	0	855
Union	5	2	2	95	38	36	130	28	12	51	27	70	6	37	6	143	11	92	111	0	902
SEDA-COG	49	77	61	1,363	805	503	2,370	564	231	824	421	1,073	71	602	143	1,662	213	1,426	1,888	9	14,355
Percent of Total Establishments (SEDA-COG)	0.34%	0.54%	0.42%	9.49%	5.61%	3.50%	16.51%	3.93%	1.61%	5.74%	2.93%	7.47%	0.49%	4.19%	1.00%	11.58%	1.48%	9.93%	13.15%	0.06%	
Pennsylvania	2,609	34,796	29,717	221,831	547,925	247,012	649,337	203,872	118,234	259,747	60,076	313,836	171,593	302,174	258,785	969,403	100,817	437,440	239,890	124	5,169,196
Percent of Total Establishments (PA)	0.05%	0.67%	0.57%	4.29%	10.60%	3.50%	12.56%	3.94%	2.29%	5.02%	1.16%	6.07%	3.32%	5.85%	5.01%	18.75%	1.95%	8.46%	4.64%	0.002%	
Source: County Business Patterns, U.S. Census Bureau (2012) - Note: Due to government confidentiality requirements, some NAICS employment code values are represented as ranges. For these values, the median (Middle Number) was used to replace a range.																					

2012 Jobs By County and Industry

NAICS Code	11	21	22	23	31-33	42	44-45	48-49	51	52	53	54	55	56	61	62	71	72	81	99	Total
Centre	59.5	340	174.5	2,690	3,961	949	7,852	1,124	1,151	1,209	1,041	3,157	1,366	1,504	855	7,605	650	6,537	2,298	5	44,438
Clinton	59.5	374.5	62	555	3,101	374.5	1,813	486	109	155	162	252	174.5	300	174.5	1,261	174.5	1,290	504	0	11,208
Columbia	9	59.5	98	861	5,173	458	3,498	1,631	374.5	567	171	766	213	937	256	4,307	300	2,498	780	9.5	22,965.5
Juniata	14	9.5	9.5	265	1,884	149	590	441	59.5	236	9.5	59.5	9.5	174.5	75	522	56	367	322	0	5,193
Lycoming	9.5	1,318	185	2,948	8,279	2,450	7,419	1,450	640	1,332	529	1,914	188	1,843	913	8,473	527	4,506	2,317	9.5	47,239
Mifflin	59.5	9.5	59.5	374	3,835	388	2,083	606	174	356	71	163	59.5	174.5	174.5	3,186	89	1,058	622	9.5	13,448
Montour	9.5	0	374.5	118	374.5	150	669	233	52	1749.5	9.5	446	1749.5	52	9.5	7,250	89	973	299	9.5	13,800
Northumberland	9.5	374.5	249	1,047	3,613	962	3,178	2,514	345	570	180	531	749.5	573	336	5,318	374.5	1,510	1,264	9.5	23,342
Perry	9.5	9.5	59.5	547	635	144	1136	1060	59.5	237	59.5	215	0	151	59.5	1056	9.5	452	440	0	6230
Snyder	5	59.5	59.5	399	3,647	357	2,874	409	59.5	289	61	207	59.5	370	1749.5	1,176	136	1,766	545	0	14,029
Union	59.5	59.5	9.5	552	1,366	306	1,569	390	105	368	153	342	174.5	324	3749.5	3,855	59.5	2,077	452	0	14,968
SEDA-COG	304	2,614	1,341	10,356	35,869	6,688	32,681	10,344	3,129	7,069	2,447	8,053	4,744	6,403	8,352	44,009	2,465	23,034	9,843	48	216,861
Percent of Total Jobs (SEGA-COG)	0.14%	1.21%	0.62%	4.78%	16.54%	3.08%	15.07%	4.77%	1.44%	3.26%	1.13%	3.71%	2.19%	2.95%	3.85%	20.29%	1.14%	10.62%	4.54%	0.02%	
Pennsylvania	2,609	34,796	29,717	221,831	547,925	247,012	649,337	203,872	118,234	259,747	60,076	313,836	171,593	302,174	258,785	969,403	100,817	437,440	239,890	174.5	5,169,196
Percent of Total Jobs (PA)	0.05%	0.67%	0.57%	4.29%	10.60%	4.78%	12.56%	3.94%	2.29%	5.02%	1.16%	6.07%	3.32%	5.85%	5.01%	18.75%	1.95%	8.46%	4.64%	0.003%	

Source: County Business Patterns, U.S. Census Bureau (2012) - Note: Due to government confidentiality requirements, some NAICS employment code values are represented as ranges. For these values, the median (Middle Nmuber) was used to replace a range. These numbers are shown in red.

a	0-19	9.5
b	20-99	59.5
c	100-249	174.5
e	250-499	374.5
f	500-999	749.5
g	1,000-2,499	1749.5
h	2,500-4,999	3749.5

Industry Sectors and Clusters for SEDA-COG

SEDA-COG Economic Composition (Industry Sectors)

NAICS	Industry Sector	Employment	Percent	State Location Quotient	Historical Change	Projected Change	Earnings	Establishments
11	Crop and Animal Production	3,700	1.2%	0.93	↓ -5.8%	↓ -8.9%	\$27,200	210
21	Mining, Quarrying, and Oil and Gas Extraction	3,200	1.0%	2.07	↑ 454.4%	↑ 27.5%	\$88,000	90
22	Utilities	600	0.2%	0.58	↓ -23.5%	↑ 9.4%	\$97,500	30
23	Construction	14,800	4.8%	0.98	↓ -3.4%	↑ 4.2%	\$47,100	1,400
31	Manufacturing	37,300	12.2%	1.51	↓ -2.9%	↓ -5.1%	\$57,100	810
42	Wholesale Trade	6,900	2.3%	0.60	↓ -3.7%	↑ 9.0%	\$50,600	610
44	Retail Trade	33,200	10.8%	1.03	↓ -0.9%	↑ 0.9%	\$27,600	2,200
48	Transportation and Warehousing	10,300	3.4%	1.10	↓ -0.1%	↑ 9.3%	\$47,200	540
51	Information	3,000	1.0%	0.55	↓ -12.8%	↑ 1.6%	\$57,000	180
52	Finance and Insurance	6,700	2.2%	0.52	↑ 0.3%	↓ -1.7%	\$55,300	810
53	Real Estate and Rental and Leasing	3,400	1.1%	0.72	↑ 19.0%	↑ 5.5%	\$41,800	410
54	Professional, Scientific, and Technical Services	9,500	3.1%	0.49	↑ 6.2%	↑ 7.4%	\$58,100	1,100
55	Management of Companies and Enterprises	7,800	2.5%	1.87	↑ 41.5%	↑ 5.6%	\$63,100	90
56	Administrative and Support and Waste Management and Remediation Services	9,700	3.2%	0.52	↑ 26.2%	↑ 9.7%	\$28,200	600
61	Educational Services (private)	6,800	2.2%	0.85	↓ -6.4%	↑ 6.3%	\$33,500	120
62	Health Care and Social Assistance	43,700	14.3%	1.16	↑ 9.7%	↑ 11.2%	\$56,200	2,300
71	Arts, Entertainment, and Recreation	3,200	1.0%	0.62	↑ 0.9%	↑ 1.9%	\$20,000	200
72	Accommodation and Food Services	23,100	7.5%	0.89	↑ 9.4%	↑ 3.3%	\$16,300	1,300
81	Other Services (except Public Administration)	13,800	4.5%	0.92	↑ 1.8%	↑ 1.5%	\$22,300	1,400
90	Government (including public education)	65,300	21.3%	1.36	↓ -2.1%	↑ 1.7%	\$65,400	1,300
Total	All Industries	306,100	100.0%	--	↑ 3.1%	↑ 3.6%	\$48,100	15,700

Source: Economic Modeling Specialists, Incorporated 2014.3 Class of Worker; QCEW Employees, Non-QCEW Employees & Self-Employed
 SEDA-COG: Centre, Clinton, Columbia, Juniata, Lycoming, Mifflin, Montour, Northumberland, Perry, Snyder, and Union Counties
 Employment based on 2014 estimates; public education and some hospitals classified under government
 Historical change based on the 2009-2014 time period; projected change based on the 2014-2019 time period.

State location quotients measure the concentration of employment in a sector compared to the State. A value greater than 1.0 indicates a larger concentration, and a value less than 1.0 indicates a smaller concentration; based on 2014 estimates.

Industry earnings include Wages, Salaries, Proprietor Earnings, and Supplements; based on 2014 estimates.

Establishments do not include sole-proprietors; based on 2013 estimates.

