COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

South Central Pennsylvania Partnership for Regional Economic Performance (PREP)

Pennsylvania Counties of Adams, Berks, Cumberland, Dauphin, Franklin, Lancaster, Lebanon, Perry, and York

IN PARTNERSHIP WITH:

HARRISBURG REGIONAL CHAMBER & CREDC SM

ADAMS ECONOMIC ALLIANCE

DAUPHIN COUNTY
MIKE PRIES - CHAD SAYLOR - GEORGE P. HARTWICK III

LIBERTY ★ INDEPENDENCE ★ VIRTUE ★ BERKS ★ COUNTY

FCADC
FRANKLIN COUNTY AREA DEVELOPMENT CORPORATION

LANCASTER COUNTY, PA
Economic Development Company

PERRY COUNTY
PCEDA
ECONOMIC DEVELOPMENT AUTHORITY

cumberland Valley pa
CUMBERLAND AREA ECONOMIC DEVELOPMENT CORPORATION | VISITORS BUREAU

LEBANON VALLEY
ECONOMIC DEVELOPMENT CORPORATION

York County Economic Alliance

PREPARED BY:

THOMAS P. MILLER & ASSOCIATES

Thomas P. Miller & Associates, LLC (TPMA) envisions a world that thinks strategically, works collaboratively, and acts sustainably. In keeping with that vision, we empower organizations and communities through strategic partnerships and informed solutions that create positive, sustainable change. Our economic development approach aims to achieve community resiliency through economic diversity, resource alignment, and community vibrancy. TPMA's Economic Development and Community Resiliency Team provides expertise in assessing markets, identifying business sector opportunities, building innovation and entrepreneurial ecosystems, and conducting housing assessments. The South Central Pennsylvania Economic Development Partnership (PREP) contracted with TPMA for the development of this Comprehensive Economic Development Strategy. A variety of data sources were used to collect data. Attempts were made to verify data as much as possible.

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Executive Summary

SCPA COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

The South Central Pennsylvania Partnership for Regional Economic Performance (PREP) is a regional partnership designated by the Pennsylvania Department of Community & Economic Development. Statewide, the PREP Program is designed to encourage regional coordination of economic development efforts and superior customer service to the business community as part of a comprehensive, statewide economic development delivery strategy.

Capital Region Economic Development Corporation (CREDC), as the Coordinator of the South Central PA PREP, is responsible for developing and maintaining the regional Comprehensive Economic Development Strategy (CEDS) which provides a plan for growing and sustaining the economic welfare of the region, which consists of the following nine counties: Adams, Berks, Cumberland, Dauphin, Franklin, Lancaster, Lebanon, Perry, and York. This plan represents a partnership between all nine county Economic Development Corporations, local county governments, and other regional stakeholders. The strategy provides a structured plan and goals that will help the region achieve economic success with proper implementation. Our strategy-driven plan was developed by a diverse workgroup of local representatives from the private, public, workforce, education, and nonprofit sectors.

The South Central PA CEDS addresses the five main elements of a CEDS, including:

- SUMMARY BACKGROUND
- SWOT ANALYSIS
- STRATEGIC DIRECTION
- EVALUATION FRAMEWORK
- ECONOMIC RESILIENCE

Population Characteristics

STRENGTHS

- Geographic Location
- Economic Well-Being
- Sense of Place
- Tourism & Recreation

WEAKNESSES

- Inequity Concerns
- Workforce Challenges
- Lack of Transportation/Infrastructure Improvements
- Regional Divisions

OPPORTUNITIES

- Building Regional Economic Resiliency
- Building Regional Collaboration
- Increase Collaboration Between Higher Educational Institutions
- Unify Regional Tourism & Recreation Efforts

THREATS

- Regional Labor Force Shortage
- Leadership Dissonance
- Lack of Regional Cooperation
- Declining Quality of Life Features

Regional Stakeholders were asked what resiliency strategies they believed were critical to implementing the Strategic Action Plan. Some stakeholder recommendations included 1) plan for the impacts of climate change, including population shifts; 2) continue emphasizing a diverse economy that does not focus too heavily on one industry; 3) support career opportunities for area students so they do not need to leave the area for employment; 4) develop or utilize County Economic Recovery teams; 6) apply for and secure funding to improve flooding resiliency (the largest natural threat in the area); and 7) conduct effective scenario planning.

Our 2023 CEDS is built on four priority goals for the region that will be the foundation of this plan:

1 Foster & Maintain an Economically Competitive Region

OBJECTIVE I. PROMOTE INTENTIONAL ECONOMIC GROWTH
OBJECTIVE II. ESTABLISH AND MAINTAIN A BUSINESS-FOCUSED REGION
OBJECTIVE III. IMPROVE AND DEVELOP REGIONAL COLLABORATION

2 Build, Develop, & Maintain the Region's Talent

OBJECTIVE I. BUILD THE REGIONAL TALENT PIPELINE
OBJECTIVE II. INCREASE REGIONAL WORKFORCE COLLABORATION

3 Improve & Modernize Infrastructure Networks to Maintain Locational Advantages

OBJECTIVE I. ADVOCATE FOR A REGIONAL GROWTH PLAN

4 Enhance & Promote the Development of Regional Quality of Life Features

OBJECTIVE I. GENERATE EQUITABLE AND INCLUSIVE ENGAGEMENT
OBJECTIVE II. ADDRESS CRITICAL QUALITY-OF-LIFE NEEDS
OBJECTIVE III. INVEST IN REGIONAL PLACEMAKING EFFORTS
OBJECTIVE IV. COLLABORATIVELY PROMOTE REGIONAL TOURISM ASSETS

An Evaluation Framework has been developed to gauge progress on the successful implementation of the overall CEDS while providing information for the CEDS Annual Performance Report, as required by EDA. Annually, the South Central PA PREP will distribute the results of an annual evaluation over the next five years. The South Central PA PREP will adjust the goals, objectives, and strategies as needed throughout the five-year planning period as needed or when additional strengths, weaknesses, threats, and opportunities are identified.

SUMMARY

The 2023 South Central Pennsylvania Partnership for Regional Economic Performance Comprehensive Economic Development Strategy outlines an approach to coordinate growth and prosperity that builds on the region's strengths, prioritizes key regional industry clusters, and emphasizes collaboration and unity.

Additionally, with a focus on economic resilience and equity, these strategic components comprise an optimal foundation for securing the future economic prosperity of the South Central PA region. The SC PA PREP invites and encourages all citizens of the region to strive to implement this plan in their own communities.

About South Central Pennsylvania Partnership for Regional Economic Performance (PREP)

The South Central Pennsylvania Partnership for Regional Economic Performance (PREP) is a regional partnership designated by the Pennsylvania Department of Community & Economic Development. Statewide, the PREP Program is designed to encourage regional coordination of economic development efforts and superior customer service to the business community as part of a comprehensive, statewide economic development delivery strategy.

PREP is designed to help entrepreneurs & innovators successfully jumpstart their businesses, promote a diversified and innovative regional economic base, advocate sustainable growth, and support job development through expansion, retention, and recruitment of business and industry. By harnessing our collective resources of local, regional, and state experts in business formation and development, PREP is helping to create jobs and build wealth for the South Central region of the Commonwealth of Pennsylvania.

The South Central PA PREP as coordinated by Capital Region Economic Development Corporation (CREDC) is responsible for developing and maintaining the regional Comprehensive Economic Development Strategy (CEDS). The South Central Pennsylvania Regional CEDS provides a plan for growing and sustaining the economic welfare of the region, which consists of the following nine counties: Adams, Berks, Cumberland, Dauphin, Franklin, Lancaster, Lebanon, Perry, and York. The strategy provides a structured plan and goals that will help the region achieve economic success with proper implementation. Our strategy-driven plan was developed by a diverse workgroup of local representatives from the private, public, workforce, education, and nonprofit sectors.

Together we will work to ensure the goals, objectives, and strategies described in the CEDS for our region are being implemented either directly or by other groups and organizations within the ecosystem across our respective areas. We seek to share information and better coordinate efforts within the ecosystem to support results from implementing the activities described in the CEDS. This group does not seek to duplicate the work of groups within the reigon that are making progress in these areas. Rather, we seek to amplify their intended results in line with the CEDS and whenever possible coordinate improvement efforts on a regional basis. The PREP partners further agree, should the Commonwealth's PREP program be changed in a way to negatively impact our efforts or be disbanded by any change of administration, we will continue our collaborative efforts and meet with regularity to share information and support the activities necessary to uphold the CEDS and continue to contribute positively to our regional economy's improvement and sustainability.


Dauphin
Berks
Perry
Lebanon
Cumberland
Lancaster
Franklin
York
Adams

What is a CEDS?

A Comprehensive Economic Development Strategy (CEDS) is a unified, regionally focused action plan that provides a framework for an area's economic growth and community development. The CEDS serves as an economic blueprint for the region and establishes a process that will help create jobs, foster more stable and diversified economies, and improve living conditions. It is a continuous planning process that addresses the economic challenges and opportunities of an area, providing objectives to strengthen economies through regional strategies which focus on economic and workforce development, quality of life, transportation, and other vital infrastructure. This five-year CEDS will guide the direction of the SC PREP region from 2023-2028.

The benefits of developing a CEDS include:

The CEDS helps to build on the strengths of the region, as well as identify gaps in resources or expertise that need to be addressed.

The CEDS planning process can facilitate regional collaboration, expand supply chains, and grow and support new industry clusters.

Regions are more likely to attract federal funds and technical assistance by demonstrating resources are used efficiently and effectively.

The CEDS process can make the region more resilient and better positioned to plan for, respond to, and recover from natural disasters and economic shocks.

The CEDS can be much more than just a static document, but rather an engaging platform that generates region-wide discussions and serves as a call to action for economic development.

An effective CEDS planning process identifies locally-grown strategies that will guide regional economic development, encourage partnerships and collaboration, and improve economic outcomes and overall quality of life in the region.

Regionalism-to unite and strengthen the ties between each community.

SCPA COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

This is the 2023 Five-Year Update to the 2017 South Central Team PA PREP CEDS. This plan represents a partnership between the SC PA PREP and all nine county Economic Development Corporations, local county governments, and other regional stakeholders. This CEDS was devised with a comprehensive economic development planning approach to support the goal of making the region globally competitive, vibrant, and resilient with a common vision to "support sustainable, economic vitality throughout South Central Pennsylvania."

The purpose of the CEDS is to plan a coordinated approach to the economic development of the region. More broadly, its purpose is to promote the overall economic prosperity of the area and its people while assuring the livability of its communities and the enduring quality of the environment that is so valued by the people who live here.

This 2023 CEDS Strategic Plan reflects a holistic, modern view of economic development. While economic resiliency is one part of the initiative going forward, there is a wider approach needed that includes business retention and expansion, entrepreneurship, talent, and entrepreneurial development. With an additional focus on quality-of-life factors and economic equity and mobility, these components comprise an optimal community spectrum for future economic prosperity for the South Central PA region.

Our 2023 CEDS is built on four priority goals for the region that will be the foundation of this plan:

1. Foster & Maintain an Economically Competitive Region
2. Build, Develop, & Maintain the Region's Talent
3. Improve & Modernize Infrastructure Networks to Maintain Locational Advantages
4. Enhance & Promote the Development of Regional Quality of Life Features

The South Central PA CEDS addresses the five main elements of a CEDS, including:

1. **SUMMARY BACKGROUND**

   Summary Background of the region's economic conditions and demographics

2. **SWOT ANALYSIS**

   SWOT Analysis to identify the region's strengths, weaknesses, opportunities, and threats

3. **STRATEGIC DIRECTION**

   Strategic Direction to incorporate tactics identified through the planning process, other plans, and stakeholder feedback to develop the priority strategies for the region

4. **EVALUATION FRAMEWORK**

   Evaluation Framework to identify and monitor performance measures associated with the plan.

5. **ECONOMIC RESILIENCE**

   Economic Resilience to assess and develop strategies for improving the region's ability to prepare for and respond to economic shocks.

HOW TO USE THE SOUTH CENTRAL PENNSYLVANIA CEDS PLAN

Our 2023 Comprehensive Economic Development Strategy outlines an approach to coordinate growth and prosperity that builds on the region's strengths, prioritizes key regional priorities, and emphasizes intentional collaboration. The 2023-2028 South Central PA CEDS was designed for regional, city, and county economic development practitioners, business leaders, elected officials, and stakeholders implementing programs that support the growth of businesses and enhance opportunities for individuals to access economic mobility in the South Central Pennsylvania region. The SC PA PREP invites and encourages all citizens of the South Central PA region to strive to implement this plan in their own communities.

The key component of this strategic planning process is to maintain and bolster the regional economy and job growth by continued linkage of the region's workforce skills and strengths, educational assets, and amenities to the needs of high-growth and emerging industries. We believe our region, with cohesive and realistic plans, will grow sustainability by maximizing assets in each of the nine counties.

Summary Background

The South Central CEDS Region is one of the fastest-growing, dynamic, and productive regions in the Commonwealth of Pennsylvania. The cultural makeup and business-savvy nature of the residents in the region have produced a highly skilled, well-trained, dependable, and loyal workforce. With a population of more than 2.4 million people (and growing) encompassing nine counties, there is access to skilled workers, recreation, tourist destinations, and major employers throughout the region.

The Region is strategically located in Pennsylvania and close to major domestic and international markets. South Central PA is only a four-hour drive or less from the large metros of Philadelphia, Pennsylvania, Pittsburgh, Pennsylvania, Baltimore, Maryland, and Washington D.C. Within a 500-mile radius of the Region lies 40% of the United States population and more than 60% of Canada's population. An extensive inter-modal transportation system of highways, railroads, ports, and airports easily moves people and goods to these vital markets. The opportunities that are available given that the region is within several hours to a one-day drive from some of the richest consumer and industrial markets within the United States and Canada present an unmatched opportunity.

Cultural Assets

With a population of more than 2.4 million people and encompassing nine counties, there is access to skilled workers, recreation, tourist destinations, and major employers throughout the region. South Central Pennsylvania is home to major tourist attractions like Gettysburg National Military Park, The Hershey Company, Hershey Park, Amish Country, and the State's Capital, the City of Harrisburg. The region is known for both its urban and rural assets. This region holds opportunities to enjoy the historic, agricultural, and natural scenery while also enjoying the nightlife and amenities of the major metros of the area. Small-town living, big-city, outdoor recreation, arts and music, and historic attractions-there is something for everyone.

ADAMS COUNTY is home to several large tourist attractions and prominent townso and is home to Gettysburg National Military Park. The county sees thousands of tourists enjoying Civil War tourism. Recreation and forestry assets within the county include Eisenhower National Historic Site, Caledonia State Park, and Michaux State Forest.

BERKS COUNTY is home to a variety of beautiful scenery and historical landmarks. Home to the Daniel Boone and Conrad Weiser Homestead, the County holds rich history for South Central Pennsylvania. The Central PA African American Museum is just east of Reading, which played an important role in the Underground Railroad. The Santander Arena, Berkshire Mall, and Berks Jazz fests are just a few of the recreation assets in Berks County.

CUMBERLAND COUNTY holds major community assets like the Appalachian Trail, the U.S. Army Heritage and Education Center, and the Colonel Denning State Park. But these are just a few of the many recreational and forestry assets in Cumberland County.

DAUPHIN COUNTY is home to several large tourist attractions and prominent towns. Harrisburg, the Capital City, is the urban nucleus of Dauphin County. It is the region's cultural, business and government center. Beautifully situated on the mile-wide Susquehanna River and back-dropped by the Blue Ridge Mountains, Harrisburg has merged big-city influence and sophistication with small-town friendliness and charm.

FRANKLIN COUNTY is one of the smaller counties in the region (by population) low traffic, three universities, and beautiful outdoor places (including forests, valleys, mountains). Mont Alto State Park, Buchanan's Birthplace State Park, and Pine Grove Furnace State Park are some of the forestry and recreation assets in the county.

LANCASTER COUNTY is home to several large tourist attractions and prominent towns, not to mention it holds the longest established and largest Amish populations in the United States. Lush farmlands, agriculture, and multiple state parks are home to Lancaster County.

LEBANON COUNTY is home to several nationally registered historic sites, including St. Lukes Episcopal Church and the Waterville Bridge. The county holds several state parks including Memorial Lake State Park, Swatara State Park, and Mount Gretna Lake.

PERRY COUNTY has a "down home" feel that welcomes the small-town living lifestyle. With several protected areas including Fowlers Hollow State Park, Little Buffalo State Park, and Big Spring State Forest Picnic Area, Perry County has an abundance of natural and scenic beauty.

YORK COUNTY, the "Snack Food Capital of the World", is home to companies like Utz Brands Inc and Snyder's of Hanover. Additionally, York County is known for its 4,500 acres of public park land and miles upon miles of hiking and biking trails. The county holds recreation and forestry assets such as Codorus State Park, York County Heritage Rail Trail, and Samuel Lewis State Park.


Perry
Dauphin
Lebanon
Berks
Cumberland
Lancaster
Franklin
Adams
York

COMMUNITY CULTURE

As seen in the community indicators below, the number of millennials (the generation born approximately between 1980-1995) and the retirement risk (workers approaching age of retirement) are about average, compared to the national average for an area of comparable size. Racial diversity in the area is low, compared to the national average. The number of veterans living in the South Central Region is slightly higher than the national average. Compared to the national average, the local rate of violent crime and property crime is significantly lower.

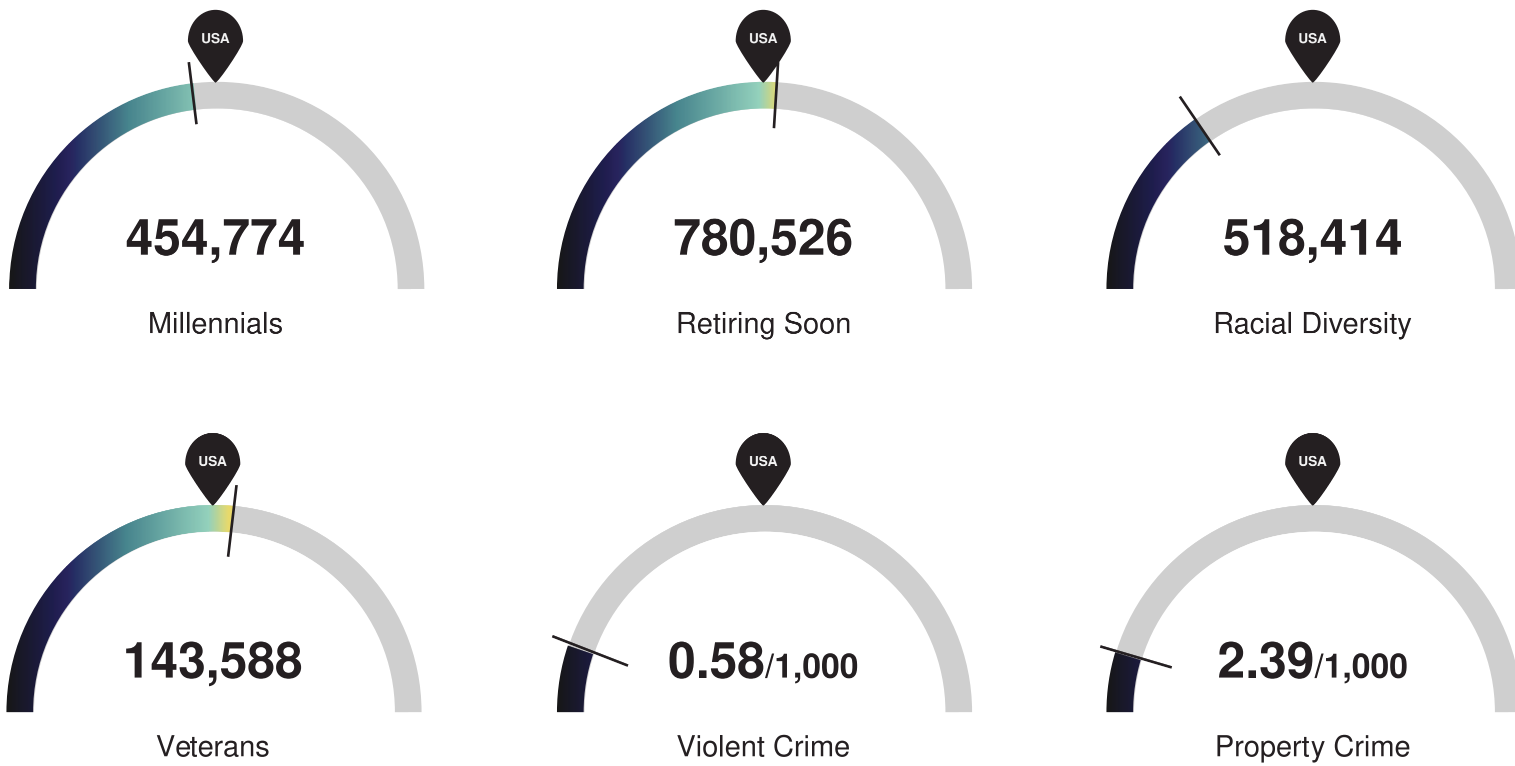


Figure 1: Population characteristics. Source: Lightcast, retrieved 2022.

URBAN AND RURAL

The South Central Region includes a mix of urban and rural areas. According to the Center for Rural Pennsylvania, of the nine counties in the region, three are considered rural (Adams, Franklin, and Perry), while the others are considered urban. The Center for Rural Pennsylvania defines a county as being rural based on population density. If the number of people per square mile is less than 291, the average population density throughout the state, it is considered rural. According to the Center's definition, there are 48 rural counties and 19 urban counties in Pennsylvania.

The Appalachian Regional Commission (ARC) currently serves Perry County, the only designated ARC county in South Central Pennsylvania. The ARC is an economic development partnership agency of the federal government with thirteen state governments (including Pennsylvania), with a focus on investing and economic growth in the United States Appalachia.

ANNUAL TOURISM SPENDING

Although the Commonwealth's tourism industry saw negative impacts during the COVID-19 pandemic, the industry has remained resilient and remains a critical economic driver of both the state and region's economy. Tourism provides an important economic input the "Dutch Country Roads" region of Pennsylvania. In 2020, the region ranked first among the state's tourism regions in total visitor spending. Despite seeing significant declines in 2020 due to the Covid-19 pandemic, tourists still spend approximately $5.9 billion in the region, with Dauphin and Lancaster counties drawing in the most tourism spending (see Figure 2). The tourism industry supported over 52,000 jobs in the region, about 8.4% of all employment in the region, and provided over $1.7 billion in labor income, about 6.4% of all labor income in the region (see Table 1).

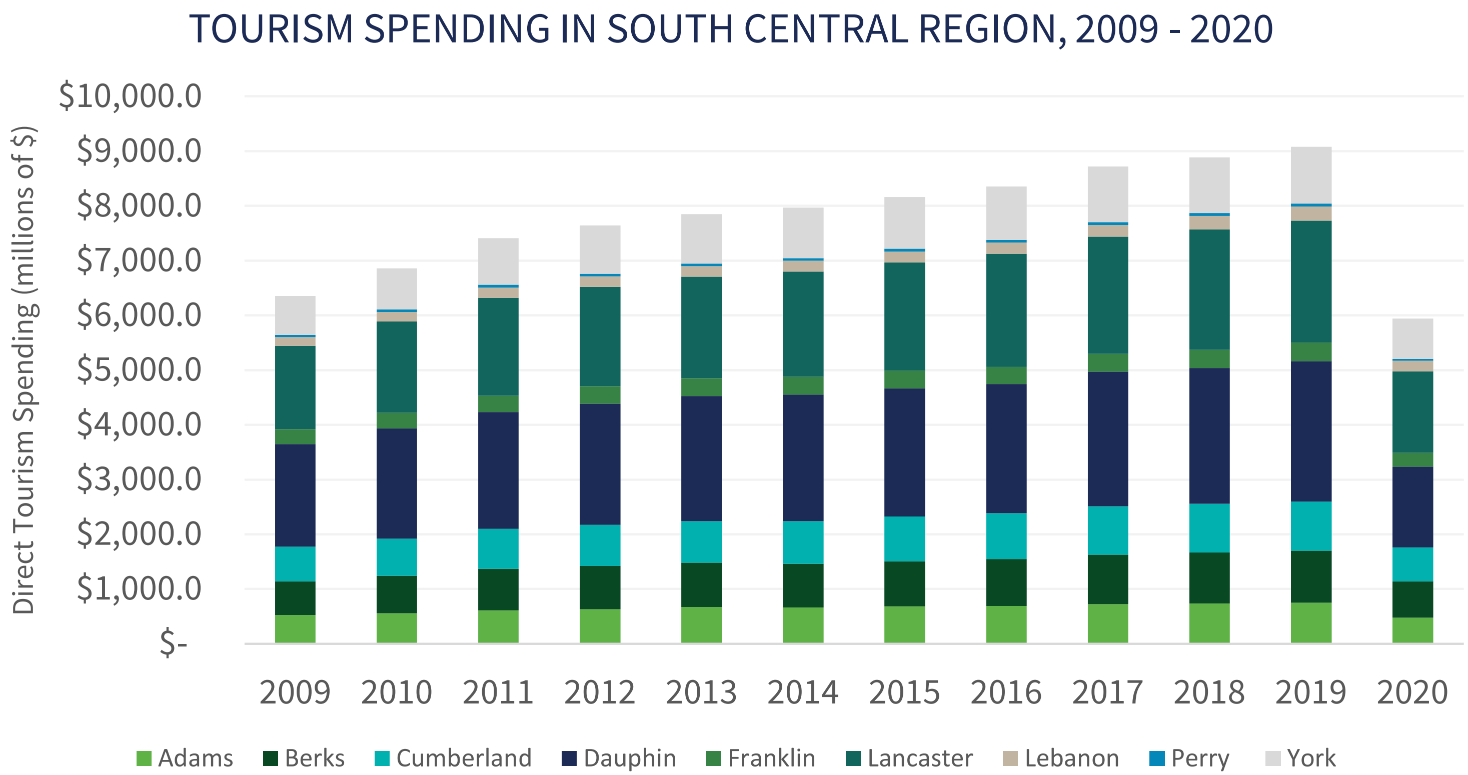


Figure 2: Annual Tourism Spending, 2009 to 2020. Source: Economic Impact of Travel and Tourism in Pennsylvania 2020 Report, retrieved 2022.

County	Tourism Spending	Employment	Labor Income	State/Local Taxes	Federal Taxes
Adams	$480.5	4143	$121.4	$27.5	$32.7
Berks	$661.5	5469	$177.4	$38.8	$46.7
Cumberland	$617.5	5116	$159.8	$35.3	$42.6
Dauphin	$1,475.3	14578	$534.4	$101.7	$127.0
Franklin	$251.0	2148	$61.5	$14.2	$16.7
Lancaster	$1,495.0	13151	$403.8	$89.0	$106.0
Lebanon	$187.2	1441	$45.7	$10.6	$12.5
Perry	$36.7	304	$7.1	$1.8	$2.1
York	$736.8	6512	$201.6	$43.8	$52.7
Total	$5,941.4	52863	$1,712.7	$362.6	$439.0

Table 1: 2020 Direct Tourism Impacts. All values are in millions, besides employment (in units). Values may not sum to totals due to rounding. Source: Economic Impact of Travel and Tourism in Pennsylvania 2020 Report, retrieved 2022.

Natural Assets

South Central Pennsylvania has a plethora of natural assets, including National Parks, State Parks, preservation programs, and a rich history of agriculture. These assets are directly linked to the unique tourism experiences offered in the region, creating economic growth within the tourism sector.

SCPA NATIONAL PARKS, TRAILS, AND HISTORIC SITES

South Central Pennsylvania is home to one National Park and two National trails, and one National Historic Site. The 2,175-mile-long Appalachian Trail stretching from Georgia to Maine, sees several million visitors annually. Some visitors will only hike a few miles, but others may hike for weeks or months.

The Captain John Smith Chesapeake National Historic Trail, a 3,000-mile-long trail, stretching from Virginia to New York, expands into the South Central region of Pennsylvania. Like the Appalachian Trail, this trail also sees millions of visitors each year.

The Eisenhower National Historic Site is in Gettysburg, just adjacent to the Gettysburg Battlefield. This Historic Site is the estate of the 34th President of the Unted states, Dwight D. Eisenhower. Visitors traveling within the Gettysburg National Military Park typically visit this historic site during their time in Adams County.

One of the most well-known National Military Parks in the United States, is the Gettysburg National Miliary Park in Adams County. The park holds the famous location of the Battle of Gettysburg, the Civil War's bloodiest battle and the inspiration for President Abraham Lincoln's immortal "Gettysburg Address". This 6,032-acre National Park sees over 2 million visitors annually.

National Park/Trail/Historic Site	County(s)	Significance
Appalachian National Scenic Trail	Berks, Cumberland, Dauphin, Franklin, Lebanon, Perry	The Appalachian Trail is a 2,180+ mile long public footpath that traverses the scenic, wooded, pastoral, wild, and culturally resonant lands of the Appalachian Mountains.
Captain John Smith Chesapeake National Historic Trail	Dauphin, Lancaster	When Englishman Captain John Smith explored the Bay in 1608, he documented hundreds of American Indian communities.
Eisenhower National Historic Site	Adams	The Eisenhower National Historic Site preserves the farm and home of General and 34th President Dwight D. Eisenhower, which is adjacent to the Gettysburg battlefield.
Gettysburg National Military Park	Adams	The Battle of Gettysburg was the Civil War's bloodiest battle and was also the inspiration for President Abraham Lincoln's immortal "Gettysburg Address".

Table 2: National Park Service, Pennsylvania State Map

SCPA STATE PARKS

South Central Pennsylvania is home to twenty designated state parks, with nearly 25,000 acres of land to explore. All nine counties have at least one state park within their county. The most common recreational activities in these parks include hiking, picnicking, camping, fishing, hunting, and boating.