SEDA-COG Economic Composition (Industry Clusters)

Industry Cluster		Employment	Percent	State Location Quotient	Historical Change	Projected Change	Earnings	Establishments
Statewide Targeted Industry Clusters	Advanced Manufacturing	19,500	6.4%	1.01	↑ 12.6%	↑ 3.7%	\$52,700	1,000
	Agriculture & Food Production	13,400	4.4%	1.51	↓ -1.3%	↓ -2.3%	\$42,900	540
	Bio-Medical	1,700	0.6%	0.46	↑ 0.1%	↑ 8.7%	\$82,000	70
	Building and Construction	21,300	7.0%	1.07	↓ -6.6%	↑ 0.0%	\$45,300	1,800
	Business Services	23,700	7.7%	0.63	↑ 11.2%	↑ 6.2%	\$52,500	1,600
	Education	53,700	17.5%	1.66	↓ -3.8%	↑ 3.1%	\$57,800	740
	Energy	6,200	2.0%	1.02	↑ 77.4%	↑ 21.5%	\$78,400	270
	Health Care	42,500	13.9%	0.89	↑ 10.9%	↑ 11.5%	\$58,000	2,200
	Hospitality, Leisure, & Entertainment	10,500	3.4%	0.76	↑ 5.1%	↑ 2.9%	\$20,100	790
	Logistics and Transportation	8,400	2.7%	0.75	↑ 2.4%	↑ 10.4%	\$52,800	480
	Real Estate, Finance & Insurance	9,900	3.2%	0.62	↑ 5.9%	↑ 1.6%	\$52,700	1,200
	Wood, Wood Products, & Publishing	10,800	3.5%	2.08	↓ -9.5%	↓ -2.7%	\$48,600	350
	Total-Targeted Industry Clusters	221,500	72.4%	1.00	↑ 3.6%	↑ 5.0%	\$52,800	11,040
	Non-Targeted Industries	84,600	27.6%	1.00	↑ 1.8%	↓ -0.1%	\$35,800	4,660
All Industries		306,100	100.0%	--	↑ 3.1%	↑ 3.6%	\$48,100	15,700

Source: Economic Modeling Specialists, Incorporated 2014.3 Class of Worker; QCEW Employees, Non-QCEW Employees & Self-Employed

SEDA-COG: Centre, Clinton, Columbia, Juniata, Lycoming, Mifflin, Montour, Northumberland, Perry, Snyder, and Union Counties

Employment based on 2014 estimates

Historical change based on the 2009-2014 time period; projected change based on the 2014-2019 time period.

State location quotients measure the concentration of employment in a sector compared to the State. A value greater than 1.0 indicates a larger concentration, and a value less than 1.0 indicates a smaller concentration; based on 2014 estimates.

Industry earnings include Wages, Salaries, Proprietor Earnings, and Supplements; based on 2014 estimates.

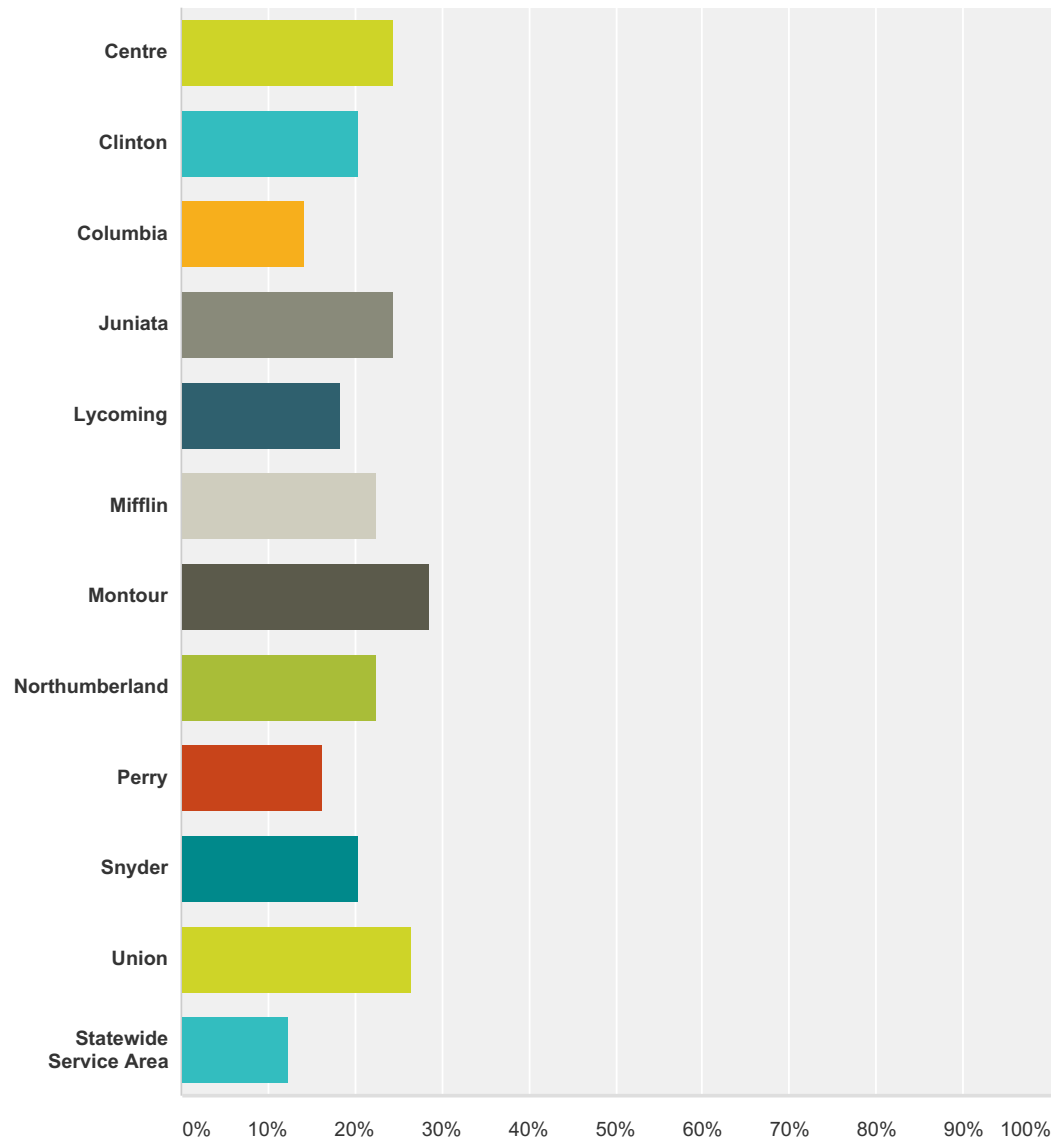
Establishments do not include sole-proprietors; based on 2013 estimates.

Industry Clusters are defined by the PA Department of Labor and Industry's Center for Workforce Information and Analysis

Survey Results of Local Stakeholders

Q1 Which county or counties do you serve in the SEDA-COG region? (Select all that apply)