PENNSYLVANIA HERITAGE AREAS PROGRAM

The Pennsylvania Heritage Areas Program is a multi-region asset-based economic development program rooted in the commonwealth's rich natural, cultural, and industrial history. The Pennsylvania Heritage Areas Program, administered by Pennsylvania's Department of Conservation & Natural Resources (DCNS) Bureau of recreation and Conservation, covers eight of the nine SCPA counties, with four distinct Heritage Areas. Heritage Areas create cross-sector partnerships that enhance a region's "sense of place" and strengthen regional economies. These partnerships create vibrant livable communities that attract private investment and house the products and places that drive Pennsylvania's tourism industry. National Heritage Areas are designated by the United States Congress where natural, cultural, historic, and recreational resources combine to form a cohesive, nationally distinctive landscape.

County(s)	State Park	Acres
Adams/Franklin	Caledonia	1,125
Berks/Chester*	French Creek	7,339
Berks	Nolde Forest Environnemental Education Center	665
Cumberland	Colonel Denning	273
	Kings Gap Environmental Education & Training Center	1,451
	Pine Grove furnace	696
Dauphin	Boyd Big Tree Preserve Conservation Area	914
	Joseph E. Ibberson Conservation Area	350
Franklin	Cowans Gap (shared with Fulton County)	1,085
	Buchanan's Birthplace	18.5
	Mont Alto	24
Lancaster	Susquehannock	224
Lebanon	Swatara (shared with Schuylkill County)	3,515
	Memorial Lake	230
Perry	Big Spring State Forest Picnic Area	45
	Fowlers Hollow	104
	Little Buffalo	923
York	Codorus	3,329
	Gifford Pinchot	2,338
	Samuel S. Lewis	85
Total	**20**	**24,733.5**

National Heritage Area	SCPA Designated County(s)
Allegheny Ridge Corporation	Cumberland, Dauphin, Perry
Lincoln Highway Heritage Corridor	Adams, Franklin
Schuylkill River Greenways	Berks
Susquehanna Heritage Area	Lancaster, York

Table 3: DCNR, State Park Maps
Table 4: Source: DCNR, Pennsylvania Heritage Areas Program

AGRICULTURE AND AGRITOURISM

Like the Commonwealth of Pennsylvania, agriculture has been a staple of the South Central regional economy for centuries. In fact, agriculture supports one out of every ten jobs in Pennsylvania. As of 2021, the region follows the state's trend with top industries related to production and processing of crops, animals, and forestry products, as well as food manufacturing. State-wide, in 2019, these sectors represent a total economic impact of $132.5 billion. The Pennsylvanian agriculture industry supports a total of 593,600 jobs, both directly and indirectly to the industry. Additionally, The Pennsylvania Farm Bill, signed into law in July of 2019, has resulted in a total of $37.2 million in support to agriculture in the Commonwealth in the first two years, with an additional $13.6 million proposed for the 2021/22 fiscal year.

Because the state's agriculture industry remains a strong contributor to the state's economy, it has increased economic opportunity in other agricultural sectors, especially in the South Central region. Agritourism, a cross between agriculture and tourism, refers to an enterprise at a working farm, ranch, or agricultural plant conducted for the enjoyment of visitors that generates income for the owner. Agricultural tourism refers to the act of visiting a working farm or any horticultural or agricultural operation for the purpose of enjoyment, education, or active involvement in the activities of the farm or operation that also adds to the economic viability of the site. (American Farm Bureau Federation, 2004).

In recent years, South Central PA has seen a significant increase of agritourism providers within the region (see figure x below). These agritourism operators provide experiences like farm retail/dining (breweries, distilleries, ice cream shops, bakeries, special event venues), agriculture education (garden/nursery tours, agricultural exhibits/tours, winery tours), and agricultural entertainment (fairs, festivals, and shows).

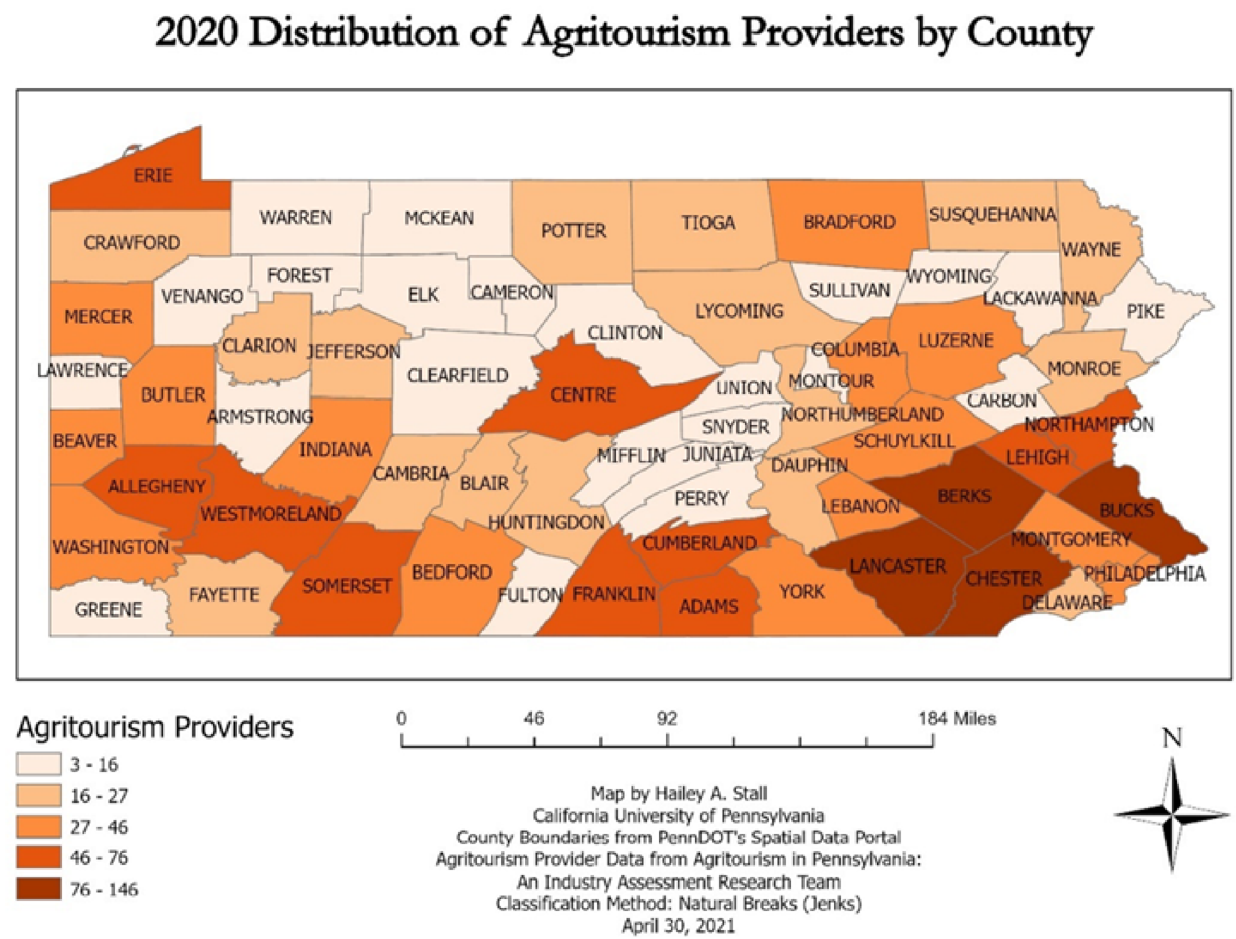


Figure 3: Center for Rural Pennsylvania: Your Agritourism Business in Pennsylvania, A Resource Handbook, Second Edition, 2021.

Demographic Overview

The region is seeing the largest population growth in the Commonwealth due to its wealth of assets (state capital, historic tourism, improved amenities, natural environment, etc.) and its proximity to major metropolitan areas. Nearly nineteen percent of statewide residents of the Commonwealth of Pennsylvania live in the South Central Region. As of 2021, the region's population increased by 2.2%. The population of the region is expected to increase by 2.1% between 2021 and 2026, nearing 2.5 million people in the region.

The South Central PA Region is home to roughly 2.38 million residents. Within the region, the most populous county is Lancaster with 23% of the population and the least populous county is Perry with 2% of the population.

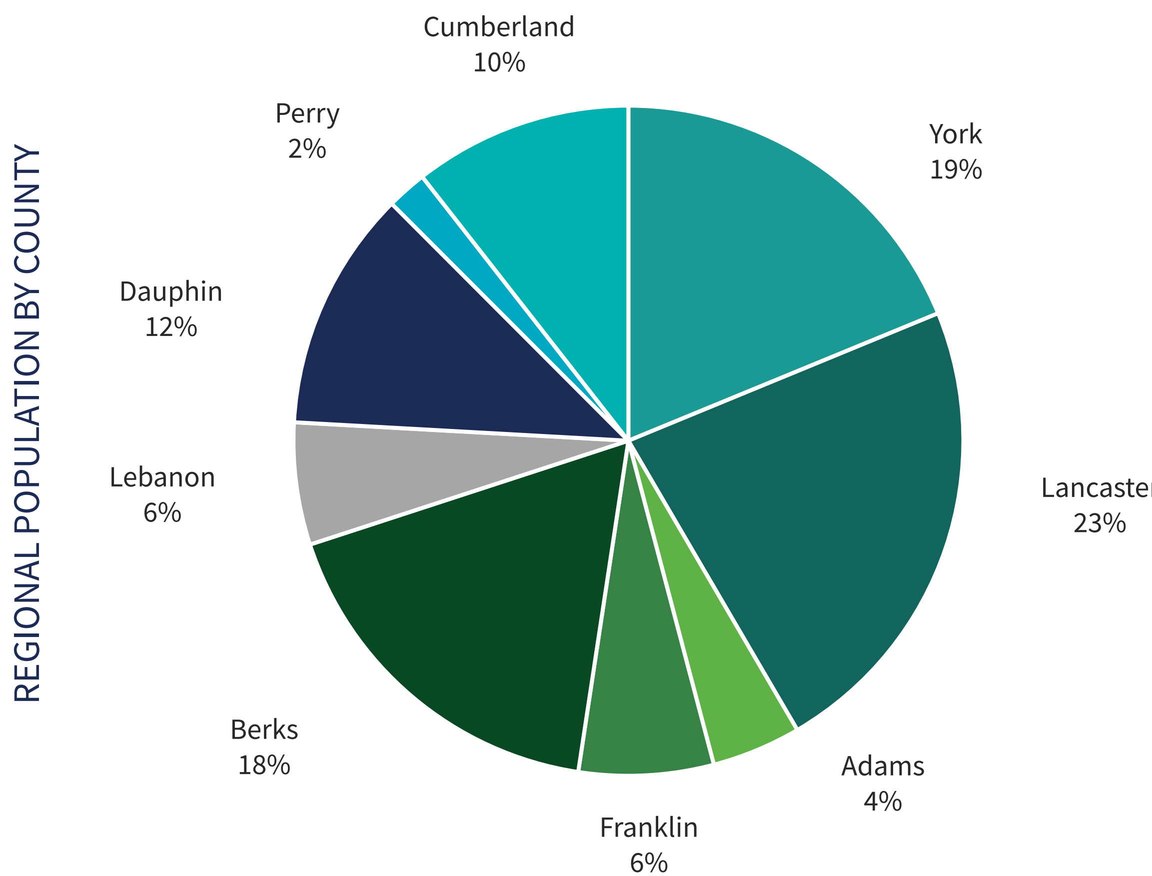


Figure 4: US Census, accessed 2022

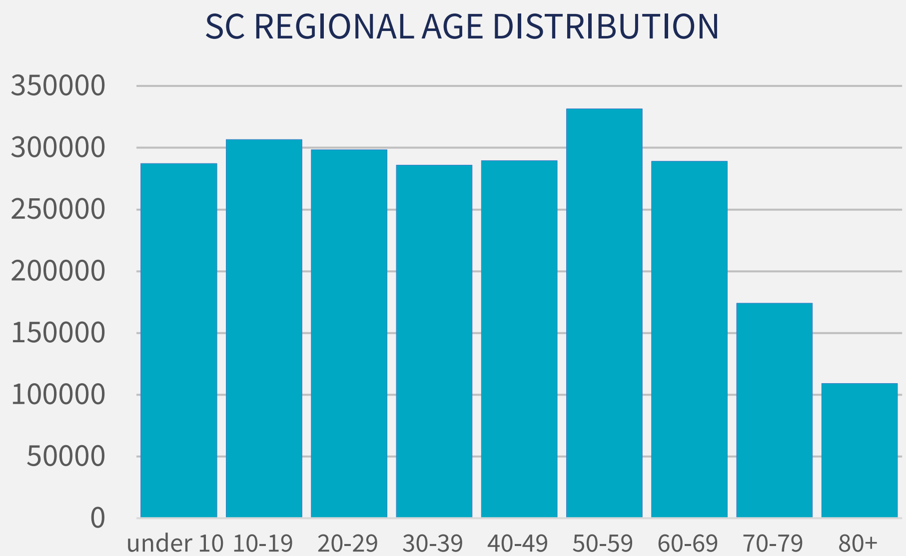


Figure 5: US Census, accessed 2022

AGE DISTRIBUTION

On the state level, most Pennsylvanian residents are between 20 and 49 years of age. Although residents' ages are relatively evenly distributed, more South Central residents fall into the age range of 50 to 59 than any other range, unlike the state average. This group will soon reach retirement age, making replacement of workers, retiree housing, and healthcare especially important in the coming decade.

POPULATION BY RACE/ETHNICITY

The South-Central region is 85% white, with 6% of residents identifying as Black or African American, 4% as mixed-race, 2% as Asian, and 3% as some other race. Compared to the State and the nation, a larger share of the South-Central population is white, with a state figure of 81% and a national figure of 62%. Some 10% of the region identifies as Hispanic or Latino.

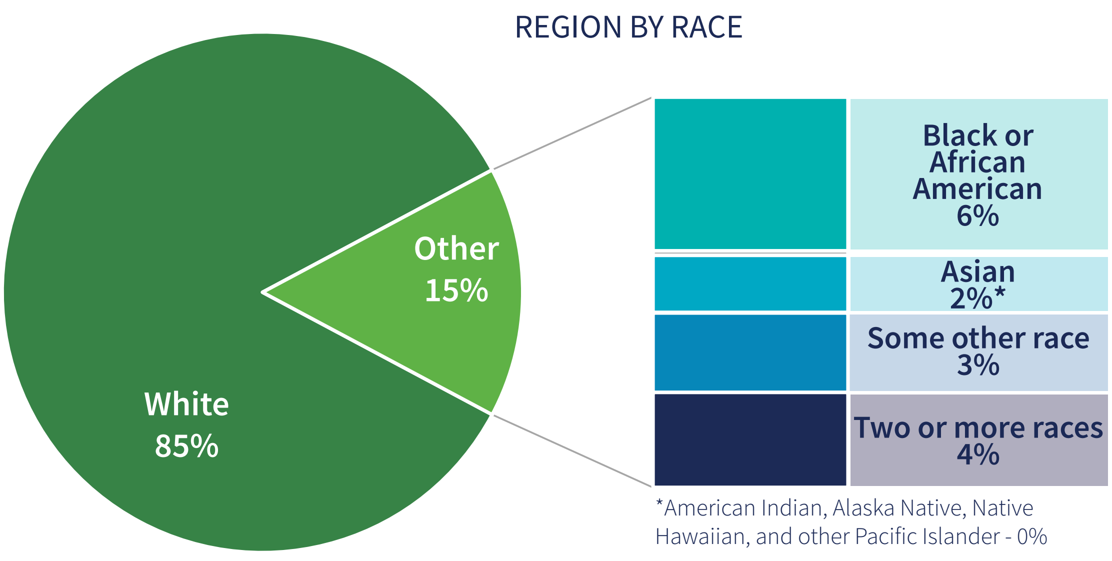


Figure 6: US Census, accessed 2022

MEDIAN HOUSEHOLD INCOME

Median Household Income (MHI) among the region's counties ranges from $60,000 to $71,000. These ranges are par to the national MHI in 2020 ($64,994) and the state MHI in 2020 ($63,627). Cumberland County appears to be the highest-earning county, with Dauphin and Lebanon Counties reporting the lowest MHIs.

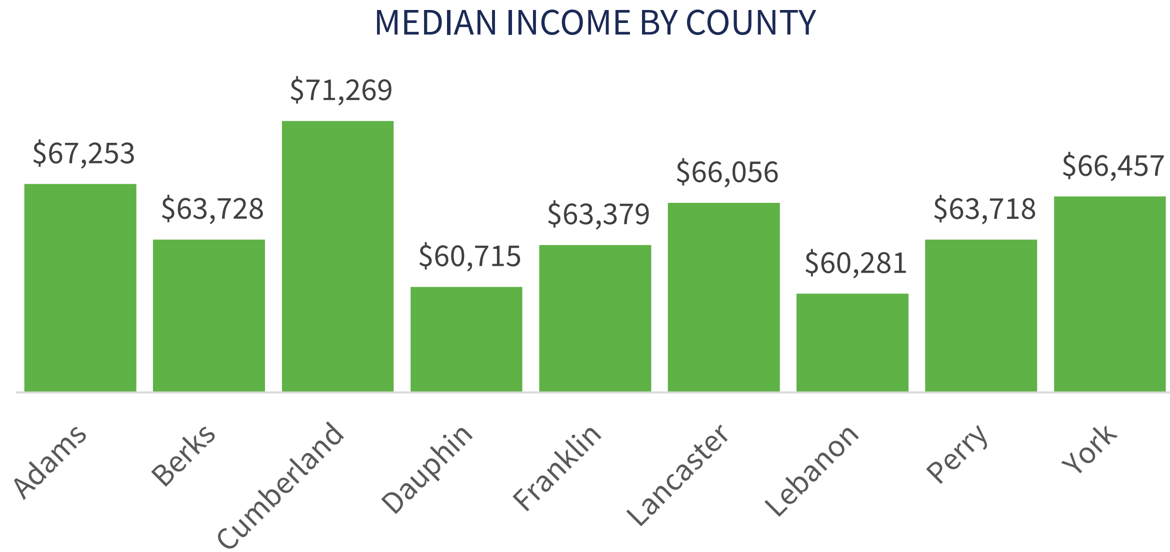
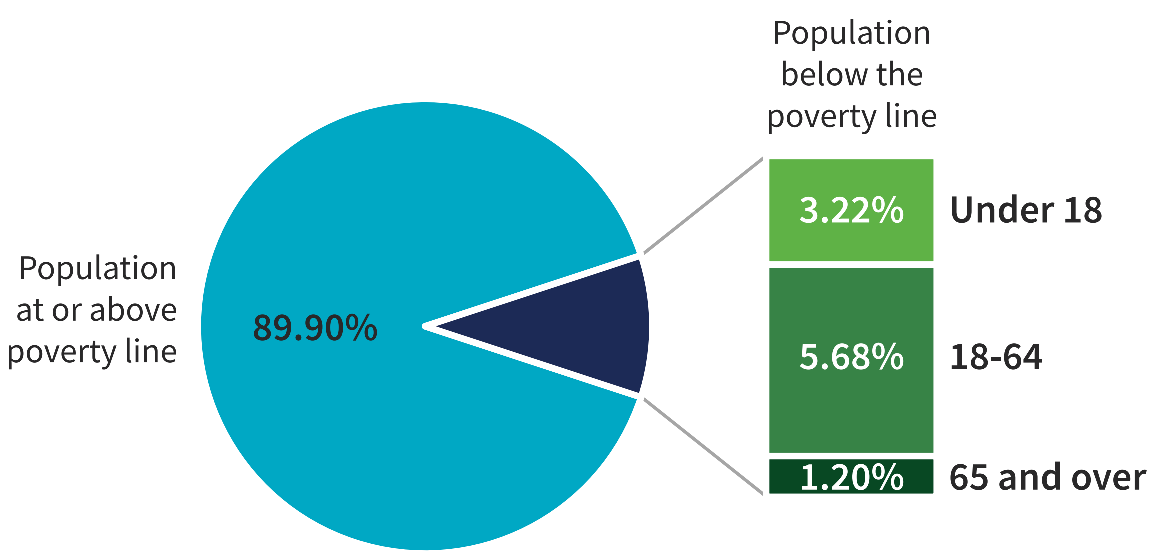


Figure 7: US Census, accessed 2022



POVERTY LEVELS

The percentage of the population in the region living below the poverty line is about 10%. Compared to the nation and state, there is a lower percentage of the population in the South-Central region living in poverty, with a national rate of 12.8% and a state rate of 12.0%, respectively.

Of the 10.10% of the population that is living in poverty, more than half are individuals ages 18 to 64. Over 3% is individuals younger than 18, and the remaining 1.20% is individuals 65 and over.

Figure 8: US Census, accessed 2022

PROSPERITY/INCLUSIVITY INDEX

The Hamilton Project uses a county's median income, poverty rate, unemployment rate, employment rate, housing vacancy rate, and life expectancy to compute a Vitality Index, a measure of a place's economic and social well-being.[1] A higher score indicates higher well-being, while a lower score indicates lower.

The Vitality Index for the counties range from 0.033 to 0.706, with the regional average being 0.345. The Vitality Index rating for the state of Pennsylvania is 0.0317, indicating that the region overall is better off than the state.

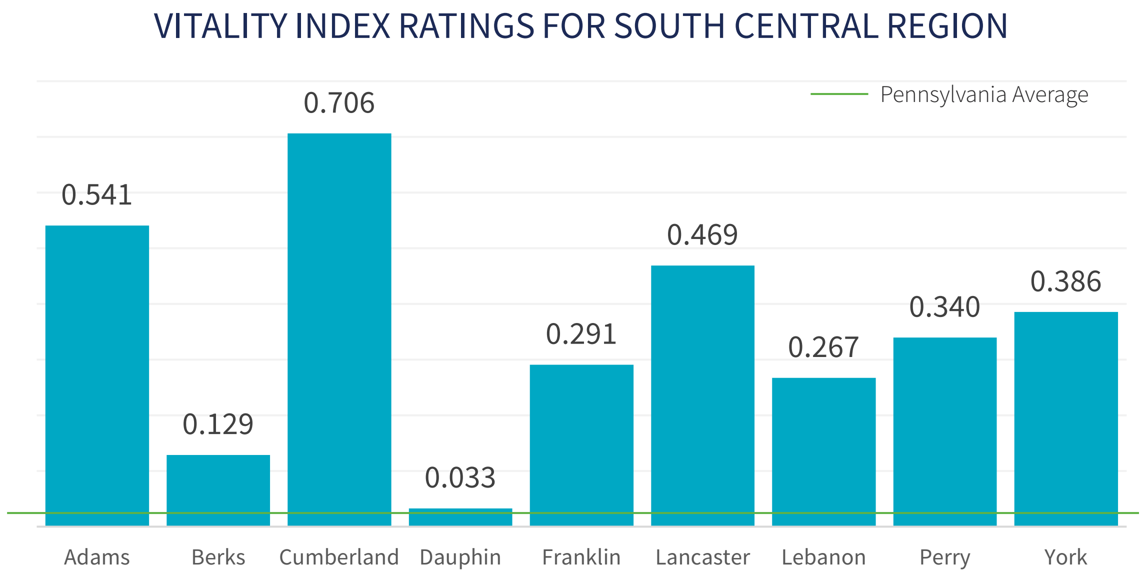


Figure 9: Vitality Index Ratings, retrieved 2022.

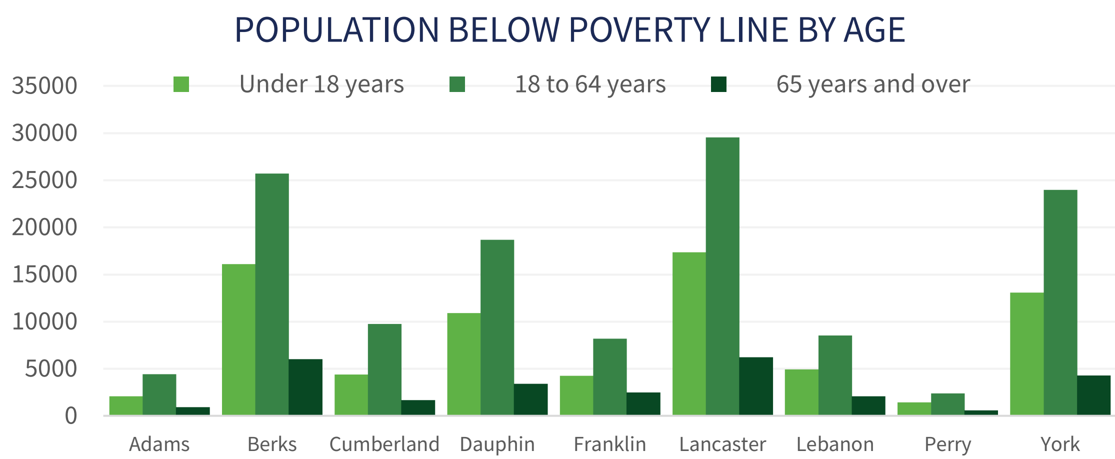


Figure 10: US Census, accessed 2022

POVERTY LEVELS IN SCPA

The child poverty rate varies by county, ranging from 1.85% to 4.01%. Childhood poverty is lowest in Cumberland County, the county with the highest median income in the region, and highest in Dauphin County. Per county, these rates are significantly lower than the state average of 16.9% for those under the age of 18, 11.5% for those between the ages of 18 to 64, and 8.3% between the ages of 65 and over.

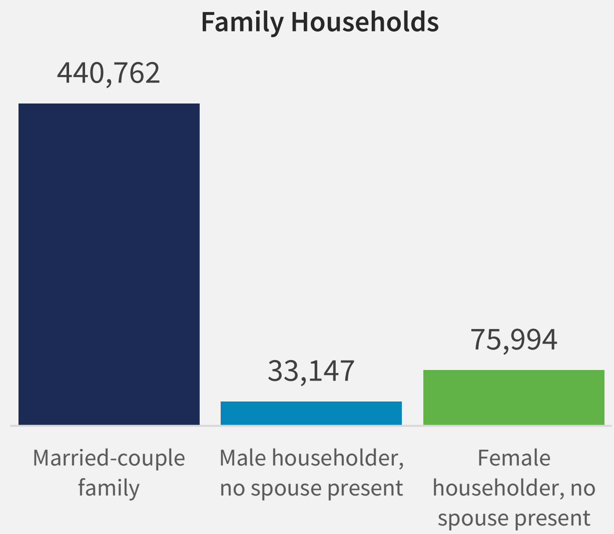
[1] *Weights of indicators are as follows: Median household income - 45%, poverty rate - 24%, life expectancy - 13%, prime-age employment to population ratio - 9%, housing vacancy rate - 5%, unemployment rate - 4%.*

HOUSING CHARACTERISTICS

In the South Central region, the majority of households are family households. Within this household type, most are married-couple families. For those not living in family households, it is most common to live alone. The least common household type is male householders, with no spouse present.

Single family homes are the most common housing type in the South Central region, making up about 78% of total occupied housing stock. Of this housing type, three-quarters are detached homes. Mobile homes or other types of housing make up a small, but significant portion of housing types in this area (about 5%).

SOUTH CENTRAL REGION BY HOUSEHOLD TYPE



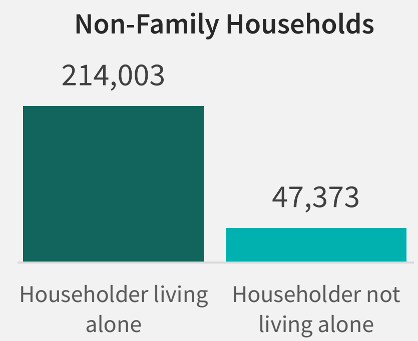


Figure 11: US Census, accessed 2022

Renters often bear disproportionately high monthly housing costs as a percent of income when compared to homeowners. Any household contributing 30% or more of their income towards housing costs is considered "cost burdened," and this is a regional issue if low-wage workers are uniformly unable to access housing at costs lower than 30% of their income.

US Census Bureau Data indicates that 52% of renters in the South Central Region are housing cost-burdened. Perry County has the highest incidence of cost-burdened renters, with over 65% of renter households being cost-burdened. Berks County has the lowest incidence, at 47%.

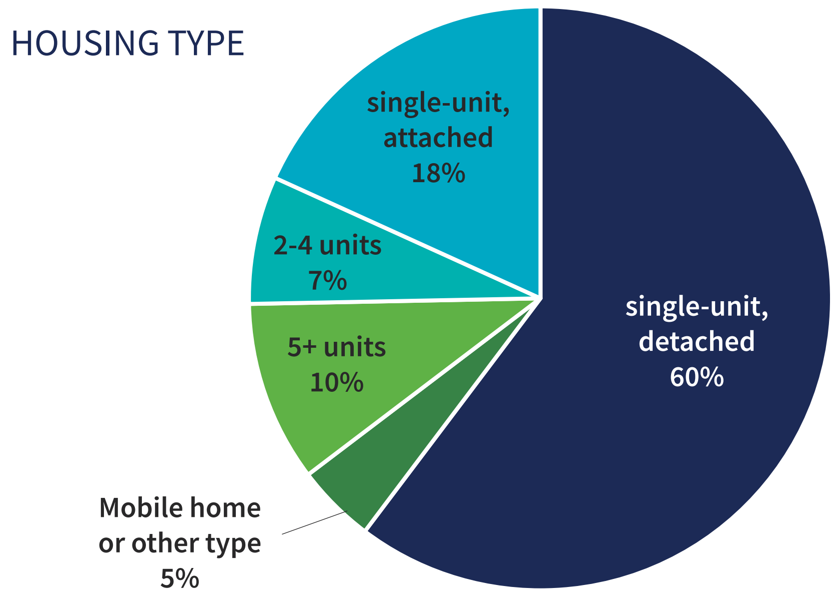


Figure 12: Housing type in the South Central region. Source: US Census, retrieved 2022.

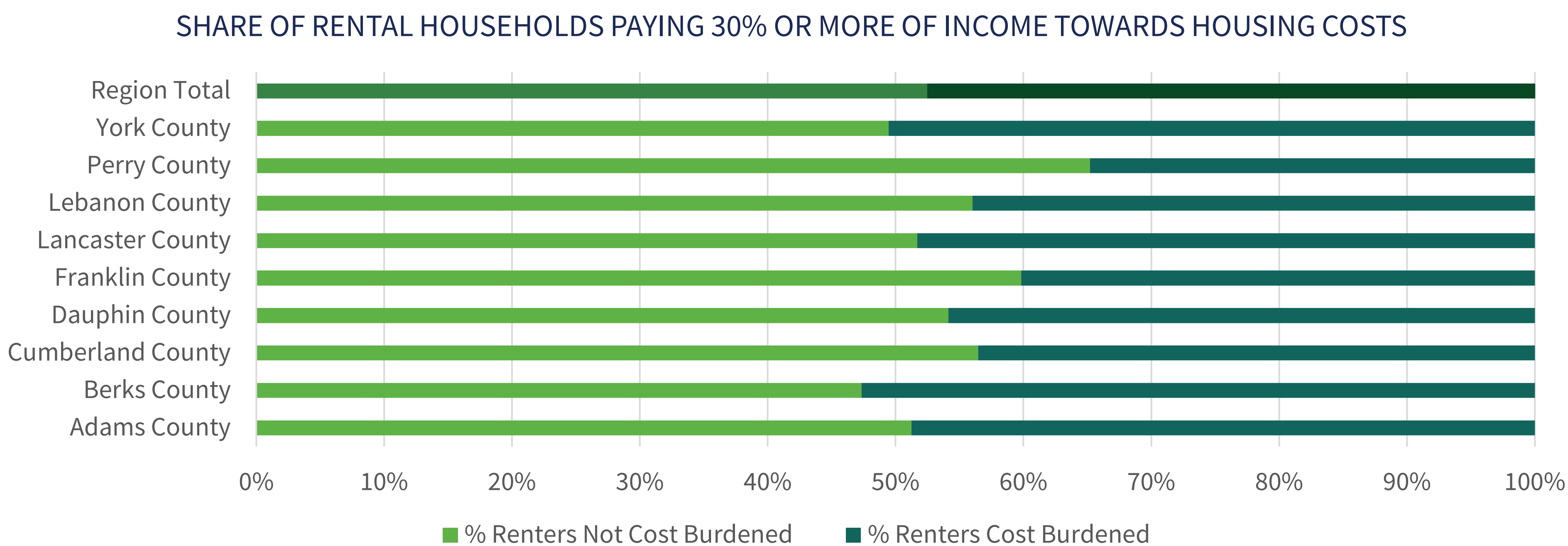


Figure 13: US Census, accessed 2022

HEALTH SERVICES

Access to health services is a social determinant of health. Social determinants of health are conditions where people live and work that impact their health risks and outcomes. One aspect of health services access is health insurance coverage. Within the region, 92.6% of individuals have health insurance. This varies by county, with Lancaster County having the lowest rate of health insurance coverage and York County having the highest.

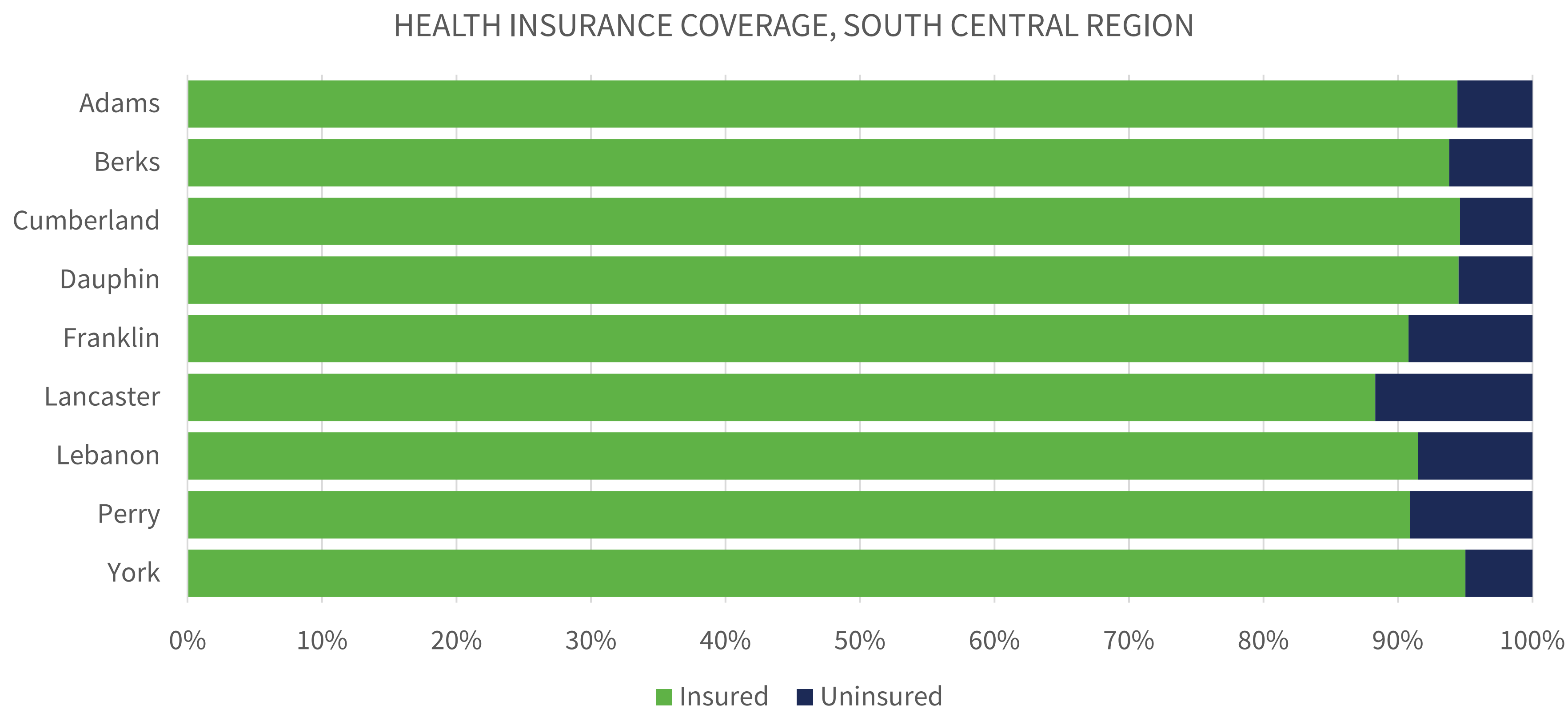


Figure 14: Health insurance coverage of the civilian non-institutionalized population in the South Central region. Source: US Census, retrieved 2022.

According to data from the 2020 U.S. Census County Business Patterns, there are over 5,500 health care and social assistance establishments within the South Central region. As seen on the map from the Pennsylvania Department of Health, these health centers are clustered around major cities (see Figure 15). Those living in more rural areas of the region may have difficulty in accessing health care.

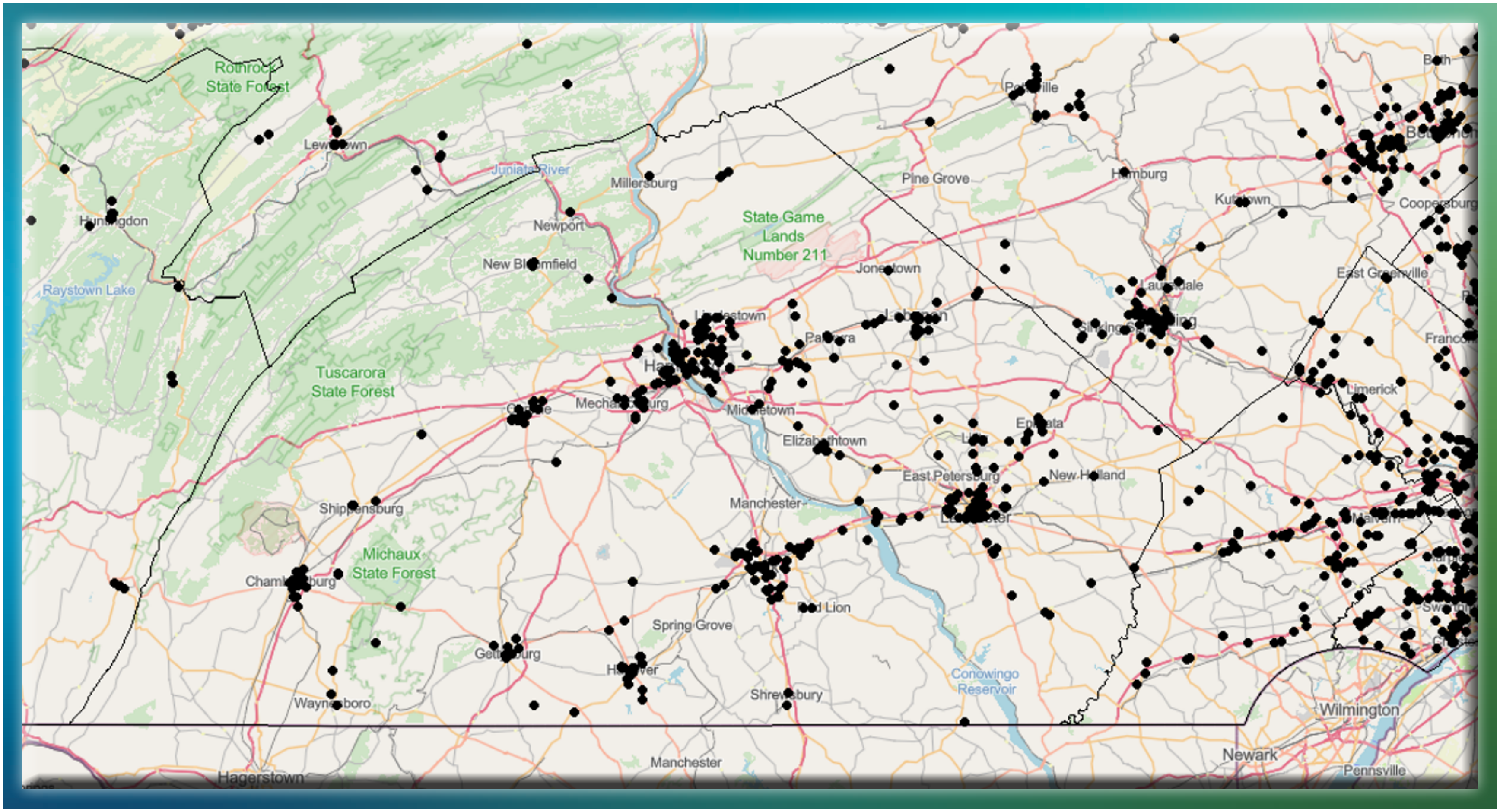


Figure 15: Health centers in the South Central region. Source: Pennsylvania Department of Health, 2022.

[2] *Health centers includes ambulatory surgery centers, birth centers, community mental health centers, drug alcohol treatment facilities, home health agencies, hospices, hospitals, intermediate care facilities, physical and speech therapy facilities, portable X-Ray facilities, psychiatric residential treatment facilities, rural health clinics, nursing homes, state health centers, and medical marijuana dispensaries. For more information, see:* https://www.pasda.psu.edu/uci/DataSummary.aspx?dataset=909

COST OF LIVING

Living wage in the South-Central Region for an adult with no children is roughly $33,000-$34,000, annually. This is slightly higher than the state average of $32,000, annually. For a single parent with one child, the cost-of-living jumps to roughly $65,000, annually, slightly higher than the $62,200 average. The chart below estimates cost of living in various household types for each county in the region.

Living Wage									
	1 ADULT			2 ADULTS (1 WORKING)			2 ADULTS (BOTH WORKING)		
	0 Children	1 Child	2 Children	0 Children	1 Child	2 Children	0 Children	1 Child	2 Children
Adams County	$33,987	$64,438	$79,539	$52,686	$62,837	$74,714	$26,333	$35,672	$45,864
Berks County	$32,906	$66,498	$84,011	$51,730	$62,483	$74,381	$25,854	$36,712	$48,110
Cumberland County	$33,280	$65,832	$82,285	$52,229	$62,878	$74,776	$26,104	$36,379	$47,258
Dauphin County	$33,280	$66,040	$82,701	$52,229	$62,878	$74,776	$26,104	$36,483	$47,466
Franklin County	$33,218	$63,107	$78,062	$50,794	$61,630	$73,507	$25,397	$35,006	$45,136
Lancaster County	$33,779	$66,082	$82,160	$52,790	$63,523	$75,421	$26,395	$36,504	$47,195
Lebanon County	$34,216	$65,104	$81,557	$51,334	$62,130	$74,027	$25,667	$36,005	$46,883
Perry County	$33,280	$63,586	$77,792	$52,229	$62,878	$74,776	$26,104	$35,256	$45,011
York County	$33,093	$65,270	$81,286	$51,646	$62,754	$74,651	$25,834	$36,088	$46,738
Average	**$33,374.33**	**$65,600.98**	**$81,898.01**	**$52,033.23**	**$62,805.32**	**$74,700.67**	**$26,013.78**	**$36,260.00**	**$47,056.28**

Table 5: MIT Living Wage Calculator, 2022




Labor Market Analysis

UNEMPLOYMENT

The Region's unemployment rate closely mimicked the state figure from 2012-2022, consistently remaining roughly 1 percentage point below the state unemployment rate.

Unemployment rates within the region have dropped significantly since the beginning of the Covid-19 pandemic but remain about one percentage point higher than prior to the pandemic. In 2021, Adams County had the lowest unemployment rate, at 4.4%, while Berks County has the highest unemployment rate, 6.6%. This matches 2019 rankings, during which time Adams County had the lowest unemployment rate and Berks had the highest.

MONTHLY UNEMPLOYMENT RATE IN SOUTH CENTRAL REGION

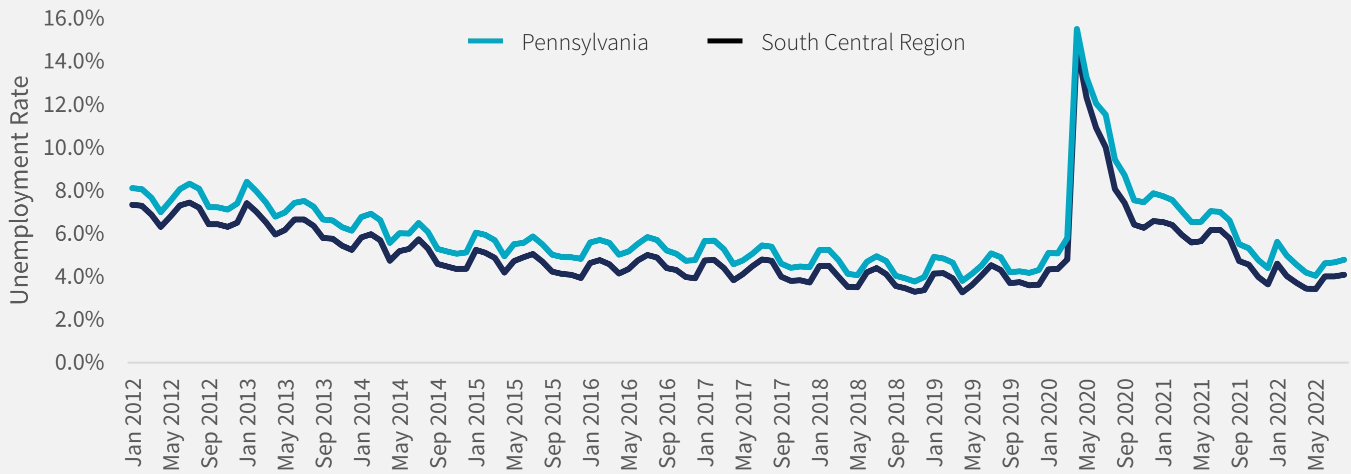
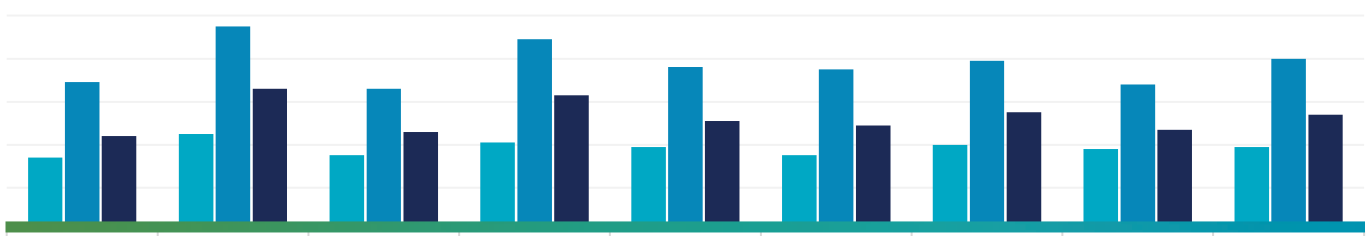


Figure 16: Monthly unemployment rate in the South Central region compared to the state, January 2012 to August 2022. Unemployment rates are not seasonally adjusted. Source: U.S. Bureau of Labor Statistics Local Area Unemployment Statistics, retrieved 2022.

UNEMPLOYMENT RATE BY COUNTY



	Adams	Berks	Cumberland	Dauphin	Franklin	Lancaster	Lebanon	Perry	York
2019	3.4%	4.5%	3.5%	4.1%	3.9%	3.5%	4.0%	3.8%	3.9%
2020	6.9%	9.5%	6.6%	8.9%	7.6%	7.5%	7.9%	6.8%	8.0%
2021	4.4%	6.6%	4.6%	6.3%	5.1%	4.9%	5.5%	4.7%	5.4%

2019 2020 2021

Figure 17: Annual unemployment rate by county, 2019 to 2021, non-seasonally adjusted. Source: U.S. Bureau of Labor Statistics Local Area Unemployment Statistics, retrieved 2022.

LABOR FORCE PARTICIPATION RATE

The Labor Force Participation Rate in the South Central Region was consistently higher than the State figure from 2016-2020. Despite maintaining a gap of over two points, the State LFP figure has trended slightly up, and the Region's figure has declined slightly, slowly narrowing the gap over the 5-year period.

Within the region, Lancaster and Dauphin Counties had the highest 2020 labor force participation rates, at 66.3% and 65.8%, respectively. Franklin and Adams Counties have the lowest labor force participation rates, with 62% and 63.1%, respectively. The regional labor force participation rate in 2020 was 65.06%.

LABOR FORCE PARTICIPATION RATE

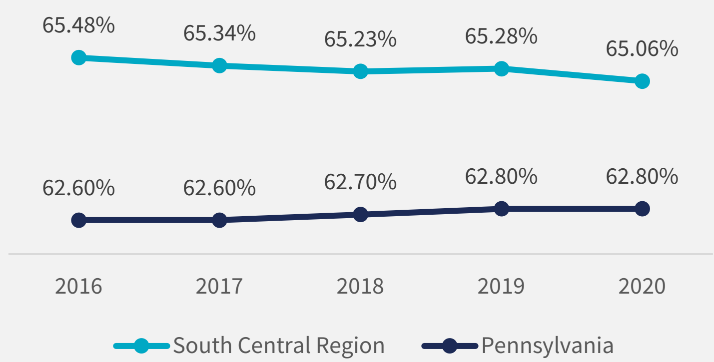


Figure 18: US Census, accessed 2022

The Bureau of Labor Statistics defines labor force participation rate as the proportion of the working-age population that is either working or actively looking for work. This rate is an important labor market measure because it represents the relative amount of labor resources available for the production of goods and services.

2020 LABOR FORCE PARTICIPATION RATE

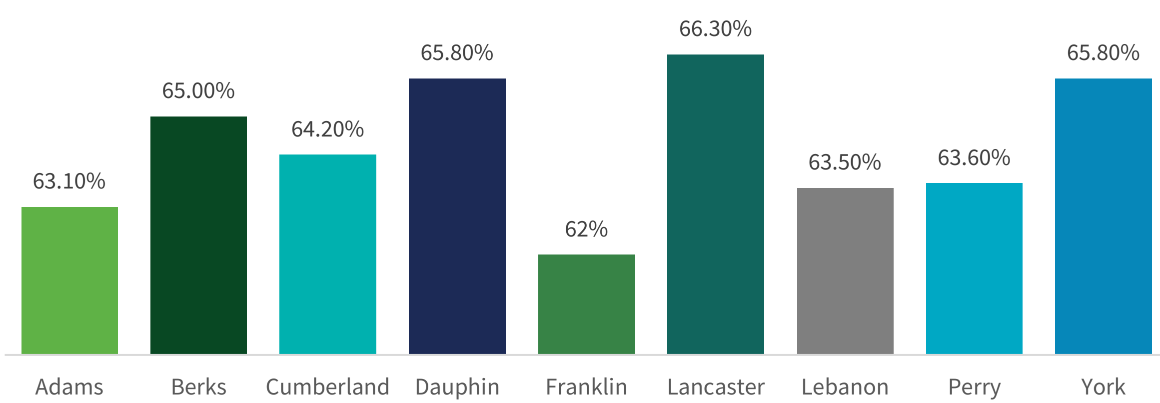


Figure 19: US Census, accessed 2022

JOB OPPORTUNITIES IN SOUTH CENTRAL PA

The number of job hires and the number of unique job postings will be used to better understand job opportunities within the region. Hiring in the South Central region has a distinctly seasonal trend, with Quarter 2 of each year (besides 2020) having the highest number of new hires, followed by a decline that continues until Quarter 1 of the following year. Job opportunities (in terms of hires) are highest in Quarter 2 and lowest in Quarter 1. This is the same trend of hiring for the whole state.

The hiring rate is the number of hires during a quarter, as a percentage of total employment during that quarter. The hiring rate in the region is higher than the state, which may indicate that there are more job opportunities within the region.

Unique job postings have varied over time. They peaked in May 2017, followed by a period of decline. From January 2018 to May 2019, they remained relatively stable. Since that time, the number of unique job postings have been somewhat turbulent, with period of peaks and valleys. Postings have been on a mostly upward trajectory since May 2020, which could indicate an increased need for employees.

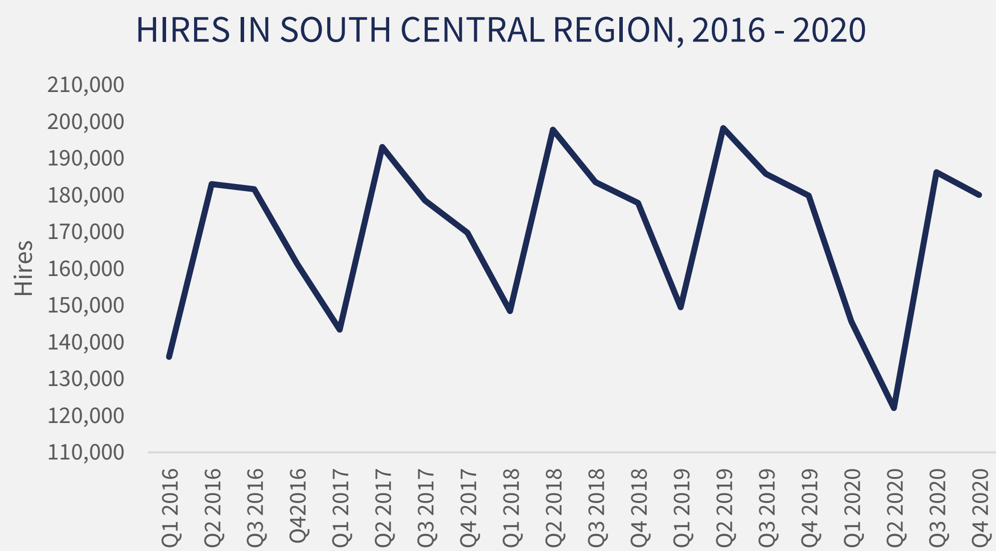


Figure 20: Hires in South Central Region by quarter, Quarter 1 2016 to Quarter 4 2020. Hires are a combination of new hires and recalled workers. Source: U.S. Census Bureau Quarterly Workforce Indicators, retrieved 2022.

Figure 21: Hiring Rate in Pennsylvania and the South Central Region, Quarter 1 2016 to Quarter 4 2020. The hiring rate is the number of hires during the quarter as a percentage of total employment. Source: U.S. Census Bureau Quarterly Workforce Indicators, retrieved 2022.

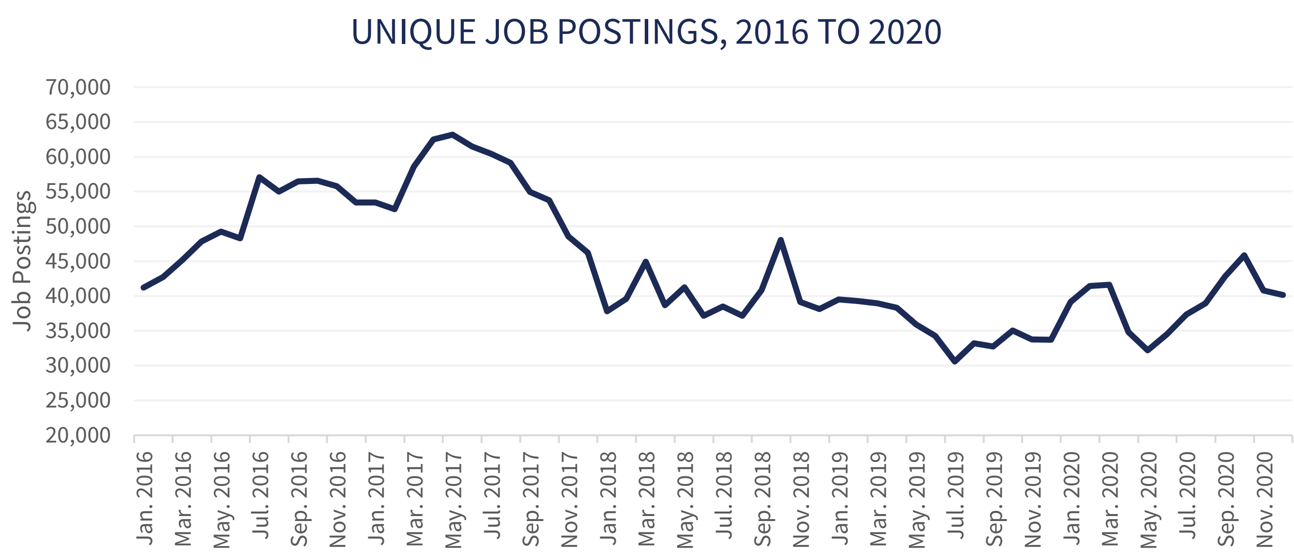


Figure 22: Unique Job Postings in the South Central Region, 2016 - 2020. Source: Lightcast, retrieved 2022.

EDUCATION ATTAINMENT RATE

Over 90% of the region's population aged 25+ has at least a high school diploma. This is more than the state, where just over 88% of individuals are high school graduates. The largest share of the region's population aged 25+ has a high school diploma or high-school equivalency, with 26.2% having obtained a bachelor's degree or higher. This is slightly lower than the state, where 31.4% have a bachelor's degree or higher.

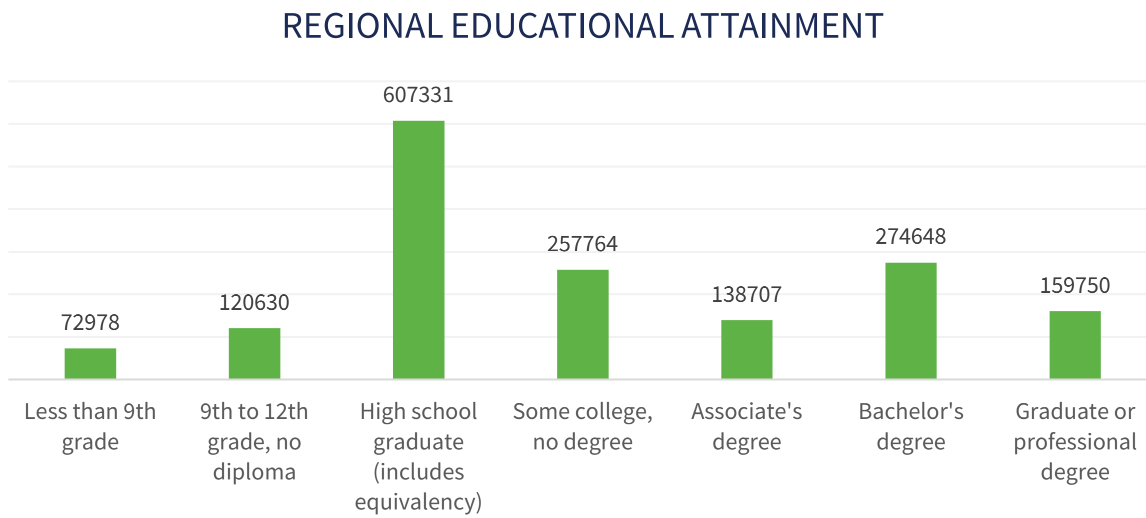


Figure 23: US Census, accessed 2022

DIVERSITY OF HIGHER EDUCATION INSTITUTIONS

The region has numerous higher education opportunities. There are over fifty postsecondary and higher education institutions, including main campuses and branches. There are the same number of 2- and 4-year colleges in the region, giving learners ample access to a diverse set of educational opportunities.