Answered: 49 Skipped: 0

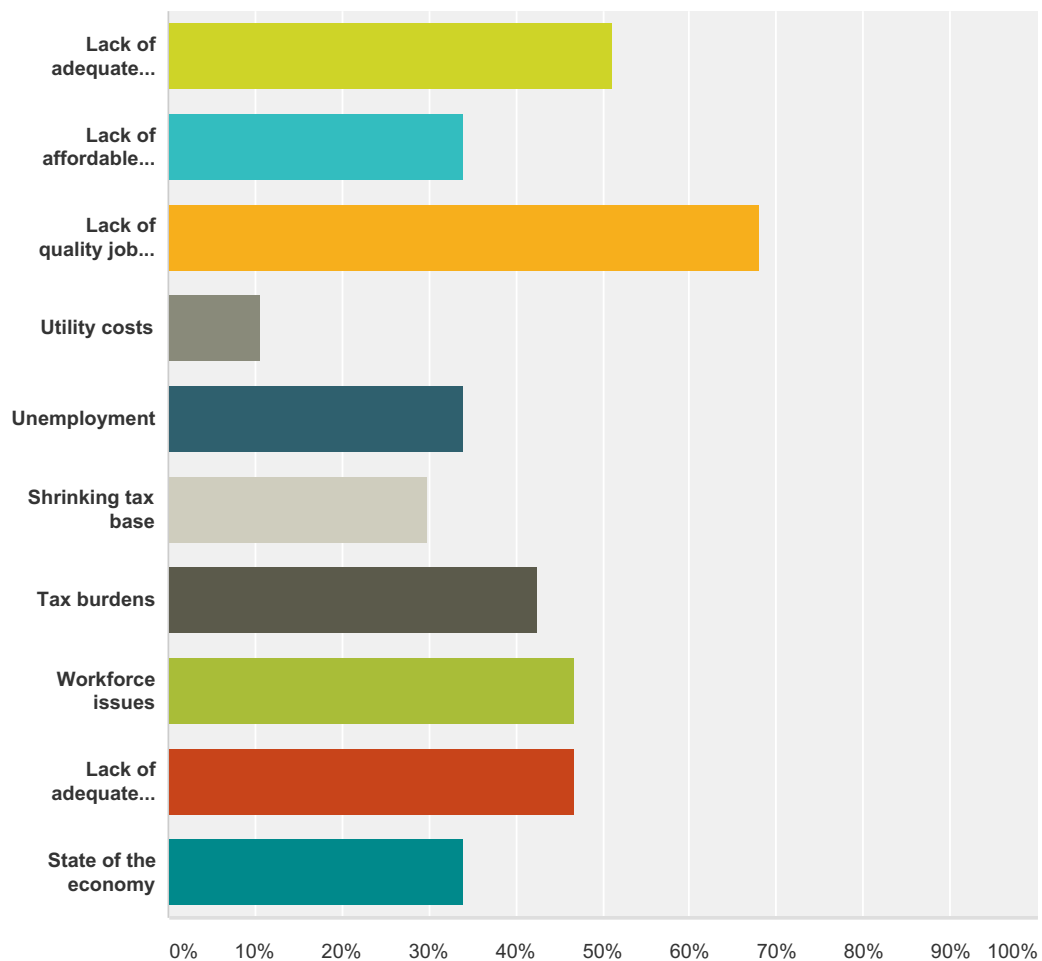


Answer Choices	Responses
Centre	24.49% 12
Clinton	20.41% 10
Columbia	14.29% 7
Juniata	24.49% 12
Lycoming	18.37% 9
Mifflin	22.45% 11

Montour	28.57%	14
Northumberland	22.45%	11
Perry	16.33%	8
Snyder	20.41%	10
Union	26.53%	13
Statewide Service Area	12.24%	6
Total Respondents: 49		

Q2 Please choose the primary issues facing your county/region. (Select all that apply)

Answered: 47 Skipped: 2

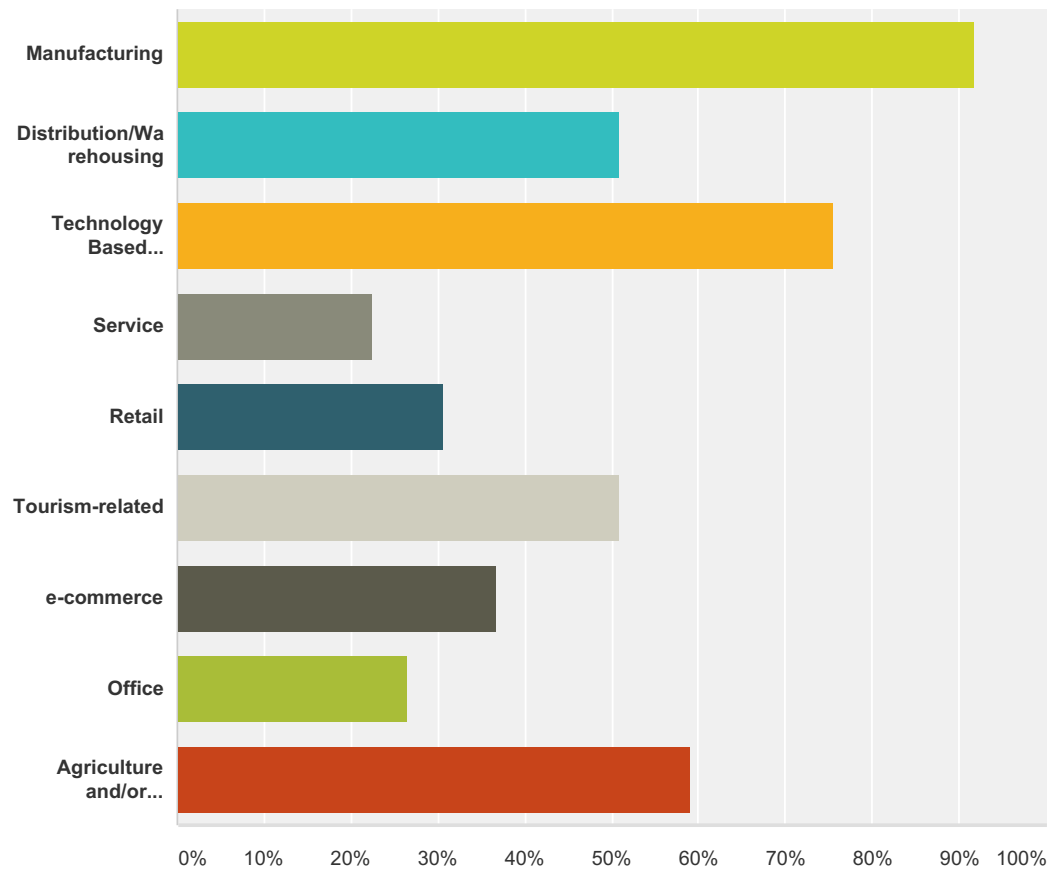


Answer Choices	Responses
Lack of adequate infrastructure	51.06% 24
Lack of affordable housing	34.04% 16
Lack of quality job opportunities	68.09% 32
Utility costs	10.64% 5
Unemployment	34.04% 16
Shrinking tax base	29.79% 14
Tax burdens	42.55% 20
Workforce issues	46.81% 22
Lack of adequate broadband services	46.81% 22

State of the economy	34.04%	16
Total Respondents: 47		

**Q3 What types of industry, business, or other economic activity would you like to attract or develop in your county/region?
(Select all that apply)**

Answered: 49 Skipped: 0

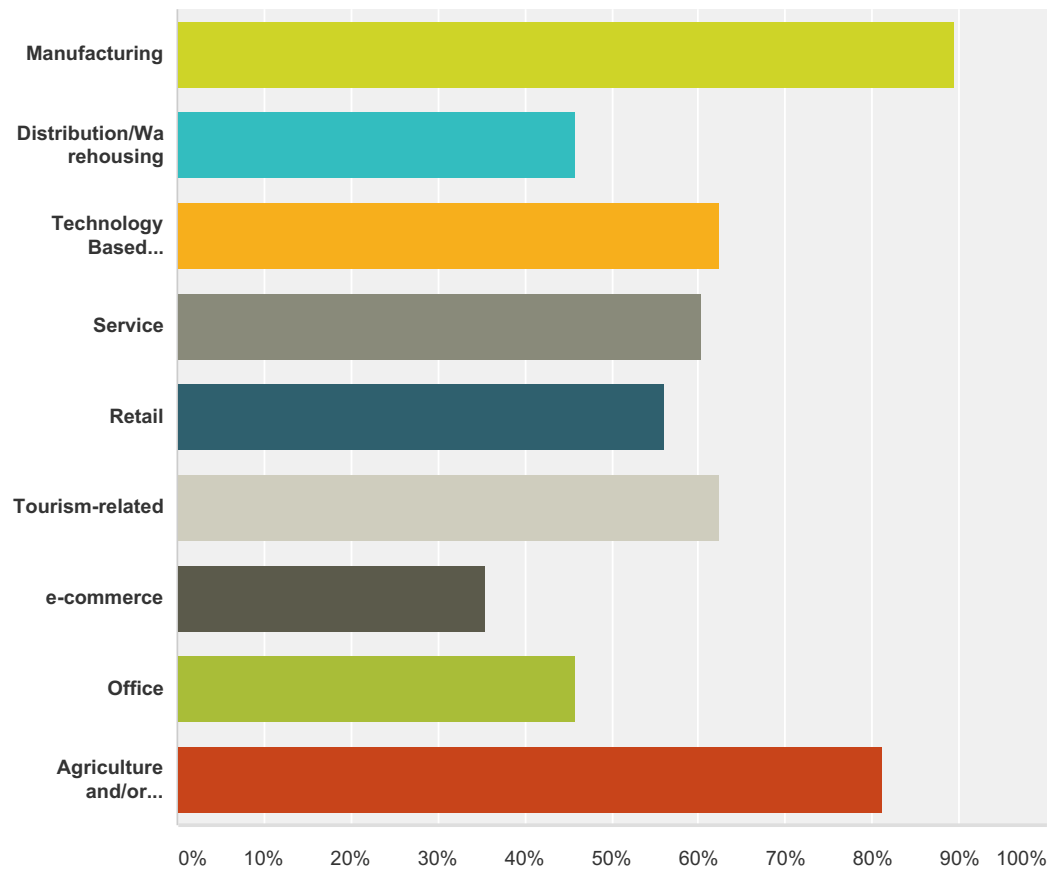


Answer Choices	Responses	
Manufacturing	91.84%	45
Distribution/Warehousing	51.02%	25
Technology Based Enterprises	75.51%	37
Service	22.45%	11
Retail	30.61%	15
Tourism-related	51.02%	25
e-commerce	36.73%	18
Office	26.53%	13
Agriculture and/or Agribusiness	59.18%	29

Total Respondents: 49	
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Q4 What types of industry, business, or other economic activity would you like to retain in your county/region? (Select all that apply)