Institution Type	Count
4-Year College	22
2-Year College	22
Theological Seminary	3
Other Institutions	5

Table 6: Count of postsecondary and higher education institutions in the South Central Region. Source: Pennsylvania Institutions of Postsecondary and Higher Education Map, retrieved 2022.[3]

[3] https://www.education.pa.gov/Documents/About%20PDE/PA%20Institutions%20of%20Postsecondary%20and%20Higher%20Education%20Map.pdf

Infrastructure

Interstates	76
	78
	81
	83
	176
	283
Routes	11
	15
	22
	30
	209
	222
	322
	422
PA State Routes	61
	283

Table 7: Corridors and areas of transportation significance in the South Central Region. Source: Pennsylvania Department of Transportation Regional Operations Plan for the Eastern RTMC Region, retreived 2022.

HIGHWAYS AND INTERSTATES

Six major interstates run through the region, I-76 (Pennsylvania Turnpike), I-78, I-81, I-83, I-176, and I-283, with most meeting in the vicinity of Harrisburg. I-76 runs east-west across the state, while I-83 runs north-south between Harrisburg and Baltimore, MD. I-81 runs northeast/southwest and is a particularly notable national freight corridor. In addition to these interstates, the region is home to many major US Routes, including US 15, running through Gettysburg and Harrisburg, and US 30, running through Chambersburg, Gettysburg, York, and Lancaster. A full list of US routes in the district can be found in Figure 26. Transportation in the region also includes two Pennsylvania State Routes, PA 61 and PA 283. PA 61 connects Reading to I-78 and I-81, while PA 283 connects Lancaster with I-283 and the Harrisburg area.

This region is home to significant trucking activity, due to an increase in distribution centers. Major trucking routes in this region include the Capital Beltway, I-83, I-78/US 22, and I-81. In addition to trucking, there are four rail operators providing freight distribution. Norfolk Southern operates rail freight service in Dauphin and York County, including the Harrisburg Line, a critical and expanding railway.

PUBLIC TRANSPORTATION

Within the region, there are local fixed route, intercity, and express bus service. Local fixed route service is the most common service type, followed by intercity service (see Figure 27). Fullington Trailways provides service from the region throughout Pennsylvania, as well as to New Jersey and New York City.

Operator	Service types
Berks Area Regional Transportation Authority	Local fixed route
Capital Area Transit (Dauphin and Cumberland Counties)	Local fixed route, intercity, express
Lebanon Transit	Local fixed route
Rabbit Transit (York and Adams Counties)	Local fixed route, intercity, express
Red Rose Transit Authority (Lancaster County)	Local fixed route
Fullington Trailways	Intercity
Greyhound Lines	Intercity

Table 8: Bus service options in the South Central Region. Source: Pennsylvania Department of Transportation Regional Operations Plan for the Eastern RTMC Region, retreived 2022.

RAILROADS

CSX Corporation operates about 15 miles of tracks in York County and provides connection with the York Railway lines. Reading Blue Mountain and Northern Railroad operates over 400 miles of rail lines in nine counties, including Berks County. Finally, York Railway County operates 42 miles of tracks and connects city of York with the Hanover area and the CSX and Norfolk Southern tracks.

The region also has two Amtrak lines: the Keystone and the Pennsylvanian. The Keystone provides daily service between Harrisburg and New York City, by way of Philadelphia. The Pennsylvanian connects Pittsburgh and New York City, with stops in Harrisburg and Lancaster (among others).

AIRPORTS

The state of Pennsylvania has 121 public-use airports, 513 private-use airports/heliports. Of those, South Central Pennsylvania hosts two commercial airports, the Harrisburg International Airport, and the Lancaster Airport, and twenty private airports.

Harrisburg International

Harrisburg International Airport is located approximately five miles southeast of downtown Harrisburg, the capital of the Commonwealth. Harrisburg International Airport serves as the primary scheduled service airport for this area, with seven airlines providing commercial air service. The airport is used extensively by state government employees as well as by many visitors who fly into Harrisburg to conduct business with state government. The airport provides an array of general aviation, cargo, and small package services. The airport provides 77,000 annual operations, 11,627 jobs and has an economic output on $946.6 million annually.

Lancaster Airport

Lancaster Airport is located directly north of Lancaster, Pennsylvania. Cape Air operates five commercial flights per day from Lancaster to Baltimore/Washington International Airport. Dutch County Helicopters, AeroTech Services, and Lancaster Helicopters offer daily flight instruction at Lancaster Airport. The airport works directly with local and area colleges and universities, notably Millersville University, in flight training and career development programs. Additionally, the airport experiences many other aviation activities such as recreational flying, aerial inspections of utilities, aerial sightseeing, and military exercises by the Pennsylvania Air National Guard, and seasonal agricultural spraying. The airport provides 90,000 annual operations, 657 jobs, with an annual economic output of $76.4 million.

County	Airport(s)	Use
Adams	Bermudian Valley Airpark	General/Private
	Gettysburg Regional	General/Private
	Mid-Atlantic Soaring Center	General/Private
Berks	Grimes	General/Private
	Morgantown	General/Private
	Reading Regional	General/Private
Cumberland	Carlisle	General/Private
Dauphin	Capital City	General/Private
	Harrisburg International	Commercial
Franklin	Franklin County Regional	General/Private
Lancaster	Donegal Springs Airpark	General/private
	Lancaster	Commercial
	Smoketown	General/Private
Lebanon	Deck	General/Private
	Farmers Pride	General/Private
	Keller Brothers	General/Private
	Reigle Field	General/Private
York	Baublitz	General/Private
	Kampel	General/Private
	Lazy B Ranch	General/Private
	Shoestring Aviation Airfield	General/Private
	York	General/Private

Table 9: Department of Transportation, Pennsylvania Airports

BROADBAND ACCESS

In November 2022, Governor Wolfe announced the statewide plan to expand broadband access. Within the plan, four core challenges are addressed: broadband service infrastructure and availability. Digital equity and affordability, device and technology access, and digital literacy and technical support. These goals represent the 2.6 million Pennsylvanians that do not have access to or have not adopted high-speed broadband or may lack the skills to effectively use it.

However, most households in the South Central Region have internet access. Of the 84.5% of households with internet access, 99.4% have some type of broadband access (this includes cellular data plans, cable, fiber optic, DSL, and satellite internet service). While this shows that most households have internet access, it does not provide any information regarding internet access by income level. Further analysis shows that internet and broadband access (the predominate type of internet subscription) is correlated with income. About 60% of low-income households have broadband subscriptions, compared with almost 94% of higher-income households (see figure x).

INTERNET ACCESS IN THE SOUTH CENTRAL REGION

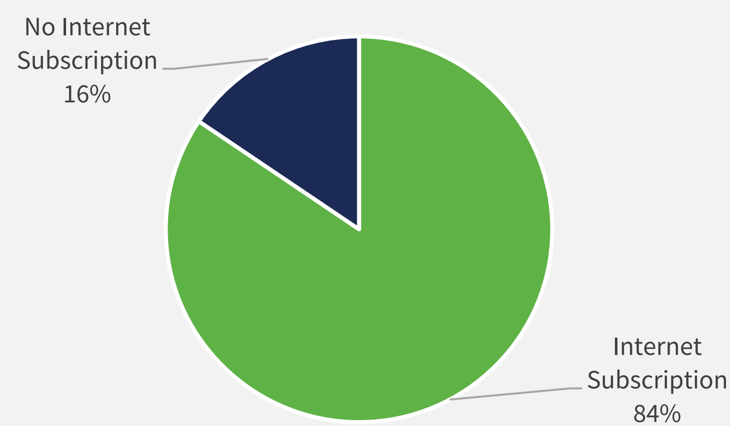


Figure 24: Internet subscription in the South Central Region. Source: US Census, retrieved 2022.

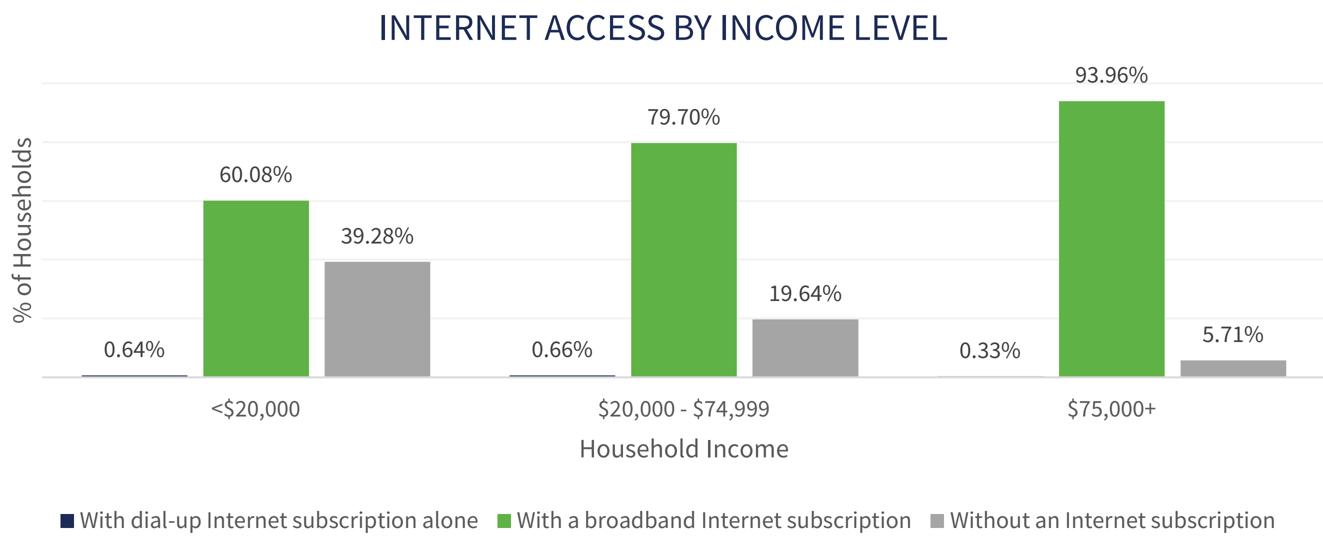


Figure 25: South Central Region Internet Access by Income Level. Source: US Census, retrieved 2022.

RURAL BROADBAND ACCESS

According to the Center for Rural Pennsylvania's 2019 Study "Broadband Availability and Access in Rural Pennsylvania", over 800,000 Pennsylvania residents do not have access to broadband connectivity (Federal Communications Commission, FCC). However, the data indicated that, while there is a need across the Commonwealth for improved broadband services, the majority of counties most in need were not located in the South Central PA region, with the exception of Perry County.

Among broadband test speed participants in Pennsylvania, those in rural counties experience disproportionately slower download speed than those in urban counties. In 2021, 50% of Perry County broadband test users' download speeds were considered "unserved," according to Act 96 standards (that is, their download speed was less than 25 Mbps). For the detailed state map, see appendix x.

WATER ACCESS

Pennsylvania's surface water access includes 83,184 miles of streams and rivers, 4,000 lakes, reservoirs, and 120 miles of coastal waters. Below surface, it is estimated that 80 trillion gallons of water is stored in underground aquifers. Annually, more than forty inches of precipitation will replenish the Commonwealth's water supply.

The region is covered by three major river basins: Delaware River Basin, Potomac River Basin, and the Susquehanna River Basin. See Appendix X for the Pennsylvania Major River Basins Map.

River Basin	PA Drainage Area (Miles)	Length of River (Miles)	Pennsylvania Major Tributaries	PA Population Served by River Basin	Pennsylvania Major Cities Impacted
Delaware	6,422	330	Schuylkill, Lehigh, and Lackawaxen Rivers	4.9 million	Allentown, Bethlehem, Easton, Philadelphia, Pottsville, Pottstown, Reading
Potomac	1,584	383	Antietam and Conococheague Creeks	140,000	Gettysburg and Chambersburg
Susquehanna	20,960	444	Juniata, Lackawanna, Conestoga, and West Branch Susquehanna Rivers	3.3 million	Altoona, Bedford, Carbondale, Carlisle, Clearfield, Harrisburg, Hollidaysburg, Lancaster, Lebanon, Lewisburg, Lewistown, Lock Haven, State College, Scranton, Sunbury, Wilkes-Barre, Williamsport, York

Table 9: Pennsylvania Department of Conservation & National Resources. Accessed 2022.

WATERSHEDS

The Potomac Watershed covers 1,584 square miles of land (54.6% forest, 35.8% agriculture, 8.3% developed, <1% wetlands), however the Potomac River does not flow directly through the Commonwealth of Pennsylvania. Pennsylvania is important to the watershed because many headwater streams that contribute to the Potomac or the Monocacy River form in southcentral Pennsylvania (which serves Adams, Cumberland, Franklin, and Perry counties.) The Potomac Basin experiences a moderate climate pattern, marked by cold winters and warm, humid summers. A majority of the region has a mean minimum temperature of 18 to 19 °F and a mean maximum temperature of 82 to 85 °F. Precipitation in the Potomac region receives half of its precipitation during the growing season (with May being the wettest month). Winter precipitation consists of a mix of snow, freezing rain and rain. Average annual precipitation for the Potomac Region ranges between 34 and 49 inches—the eastern half of the region generally receives more precipitation than the western half. The area surrounding the Franklin/Adams County border receives the greatest amounts of precipitation, averaging between 42-43 inches up to 46-49 inches of precipitation per year.

The Susquehanna Watershed, the largest of Pennsylvania, covers half the land area of the Commonwealth, stretching from the North to the South line. The watershed land covers 77% forest, 16% agriculture, 4% developed, 1% water, 1% wetlands, and <1% is considered bare. The Susquehanna River has more than 49,000 miles of waterways – rivers, streams, creeks, brooks, and runs. It is the 16th largest river in the United States and considered a vital source of drinking water, recreation, and hydroelectric power to millions of people it serves. The river is one of the most flood prone areas in the entire nation, experiencing a major devastating flood on average every 14 years. In fact, the basin's average annual flood damages is $150 million dollars. One of the more prominent features of this region is the Appalachian Mountains. Nearly all headwaters originating in these mountains flow into the Juniata River, eventually reaching the Susquehanna River near Duncannon in Perry County. The Susquehanna Region has a moderate climate, lacking long periods of extreme hot or cold weather. A majority of the basin has a minimum temperature of 12 to 19 °F and a maximum temperature of 78 to 85 °F. Average annual precipitation for most of the basin ranges from 34 to 43 inches per year. Almost half of the basin's annual precipitation falls during storms between May and September, the primary plant-growing season. The remainder precipitation, including snowmelt during the winter months, infiltrates the ground and recharges groundwater reserves.

Berks County is partially incorporated into the Delaware Watershed. The Delaware Watershed covers 6,422 square miles in the state of Pennsylvania. The 6,422 square mile area of Pennsylvania that drains into the Delaware River is not only the largest contributor of the basin, but also accounts for half of the basin's land area and 42 percent of Pennsylvania's population. Approximately 15 million people (5 percent of the U.S. population) rely on the Delaware Basin for drinking water and industrial use, including 7 million residents of New York City and northern New Jersey who live outside of the watershed. Of the 216 tributaries that flow into the Delaware, the two largest are the Schuylkill and Lehigh rivers.

Environmental Impacts

PENNSYLVANIA CONSERVATION LANDSCAPES

Land and natural resource conservation is a priority for the Commonwealth. Since 2004, the Pennsylvania Department of Conservation and Natural Resources (PDCNS) maintains eight regional “conservation landscapes”. These landscapes highlight the conservation and stewardship of natural resources that contribute to the long-term sustainability of special regions throughout the Commonwealth. Conservation landscapes motivate citizens and elected officials to take on the challenge of effective land use planning, investment, civic engagement, and revitalization. These collaborations take place where there are strong natural assets, local readiness and buy-in, and state-level investment and support. For counties to be considered a part of a regional Conservation Landscape, they must meet the following criteria: Presence of DCNR-owned lands, Regional Sense of Place, Economic Readiness, Civic Engagement, and Strategic Investments.

In South Central PA, all counties are covered by one of four Conservation Landscapes. To review the map of the conversation landscapes, see Appendix D.

Conservation Landscape	SCPA Designated County(s)
Kittatinny Ridge	Cumberland, Dauphin, Franklin, Lebanon, Perry
Schuylkill Highlands	Berks, Lancaster, Lebanon
South Mountain Partnership	Adams, Cumberland, Cumberland, Franklin, York
Susquehanna Riverlands	Lancaster, York

Table 10: DCNR, Conservation Landscapes

BIODIVERSITY

Like conservation, biodiversity is also a priority for the Commonwealth. The PDCNS focuses on the conservation of Pennsylvania’s biodiversity through program and land management. It is a key element in maintaining ecosystem integrity, viability, and resilience across all the Commonwealth’s ecological communities. DCNS biodiversity conservation work falls under three main programs: Pennsylvania Natural Heritage Program, Wild Resource Conservation Program, and general Biodiversity Management.

CLIMATE CHANGE

The South Central region is already experiencing the impacts of climate change. At a state level, the climate has warmed by over 1.8°F and the average annual precipitation has increased by about ten percent, trends that are expected to continue. The weather within the region is predicted to get hotter, with the average annual temperature expected to increase, as well as the number of days with temperatures above 95°F. By the end of the century, the number of extreme rainfall events is expected to increase, as well as the amount of time between rain events. Though there may be more rain overall, there may be an increase in drought conditions, due to a decrease in regular rain events.

Despite the numerous challenges caused by climate change, there may be some opportunities. As temperatures increase, the length of the growing season will increase. By mid-century, all counties in the South Central region are predicted to see an increase in growing degree days (the annual number of days when the average temperature is greater than 50°F). Some crops are expected to see increased yields due to the longer growing season. Climate change will require adaptation and innovation. There may be the opportunity for the South Central region to establish itself as a leader in green jobs.

On the state level, in 2021, the Commonwealth enacted the first Pennsylvania Climate Action Plan. The state-wide plan aims to reduce greenhouse gas emissions by 26% by 2025 and by 80% by 2050. The plan also addresses how municipalities can join in on reducing climate change impacts at the local level. The Department of Environmental Protection (DEP) initiated the "Local Climate Action program", which has trained 53 cities, townships, boroughs, counties, and regional organizations, representing approximately 380 municipalities across the Commonwealth regarding sustainability and environmental health.

ESTIMATED CHANGE IN TEMPERATURE FROM NOW TO END OF CENTURY

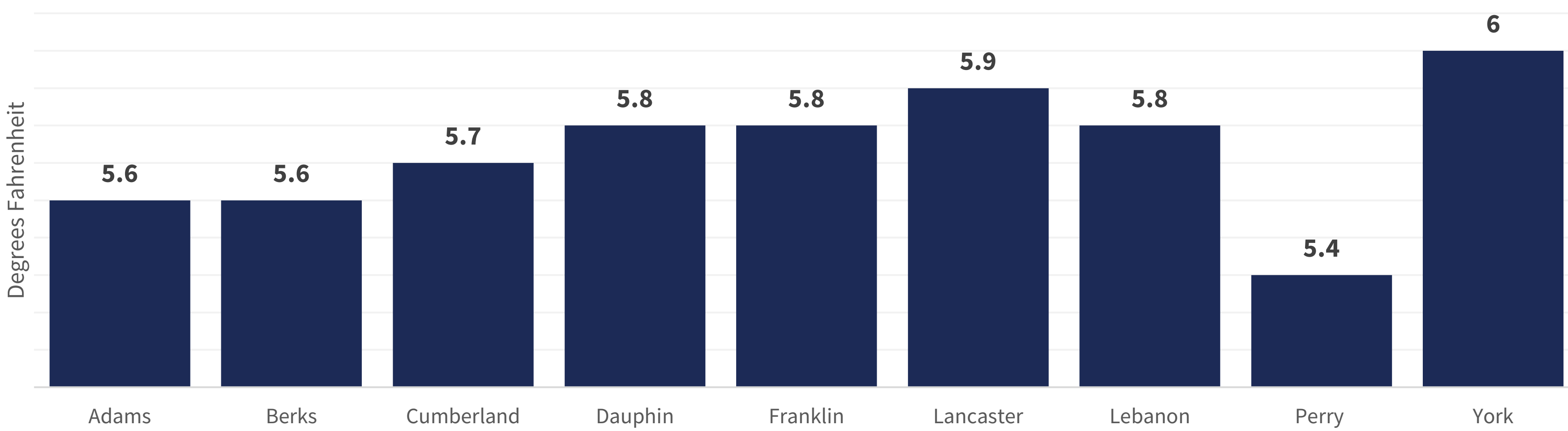


Figure 25: Change in the average annual temperature from current (1971-2000) to mid-century (2041-2070) for counties in the South Central region. Source: Pennsylvania Climate Impacts Assessment, Pennsylvania Department of Environmental Protection. Retrieved 2022.

ENERGY

Pennsylvania is the nation's second-largest natural gas producer and the third largest coal-producing state. Additionally, Pennsylvania is the second-largest net supplier of total energy to other states, after Texas.

Consumption wise, Pennsylvanians majorly use natural gas, followed by nuclear electric power, and ethanol. However, in the 2019 Energy Assessment Report for the Commonwealth of Pennsylvania, energy used to generate electricity is projected to increase due to increasing power exports. Because Pennsylvania has been a net exporter of electricity, the trend is projected to continue and expand.

The 2019 report also suggests that the Pennsylvanian transportation sector is seeing an increase in electric vehicles, but an increase in natural gas consumption, causing significant environmental risks. To combat this, the Commonwealth enacted the 2020 Clean Energy Program Plan. The Plan supports policies, and programs related to clean energy; recommends new clean energy actions to be taken over the next one to three years; and explores approaches that may be taken to anticipate future events and mitigate disruptions to ensure energy resilience and security.

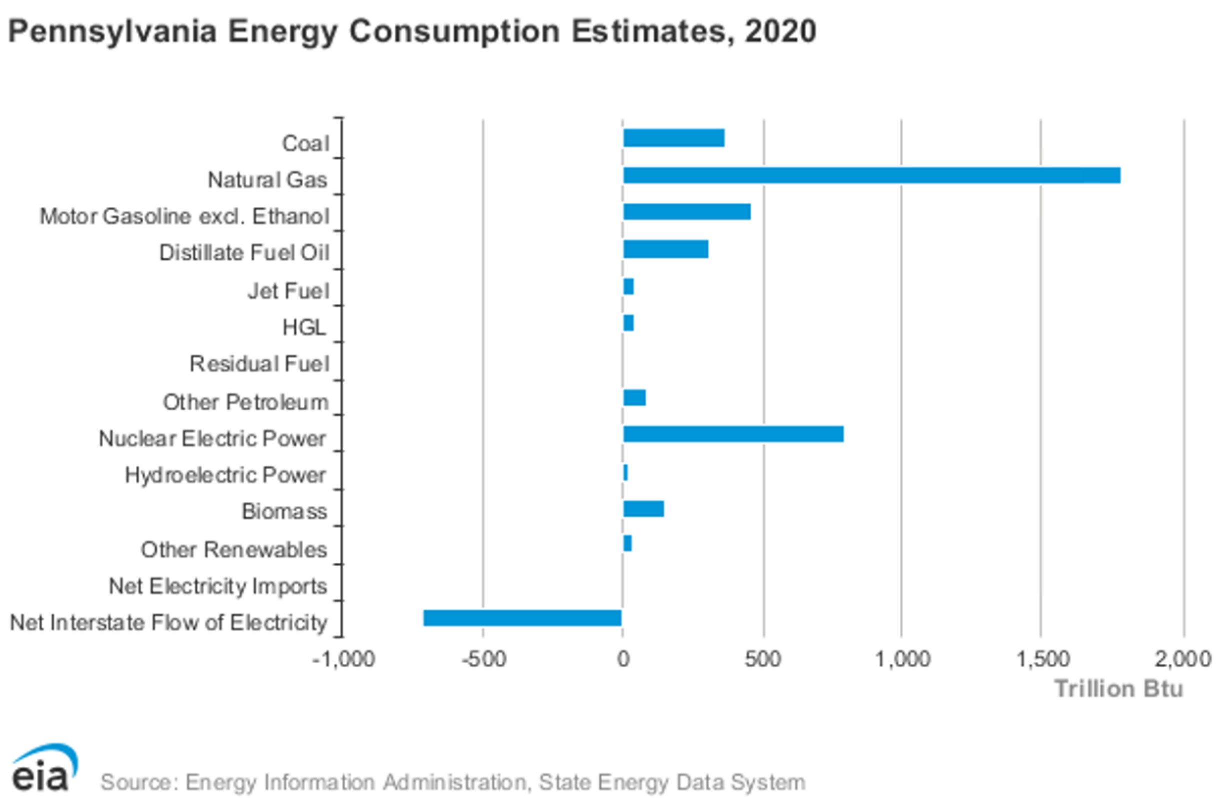


Figure 26:

WATER QUALITY

Clean drinking water and water quality is vital to quality of life and economic growth strategies. Pennsylvania is a water-rich state with approximately 85,500 miles of rivers and streams connecting over 2,000,000 acres of lakes, bays, and wetlands. Of the 88,200 acres total potable water supply, only 627 acres is considered "impaired" by the U.S Environmental Protection Agency (EPA). To continue improving the overall water quality, the Commonwealth has taken a more regional and local approach to water quality improvement by implementing both state and county water improvement plans.

STATE WATER PLAN REGIONS AND PRIORITIES

To better preserve water access across the state, the Department of Environmental Protection, will soon implement the 2022 State Water Plan. Within the plan the state is divided into six Water Plan Regions. Of those, the South Central PA counties are covered by three water plan regions: Potomac (Adams and Franklin), Lower Susquehanna (Cumberland, Dauphin, Lancaster, Lebanon, Perry, and York), and the Delaware region (Berks). See Appendix X for the Pennsylvania State Water Plan Region Map.

Water Planning Region	2022 Priorities	County(s) Affected
Delaware	• Strengthen the link between land use and water resources management. • Regional planning and land use coordination and collaboration.	Berks
Lower Susquehanna	• Identify and target solutions for potential protection priority water resources to reduce or prevent point and nonpoint source pollution with a focus on currently impaired water resources. • Enable continued responsible economic growth by ensuring adequate water resources.	Cumberland, Dauphin, Lancaster, Lebanon, Perry, York
Potomac	• Promote programs and practices that protect water quality and quantity and preserve the ecological integrity of groundwater and surface water. • Climate change resiliency especially with regard to stormwater management, flooding, and drought.	Adams, Franklin

Table 11: 2022 Pennsylvania State Water Plan, Regional Priorities. Accessed 2022.

COUNTY ACTION PLANS

Forty-three of Pennsylvania's counties contain waterways that drain to either the Susquehanna or the Potomac rivers. This effort is part of the Phase 3 Watershed Implementation Plan (Phase 3 WIP). Led by the Department of Environmental Protection (DEP), local and other state agencies are working with the counties whose local waters run to the Chesapeake Bay to create Countywide Action Plans. These plans outline how each county's share of the state's 2025 pollution reduction goals will be met. The county-based planning process provides an opportunity for everyone involved to learn more about their local waters and how to achieve local clean water goals in a way that fits within local, regional, and state priorities.

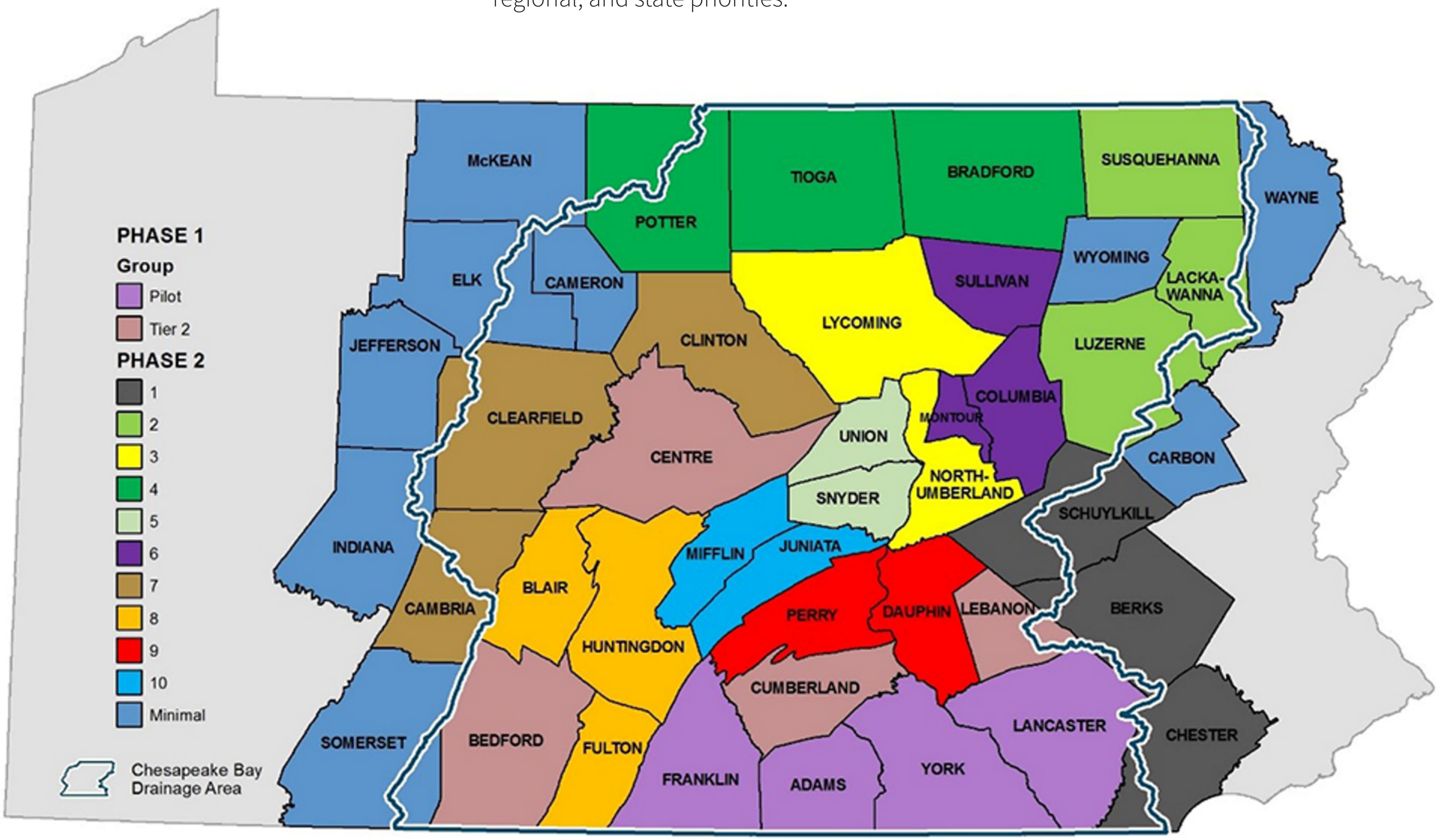


Figure 27: DEP, Countywide Action Plans Map

AIR QUALITY

The Pennsylvania Department of Environmental Protection (DEP) provides hourly reports of each of the seven Air Quality Index (AQI) regions of Pennsylvania. Like the EPA, the DEP reports the same five primary air pollutants. As levels of any or all these air pollutants rise beyond health standards, precautionary health warnings are triggered, and residents are immediately notified.

Along with the DEP, the Pennsylvania Air Quality Partnership to work with specific counties on addressing the public's understanding on the impact of air pollution, provide alerts for days with high air pollution, provide health effects information and guidelines to prevent or reduce exposure, and finally encourage voluntary actions to reduce air pollution emissions, especially on "Action Days", when air quality is expected to be considered "unhealthy". The South Central region is mostly covered by the Susquehanna Valley (Cumberland, Dauphin, Lancaster, Lebanon, York) Leigh Valley (Berks) partnerships.

EPA 2021 AIR QUALITY INDEX REPORT

Air Quality Index (AQI) is an indicator of overall air quality because it considers all criteria air pollutants that are measured within a geographic area, which include five primary air pollutants: ozone (O3), sulfur dioxide (SO2), nitrogen dioxide (NO2), carbon monoxide (CO), particulate matter 10 microns or less in size (PM10) and 2.5 microns or less (PM2.5). The 2021 EPA AQI Report indicates that the South Central region generally had "good" to "moderate" air quality days for 2021. In 2021, Cumberland County received the most "good" ranking days (278) in the region, while Lancaster County received the least amount of "good" ranking days (186) out of the region. Note, Perry County data was not available at the time the report was retrieved. To review the full report, see Appendix X.

HAZARD MITIGATION

Pennsylvania is considered one of the lower-risk states in the nation when it comes to hazardous disasters. Past occurrences show that flooding related hazards remain Pennsylvania's highest risk. As population increases, industry shifts, technology advances, and climate changes, the list of hazards putting the Commonwealth at risk is evolving. The Commonwealth is not only at-risk of natural hazards but should be prepared for increasing technological and human-made disasters as well. Note the state is currently undergoing the 2023 Hazard Mitigation Plan update.

According to the 2018 State Hazard Mitigation Plan, since 1953, sixty presidential disasters have been declared in the Commonwealth of Pennsylvania: twenty-seven flooding events, sixteen severe storms, eight hurricanes, five snowstorms, two tornados, one drought, and one severe ice storm. Each county in Pennsylvania has experienced at least seven Presidential Disaster or Emergency Declarations since 1954. Note these totals do not include the statewide disaster declarations that have occurred between 2018-2022, including the COVID-19 Pandemic, Remnants of Hurricane Ida, and other Severe Storms and Flooding events.

Geographically, the highest concentration of Presidential Disaster and Emergency Declarations are in the Commonwealth's most densely populated areas in the eastern half of the state. Montgomery County (outside of the South Central region) had the most Presidential Disaster or Emergency Declarations, with a total of twenty-six, as of 2018.

Total Presidential disaster declarations in Pennsylvania by county between 1954 and 2018.

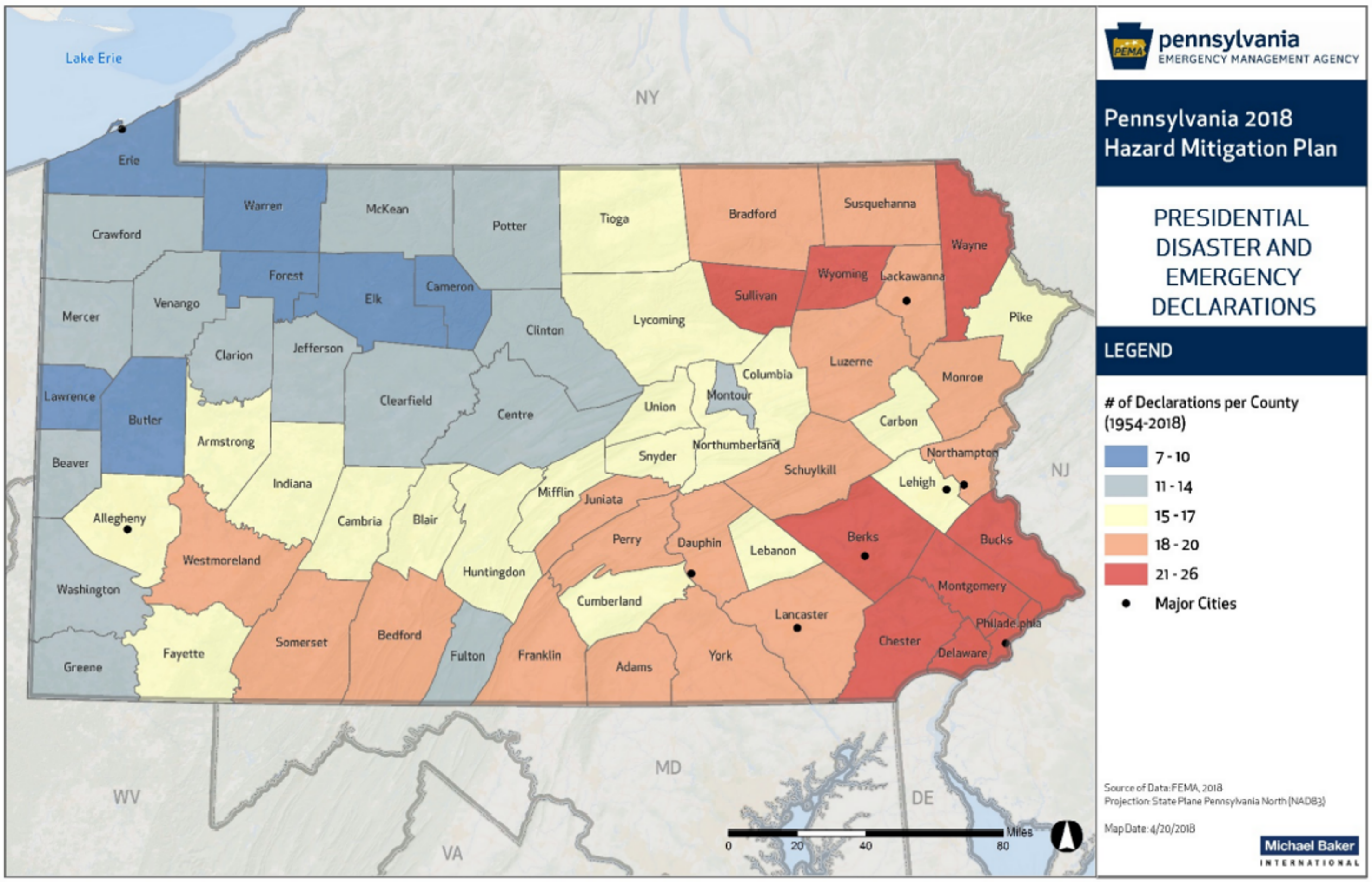


Figure 28: Commonwealth of Pennsylvania 2018 Hazard Mitigation Plan, Accessed 2022.

2

Regional Economic Resilience

Establishing economic resilience in a local or regional economy requires the ability to anticipate risk, evaluate how that risk can impact key economic assets, and build a responsive capacity. Often, the shocks/disruptions to the economic base of an area or region are manifested in three ways:

- Downturns or other significant events in the national or international economy which impact demand for locally produced goods and consumer spending;
- Downturns in particular industries that constitute a critical component of the region's economic activity; and/or
- Other external shocks (a natural or man-made disaster, closure of a military base, exit of a major employer, the impacts of climate change, etc.).

-US Economic Development Administration (EDA)

A focus on resiliency and recovery has become a global focus, especially in the aftermath of the COVID-19 pandemic. Negative impacts from an economic disaster or event, either natural or manmade, will require some immediate action on the community's part to minimize any threats to future economic challenges. Too often, communities are unprepared for the devastation and destruction that is likely to come post-disaster. By preparing for foreseen economic shocks, communities can endure these situations, and take steps toward long-term recovery.

South Central Pennsylvania has been successful at maintaining a diversified regional economy. This serves the region well as economic shocks are more easily absorbed, compared to communities in the Commonwealth without any strategy for dealing with economic adversity. Although the region has not made a complete job recovery from the recent pandemic, it has recovered faster than the state job retention average.

The region does not currently hold a strategic plan for economic disaster preparedness and recovery. However, this CEDS addresses economic resiliency strategies in each of the four outlined goals. To mitigate the consequences of economic shocks in the region, strategies within the goals reflect both "steady-state" and "responsive" initiatives.

Steady-state initiatives tend to be long-term efforts that seek to bolster the community or region's ability to withstand or avoid a shock.

Responsive initiatives can include establishing capabilities for the economic development organization(s) to be responsive to the region's recovery needs following an incident.

Regional Stakeholders were asked what resiliency strategies they believed were critical to implementing the Strategic Action Plan. Below are some of the most common responses from regional stakeholders:

- Plan for the impacts of climate change, including population shifts. Continue emphasizing a diverse economy that doesn't focus too heavily on one industry. Support career opportunities for area students so they don't need to leave the area for education.
- Infrastructure (roads, broadband), available housing, regional planning for disasters
- Develop or utilize County Economic Recovery teams that also meet as a region. Identify resources, unified voice in sharing messages, and pre-plan before disaster strikes.
- Continue to focus on diversifying economic sectors (a current strength of Southcentral PA). Initiate regional collaborations to apply for and secure funding to improve flooding resiliency (the largest natural threat in our area.)
- Conduct effective scenario planning.
- Be mindful of industry cluster concentration. The diversity of industries has been key to our region.

These strategies, amongst other resiliency strategies, are represented throughout the Strategic Action Plan. Ultimately, the South Central Pennsylvania region strives to capitalize on emerging opportunities while protecting its most vulnerable assets. The Strategic Action Plan incorporates necessary actionable strategies for economic recovery to bolster long-term economic resiliency in South Central Pennsylvania.

Economic Opportunity

The region has a strong economy and is responsible for about 20% of the state's total gross domestic product (GDP). This is a slightly outsized contribution for the size of the region, as the region's population is about 19% of the state's total population. The major industries within the region mimic those at the state level, with healthcare and social assistance being the largest industry (in terms of jobs) for both. Transportation and warehousing are the fastest-growing industries at both the state and local levels. This trend continues occupationally, where most top occupations and in-demand skills are the same at the local and state level.

ECONOMIC DIVERSITY

The Hachman Index will be used to measure the economic diversity of the region by county. The Hachman Index uses industry employment data to provide a measure of economic diversity.[4] Hachman Index Scores range from 0 to 100, with a higher score indicating that a county's industry mix closely resembles that of the state and is therefore more diverse. A lower score indicates that it is less diverse and industry is more concentrated in fewer areas. Put more simply, a higher score indicates higher economic diversity, while a lower score indicates the opposite.

Overall, economic diversity throughout the region is relatively high. Over half of the counties rank in the top 50% of most economically diverse counties in the state, with two counties being in the top 25%. Having a diverse industry mix can increase resiliency throughout the region.

County	Hachman Index	State Ranking
Adams	47.40	51
Berks	88.26	14
Cumberland	82.08	24
Dauphin	76.34	31
Franklin	76.16	32
Lancaster	90.30	12
Lebanon	83.67	20
Perry	67.33	43
York	88.53	13

Table 12: 2021 Hachman Index Rankings for counties in the South Central region. Source: U.S. Census and Lightcast, retrieved 2022.

[4] *Quarter 4 2021 employment data from U.S. Census Bureau Quarterly Workforce Indicators (QWI). Employment figures for some industries was suppressed; for counties of interest, Lightcast data were used to supplement. Counties with missing employment data outside the South Central region were excluded. 12 out of 67 counties were excluded.*

INNOVATION/ENTREPRENEURSHIP

The Innovation Intelligence Index (I3) by Stats America uses measures of human capital and knowledge creation, business dynamics, business profiles, employment and productivity, and economic well-being to create an overall index to help users understand the potential innovation capacity of an area. This is a comparative metric; the project team will compare the region to Pennsylvania as a whole. Overall, innovation capacity is higher within the region than the state.

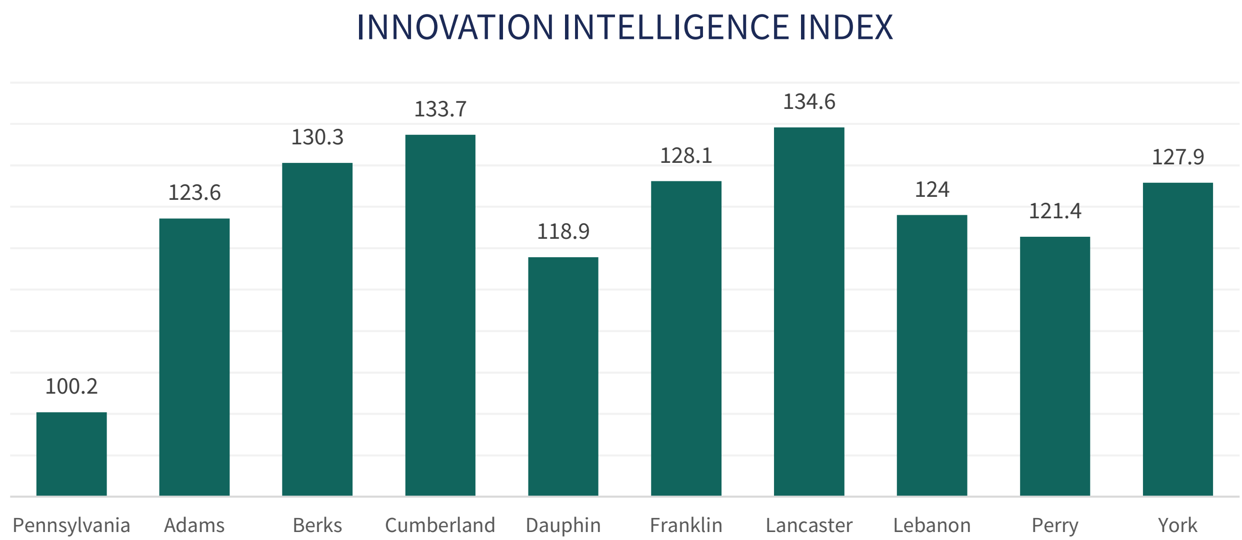
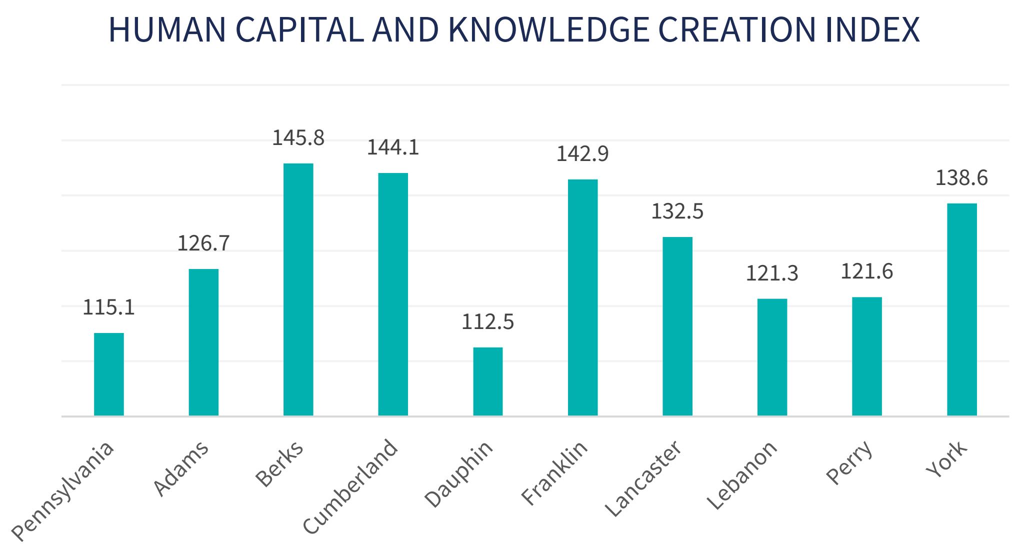


Figure 29: Innovation Intelligence Index values for Pennsylvania and the South Central Region. Source: StatsAmerica Innovation Intelligence, retrieved 2022.



Sub-indexes are generated from the measures used in the I3. The sub-indexes can help inform which indexes the South Central Region excel at and which indexes need improvement. The Human Capital and Knowledge creation Index measures the capacity of an area's population and labor force to engage in innovation activities. Some measures included are population growth rate for ages 25 to 44, educational attainment, and patent activity. Most counties in the region score higher than the state, indicating that there is higher capacity for innovation within the region than outside.

Figure 30: Human Capital and Knowledge Creation values for Pennsylvania and the South Central Region. Source: StatsAmerica Innovation Intelligence, retrieved 2022.

The Innovation Intelligence Index (I3) by Stats America uses measures of human capital and knowledge creation, business dynamics, business profiles, employment and productivity, and economic well-being to create an overall index to help users understand the potential innovation capacity of an area. This is a comparative metric; the project team will compare the region to Pennsylvania as a whole. Overall, innovation capacity is higher within the region than the state.

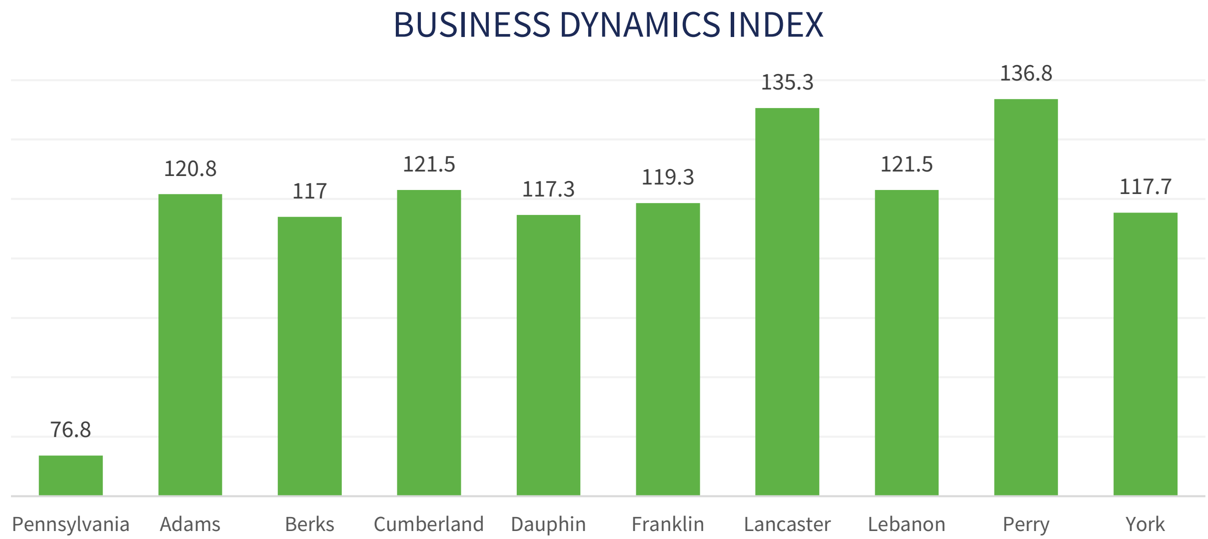


Figure 31: Business Dynamics Index values for Pennsylvania and the South Central Region. Source: StatsAmerica Innovation Intelligence, retrieved 2022.

The local business index measures local business conditions and resources, such as foreign direct investment and broadband access. The region is weaker in this area; seven out of the nine counties score lower than the state.

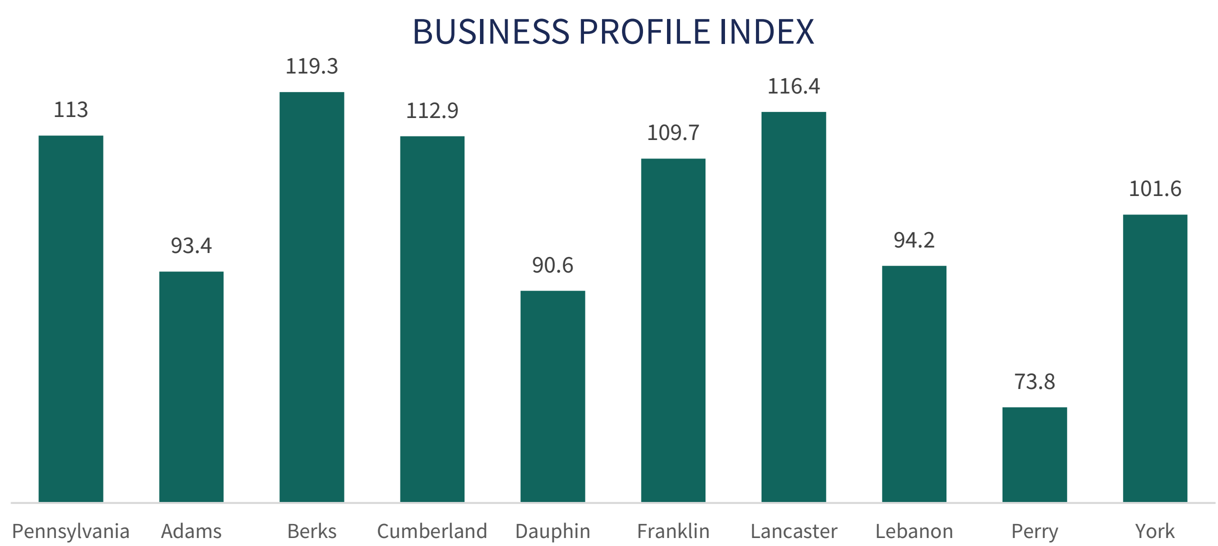


Figure 32: Business Profile Index values for Pennsylvania and the South Central Region. Source: StatsAmerica Innovation Intelligence, retrieved 2022.

The employment and productivity index captures the economic growth, regional desirability through industry clusters, and the outcomes of innovative activities, such as GDP and patent activity. The region performs well in this area.

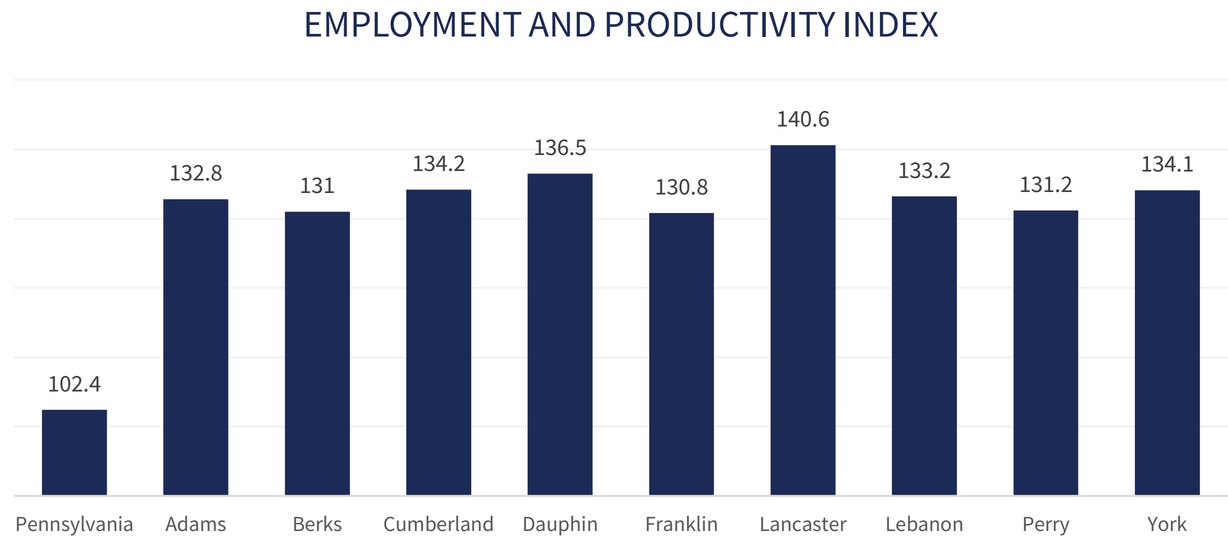


Figure 33: Employment and Productivity Index values for Pennsylvania and the South Central Region. Source: StatsAmerica Innovation Intelligence, retrieved 2022.

The Economic Well-Being Index uses information such as broadband connectivity, per capita income growth, poverty rate, and net migration to measure standard of living. The region scores highly, indicating a higher standard of living within the region than the state.

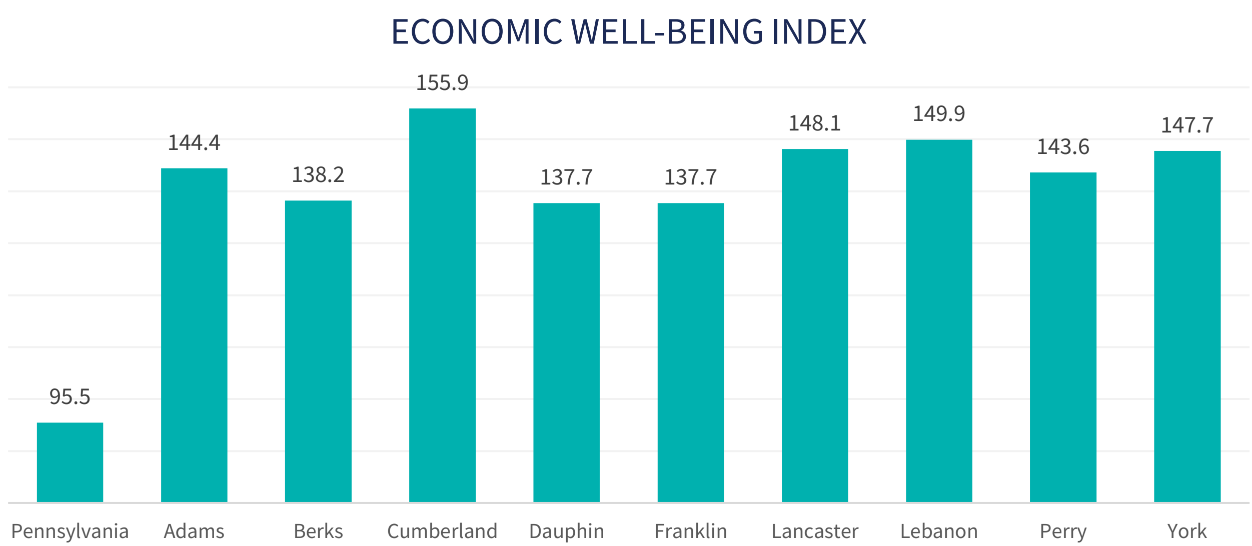


Figure 34: Economic Well-Being Index values for Pennsylvania and the South Central Region. Source: StatsAmerica Innovation Intelligence, retrieved 2022.

Entrepreneurship activity has been increasing in the area over the past decade. New business applications were at a low in 2009, when 11,064 new applications were filed in the region. Since then, the number of new business applications has been on an upward trajectory, reaching 22,417 applications in 2021. This is a 28.6% increase of new business applications in 2020. These new businesses are supported by the numerous Chambers of Commerce within the region

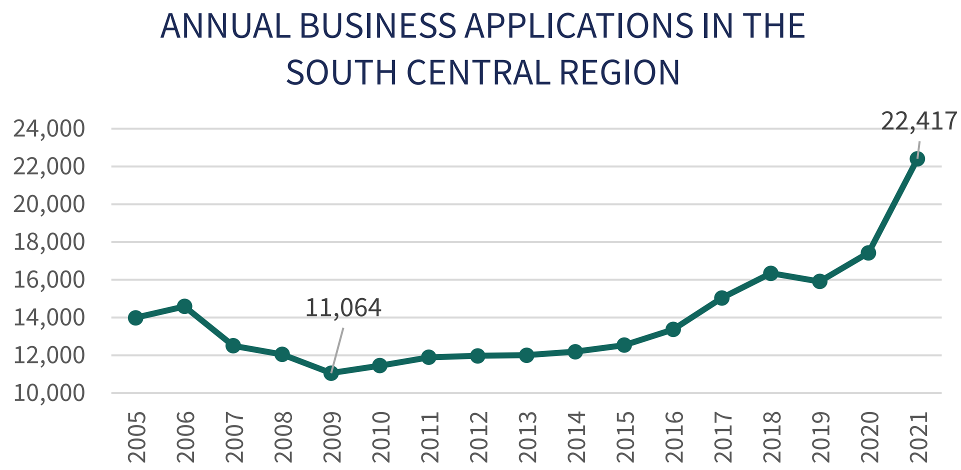


Figure 35: New business applications in the South Central region. Source: US Census Business Formation Statistics, retrieved 2022.

TOP INDUSTRIES BY NUMBER OF JOBS

Local government is considered the largest employer in the region. This sector is still the leading employer in the region, despite the twelve percent decrease in employment in the industry from 2011 to 2021. State government, the ninth-largest industry in the region, also experienced negative growth. All other top industries had either 0% or positive growth from 2011 to 2021.