Answered: 48 Skipped: 1

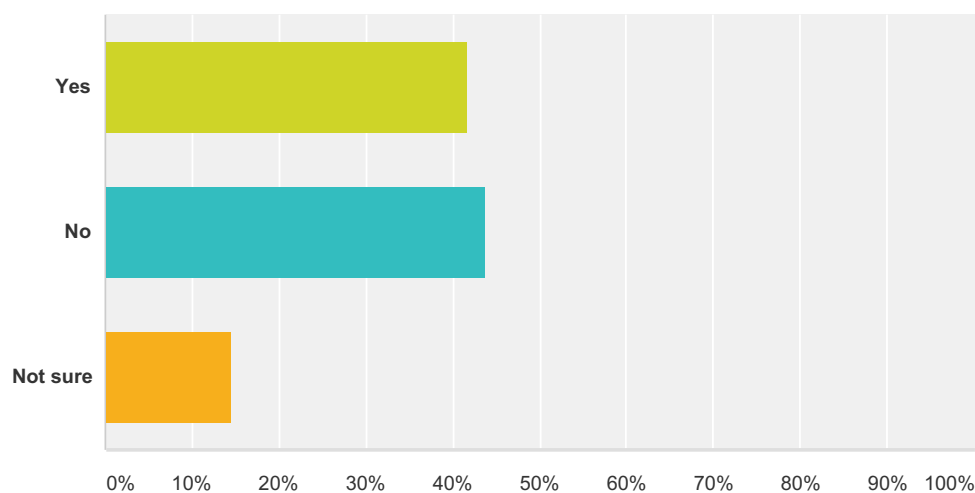


Answer Choices	Responses	
Manufacturing	89.58%	43
Distribution/Warehousing	45.83%	22
Technology Based Enterprises	62.50%	30
Service	60.42%	29
Retail	56.25%	27
Tourism-related	62.50%	30
e-commerce	35.42%	17
Office	45.83%	22
Agriculture and/or Agribusiness	81.25%	39

Total Respondents: 48	
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Q5 Does your county/region need additional industrial and/or business park space?

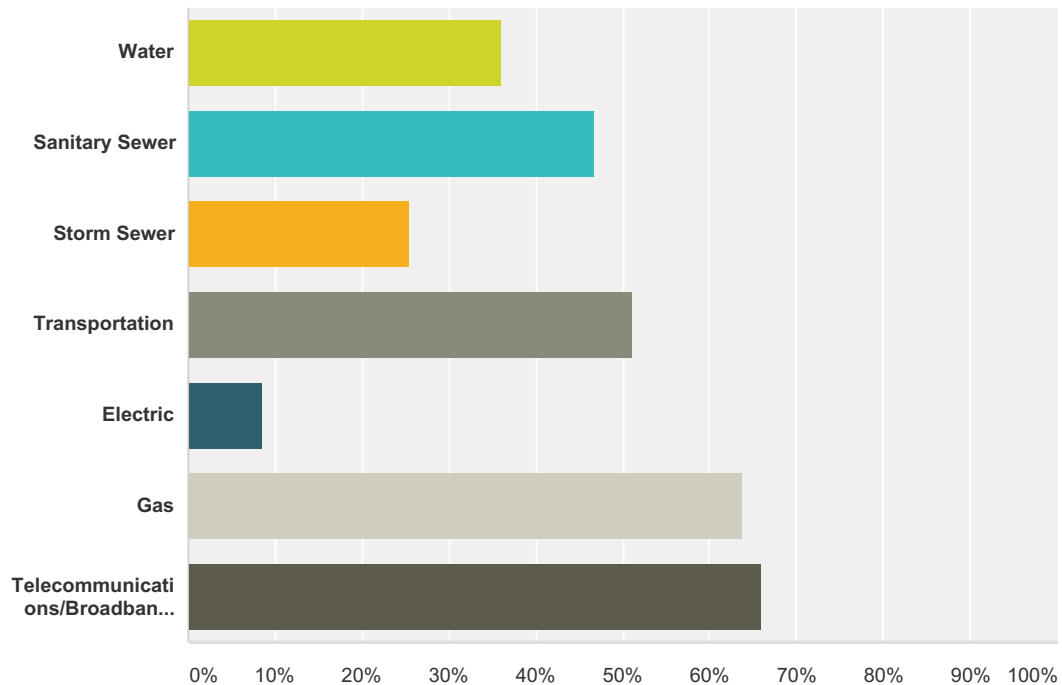
Answered: 48 Skipped: 1



Answer Choices	Responses	
Yes	41.67%	20
No	43.75%	21
Not sure	14.58%	7
Total		48

Q6 What are the pressing infrastructure needs of your county/region? (Select all that apply)

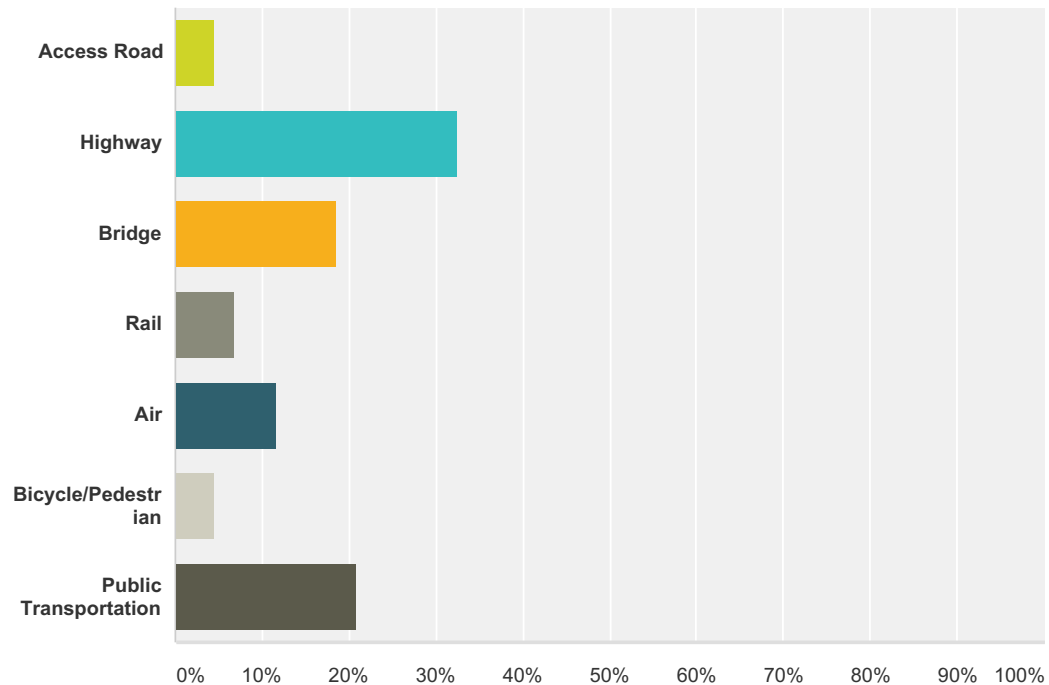
Answered: 47 Skipped: 2



Answer Choices	Responses	
Water	36.17%	17
Sanitary Sewer	46.81%	22
Storm Sewer	25.53%	12
Transportation	51.06%	24
Electric	8.51%	4
Gas	63.83%	30
Telecommunications/Broadband/Wireless	65.96%	31
Total Respondents: 47		

Q7 What category below represents the most urgent transportation needs in your county/region? (Select only one)

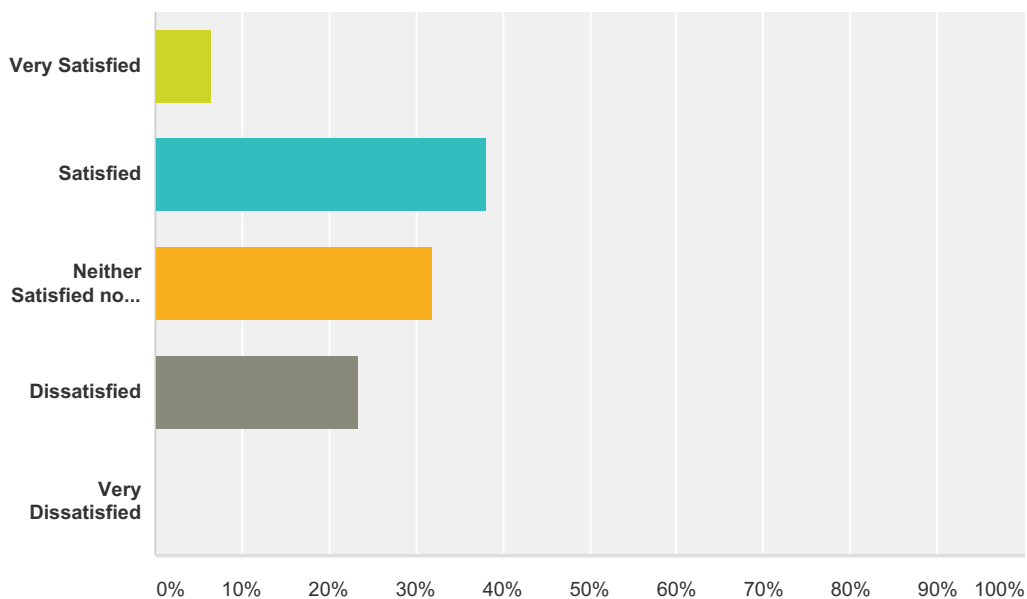
Answered: 43 Skipped: 6



Answer Choices	Responses
Access Road	4.65% 2
Highway	32.56% 14
Bridge	18.60% 8
Rail	6.98% 3
Air	11.63% 5
Bicycle/Pedestrian	4.65% 2
Public Transportation	20.93% 9
Total	43

Q8 What is your overall satisfaction with the transportation system in your county/region?