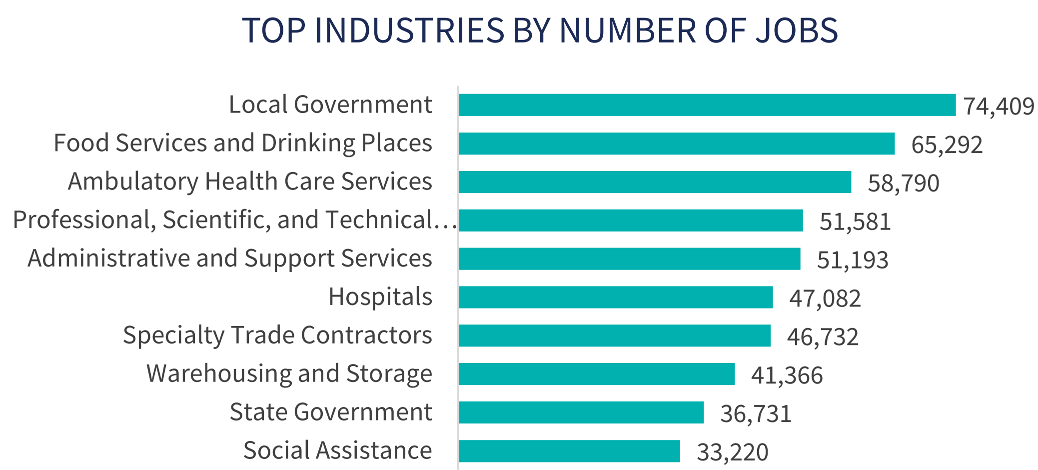


Figure 36: Lightcast, 2022

TOP GROWING INDUSTRIES

Beverage and Tobacco Product Manufacturing leads the list of top growing industries by percent growth. This sector, along with Warehousing and Storage, nearly doubled their presence in the region from 2011 to 2021. In 2021, Beverage and Tobacco Product Manufacturing was estimated to represent 2,055 jobs and Warehousing and Storage was estimated to represent 41,366 jobs. Because measuring percent growth does not account for relative size of the industry in the region, top growing industries by number of jobs are also provided below.

Warehousing and Storage led the list of top growing industries by number of jobs, notably at the front of both lists measuring top growing industries. Second on the list is Ambulatory Health Care Services with nearly 12,098 estimated new jobs. The top-ten top growing industries by number of jobs is relatively diversified, including sectors in healthcare, education, professional services, construction, and more.

TOP GROWING INDUSTRIES BY % GROWTH 2011-2021

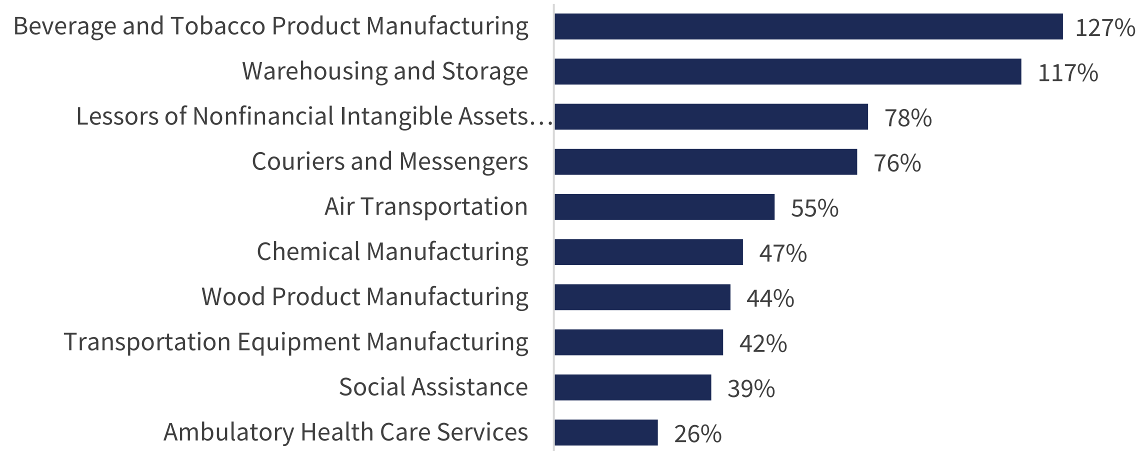


Figure 37: Lightcast, 2022

TOP GROWING INDUSTRIES BY NUMBER OF NEW JOBS 2011-2021

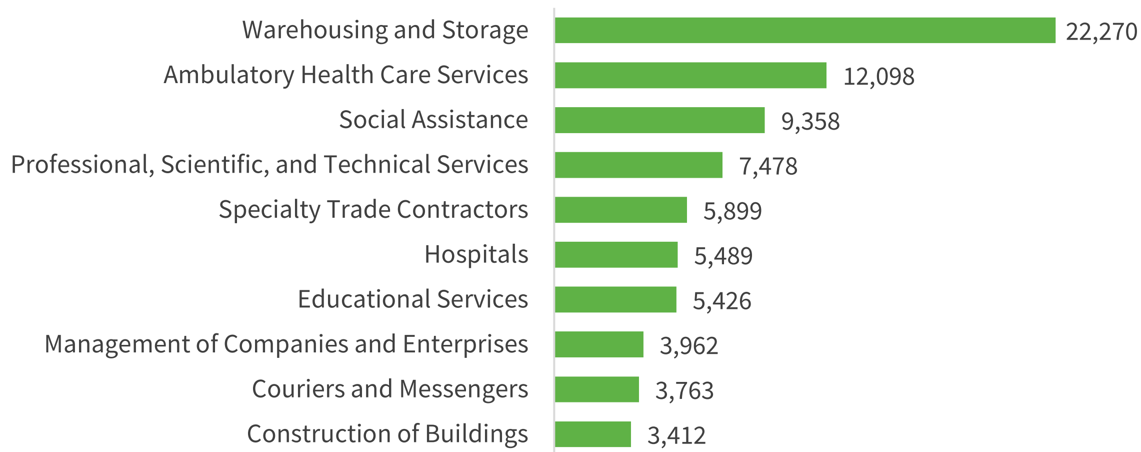


Figure 38: Lightcast, 2022

TOP INDUSTRIES BY AVERAGE ANNUAL EARNINGS

The top industries by average earnings per job can be seen in Figure 41, juxtaposed with the number of jobs in that industry, to give a more complete picture. In all the top industries, the average annual earnings are over $100,000 per year. The top earning industries are diversified, including sectors in financial services, transportation, manufacturing, and utilities.

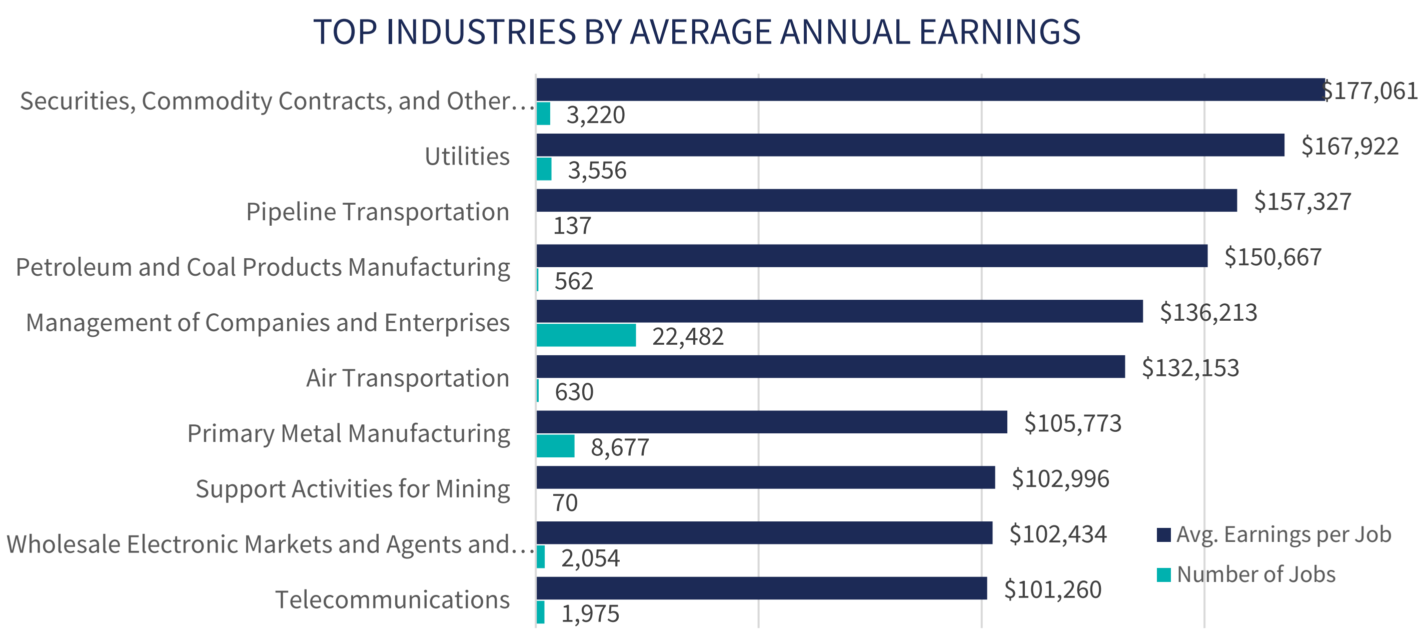


Figure 39: Lightcast, retrieved 2022.

TOP JOB SECTORS BY LOCATION QUOTIENT

The top industries by average Location quotients (LQ) provide a measure of an industry's concentration in a region. An LQ greater than one indicates that the local industry is larger than at the national level, while an LQ less than one indicates that the local industry is less than the national level. All top industries have LQs greater than one, indicating that the industries have a high concentration within the South Central region. However, having a highly concentrated industry in the region cannot be interpreted as having a high level of impact; the impact on the region's economy is dependent on the number of jobs. The top industries by LQ are dominated by the manufacturing sector. Other highly concentrated sectors include warehousing and storage and animal production and aquaculture.

TOP INDUSTRIES BY LOCATION QUOTIENT

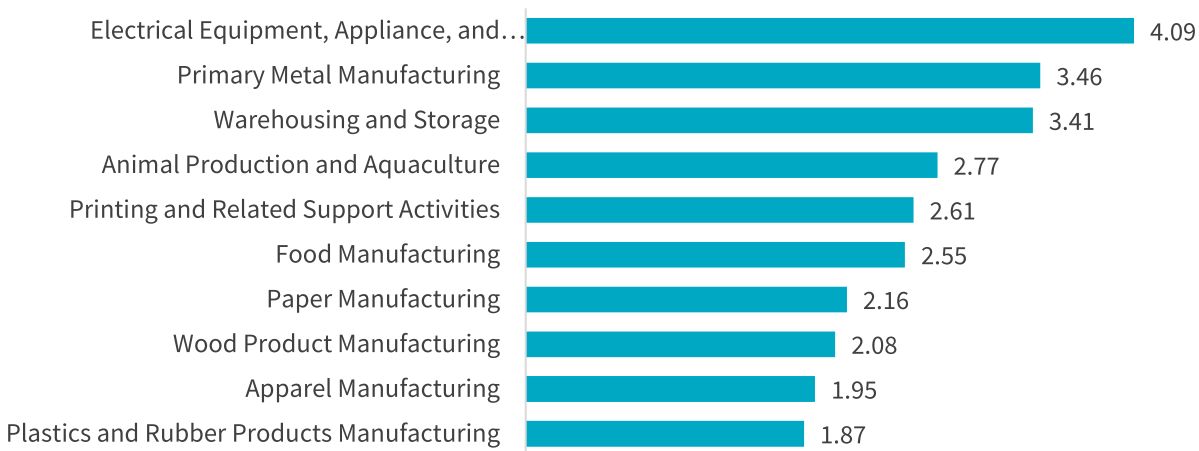


Figure 40: Lightcast, retrieved 2022.

TARGET INDUSTRIES

Target industries analysis determines how best to utilize the region's competitive economic advantages to attract and retain the best-fit industries for South Central Pennsylvania. Determining what industries are best suited for the region includes the concentration of existing industries, supply-chain gaps in those industries, regional labor market advantages, effective and efficient use of limited regional resources, and the local perception of key industries, among other factors.

A shift share analysis of the region was used to identify industries in the region that may have a unique competitive advantage based on expected and actual growth from 2011-2021. Industries were then filtered based on average wages and national trends to produce an overview of industries that may be especially competitive or primed for growth in the region.

A more exhaustive dataset can be found in the appendix of this document.

The sub-sectors listed indicate industries in the South Central Region where the region has shown a competitive advantage compared to the rest of the region and wages are close to or above the regional average. While wages in the agricultural sector mostly below the regional average, the industry was included because of its growth in the region despite national decline.

TARGET INDUSTRY	INDUSTRY SECTORS	NOTES
Agriculture	• Crop Production • Animal Production • Forestry & Logging	High competitive advantage but low wages
Manufacturing	• Chemical Manufacturing • Transportation Equipment Manufacturing • Metal Product Manufacturing • Wood Product Manufacturing • Plastics & Rubber Manufacturing • Paper Product Manufacturing	Competitive wages across sectors, high competitive advantage. This industry makes up the bulk of the region's competitive industry, and efforts should be focused on reducing turnover, establishing individual professional growth pathways, and transitioning to advanced manufacturing while retaining jobs and upskilling workers.
Transportation & Warehousing	• Air Transportation • Ground Transportation & Distribution • Warehousing & Storage	Road transportation is not competitive or growing. Largest regional gains have been in air transportation. Transportation manufacturing is also promising. Warehousing shows high growth not reflected in competitive advantage.
Healthcare	• Hospitals • Outpatient Care • Nursing & Residential Care	Low wages in home & residential care.

Table 13

TOP EMPLOYERS

A list of major employers in the area can be found in Lightcast's Profile Analytics, which uses employer information from online profiles and resumes to estimate the top employers in a region. Many of the major employers in the South Central Region are in the healthcare industry.

TOP EMPLOYERS
Commonwealth of Pennsylvania
Lancaster General Health
Penn State Milton S. Hershey Medical Center
TE Connectivity
The Hershey Company
The Pennsylvania State University
U.S. Army
University of Pittsburgh Medical Center
Walmart
Wellspan Health

Table 14

TOP OCCUPATIONS

A similar analysis was done of occupations corresponding to target industries. Promising occupations in each sector were identified based on a shift-share analysis and wage data. A more exhaustive dataset can be found in the appendix of this document.

Within the Agricultural sector, wages are high for management, which makes up 54% of jobs in the industry. Farming, fishing, and forestry occupations make up the other significant portion of jobs in the industry, but wages are low.

The target industry analysis was used to identify sectors and occupations where the region is a strong market presence, and, in the case of the agricultural sector, where poor conditions in the industry threated the industry's presence and corresponding competitive advantage in the region.

TARGET INDUSTRY	OCCUPATION CLUSTERS
Agriculture	• Management • Farming, fishing, and forestry • Transportation and material moving
Manufacturing	• Management • Business and Financial Operations • Computer and Mathematical • Architecture and Engineering • Installation, Maintenance, and Repair • Production
Transportation & Warehousing	• Management • Business and Financial Operations • Office and Administrative Support • Installation, Maintenance, and Repair • Production • Transportation and Material Moving
Healthcare	• Management • Business and Financial Operations • Computer and Mathematical • Life, Physical, and Social Science Occupations • Community and Social Service • Healthcare Practitioners and Technical • Office and Administrative Support • Installation, Maintenance, and Repair

Table 15

WORKFORCE COMMUTING PATTERNS

An inflow/outflow analysis using US Census Bureau resources indicated that nearly 50,000 more residents live in the region but commute outside for work than those who live outside the region but commute in for work. While the majority of residents (roughly 885,000) both live and work in the region, about 210,000 commute from outside, and about 257,000 commute to a job outside the region.

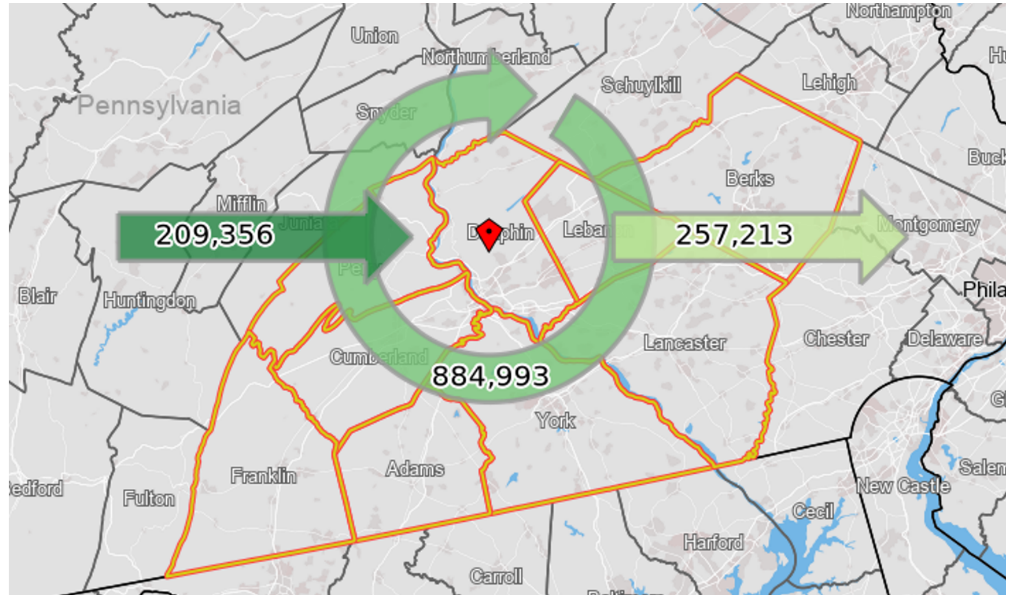


Figure 41: Regional Employment Inflow/Outflow, On The Map, 2022

AVERAGE COMMUTE TIME

Commute times in the South Central Region are relatively short, with 68% of workers having commutes less than 30 minutes. This indicates that most workers are able to find suitable employment locally. However, some workers have found employment farther afield, with 7% of commutes being longer than 60 minutes.

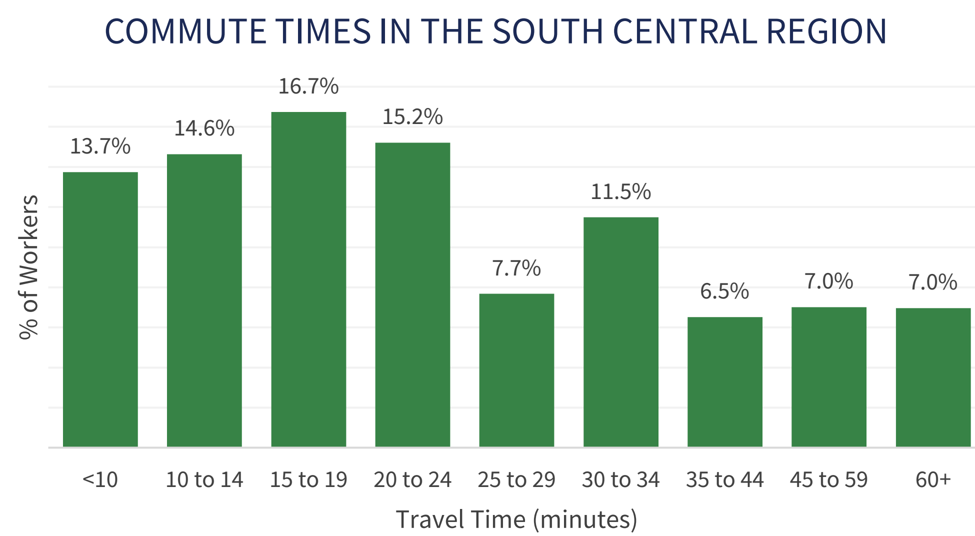
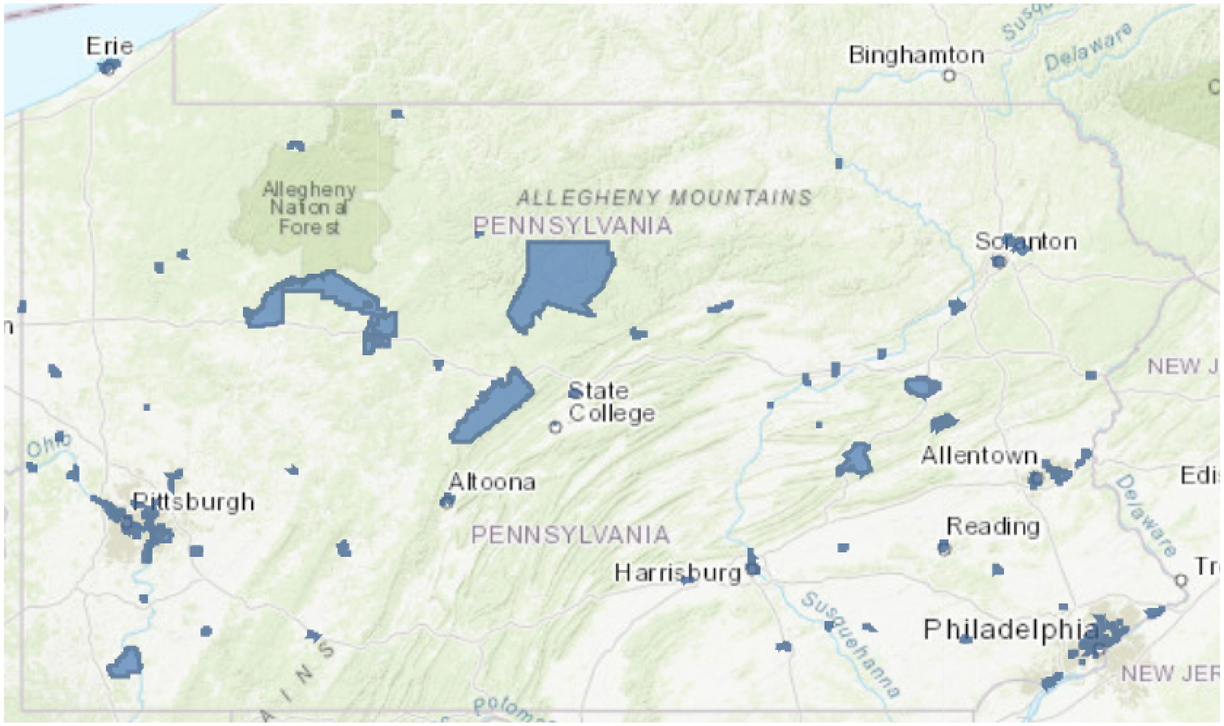


Figure 42: Travel time to work for workers in the South Central Region. This does not include workers who work from home. Source: US Census, retrieved 2022.

South Central Pennsylvania Federal Opportunity Zones

The Federal Qualified Opportunity Zone (QOZ) program spurs economic development and job creation in low-income communities by offering tax incentives for investment into designated distressed census areas. Individuals who make investments through special funds in these zones can defer or eliminate federal taxes on capital gains. At the state level, the governor was given the opportunity to designate up to twenty-five percent of census tracts that either have poverty rates of at least twenty percent or median family incomes of no more than 80 percent of statewide or metropolitan area family income. The governor designated 300 tracts based on the potential to eliminate poverty, the likelihood of private-sector investment in those tracts, and the assessment of the priorities of local economic development partners and community organizations.

Outside of the Federal QOZ program, the Commonwealth of Pennsylvania, administered by the PDCED, offers the Keystone Opportunity Zone program (KOZ). The KOZ program provides state and local tax abatements to businesses and residents locating in a geographically designated zone. Businesses relocating to KOZs must increase their full-time employment by 20% within the first full year of operation or make a 10% capital investment in the KOZ/KOEZ property based on their prior year's gross revenues.



South Central Pennsylvania has a total of twenty-six distinct census tracts in the following counties: Berks (6), Cumberland (1), Dauphin (6), Lancaster (6), Lebanon (2), and York (5). All Berks, Cumberland, Lancaster, and York Opportunity Zones have census tract types that are considered "low-income communities". Dauphin and Lebanon Opportunity Zones have a mix of census tract types that are "low-income communities" and "Non-LIC Contiguous". Although Adams, Franklin, and Perry counties are considered rural, they do not hold communities that are designated QOZs.

County	Associated Census Tract(s)	Population	Labor Force	Land Area	Unemployment Rate	Per Capita Income	Poverty Rate
Berks	1	4,322	1,975	0.0	19.7	15,924	47.2
	4	3,952	1,868	1.0	8.9	19,274	23.3
	9	2,593	1,022	0.0	3.9	17,950	28.3
	13	2,930	1,500	0.0	16.2	16,709	39.6
	25	3,388	812	0.0	12.9	10,472	52.5
	112	4,293	1,903	1.0	1.0	41,982	27.1
Cumberland	120	4,624	2,555	1.0	1.4	27,502	15.1
Dauphin	201	3,449	2,212	1.0	2.7	38,415	20.9
	203	1,793	1,019	0.0	8.9	24,570	37.3
	206	N/A	N/A	0.0	N/A	N/A	N/A
	211	3,159	1,145	3.0	9.3	14,666	46.1
	213	5,662	2,240	0.0	11.2	14,044	33.2
	214	5,253	2,133	1.0	21.8	15,781	43.9
Lancaster	8	3,734	1,592	0.0	3.8	15,477	27.8
	9	3,601	1,661	0.0	17.7	15,626	38.5
	10	4,098	2,184	0.0	15.6	20,508	16.6
	14	5,169	2,219	0.0	6.6	14,907	31.3
	112	1,910	893	0.0	4.1	16,893	28.1
	113	4,502	2,290	1.0	2.2	32,843	11.1
Lebanon	1	4,270	2,088	1.0	9.1	20,826	27.9
	2	5,009	2,183	1.0	6.4	21,551	25.3
York	3	2,426	1,450	0.0	25.9	14,911	32.4
	6	3,064	2,003	1.0	12.0	29,787	23.0
	10	1,437	552	0.0	6.9	20,041	33.6
	12	3,254	1,543	0.0	26.2	15,362	33.8
	16	1,531	650	0.0	17.2	46,012	367

Table 16: Stats America Opportunity Map., U.S. Census Bureau: American Community Survey

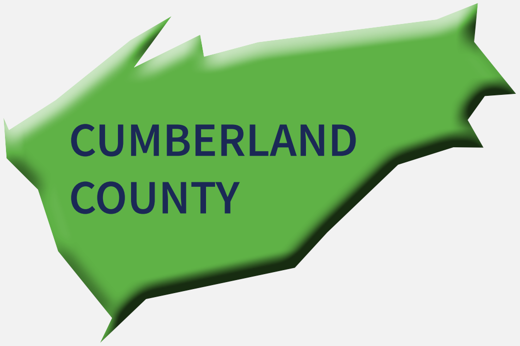
Berks County is home to over 400,000 people and roughly 183,000 jobs. The county has an above-average median household income, low unemployment, a growing, and highly educated population, and several large, high-paying occupations.

However, Berks County differs in terms of percentage of population by age group compared to the state and the nation. The 25 to 44 age group (often considered the "Working Professional" population), is the largest group for Berks County in terms of percentage of population. However, the CEDS region, as well as the US, hold a higher percentage of the population for this age segment than that of Berks County. This could have possible labor force implications, as the county has fewer people in this critical age group.

Berks County has both a lower unemployment rate, and a higher labor force participation rate than that of the Commonwealth of Pennsylvania. The unemployment rate has closely followed state trends and has recovered from COVID-19 spikes. While the labor force participation rate has been declining, in 2021 a slight uptick has been seen in the county compared to previous 2020 numbers. The state's labor force continues to fall following US trends.

Compared to the CEDS region, Berks County has a roughly 4% lower educational attainment rate for those completing a bachelor's degree and a 1% lower educational attainment rate for those completing a graduate degree or higher.

Berks County is predominately White with the second-highest race/ethnicity identified by residents being Hispanic. Median Household Income is roughly $1,000 less than the regional average and almost $2,000 more than the state average. Further, poverty levels in the county are above the regional average by significant margins.



CUMBERLAND COUNTY

Cumberland County is home to over 255,000 and roughly 147,000 jobs. The county has an above-average median household income, low unemployment, a growing and highly educated population, and several large, high-paying occupations.

Age distributions indicate Cumberland County differs in terms of the percentage of population by age group compared to the state and the nation. The 25 to 44 age group is the largest group for Cumberland County in terms of percentage of the population. However, the CEDS region, as well as the US, holds a higher percentage of the population for this age segment than that of Cumberland County. Those ages 45 to 59, 60 to 74, and 75+ also have lower representation within the county than compared to the region and state. This could have implications for the possible labor force, as well as additional impacts that come with an aging population like increased healthcare and transportation needs.

Cumberland County has both a lower unemployment rate, and a higher labor force participation rate than that of the Commonwealth of Pennsylvania. The unemployment rate has closely followed state trends and has recovered from COVID-19 spikes. While the labor force participation rate has been declining, in 2021 a slight uptick has been seen in the county compared to previous 2020 numbers. The state's labor force continues to fall following US trends.

Compared to the CEDS region, Cumberland County has a roughly 1% lower educational attainment rate for those completing an associate degree and a 1% lower educational attainment rate for those completing some college.

Cumberland County is predominately White with the second-highest race/ethnicity identified by residents being Hispanic. Median Household Income is roughly $7,000 more than the regional average and almost $10,000 more than the state average. Further, poverty levels in the county are below both the region and state averages by significant margins.

Dauphin County is home to over 255,000 people and roughly 189,000 jobs. The county's location is beneficial as it is home to the state capital. It is also a critical hub for east coast transportation systems as a convergence point in the Boston-to-Richmond northeast corridor.

The 25 to 44 age group is the largest group for Dauphin County in terms of percentage of the population. The CEDS region, as well as the US, has a lower percentage of the population for this age segment than that of Dauphin County. This could have possible labor force implications, as the county has fewer people in this critical age group. Coherently, those ages 45 to 59, 60 to 74, and 75+ have higher representation within the county than compared to the region and state.

Dauphin County has both a lower unemployment rate, and a higher labor force participation rate than that of the Commonwealth of Pennsylvania. The unemployment rate has closely followed state trends and has recovered from COVID-19 spikes. While the labor force participation rate has been declining, in 2021 a slight uptick has been seen in the county compared to previous 2020 numbers. The state's labor force continues to fall following US trends.