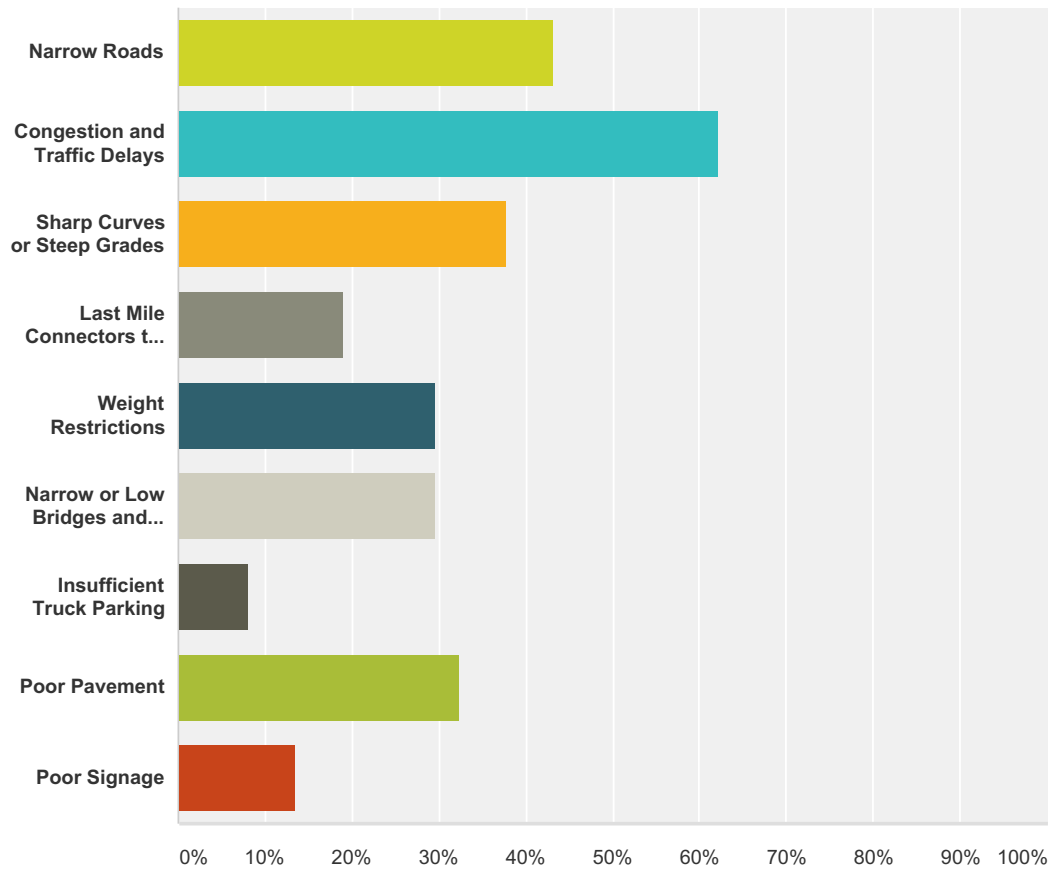
Answered: 47 Skipped: 2



Answer Choices	Responses	
Very Satisfied	6.38%	3
Satisfied	38.30%	18
Neither Satisfied nor Dissatisfied	31.91%	15
Dissatisfied	23.40%	11
Very Dissatisfied	0.00%	0
Total		47

Q9 Which of the following roadway problems impede freight transportation in your county/region? (Select all that apply)

Answered: 37 Skipped: 12



Answer Choices	Responses
Narrow Roads	43.24% 16
Congestion and Traffic Delays	62.16% 23
Sharp Curves or Steep Grades	37.84% 14
Last Mile Connectors to Origins/Destinations	18.92% 7
Weight Restrictions	29.73% 11
Narrow or Low Bridges and Overpasses	29.73% 11
Insufficient Truck Parking	8.11% 3
Poor Pavement	32.43% 12
Poor Signage	13.51% 5
Total Respondents: 37	

Q10 Please enter a specific location where selected problems from the above question occur. Provide problem type, municipality name, highway route, etc. for the area.

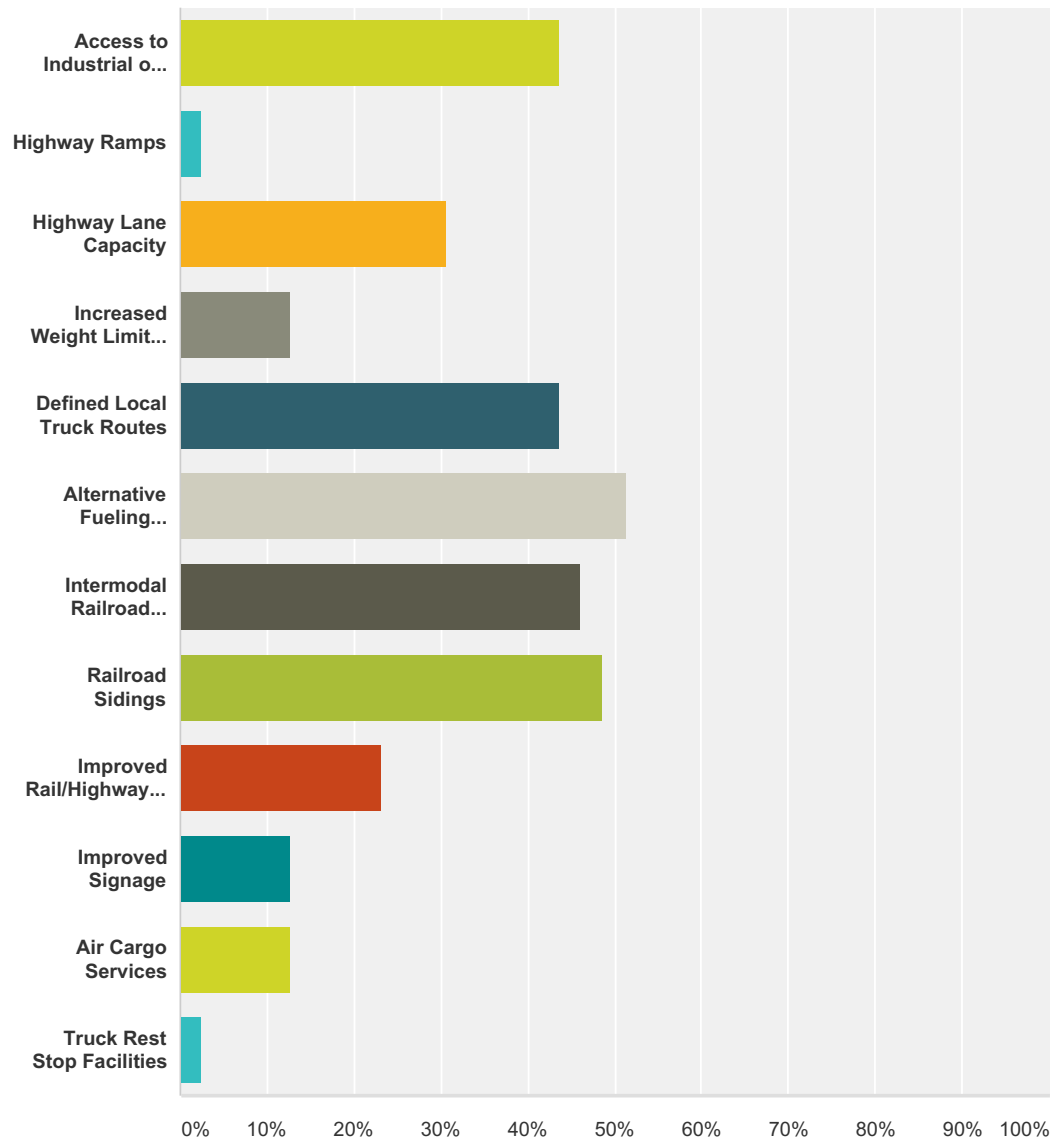
Answered: 33 Skipped: 16

#	Responses	Date
1	Rte 322 near Potter Mills is a bad intersection with numerous accidents.	11/28/2014 11:46 AM
2	Perry County Industrial Park is hard for tractor trailers to get into or out of.	11/23/2014 7:21 AM
3	Poor signage for truck traffic entering the First Quality Facility near Lock Haven. However a new access road would improve that and that project is in the works. Narrow road- SR 1014, Hyner Mt. Road impedes the connection for truck traffic between Renovo area and gas drilling on the SR 664 plateau.	11/22/2014 9:30 PM
4	Shamokin Dam, Allenwood, Bellefonte	11/21/2014 3:42 PM
5	Throughout our hills	11/21/2014 2:16 PM
6	Samplings Dam; Lewisburg to Williamsport	11/21/2014 2:15 PM
7	Shamokin Dam, Selinsgrove and our neighbors in Northumberland and Sunbury.	10/27/2014 1:55 PM
8	Northumberland Borough	10/23/2014 9:32 AM
9	1. SR#274 & US11-15 intersection Duncannon. 2.SR#34 and Sr#850 intersection Shermans Dale 3.SR#274 double split and SR#34 Mecks Corner 4. Iron Bridge (state) replacement over Shermans Creek off SR#274 South West Madison Twp. Proposed replacement will be 13 Ft wide with weight limit. Stopping Fire Co trucks and farmers from crossing and discriminates Amish population. 1.3m ?????? 5.Dix Hill bridge (Twp) off SR#34 Centre Twp.	10/21/2014 1:52 PM
10	Boro of Lewistown, Pa. 17044	10/21/2014 11:48 AM
11	County of Perry is very rural and problems are across the whole county. We have 17,000 plus cars go over Sterretts Gap daily on a two lane highway. Route 15 north has some real restrictions. The southeast third of the county from Carroll Township through Oliver Township (going counter clockwise) are the areas most affected. This is with New Bloomfield being the center point.	10/21/2014 9:10 AM
12	Intersection of I-80 and I-99, traffic backup without a high speed interchange, very dangerous conditions in Spring And Marion Townships, Centre County	10/21/2014 8:12 AM
13	Paul Mack Blvd to Jay Street, Lock Haven City Main corridor to Rt. 120 , heavy truck traffic. Poor Road condition . Narrowing turning radius.	10/21/2014 7:51 AM
14	Small bridges	10/21/2014 1:42 AM
15	U.S. Route 11 between Bloomsburg and Berwick	10/14/2014 12:36 PM
16	Danville Borough	10/13/2014 1:42 PM
17	I-99 Route 322 - Potters Mills area "the missing link"	10/10/2014 4:21 PM
18	Route 11 and Ferry Street to Route 11 and 54	10/10/2014 7:49 AM
19	CSV Region Lower Anthracite Region, specifically Route 61 passing through Shamokin going down to 2 lanes in town with parking on both sides. Steep grades in the Shamokin/Coal Twp/Mt. Carmel Region	10/9/2014 10:27 AM
20	Congestion on the 11/15 corridor between Selinsgrove and interstate 80 connections. This will be a barrier removed after the bypass is completed. Curves and grading present challenges on rural routes. Truck routes (522 and 35) moving through boroughs continues to be a deterrent for primary residential communities in the county (Middleburg, Freeburg, and Beavertown). These more densely populated communities slow the traffic flow, but also are not ideal for heavy truck traffic. Intersections of 104 and 522 in Middleburg presents challenges for trucks making turns and pedestrian safety.	10/8/2014 11:27 AM

21	Rt. 11 becomes congested in Downtown Danville, Bloomsburg and Berwick due to intersections and narrow roads.	10/7/2014 2:47 PM
22	This is pervasive in the region	10/7/2014 2:18 PM
23	Main and Water Street intersection in Muncy Borough is biggest problem.	10/7/2014 9:37 AM
24	Former rail siding existed in Duncannon Borough, Newport Borough, Marysville Borough and perhaps Tuscarora Township across the Juniata River from Millerstown Borough.	10/7/2014 9:03 AM
25	Juniata County anywhere	10/7/2014 8:55 AM
26	Danville Borough (narrow roadways and very poor pavement - numerous instances)	10/6/2014 8:48 PM
27	Bypass called the Central Susquehanna Thruway needs to be built to relieve congestion in our towns. Allenwood, PA needs highway improvements to accommodate proposed industrial development there, and the county cannot afford to pay for it themselves.	10/6/2014 5:17 PM
28	Granville Twp industrial areas	10/6/2014 4:12 PM
29	SR 0015 congestion and delays; SR 0045 delays in Mifflinburg and Lewisburg Boroughs Weight restrictions exist on numerous bridges; MPO Staff can identify as they are too numerous to list.	10/6/2014 2:37 PM
30	Geisinger main campus and Woodbine Lane, Mahoning Twp. Railroad Street, Danville Borough. 1-80 interchange with Rte 54 and 642.	10/6/2014 1:20 PM
31	all of montour county	10/6/2014 1:14 PM
32	Rt 901. Rt 54. Rt 147	10/6/2014 1:12 PM
33	Central Susquehanna Valley Thruway (CSVt) hasn't been built yet.	10/6/2014 1:11 PM

**Q11 What additional amenities should be provided for the freight/logistics industry?
(Select all that apply)**

Answered: 39 Skipped: 10

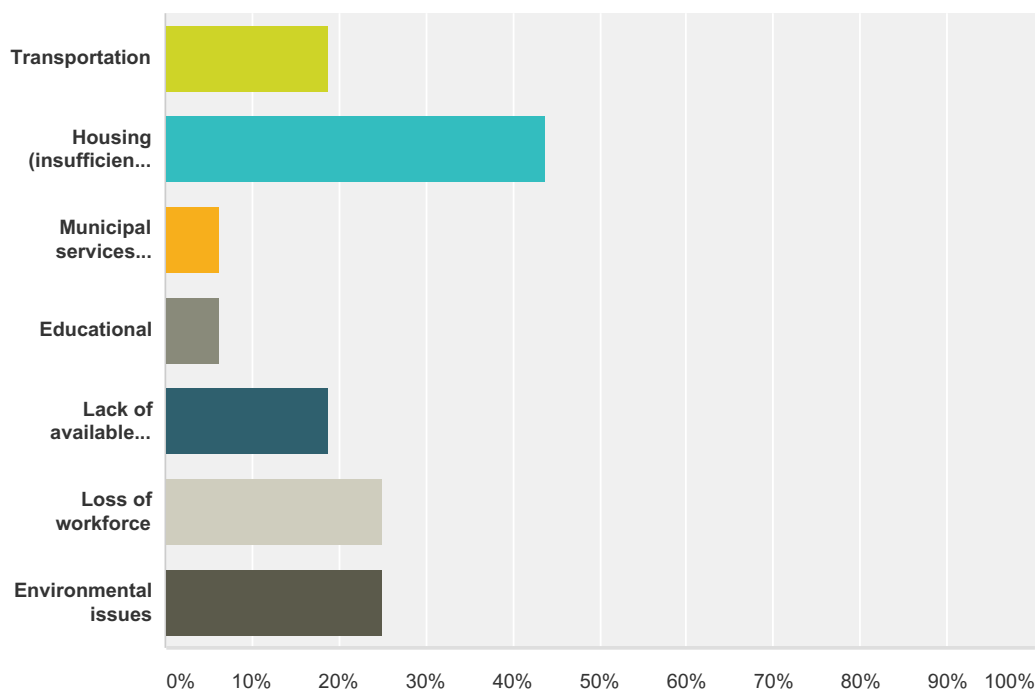


Answer Choices	Responses	
Access to Industrial or Business Parks	43.59%	17
Highway Ramps	2.56%	1
Highway Lane Capacity	30.77%	12
Increased Weight Limits for Trucks	12.82%	5
Defined Local Truck Routes	43.59%	17
Alternative Fueling Facilities (natural gas, electric, etc.)	51.28%	20

Intermodal Railroad Facilities	46.15%	18
Railroad Sidings	48.72%	19
Improved Rail/Highway Crossings	23.08%	9
Improved Signage	12.82%	5
Air Cargo Services	12.82%	5
Truck Rest Stop Facilities	2.56%	1
Total Respondents: 39		

Q12 Is your county/region experiencing any negative impacts from the natural gas industry? If so, choose from the following. (Select all that apply)