Dauphin County outperforms regional averages in terms of higher educational attainment (Associate degree or higher) while competing closely with national averages. Compared to the CEDS region, Dauphin County has a roughly 3% higher educational attainment rate for those completing a bachelor's degree and a 2% higher educational attainment rate for those completing a graduate degree or higher. Dauphin County is predominately White with the second-highest race/ethnicity identified by residents being Black. Median Household Income is roughly $4,000 less than the regional average and over $1,000 less than the state average. Further, poverty levels in the region are below both the region and state averages by close margins.

Lancaster County is home to over 500,000 people and roughly 269,000 jobs. The county has an above-average median household income, low unemployment, a growing and highly educated population, and several large, high-paying occupations.

The 25 to 44 age group is the largest group for Lancaster County in terms of percentage of the population. However, the CEDS region, as well as the US, holds a higher percentage of the population for this age segment than that of Lancaster County. This could have possible labor force implications, as the county has fewer people in this critical age group.

Lancaster County has both a lower unemployment rate, and a higher labor force participation rate than that of the Commonwealth of Pennsylvania. The unemployment rate has closely followed state trends and has recovered from COVID-19 spikes. While the labor force participation rate has been declining, in 2021 a slight uptick has been seen in the county compared to previous 2020 numbers.

Lancaster County outperforms region averages in terms of higher educational attainment (bachelor's degree or higher) while competing closely with national averages. Compared to the CEDS region, Lancaster County has a roughly 1% higher educational attainment rate for those completing a bachelor's degree and the same higher educational attainment rate for those completing a graduate degree or higher. Lancaster County is predominately White with the second-highest race/ethnicity identified by residents being Hispanic. Median Household Income is roughly $2,000 more than the regional average and almost $6,000 more than the state average. Further, poverty levels in the county are below both the region and state averages by significant margins.

Lebanon County is home to over 140,000 people and roughly 55,000 jobs. The county has an above-average median household income, low unemployment, a growing population, and several large, high-paying occupations. Manufacturing as well as transportation and warehousing industries are particularly concentrated in the region. Penn State Health Milton S. Hershey Medical Center and the famous Hershey Company are top employers in the county. As of the latest Urban and Rural Census data, Lebanon County population is 73% Urban and 27% Rural.

Lebanon County differs in terms of percent of population by age group compared to the state and the nation. The 25 to 44 age group (often considered the "Working Professional" population), is the largest group for Lebanon County in terms of percent of population. However, the CEDS region, as well as the US, hold a higher percentage of the population for this age segment than that of Lebanon County.

Lebanon County outperforms regional averages in terms of high school educational attainment while competing closely with national averages. Compared to the CEDS region, Lebanon county has a roughly 5% lower educational attainment rate for those completing a bachelor's degree and a 2% lower educational attainment rate for those completing a graduate degree or higher.

Lebanon County is predominately White with the second highest race/ethnicity identified by residents being Hispanic. Median Household Income (MHI) is roughly $4,000 less than the regional average and about $1,000 less than the state average. Further, poverty levels in the region are below both the region and state averages by significant margins. Earnings and wages considerably impact poverty percentages, but the cost of living and quality of life characteristics can also increase burdens on families experiencing poverty.

York County is home to over 450,000 people and roughly 190,000 jobs. The county has an above-average median household income, low unemployment, a growing and highly educated population, and several large, high-paying occupations. The Transportation and Moving sector as well as the Healthcare industries are particularly concentrated in the region.

Age distributions shown below indicate York County differs in terms of the percentage of the population by age group compared to the state and the nation. The 25 to 44 age group (often considered the “Working Professional” population), is the largest group for York County in terms of percentage of the population. However, the CEDS region, as well as the US, holds a higher percentage of the population for this age segment than that of York County.

York County outperforms regional averages in terms of High School educational attainment (bachelor’s degree or higher) while competing closely with national averages. Compared to the CEDS region, York County has the same educational attainment rate for those completing a bachelor’s degree and a 1% lower educational attainment rate for those completing a graduate degree or higher.

York County is predominately White with the second highest race/ethnicity identified by residents being Hispanic. Median Household Income (MHI) is roughly $2,000 more than the regional average and almost $6,000 more than the state average. Further, poverty levels in the region are below both the region and state averages by significant margins. Earnings and wages considerably impact poverty percentages, but the cost of living and quality of life characteristics can also increase burdens on families experiencing poverty.

OPPORTUNITY ZONES SUMMARY

In collaboration with the PDCED, SCPA PREP, and other regional and local partners, each Opportunity Zone community works with their perspective local champions and economic developers to leverage identified Opportunity Zone assets to maximize economic benefits for those living in these communities.

The SC PA PREP is dedicated to improving equitable economic development within the nine-county region. As the SC PA PREP region continues to thrive and develop, the outlined goals and objectives will greatly impact all QOZs. For example, in Goal 1, Objective 2, Strategy 3, it is imperative to address relational gaps to improve cultural barriers and needs that impact (or enhance) economic opportunities for international businesses, target industries, and minority-owned businesses. Additionally, within the next five years, the SC PA PREP will collectively unify regional marketing opportunities to improve regional business attraction solutions, particularly targeting Opportunity Zones.

SWOT Analysis

A Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis is a strategic planning tool to ensure that there is a clear objective informed by a comprehensive understanding of a region's capabilities and capacity. A SWOT Analysis helps determine and analyze what the region already possesses that could be leveraged better to build the capacity for growth, including competitive cultural, economic, technological, intellectual, and physical assets that are critical to developing the strategic direction and implementation plan to promote regional economic vitality.

Our 2023-2028 CEDS process included an analysis of the region's strengths, weaknesses, opportunities, and threats using surveys, assessments, and stakeholder engagement workshops. Based on the community-based analysis, we have determined the four focus areas for the 2023-2028 CEDS:

- Economic Development
- Workforce Development
- Infrastructure Improvement
- Quality of Life

SWOT PROCESS

A critical component of the CEDS process is local stakeholder participation. Engagement and involvement from the local community is important to finalizing the CEDS plan that is implementable and impactful. This project employed several engagement strategies, including a virtual SWOT (Strengths, Weaknesses, Opportunities, and Threats) Survey that allowed those who could not participate in the -in-person SWOT sessions.

The three-day in-person sessions were scheduled from Monday, June 13, 2022 to Wednesday, June 15, 2022. The sessions took place in Lebanon County, Franklin County, and Dauphin County. Stakeholder Engagement Sessions are designed to provide the opportunity to hear from the local and regional stakeholders and conduct a regional SWOT analysis. Over the course of three days, over fifty stakeholders from the region participated in this process. In-person session groups were asked to unanimously identify and rank regional strengths, weaknesses, opportunities, and threats.

Top Four Regional Strengths

Strengths are a region's relative competitive advantages (e.g., industry supply chains and clusters, extensive port, rail) and often are internal in nature. The charts below reflect the top regional strengths.

1 GEOGRAPHIC LOCATION

The geographic location of the region was considered the greatest strength among stakeholders. Participants referenced the region's proximity to major metros like Philadelphia, Pittsburgh, Baltimore, and Washington D.C. which provided an advantage to market access, major highway access, and regional tourism exposure. Stakeholders see the location of the region as a competitive advantage, making it most attractive to logistics companies, young adults, and tourists.

2 ECONOMIC WELL-BEING

Stakeholders ranked the regional economic well-being as the second highest strength of South Central PA. Participants identified the industry diversity of the region, the overall economic resiliency of the region, and general public support of major regional industries. According to the StatsAmerica Innovation Intelligence index, the South Central region received a "moderate" economic well-being score based on the region's low average poverty rate and high broadband infrastructure and adoption measures, amongst other factors.

3 SENSE OF PLACE

Sense of Place factors were considered the third regional strength among stakeholders. Participants referenced a regional sense of pride and community, generally low cost of living (compared to neighboring regions and the state), the economic diversity of the region, and the "urban and rural" landscape of the region.

The average cost of living in the region is lower than the Lehigh Valley (Lehigh and Northampton counties) and the Philadelphia and the Countryside region (Bucks, Chester, Delaware, Montgomery, and Philadelphia counties). The estimated annual living wage for a family with two working adults and two children in the South Central region is about $26,000 per working adult. In the Lehigh Valley and the Philadelphia and the Countryside region, the living wage is higher, indicating a higher cost of living. The region has a mix of urban and rural places, giving residents access to a diverse set of locations to live, work, and recreate.

4 TOURISM & RECREATION

Tourism and Recreation factors were considered the fourth greatest strength of South Central PA amongst stakeholders. Participants referenced factors including the diversity of tourism opportunities of South Central PA and highlighted the natural resources of the region. Within the South Central Region, visitors can participate in agritourism, such as farm visits or winery tours, visit historical attractions like the Gettysburg Battlefield or National Civil War Museum, and experience a new culture with a visit to the Amish Village. The area has many opportunities for outdoor recreation, due to its proximity to the Appalachian Trail and other outdoor spaces. This variety of experiences drew in $5.9 billion in tourism spending in 2020, which supported 8.4% of all employment in the region.

Top Four Regional Weaknesses

Weaknesses are economic development characteristics that place a community at a disadvantage relative to other communities (e.g., a risk-averse or change-resistant regional culture).

1 INEQUITY CONCERNS

Stakeholders deemed inequity factors the top competitive weakness for South Central PA. Identified factors include limited regional DEI (Diversity, Equity, and Inclusion) opportunities, inequalities related to food access and educational opportunities, and the region's lack of affordable housing (including mid-level housing stock). As of 2019, 9.4% of households in the region are considered below poverty level and 26.1% of households in the region live with disabilities.

As of 2020, over 215,000 individuals in the region are food insecure. However, food insecurity rates vary throughout the region, ranging from 8.0% up to 10.2.

Within the region, 26.2% of individuals ages 25 years and over have obtained at least a bachelor's degree. This is about 5 percentage points less than the state as a whole, where 31.4% of individuals have at least a bachelor's degree.

In 2020, 27.1% of households in the South Central Region were cost burdened, meaning they spend at least 30% of their household income on housing costs. This demonstrates a need for more affordable housing within the region.

FOOD INSECURITY BY COUNTY, SOUTH CENTRAL PA

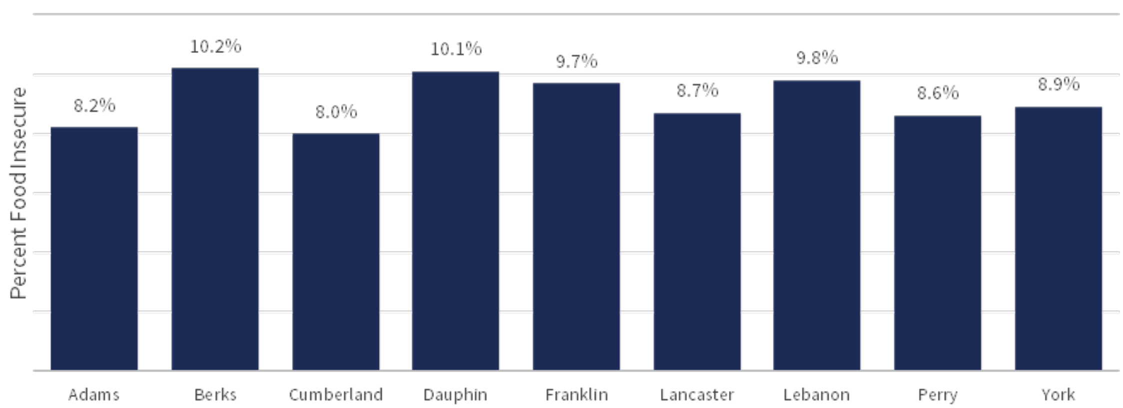


Figure 43: Food insecurity within the South Central region, 2020. Source: Feeding America, retrieved 2022.

2 WORKFORCE CHALLENGES

Workforce factors were considered the second greatest regional weakness. Workforce factors identified include the aging workforce, lack of education/low post-secondary education workforce rates, lack of workforce/talent retention efforts, and the general regional labor shortage. Individuals ages 50-59 make up almost 14% of the region's total population. This group will soon reach retirement age, and as these workers exit the labor force, this could cause a strain on the labor market. As mentioned in the Summary Background, the percentage of individuals with at least a bachelor's degree is about 5 percentage points lower in the region than in the state. Pennsylvania, like many places in the United States, is experiencing a labor shortage. An August 2022 report from the Independent Fiscal Office notes that there is, "an unusually high demand for workers relative to the number seeking employment." There are currently more job openings in the state than unemployed people. As shown in the inflow/outflow analysis in the Summary Background, the region has a net outflow of jobs, meaning more people are leaving the region for employment than entering, which could be contributing to the labor shortage.

3 LACK OF TRANSPORTATION/INFRASTRUCTURE IMPROVEMENTS

The third greatest regional weakness was identified as Transportation/ Infrastructure factors. These factors include lack of access to regional transportation (or mass transit), aging infrastructure, lack of broadband access, and lack of regional transportation planning.

Some sort of public transportation is available in all counties of the South Central region. However, it does not reflect the needs of individuals in the region. For example, in Franklin County, public transportation is limited to on-demand micro-transit, whose service area does not include the entirety of the county, medical assistance transportation, transportation for person with disabilities, and a senior shared-ride program. In comparison, Dauphin County has passenger rail service, multiple fixed route bus provides, medical assistance transportation, transportation for person with disabilities, a senior shared-ride program, and intercity passenger bus service. Transportation across the region could be challenging due to the absence of a cohesive transportation planning unit in the region. Metropolitan Planning Organizations (MPOs) are local organizations in Pennsylvania responsible for regional planning and programming for all modes of transportation. The South Central Region has seven different MPOs. Coordination of these seven MPOs to create a larger South Central transportation plan could be challenging.

Aging infrastructure is a problem throughout the state. Pennsylvania has some of the oldest infrastructures in the country which needs improvement. Pennsylvania's infrastructure report card gave a "D" rating (ratings of poor to fair, with significant portions of the infrastructure system showing significant deterioration) to the following infrastructure sectors: bridges, drinking water, inland waterways, roads, stormwater, transit, and wastewater. Within the region, 10.8% of bridges have a rating of poor and 61.8% of bridges have a rating of "fair" (main structural elements are structurally sound, but there are minor cracks and signs of deterioration). The maintenance and improvement of the region's aging infrastructure will require significant investment in the coming years.

As of 2020, almost 84% of households have broadband internet subscriptions. However, of households with broadband subscriptions, 11.9% have only a cellular data plan, which may or may not give adequate access to fast, reliable internet. Further, access to broadband is heterogeneous across income groups, with almost 94% of higher-income households having broadband subscriptions compared to just 60% of low-income households.

4 REGIONAL DIVISIONS

The fourth regional weakness identified was Regional Division factors. These factors include the lack of regional marketing/branding, strict local government controls, the concern for too many municipalities, lack of regional strategy, and lack of regional funding. Many state grants are at the county level, forcing competition between the counties of the South Central region.

Because of this "regional divide", regional stakeholders, now more than ever, want to continue to unite the region through the CEDS process. Stakeholders believe this is an important step to continue to strengthen the collective vision of South Central Pennsylvania. By completing and engaging in the CEDS process and action plan, regional stakeholders will continue the momentum to strengthen other facets of the communities in which they serve.

Top Four Regional Opportunities

Opportunities are economic development-related assets or circumstances which demonstrate a potential for growth, improvement, or support of other economic development-related activities (e.g., expansion of a biosciences research lab in the region).

1 BUILDING REGIONAL ECONOMIC RESILIENCY

Economic Resiliency factors were considered the greatest regional opportunity. These factors include how stakeholders perceived the region's response during the COVID-19 economic resiliency, the opportunity to build on the region's industry clusters, supporting innovation/entrepreneurship in regional industry clusters, reshoring/ Foreign Direct Investment (FDI), and collaborating across major industries. During the Covid-19 pandemic, the region lost over 160,000 jobs from March to April 2020. However, by May 2020, the economy was already experiencing gains, and the region added over 60,000 jobs during the month. Within those first few months, job gains were large and significant (greater than 15,000 per month). Since September 2020, employment increases have been slower, but steady, with a median monthly job gain of 1,190. In May 2022, the total employment in the region exceeded the total employment in December 2019. This recovery has been faster than at the state level, as employment in Pennsylvania has still not reached the level of December 2019.

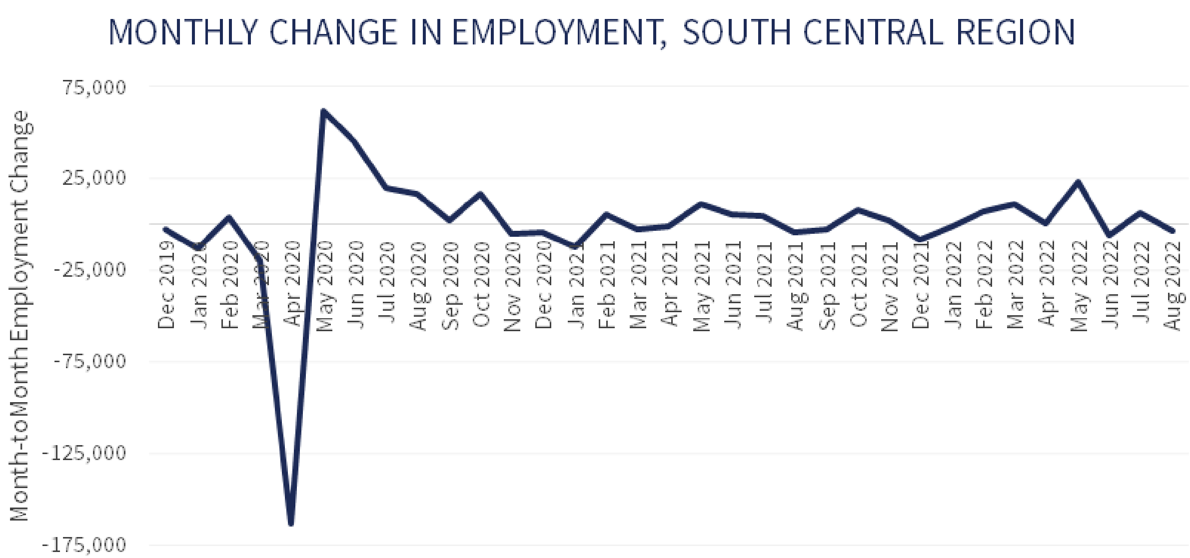


Figure 44: Monthly changes in employment, December 2019 to August 2022. Source: U.S. Bureau of Labor Statistics Local Area Unemployment Statistics, retrieved 2022.

2 BUILDING REGIONAL COLLABORATION

The second regional opportunity that emerged was Regional Collaboration factors. Regional Collaboration opportunities identified include developing a multicultural region, regional collaboration to address "low-hanging fruit" and placing an emphasis on regional planning efforts. Stakeholders recognize that the regional CEDS initiative aims to facilitate collaboration among local Economic Development Organizations and foster cross-sector approaches to regional economic and social challenges.

Additionally, stakeholders understand the importance of collaboration and thinking regionally, building on existing relationships, and being as inclusive as possible, to become a more resilient and united region. Regional collaboration can lead to gains in workforce training, business recruitment and retention, and resiliency.

3 INCREASE COLLABORATION BETWEEN HIGHER EDUCATION INSTITUTIONS

The third regional opportunity identified was factors that increased collaboration between higher educational institutions. Stakeholders identified a gap in cooperation between higher education institutions. Stakeholders believe the lack of cooperation contributes to the low educational attainment in the region as well as critical labor skills challenges.

Additionally, Higher Education/Technical Training factors include the region's low value of higher education, lack of investment in tech-based education, and increased effort of collaboration between educational institutions.

4 UNIFY REGIONAL TOURISM AND RECREATION EFFORTS

The fourth opportunity was identified by Tourism & Recreation factors. Tourism & Recreation opportunities include focusing on regional tourism branding opportunities and expanding cultural-based recreation & tourism opportunities in the region. Although the region holds many tourist attractions and sees the highest investment in tourism spending in the state, the region lacks a united effort in marketing and branding.

Top Four Regional Threats

Threats are chances or occasions for negative impacts on the region or regional decline (e.g., several companies in the region considering moving to lower-cost areas of the state).

1 REGIONAL LABOR FORCE SHORTAGE

The top identified threat of the region is related to Labor Force Shortages. Factors identified include workforce migration (out of the region), the local "brain drain", low labor force participation rates, and labor force competition amongst regional employers. The net job flow in the region is -47,857, meaning that after accounting for workers who travel into the county for work, 47,857 workers are lost to employers outside the region. Looking at just those who live in the region, approximately 22.5% of workers are leaving the region for employment. With the current labor shortage, losing over 20% of workers in the region to outside employment will increase competition for workers amongst employers in the region. Labor force participation within the region is higher than within Pennsylvania and the nation as whole. However, the labor force participation rate has declined slightly over the past five years.

2 LEADERSHIP DISSONANCE

Leadership Dissonance factors are considered the second greatest regional threat by stakeholders. Stakeholders identified leadership dissonance factors that include conservative thinking of locally elected leaders, anti-change attitude, political polarization, resistance to change, political divisiveness, lack of diversity in leadership/opportunities for Black, Indigenous, and People of Color (BIPOC) community, generally lack of state-wide strategy to support economic development, and "leading the way" for regional innovation.

When leaders across the region were surveyed about hindrances that contributed to regional collaboration, most responses related to a lack of communication between elected officials on a broad scale; taking the opportunity to act regionally to solve common challenges rather than act as individual counties.

3 LACK OF REGIONAL COOPERATION

The third greatest regional threat identified by stakeholders was Regional Cooperation factors. These factors include a lack of accurate information (communication) and lack of regional-based economic development planning efforts/collaboration to encourage funding opportunities.

Referring to the similar “opportunity”, regional stakeholders understand the importance of this planning process and believe this will provide the region with a pathway to conquering common challenges. Stakeholders mentioned this initiative will invoke political leaders, community leaders, and other regional actors to actively engage with the regional CEDS.

4 DECLINING QUALITY OF LIFE FEATURES

The fourth regional threat identified by stakeholders is the lack of Quality-of-Life factors. These factors include not meeting the needs for housing & childcare, inflation, the rising costs of living in the region, and slow regional population growth. From August 2019 to August 2022, the median home sale price increased by over 25% in all counties in the region. Perry County had the largest increase, where the median home sale price increased by over 50%. Unfortunately, homes aren’t the only area seeing price increases. The South Central region is experiencing the high inflation rates found throughout the county. The inflation rate in the Northeast Region (which includes South Central Pennsylvania) was 7.2% in September 2022. This increase is largely driven by increases in housing, new and used motor vehicles, medical care, and household furnishing and operations. Between 2016 and 2021, the region experienced about 2.1% population growth. On an annual basis, this is less than half a percentage point per year.

STRENGTHS

Geographic Location
Economic Well-Being
Sense of Place
Tourism & Recreation

WEAKNESSES

Inequity Concerns
Workforce Challenges
Lack of Transportation/Infrastructure Improvements
Regional Divisions

OPPORTUNITIES

Building Regional Economic Resiliency
Building Regional Collaboration
Increase Collaboration Between Higher Educational Institutions
Unify Regional Tourism & Recreation Efforts

THREATS

Regional Labor Force Shortage
Leadership Dissonance
Lack of Regional Cooperation
Declining Quality of Life Features

Strategic Action Plan

4

“Our region is united through shared strengths, seeking to support sustainable, economic vitality throughout South Central Pennsylvania.”

In 2021, the South Central Pennsylvania Partnership for Regional Economic Performance (PREP) agreed to pursue a regional, US EDA CEDS for 2023-2028. The SC PA PREP believed that developing and implementing a regional economic development plan would not only align common goals within the region but would also address critical barriers to regional economic prosperity.

Four priority goals were developed based on an extensive regional economic analysis, a regional SWOT analysis, and feedback from regional focus groups. This five-year plan represents region-wide collaboration and unity. As the SC PA PREP initiated the planning process, this gave regional stakeholders the opportunity to act and engage in the development of the goals and strategies.

From the development phase to the implementation of this plan, the SC PA PREP has maintained the goal to build on regional economic advantages to help guide future economic development projects and investments to further enhance regional assets. The four priorities goals for the region address:

- Economic Development
- Workforce Development
- Infrastructure Improvement
- Quality of Life

Each goal is accompanied by objectives and actions to accomplish the stated goal. Followed by the Strategic Action Plan, the Evaluation Framework will provide performance indicators and how these strategies will be monitored throughout the next five years. Additionally, the implementation matrix can be found in the appendix of this document.

GOAL 1

FOSTER & MAINTAIN AN ECONOMICALLY COMPETITIVE REGION

We have opportunities to support entrepreneurship and foster innovation to keep our region competitive in today's global economy. It is imperative that the region has a robust entrepreneurial ecosystem that enables the process for businesses to launch, sustain, innovate, and grow. To remain on the cutting edge, research and development should be prioritized in our target industries and beyond.

OBJECTIVE I. PROMOTE INTENTIONAL ECONOMIC GROWTH

Promoting intentional growth including small businesses and entrepreneurs by creating an environment where they can thrive in innovation is vital to the region's economic resiliency.

1. Convene regional partners to determine what business development/training services and entrepreneurial ecosystem gaps exist in the region.
2. Collaborate with partners to develop and promote workshops with federal, state, and local funding agencies that provide business assistance services in the region, specifically targeting women, veteran, and minority-owned businesses.
3. Identify and convene partners to facilitate collaboration among research institutions and tech-based businesses to promote and expand tech-based job opportunities in rural areas of the region.

OBJECTIVE II. ESTABLISH AND MAINTAIN A BUSINESS-FOCUSED REGION

Advancing growth and development for industries critical to the region's economic ecosystem and its prosperity.

1. Convene annual meetings with county EDCs and other partners to unify regional marketing opportunities and improve regional business attraction solutions.
2. Identify and maintain a regional inventory of available sites and buildings for development and redevelopment opportunities and to attract investment from existing and new businesses.
3. Collaborate with regional partners to understand and improve cultural barriers, needs, and gaps that impact (or enhance) economic opportunities for international businesses, target industries, and minority-owned businesses.
4. Support networking/collaboration opportunities with similar businesses & industries to foster and enhance regional competitiveness through business retention and attraction strategies.

OBJECTIVE III. IMPROVE AND DEVELOP REGIONAL COLLABORATION

Increase the region's capacity to catalyze economic vitality through partnerships and collaboration.

1. Develop and maintain a regional convening agency of economic development, workforce development, education, and planning organizations that share the common purpose to execute the regional CEDS.
2. Collaborate with PEDA (Pennsylvania Economic Developers Association) and other regional and state partners to identify and evaluate challenges and solutions relevant to our region's economic vitality and resilience.
3. Identify councils of local governments to provide learning opportunities related to regional economic development strategies.
4. Identify and invite regional disaster preparedness organizations to address plans for short, intermediate, and long-term regional business recovery needs.

GOAL 2

BUILD, DEVELOP, & MAINTAIN THE REGION'S TALENT

This goal is focused on aligning the skills of the future regional workforce with employer needs, providing opportunities for advancement, and strengthening regional collaboration to support workforce development. Our region can more intentionally focus on moving more disadvantaged or underrepresented people into the labor force by increasing access to opportunities and removing or reducing barriers to sustainable employment. Through increased collaboration, deliberate steps can be taken to retain and develop the existing talent in the region as well as attract new talent.

OBJECTIVE I. BUILD THE REGIONAL TALENT PIPELINE

Support the development of a skilled workforce to meet the growing needs of business and industry in South Central PA.

1. Partner with existing industries, Institutions of Higher Education (IHE), and the region's Workforce Development Boards (WDBs) to determine technical training gaps and address regional skill gaps in growing industries.
2. Partner with the region's Workforce Development Boards and Institutions of Higher Education to promote "career pathway programs" in growing industries.
3. Partner with the region's Workforce Development Boards, Institutions of Higher Education, and existing businesses to build regional DEI workforce development strategies to improve access and reduce or remove barriers to employment.

OBJECTIVE II. INCREASE REGIONAL WORKFORCE COLLABORATION

Support and collaborate with the region's Workforce Development Boards (WDBs) and sub-committees to maintain a robust, strategic, and equitable regional workforce development plan.

1. Collaborate with the region's Workforce Development Boards (WDBs) and regional Institutions of Higher Education (IHE) to support the retention of students and young talent from regional higher education institutions.
2. Collaborate with the region's Workforce Development Boards (WDBs) and other regional partners to develop regional talent attraction strategies, including those listed in goal four.

GOAL 3

IMPROVE & MODERNIZE INFRASTRUCTURE NETWORKS TO MAINTAIN LOCATIONAL ADVANTAGES

To prosper in this economy and anticipate future needs, the region must make necessary investments in infrastructure and protect local advantages such as our natural resources. Economic resilience is inextricably tied to the protection, enhancement, and stewardship of the region's natural resources. The federal government recognizes these needs, providing funding opportunities through various agencies. The South Central Pennsylvania region should intentionally provide information and resources to partners to upgrade infrastructure and plan for sustainability.

OBJECTIVE I. ADVOCATE FOR A REGIONAL GROWTH PLAN

Promote infrastructure improvement strategies for a more efficient, coordinated, and connected infrastructure, promoting resiliency throughout the region.

1. Act as a regional convenor to advocate and plan for regional growth: Broadband Accessibility Planning; Planning & Zoning; and collaboration opportunities between utility providers, county/city planners and other developers, and renewable energy.
2. Act as a regional convenor to advocate and plan for regional infrastructure needs including mass public transportation, road improvements, freight rail development, and utility needs, especially in historically underserved communities of the region.
3. Collaborate with regional and state partners to provide information regarding the protection of the natural environment in local and regional planning efforts, including efforts to enhance air and water quality and protect environmentally sensitive areas and wildlife from development.