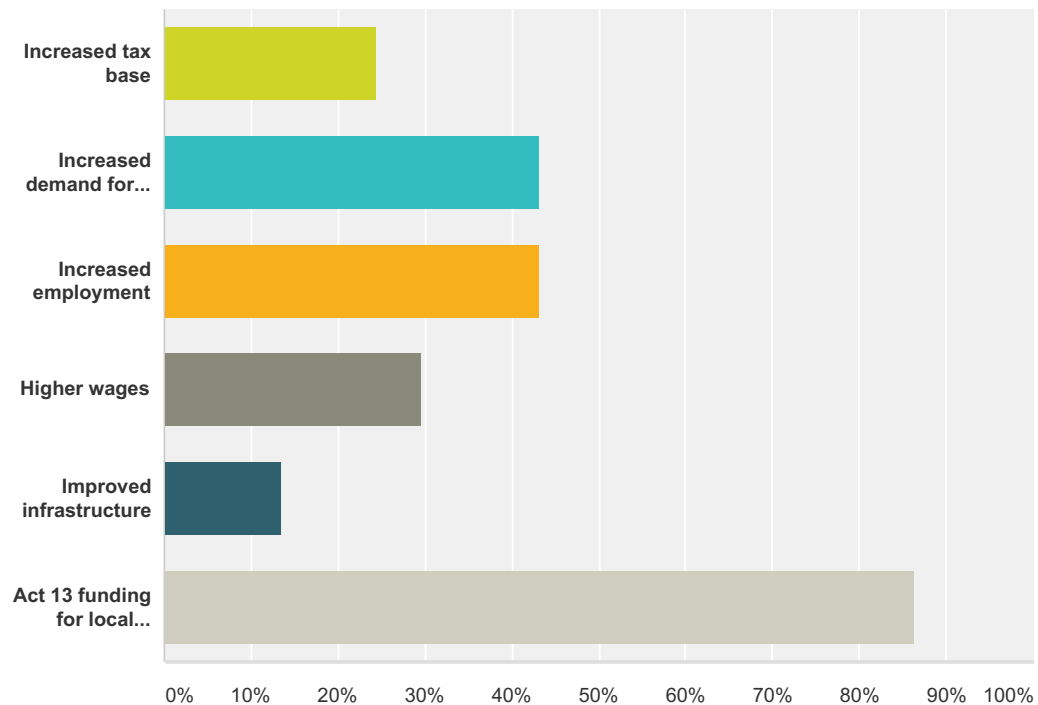
Answered: 16 Skipped: 33



Answer Choices	Responses
Transportation	18.75% 3
Housing (insufficient, high rental costs, etc.)	43.75% 7
Municipal services (sewer, water, police, fire, etc.)	6.25% 1
Educational	6.25% 1
Lack of available commercial/industrial space	18.75% 3
Loss of workforce	25.00% 4
Environmental issues	25.00% 4
Total Respondents: 16	

Q13 Is your county/region experiencing any positive impacts from the natural gas industry? If so, choose from the following. (Select all that apply)

Answered: 37 Skipped: 12



Answer Choices	Responses	
Increased tax base	24.32%	9
Increased demand for local services and products	43.24%	16
Increased employment	43.24%	16
Higher wages	29.73%	11
Improved infrastructure	13.51%	5
Act 13 funding for local governments	86.49%	32
Total Respondents: 37		

Q14 The Commonwealth offers free and low-cost services to businesses in the region. They include access to low-interest financing, help with obtaining government contracts, selling to international markets, and assistance to entrepreneurs and manufacturers. Are there other Commonwealth funded services that you would like to see available in the region? If so, please explain.

Answered: 19 Skipped: 30

#	Responses	Date
1	Funding to extend natural gas service lines to more communities. Funding to encourage more natural gas fueling stations.	11/22/2014 9:35 PM
2	Additional funding for short-term training for incumbent workers	11/21/2014 5:02 PM
3	A number of these programs are underfunded - more \$ need to be invested in economic development.	11/21/2014 2:18 PM
4	Funding should be restored to MELF	11/21/2014 2:17 PM
5	Those existing services should be more readily available.	10/27/2014 2:02 PM
6	I'd like to see how these could work for Perry County	10/21/2014 9:14 AM
7	Real dollars to bring in business and industry to the region.	10/21/2014 8:14 AM
8	The natural gas is here, but there is no funding available to support the infrastructure to get it into the homes and businesses.	10/21/2014 7:59 AM
9	More assistance to entrepreneurs and other start up businesses	10/14/2014 12:38 PM
10	Energy Efficiency Measures to help businesses lower overhead utility costs.	10/9/2014 10:30 AM
11	I would like to see increased opportunity to move truck traffic away from town centers. It would increase fuel efficiency for the transportation system and increase property values and downtown improvements. Gas service for business and homes continue to be a problem. Most business and home heating sources in the county require oil or propane. Funding for gas infrastructure would be appropriate.	10/8/2014 11:29 AM
12	- environmental and technical assistance for small businesses	10/7/2014 9:36 PM
13	Could training be available so that those planning to start a business could get information and focus on all aspect to reduce the possibility of failure.	10/7/2014 1:55 PM
14	It would be nice to see economic monies from the state's licensed gaming facilities extended to cover not only the host counties. There is obviously a much larger area of socio-economic impact.	10/7/2014 10:09 AM
15	Continue PIB loan program	10/7/2014 9:40 AM
16	Access to grant funding	10/6/2014 4:13 PM
17	1. Program(s) that help family-owned businesses transition to new ownership or restructure when one or more family members no longer want ownership in the business. 2. Program(s) that help existing businesses and start-ups establish employee stock ownership plans (ESOPs). 3. Program(s) that are specific to niche business development in agribusiness, tourism, and culture/heritage.	10/6/2014 3:35 PM
18	low interest mezzanine funding	10/6/2014 3:16 PM
19	Micro-loans for start-ups.	10/6/2014 1:13 PM

Q15 What other types of economic development projects or programs do you consider to be a priority? Please explain.

Answered: 24 Skipped: 25

#	Responses	Date
1	Someday we need the two lane of US 220 just north of I-80 to be made 4 lane and we need the high speed interchange at I-80 exit 178. Need I-99 completion.	11/22/2014 9:35 PM
2	Seed and early stage funding.	11/21/2014 2:18 PM
3	Building of infrastructure to further develop our natural gas resource and get the product to market.	11/21/2014 2:17 PM
4	Investment at Penn Valley Airport	10/27/2014 2:02 PM
5	Funding Tourism, Motels needed	10/21/2014 1:55 PM
6	All that create jobs and those that create property for taxing. It would be great to use existing property as well.	10/21/2014 9:14 AM
7	Monies to keep existing industry from leaving the area and the state.	10/21/2014 8:14 AM
8	The Grimm's Water Act must be appealed. The tax base is going to be destroyed when properties are abandoned .	10/21/2014 7:59 AM
9	Agriculture processing facilities	10/21/2014 1:44 AM
10	Review and restructuring of the local business and industry group. Questions continually arise about what is it they do, how do they do it, what have they accomplished over the years.	10/16/2014 9:30 AM
11	Grant monies for manufacturing or technology related enterprises	10/14/2014 12:38 PM
12	Fast track permitting for business relocation or expansion Business retention programs are vital, which GAT has a great program for assistance.	10/9/2014 10:30 AM
13	Helping businesses pursue low interest financing easily and also assisting with workforce development initiatives including manufacturing apprenticeship initiatives through CPWDC.	10/7/2014 2:49 PM
14	Achieving the KOZ Program designation for one site Identifying and moving forward with a business incubator opportunity Identifying and moving forward with a brownfields project	10/7/2014 10:09 AM
15	DCED / PennDOT MTF CDBG Brownfields	10/7/2014 9:40 AM
16	Workforce Development, WEDnet,	10/7/2014 9:26 AM
17	broadband, entrepreneurial development, tech-based business incubation	10/6/2014 11:36 PM
18	tourism-related infrastructure improvements	10/6/2014 8:50 PM
19	Building the CSVT. Dollars for site development of shovel ready sites. Rail development funding.	10/6/2014 5:20 PM
20	New Park development	10/6/2014 4:13 PM
21	layoff aversion services, tech conversion, advanced manufacturing common space	10/6/2014 3:16 PM
22	Meaningful and competitive incentives policies	10/6/2014 2:07 PM
23	Need to increase the length of piggy back trucks to 32 ft for interstate travel only.	10/6/2014 1:14 PM
24	Greater access to planned broadband.	10/6/2014 1:13 PM

Q16 Do you have any other comments, questions, or concerns?

Answered: 7 Skipped: 42

#	Responses	Date
1	Thanks SEDA-COG. I appreciate your services. It helps provide some continuity to the region's communities.	10/27/2014 2:02 PM
2	How do we get started with such a program in Perry County?	10/21/2014 9:14 AM
3	No	10/21/2014 8:14 AM
4	Government programs should be designed to assist citizens with services they otherwise could not afford. Yet the Grimm's water act will force people out of their homes.	10/21/2014 7:59 AM
5	No	10/14/2014 12:38 PM
6	With the number of pipelines running through Perry County and a significant electric power substation, it would seem the county should be looked at for electric power generation. A gas fired power generation plant similar to the Panda Liberty Power Plant Project in Asylum Township, Bradford County would seem to be a very real possibility for Perry County.	10/7/2014 10:09 AM
7	Thanks for asking for our input.	10/6/2014 1:13 PM

Q17 Please provide your contact information below. (Optional)

Answered: 25 Skipped: 24

Answer Choices	Responses	
Name	100.00%	25
Title	88.00%	22
Organization	92.00%	23
Phone	92.00%	23
Email	84.00%	21

Listing of Recent Plant Closings and Layoffs in the Region

Initial Report Date	Company	County	Closure or Downsizing	Number of Employees Affected
2014				
4/15/2014	Sykes	COLUMBIA	DOWNSIZING	67
6/6/2014	Healthcare Administrative Partners	COLUMBIA	CLOSURE	40
4/30/2014	B.J.s in Danville	MONTOUR	CLOSURE	50
11/19/2014	Merck Cherokee Pharmaceuticals	NORTHUMBERLAND	DOWNSIZING	25
5/28/2014	Catawissa Wood Company	NORTHUMBERLAND	DOWNSIZING	50
10/1/2014	Bimbo Bakeries	NORTHUMBERLAND	DOWNSIZING	30
4/28/2014	Pepsi	SNYDER	DOWNSIZING	3
5/14/2014	Sunbury Generation	SNYDER	CLOSURE	111
2013				
4/4/2013	South Hills School of Business and Technology	CENTRE	CLOSURE	7
6/26/2013	Arris	CENTRE	CLOSURE	56
7/19/2013	Windsor	COLUMBIA	CLOSURE	141
1/31/2013	Ames True Tember	MIFFLIN	CLOSURE	175
1/23/2013	First Savings Financial Insurance	MONTOUR	CLOSURE	Not Reported
2/4/2013	Fenco	NORTHUMBERLAND	CLOSURE	53
4/8/2013	West Point Mining	NORTHUMBERLAND	CLOSURE	20
5/29/2013	Milton Steel	NORTHUMBERLAND	DOWNSIZING	38
8/31/2013	Merck Cherokee Pharmaceuticals	NORTHUMBERLAND	DOWNSIZING	44
11/8/2013	Crafco	NORTHUMBERLAND	CLOSURE	9
10/25/2013	Furmanos	NORTHUMBERLAND	DOWNSIZING	18
2/13/2013	Alpha Mills Corporation	SNYDER	CLOSURE	20
2/13/2013	National Beef	SNYDER	DOWNSIZING	150
4/24/2013	Ram Industrial Services (aka Wagners Sales)	SNYDER	CLOSURE	Not Reported
6/1/2013	Gilberts Garden Center	SNYDER	CLOSURE	Not Reported
3/13/2013	Joe Sharp Builder	UNION	CLOSURE	20
4/10/2013	TPX Thermal Product Solutions	UNION	DOWNSIZING	12
Source: Central Pennsylvania Workforce Development Corporation, Rapid Response				

2015 - 2016 EDA Project Priority List

2015-2016 EDA PRIORITY PROJECTS: SEDA-COG EDD

Description & Location		Related Goals #	Funding Sources				Estimated Total Cost	Agencies Responsible	# Jobs Created/Retained	Other Comments
			Federal	State	Local	Other				
PUBLIC WORKS										
1.	Trenton Avenue and West Fourth Street Water Transmission Main and Distribution System Improvements	1,3	EDA	PennVest			\$4,900,000	WMWA-WSA	Retain 2,400 jobs	Installation of approximately 6,500 L.F. of 24" water main and 6,100 L.F. of 12" water main to allow for the expansion of business and industry as well as attract new businesses in this industrialized area of Williamsport.
2.	MCIDC Business Center Renovations (Mifflin County)	1,3	EDA				\$1,500,000	MCIDC	Retain 85 jobs/Create 50 jobs	Modernization and rehabilitation of 112,000 s.f. of multi-tenant industrial space owned and managed by MCIDC. The proposed improvements include roof, floor, docks, parking lot, and energy upgrades, such as insulation and alternative energy provisions.
3.	Philipsburg Hospital Property Redevelopment Project (Centre County)	1, 3	EDA \$1,000,000	DCED \$1,250,000	\$250,000		\$2,500,000	MVEDP	Create 50 jobs	Demolition, clearing, and infrastructure development on the former Philipsburg Hospital Property for use as a future business site. Securing site control and developing a financing package is necessary for this project to progress.
4.	Juniata County Industrial Park Infrastructure Development Project (Juniata County)	1,3	EDA \$1,000,000	DCED \$1,500,000	\$500,000		\$3,000,000	JB1	Unknown	Infrastructure development to include water, sewer, and access road for a site in Juniata County. Securing site control and developing a financing package is necessary for this project to progress.
5.	Life Sciences Center (Mifflin County)	1,3	EDA and ARC	DCED	Local		\$2,000,000	MCIDC	Create 300 jobs	Infrastructure extensions and site development at the proposed 50 acre Life Sciences Complex off of the Rt. 322 Burnham Interchange.
6.	Central Susquehanna Valley Transportation Project (CSV/T)	3	Multiple Federal Sources	PennDOT			\$604,000,000	PennDOT	Unknown	Important regional project to address the current and future transportation needs of the Central Susquehanna Valley Corridor. Improvements will address congestion, safety problems, and promote development on existing PA Routes 11, 15, and 147.
7.	Completion of Four-Lane U.S. Rt. 322	3						PennDOT	Unknown	Important regional transportation project which involves the completion of the four-lane limited access system for US Route 322 which would connect the Harrisburg market with the State College area and the I-99 Corridor.
8.	Interstate 80/Interstate 99 Interchange (Centre County)	3	Federal & ARC ADHS				\$162,000,000	PennDOT/Centre County MPO	Unknown	Important regional project to construct two interchanges to improve safety and traffic flow. The first involves a high speed interchange in Marion Township to connect I-80 and I-99 and a second interchange that would give local traffic access to the highways.
9.	Completion of Interstate 99 (Regional)	3	Multiple Federal Sources	PennDOT			\$600,000,000		Unknown	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.
10.	MCIDC Plaza Modernization (Mifflin County)	1,3	EDA	DCED	Local		\$3,000,000	MCIDC	Retain 100 jobs	Demolition, redevelopment, and infrastructure improvements for Bldg.5 and adjacent parcels at the MCIDC Plaza.
11.	Timber Run Industrial Park (Lycoming County)	1,3	EDA	DCED	Local		Unknown	Lycoming County	Unknown	Infrastructure development of a 300-acre industrial site.
12.	Great Stream Commons (Phase II) (Union County)	1,3	EDA	DCED \$2,500,000			\$3,850,000	UCIDC	1000	Infrastructure expansion to include gas, water, sewer, and access road for Phase II of the KOZ designated park that includes 300+ acres. Significant development of the EDA funded Phase 1 must occur before project could seek additional EDA funding.
13.	Montour County Business Park	1,3		DCED	Local		\$3,000,000	GSVCC	Unknown	Infrastructure development to include gas, water, sewer, and access road for a site yet to be determined in Montour County.
14.	Regional Telecommunications Implementation Project (Wireless)	1,3,6	EDA \$600,000		\$1,200,000		\$1,800,000	SEDA-COG	Unknown	Provide broadband technology to under-served areas throughout the SEDA-COG region.

2015-2016 EDA PRIORITY PROJECTS: SEDA-COG EDD

Description & Location		Related Goals #	Funding Sources			Estimated Total Cost	Agencies Responsible	# Jobs Created/Retained	Other Comments
			Federal	State	Local				
TECHNICAL ASSISTANCE									
1.	Gas Utilization Expansion Initiative	1,2,3,4	ARC/EDA \$50,000	DCED	Local	\$50,000	SEDA-COG		To develop and formalize a replicable process model to identify and prioritize suitable targeted investment areas ("TIAs") for natural gas distribution line extensions to commercial, industrial, and residential areas that are currently unserved or underserved.
2.	Manufacturer Energy Assessment Program	1,2,4	EDA	DCED	Local	Unknown	SEDA-COG ERC	Unknown	Assist manufacturers in the 11-county region to reduce energy costs by offering technical assistance and low cost energy assessments by qualified contractors. These assessments will focus on both energy efficiency and renewable energy measures.
3.	Revolving Loan Fund Recapitalization	1,7	EDA \$100,000	DCED	Local	\$200,000	SEDA-COG Finance Program		Recapitalize the SEDA-COG EDA Revolving Loan Fund, which will serve as an integral part of the region's ongoing PREP Financing Program. Without additional funding for the SEDA-COG RLF, the ability to provide financial assistance to businesses considering growth and expansion in the District will be limited.
4.	Regional PREP Program	1,7	ARC \$400,000	DCED \$300,000	SEDA-COG \$100,000	\$800,000	SEDA-COG		Funds are needed to continue regional technical assistance to small- and medium-sized businesses in export development, loan packaging, and procurement outreach activities.



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