GOAL 4

ENHANCE & PROMOTE THE DEVELOPMENT OF REGIONAL QUALITY OF LIFE FEATURES

Enhancing quality of life across the South Central Pennsylvania region is crucial to the area's economic resilience. Investments in quality-of-life enhancement improve the lives of citizens, especially in terms of access. Access to work, housing, childcare, healthcare, recreation, and community are the cornerstones of productive and prosperous regions, and more importantly, the wellness and happiness of citizens. Even beyond the boost for the region's residents, these investments will greatly benefit the area's tourism industry by providing amenities for visitors and improving the hospitable environment already in place.

OBJECTIVE I. GENERATE EQUITABLE AND INCLUSIVE ENGAGEMENT

Commit to prioritizing and aligning Diversity Equity, and Inclusion (DEI) initiatives within the regional economic development field that explicitly considers beneficiaries, address disparities, and support suitable outcomes.

1. Collaborate with regional partners to identify and implement initiatives that will improve disadvantaged populations' access to employment and small business opportunities.
2. Collaborate with regional partners to advance opportunities for economic prosperity by supporting projects that build wealth in historically underserved neighborhoods and communities of color.
3. Encourage local partners to identify and intentionally include diverse representatives (race, ethnicity, disability, socioeconomics, etc.) on planning boards.

OBJECTIVE II. ADDRESS CRITICAL QUALITY-OF-LIFE NEEDS

Quality-of-Life for citizens of the region is inextricably linked to basic needs like food, shelter, healthcare, and childcare. When these critical needs are addressed, the region's residents will have a higher probability of upward economic mobility and increased civic engagement.

1. Convene regional housing agencies and partners to determine housing gaps, paying specific attention to historically underserved communities throughout the region.
2. Collaborate with regional partners to address food deserts in the region and build a regional network of food producers, wholesalers, distributors, grocers, farmers' markets, and nonprofits.
3. Convene regional partners to address long-term, dedicated funding to subsidize the cost of childcare as well as childcare worker wages and benefits.

OBJECTIVE III. INVEST IN REGIONAL PLACEMAKING EFFORTS

Regional placemaking strengthens the connection between people and places they share. These strategies promote arts, culture, and recreation activities and amenities as essential elements of quality of life and support the overall recruitment of businesses, industries, and the workforce in the region.

1. Collaborate with local partners to provide information and promote small-scale infill, mixed-use, and adaptive reuse developments as well as programming to stimulate activity and attract residents and visitors.
2. Collaborate with regional and local partners to assist communities in acquiring funding to sustain current public amenities and place-based infrastructure.
3. Provide information to identify and promote the addition or expansion of multimodal assets which increase walkability and connectivity between downtown commercial districts, neighborhoods, and amenities, especially in underserved and low-income areas.

OBJECTIVE IV. COLLABORATIVELY PROMOTE REGIONAL TOURISM ASSETS

Tourism is the way in which the region tells the story of its history, culture, and vibrancy. The evolution of the region's tourism over time highlights the attraction, interest, and importance of its places and its people. The future of tourism in South Central Pennsylvania will be enhanced by collaboration and innovation.

1. Promote recreational tourism activities aligned with the region's natural assets, including recreation and agritourism.
2. Collaborate with regional tourism bureaus and agencies to create a regional asset map of tourism assets across the region (including those in underserved and rural areas) to develop connection and cohesion; identify gaps and opportunities; and build and market regional tourism experiences.
3. Catalyze business expansion opportunities in tourism-related industries (agritourism, retail, restaurants, lodging, recreation, attractions, and entertainment).

5

Evaluation Framework

The Evaluation Framework serves as a mechanism to gauge progress on the successful implementation of the overall CEDS while providing information for the CEDS Annual Performance Report, as required by EDA. The evaluation framework acts as a measuring tool for overall performance. Evaluation metrics tend to answer questions like "How are we doing?" and "What can we do better?"

Evaluation metrics are composed of both traditional and non-traditional economic development performance measures. These metrics reflect on the region's SWOT analysis, what stakeholders believe is important to the region, and what regional assets can be leveraged. The chosen metrics help identify the critical internal and external factors that speak to the region's assets, limitations, and overall ability to build capacity and collaboration amongst regional partners and stakeholders.

Annually, the SC PA PREP as coordinated by Capital Region Economic Development Corporation (CREDC) will distribute the results of an annual evaluation over the next five years. SC PA PREP will adjust the goals, objectives, and strategies as needed throughout the five-year planning period as needed or when additional strengths, weaknesses, threats, and opportunities are identified.

STRATEGIC ACTION PLAN IMPLEMENTATION MATRIX

ECONOMIC DEVELOPMENT

Goal 1: Foster & Maintain an Economically Competitive Region

It is imperative that the region has a robust entrepreneurial ecosystem that enables the process for businesses to launch, sustain, innovate, and grow. To remain on the cutting edge, research and development should be prioritized in our target industries and beyond.

Objective	Strategies	Timeline	Metrics for Success
I. Promote Intentional Economic Growth	1. Convene regional partners to determine what business development/training services and entrepreneurial ecosystem gaps exist in the region. 2. Collaborate with partners to develop and promote workshops with federal, state, and local funding agencies that provide business assistance services in the region, specifically targeting women, veteran, and minority-owned businesses. 3. Identify and convene partners to facilitate collaboration among research institutions and tech-based businesses to promote and expand tech-based job opportunities in rural areas of the region.	Medium (2-3 years)	• Number of regional meetings with EDOs and regional economic development partners. • Regional rural economic development committee formed. • Number of businesses engaged in business/ training services across the region. • Completion of regional innovation ecosystem gap map.
II. Establish and Maintain a Business-Focused Region	1. Convene annual meetings with county EDCs and other partners to unify regional marketing opportunities and improve regional business attraction solutions. 2. Identify and maintain a regional inventory of available sites and buildings for development and redevelopment opportunities and to attract investment from existing and new businesses. 3. Collaborate with regional partners to understand and improve cultural barriers, needs, and gaps that impact (or enhance) economic opportunities for international businesses, target industries, and minority-owned businesses. 4. Support networking/collaboration opportunities with similar businesses & industries to foster and enhance regional competitiveness through business retention and attraction strategies.	Medium (2-3 years)	• Number of regional meetings with EDOs and regional economic development partners. • Adoption of a regionwide CRM system to maintain a regional inventory of available sites and buildings. • Number of regional BRE/A strategies identified. • Number of international businesses, minority-owned businesses, and industry partners engaged in regional collaboration opportunities.
III. Improve and Develop Regional Collaboration	1. Develop and maintain a regional convening agency of economic development, workforce development, education, and planning organizations that share the common purpose to execute the regional CEDS. 2) Collaborate with PEDA (Pennsylvania Economic Developers Association) and other regional and state partners to identify and evaluate challenges and solutions relevant to our region's economic vitality and resilience. 2. Identify councils of local governments to provide learning opportunities related to regional economic development strategies. 3. Identify and invite regional disaster preparedness organizations to address plans for short, intermediate, and long-term regional business recovery needs.	Medium (2-3 years)	• Number of meetings with local, state, and federal agencies. • Number of learning opportunities provided (and number of attendees) for local government officials. • Number of meetings with regional and state disaster preparedness personnel and agencies.

Champions: SCPA PREP, Local Economic Development Organizations, PEDA, Local Chambers of Commerce, Targeted Industries, Targeted Small Businesses, Local Government Entities, Regional SBDCs, Regional Workforce Boards, PA DCED, Ben Franklin Technology, Regional/State Manufacturing Extension Partnerships (MEP), Interested University Incubators/Accelerator Programs

Table 18

WORKFORCE DEVELOPMENT			
Goal 2: Build, Develop, & Maintain the Region's Talent			
Our region can more intentionally focus on moving more disadvantaged or underrepresented people into the labor force by increasing access to opportunities and removing or reducing barriers to sustainable employment. Through increased collaboration, deliberate steps can be taken to retain and develop the existing talent in the region as well as attract new talent.			
Objective	**Strategies**	**Timeline**	**Metrics for Success**
I. Build the Regional Talent Pipeline	1. 1) Partner with existing industries, Institutions of Higher Education (IHE), and the region's Workforce Development Boards (WDBs) to determine technical training gaps and address regional skill gaps in growing industries. 2. Partner with the region's Workforce Development Boards and Institutions of Higher Education to promote "career pathway programs" in growing industries. 3. Partner with the region's Workforce Development Boards, Institutions of Higher Education, and existing businesses to build regional DEI workforce development strategies to improve access and reduce or remove barriers to employment.	Medium (2-3 years)	• Identification and reporting of in-demand occupations and skill gaps. • Increase in number of workforce development organizations offering comprehensive career pathway programming. • Increase in career gap degrees and certificates across the region. • Increase in funding sources identified and invested into career pathway programs. • Number of individuals being trained in in-demand industries. • Reduction in the number of unfilled positions in in-demand industries. • Increase completions of minority groups in in-demand industry postsecondary programs. • Increase the proportion of minority groups filling in-demand occupations with family sustaining wages.
II. Increase Regional Workforce Collaboration	1. Collaborate with the region's Workforce Development Boards (WDBs) and regional Institutions of Higher Education (IHE) to support the retention of students and young talent from regional higher education institutions. 2. Collaborate with the region's Workforce Development Boards (WDBs) and other regional partners to develop regional talent attraction strategies, including those listed in goal four.	Long (4-5 years)	• Regional IHE and technical school champions identified. • Regional talent attraction strategies identified. • Increase the percentage of post-secondary graduates the region retains. • Demonstrated support for regional young professional and leadership groups. • Completion of a regional talent attraction campaign.
Champions: Regional Workforce Boards, SCPA PREP, interested IHEs and tech schools/training program partners, Targeted Industries, Local/regional Community-Based Organizations			

Table 19

INFRASTRUCTURE IMPROVEMENT			
Goal 3: Improve & Modernize Infrastructure Networks to Maintain Locational Advantages			
To prosper in this economy and anticipate future needs, the region must make necessary investments in infrastructure and protect local advantages such as our natural resources. The South Central Pennsylvania region should intentionally provide information and resources to partners to upgrade infrastructure and plan for sustainability.			
Objective	**Strategies**	**Timeline**	**Metrics for Success**
I. Advocate for a Regional Growth Plan	1. Act as a regional convenor to advocate and plan for regional growth: Broadband Accessibility Planning; Planning & Zoning; and collaboration opportunities between utility providers, county/city planners and other developers, and renewable energy. 2. Act as a regional convenor to advocate and plan for regional infrastructure needs including mass public transportation, road improvements, freight rail development, and utility needs, especially in historically underserved communities of the region. 3. Collaborate with regional and state partners to provide information regarding the protection of the natural environment in local and regional planning efforts, including efforts to enhance air and water quality and protect environmentally sensitive areas and wildlife from development.	Medium (3-4 years)	• Regional champions identified. • Creation of a regional growth plan. • Regional growth plan policies reviewed/updated. • Creation of an annual regional priority project list. • Increase in regional infrastructure improvements. • Identification of funding resources for infrastructure improvements. • Demonstrated support for educational opportunities/engagements regarding the protection of the natural environment in local and regional planning efforts.
Champions: SC PA PREP, Local and Regional Transportation Planning Organizations and Commissions, Local Developers, Local broadband providers, Municipal and County governments, Local Economic Development Organizations (EDOs), Local Parks Departments			

Table 20

QUALITY OF LIFE

Goal 4: Enhance & Promote the Development of Regional Quality of Life Features

Enhancing quality of life across the South Central Pennsylvania region is crucial to the area's economic resilience. Investments in quality-of-life enhancement improve the lives of citizens, especially in terms of access. Even beyond the boost for the region's residents, these investments will greatly benefit the area's tourism industry by providing amenities for visitors and improving the hospitable environment already in place.

Objective	Strategies	Timeline	Metrics for Success
I. Generate Equitable and Inclusive Engagement	1. Collaborate with regional partners to identify and implement initiatives that will improve disadvantaged populations' access to employment and small business opportunities. 2. Collaborate with regional partners to advance opportunities for economic prosperity by supporting projects that build wealth in historically underserved neighborhoods and communities of color.	Medium (2-3 years)	• Number of partners engaged, public meetings/events hosted, and attendees regarding the improvement of disadvantaged populations' access to employment and small business opportunities. • Number of workshops/training sessions, and attendees. • Funding sources identified for DEI implementation projects. • Completion of marketing campaigns that accurately reflect the people that reside and work in historically underserved communities. • Number of newly created living-wage full-time jobs.
II. Address Critical Quality-of-Life Needs	1. Convene regional housing agencies and partners to determine housing gaps, paying specific attention to historically underserved communities throughout the region. 2. Collaborate with regional partners to address food deserts in the region and build a regional network of food producers, wholesalers, distributors, grocers, farmers' markets, and nonprofits. 3. Convene regional partners to address long-term, dedicated funding to subsidize the cost of childcare as well as childcare worker wages and benefits.	Medium (2-3 years)	• Completion of a regional housing gap analysis. • Creation of a regional food desert map. • Identification of childcare assistance program models. • Funding sources identified for regional quality-of-life projects.

III. Invest in Regional Placemaking Efforts	1. Collaborate with local partners to provide information and promote small-scale infill, mixed-use, and adaptive reuse developments as well as programming to stimulate activity and attract residents and visitors. 2. Collaborate with regional and local partners to assist communities in acquiring funding to sustain current public amenities and place-based infrastructure. 3. Provide information to identify and promote the addition or expansion of multimodal assets which increase walkability and connectivity between downtown commercial districts, neighborhoods, and amenities, especially in underserved and low-income areas.	Long (4-5 years)	• Demonstrated support for educational opportunities/engagements regarding small-scale infill, mixed-use, and adaptive reuse developments. • Funding resources identified for current public amenities and place-based infrastructure projects. • Demonstrated support for educational opportunities/engagements regarding the addition or expansion of multimodal assets.
IV. Collaboratively Promote Regional Tourism Assets	Promote recreational tourism activities aligned with the region's natural assets, including recreation and agritourism. Collaborate with regional tourism bureaus and agencies to create a regional asset map of tourism assets across the region (including those in underserved and rural areas) to develop connection and cohesion; identify gaps and opportunities; and build and market regional tourism experiences. Catalyze business expansion opportunities in tourism-related industries (agritourism, retail, restaurants, lodging, recreation, attractions, and entertainment).	Medium (2-3 years)	Regional champions identified. Regional marketing strategies identified. Completion of a regional asset map. Completion of a regional marketing campaign.
Champions: SCPA PREP, Local/Regional Community-Based Organizations, Tourism Committees and Commissions, (Community Development Financial Institutions (CDFI's), Convention and Visitors Bureaus, local Chambers of Commerce, Targeted tourism-based businesses, Local parks departments			

Table 21

Summary

The 2023 South Central PA PREP CEDS outlines an approach to coordinate growth and prosperity that builds on the region's strengths, prioritizes key regional industry clusters, and emphasizes collaboration and unity.

Additionally, with a focus on economic resilience and equity, these strategic components comprise an optimal foundation for securing the future economic prosperity of the South Central PA region. The SC PA PREP invites and encourages all citizens of the region to strive to implement this plan in their own communities.

Appendices

When viewing this document digitally, there is an option to click the appendix name for navigation to the corresponding page. Clicking the page number in the bottom corner of any page will return the user to the table of contents on page 3. Referenced websites are also linked for easy navigation.

APPENDIX A: ROSTER OF PARTICIPATING ORGANIZATIONS

Adams County
Adams County Arts Council
Adams County Community Foundation
Adams County Office of Planning & Development
Adams County Technical Institute
Adams Economic Alliance*
Alvernia University
Always Bagels
Ben Franklin Technology Partners*
Berks Alliance
Berks County
Berks IDA
Capital Region Economic Development Corporation
CareerLink
Chambersburg Development & Authority
Chambersburg Hospital
Colebrookdale Railroad Preservation Trust
Community First Fund
Community Health Council of Lebanon County
Community Progress Council
County of Berks Community & Economic Development*
Cultural Alliance of York County
Cumberland Area Economic Development Corporation*
Dauphin County
Dauphin County Community & Economic Development*
Detailed Attention, Inc
Dickinson College
Economic Development Company of Lancaster County*
Explore York
Franklin County Area Development Corporation*
Franklin County Career & Technology Center
Hanover Area Chamber of Commerce
Harrisburg Area Community College
Harrisburg Downtown Improvement District
Harrisburg Housing & Economic Development
Harrisburg Regional Chamber/CREDC*
Key Investment Partners
Keystone Health
Kutztown University*
Lancaster County Planning Commission
Lancaster County Planning Department
Lebanon Valley Chamber of Commerce
Lebanon Valley Economic Development Corporation*
Ledge Inc
Lower Paxton Township
Main Street Hanover
MANTEC*
Manufacturers' Association of Pennsylvania*
Millersville University*
New Hope Ministries
Office of Congressman Dan Meuser
Penn State Harrisburg*
Penn State Health
Penn State Mont Alto
Perry County Chamber of Commerce
Perry County Economic Development Authority*
Perry County Literacy Council
SCPA Works*
Shippensburg University*
The Fair Housing Council of the Capital Region
Tri-County Community Action
Tri-County Regional Planning Commission
United Way
University of Pittsburgh Medical Center
Visit Hershey & Harrisburg
Visit Lebanon Valley
WellSpan Chambersburg Hospital
Wilson College
Working to Empower People for Advancement (WEPA)
York County Economic Alliance*
YWCA Gettysburg & Adams County

*Organizations indicated with an asterisk serve on the SC PA PREP Board and/or CEDS Steering Committee.

APPENDIX B: RESOLUTION

RESOLUTION

ADOPTION OF THE COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS) FOR SOUTH CENTRAL PENNSYLVANIA: 2023-2028

WHEREAS, The South Central Pennsylvania Partnerships for Regional Economic Performance (PREP), and the regional Economic Development Corporations (EDCs) partnered together in 2022 to develop a Comprehensive Economic Development Strategy (CEDS) in compliance with the U.S. Economic Development Administration (EDA) regulations for the South Central Pennsylvania Region, which includes the Counties of Adams, Berks, Cumberland, Franklin, Dauphin, Lancaster, Lebanon, Perry, and York; and

WHEREAS, The CEDS recommends that economic development efforts focus on strengthening the Region's economy through collaboration, inclusivity, innovation and entrepreneurship, economic place-making, talent development, infrastructure improvements, and enhanced public-private and interagency cooperation, economic resiliency practices, and includes a strategic action plan for the Region; and

WHEREAS, The South Central Pennsylvania Partnerships for Regional Economic Performance (PREP), and the regional Economic Development Corporations (EDCs) will develop and provide an Annual Performance Report as required by the US EDA; and

WHEREAS, representatives of the PREP including every EDC has approved the draft CEDS as the South Central Pennsylvania region's consensus for future growth and prosperity and recommends that the nine regional Economic Development Corporations recognize and adopt the 2023-2028 South Central Pennsylvania CEDS.

NOW, THEREFORE, BE IT RESOLVED, that the Capital Region Economic Development Corporation (CREDC), as the Pennsylvania Commonwealth's designated PREP Coordinator, supports the strategies set forth in the CEDS and hereby adopts the Comprehensive Economic Development Strategy for South Central Pennsylvania for the period 2023 through 2028.

PASSED and ADOPTED this 9th day of February, 2023.

Ryan Unger, President and CEO

Melissa Stone, Vice President of CREDC

APPENDIX C: PENNSYLVANIA'S MAJOR RIVER BASINS

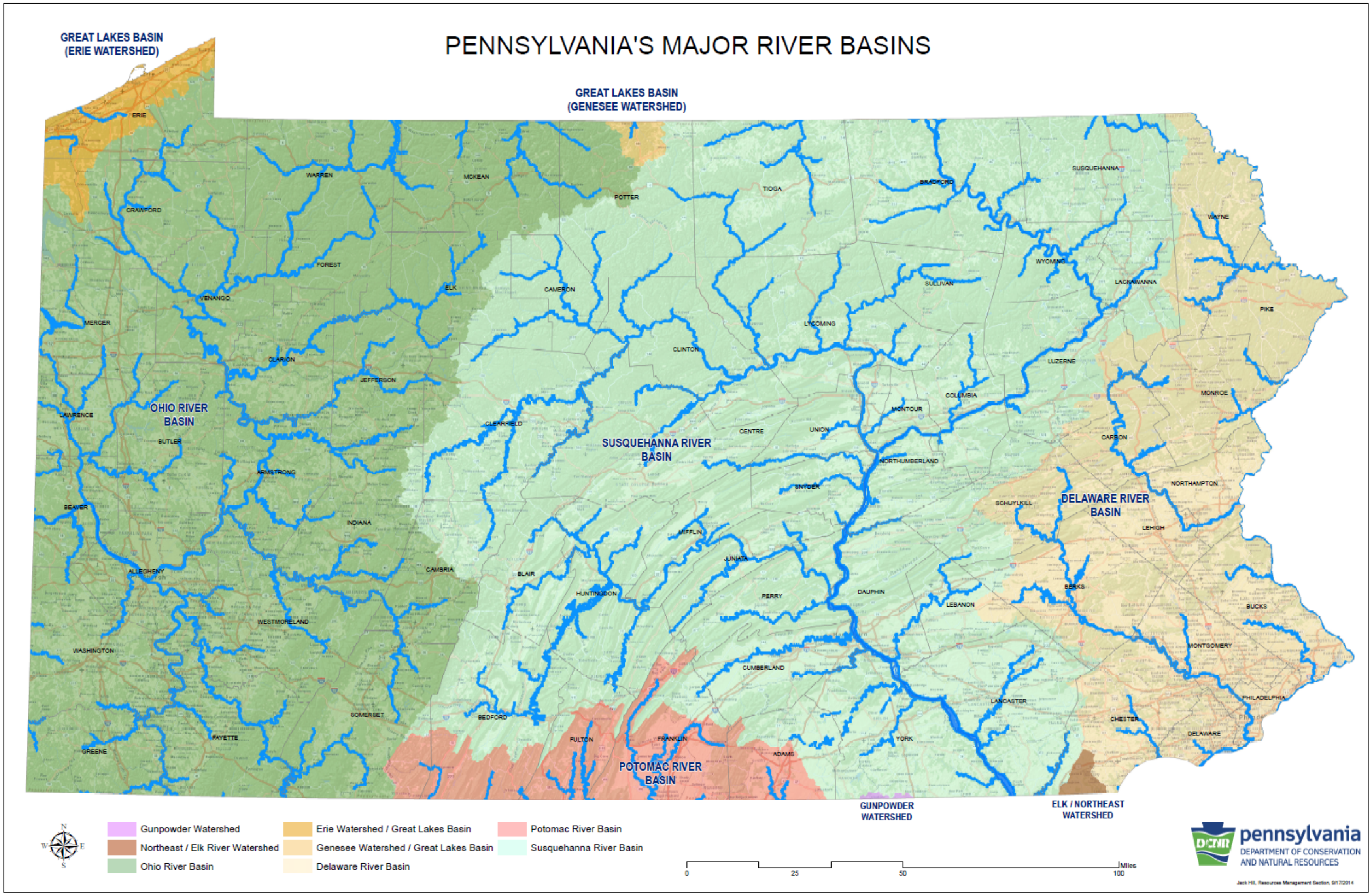
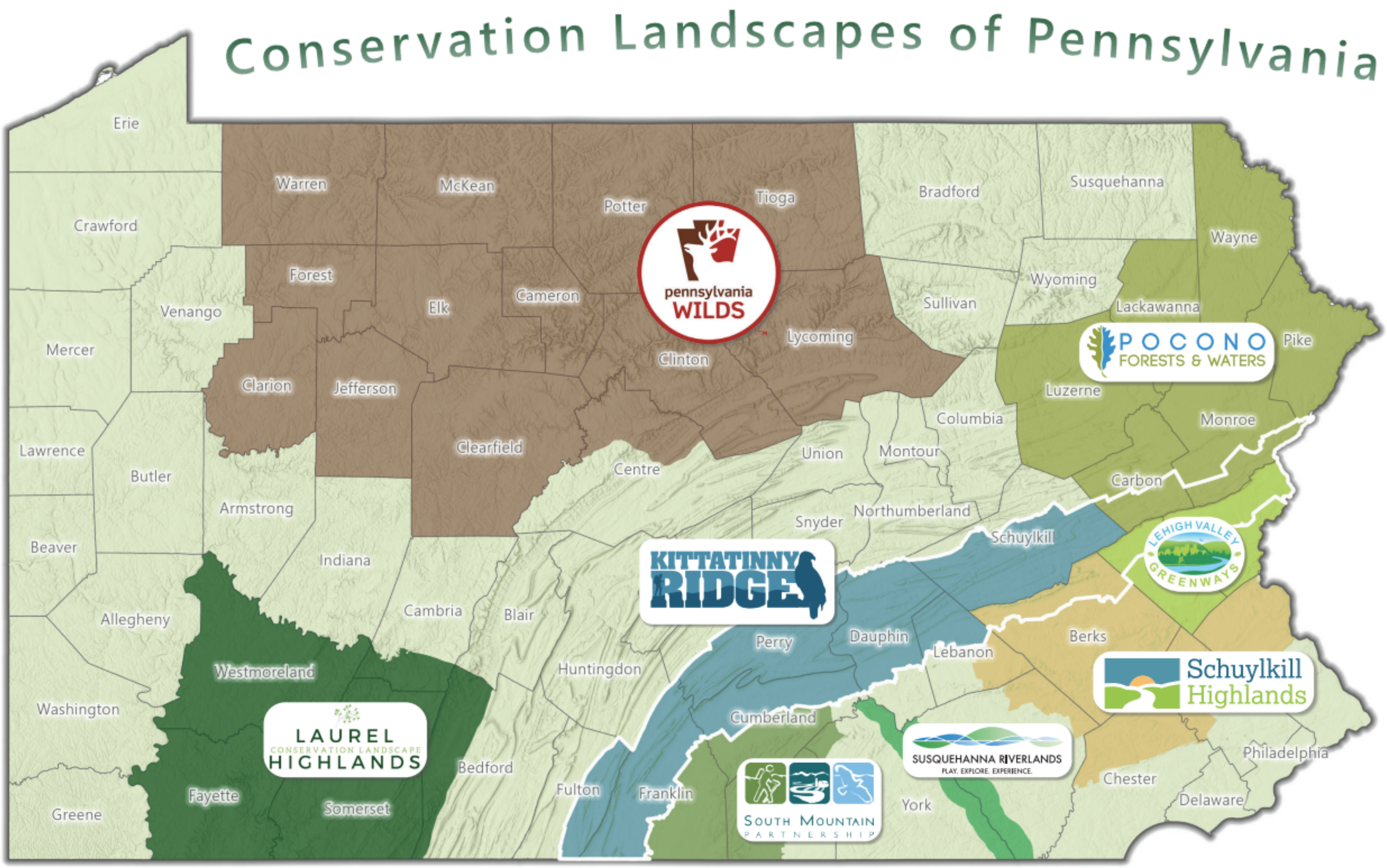


Figure 45: http://www.watersheded.dcnr.state.pa.us/maps/dcnr_20031198.pdf

APPENDIX D: CONSERVATION LANDSCAPES MAP



Landscape Name	Lead DCNR Contact	Email
Kittatinny Ridge	Kristen Hand	khand@pa.gov
Laurel Highlands	Adam Mattis	amattis@pa.gov
Lehigh Valley Greenways	Rob Neitz	rneitz@pa.gov
Pennsylvania Wilds	Meredith Hill	mehill@pa.gov
Pocono Forests and Waters	Tim Dugan & Christine Dettore	tidugan@pa.gov; cdettore@pa.gov
Schuylkill Highlands	Drew Gilchrist	agilchrist@pa.gov
South Mountain	Tyler Semder	tsemder@pa.gov
Susquehanna Riverlands	Lori Yeich	lyeich@pa.gov

Updated: June 2, 2022

pennsylvania DEPARTMENT OF CONSERVATION AND NATURAL RESOURCES

Figure 46: https://elibrary.dcnr.pa.gov/GetDocument?docId=1750448&DocName=Conservation_Landscapes_Map_2019.pdf

APPENDIX E: 2021 SOUTH CENTRAL PENNSYLVANIA AIR QUALITY INDEX REPORT

County Code	County	# Days with AQI	Good	Moderate	Unhealthy for Sensitive Groups	Unhealthy	Very Unhealthy	Hazardous	AQI Maximum	AQI 90th Percentile	AQI Median	# Days CO	# Days NO2	# Days O3	# Days PM2.5	# Days PM10
42001	**Adams**	364	263	98	3	.	.	.	129	65	42	.	.	216	148	.
42011	**Berks**	365	264	96	5	.	.	.	133	68	42	.	.	188	177	.
42041	**Cumberland**	365	278	86	1	.	.	.	114	59	35	.	.	.	365	.
42043	**Dauphin**	359	241	116	2	.	.	.	127	68	42	.	.	124	235	.
42055	**Franklin**	288	274	14	.	.	.	.	77	47	35	.	.	288	.	.
42071	**Lancaster**	365	186	171	7	1	.	.	155	80	50	.	.	100	262	3
42075	**Lebanon**	365	269	94	2	.	.	.	117	66	41	.	.	143	222	.
42133	**York**	357	244	111	2	.	.	.	148	67	43	.	6	151	200	.

Table 17: Source: U.S EPA, Air Quality Index Report, 2021. Accessed 2022. https://www.epa.gov/outdoor-air-quality-data/air-quality-index-report

APPENDIX F: PENNSYLVANIA STATE WATER PLAN REGIONS MAP

Figure 47

APPENDIX G: FULL DATASET FOR TARGET INDUSTRY VISUAL

2-digit NAICS	3-digit NAICS	4-digit NAICS	Description	Ind. Mix Effect	Nat'l Growth Effect	Expected Change	Competitive Effect	Avg. Earnings Per Job	Wages, Salaries, & Proprietor	2011 - 2021 Change	2011 - 2021 % Change
11- Agriculture/livestock production	111 - crop production	1110	Crop Production	(671)	710	39	935	$48,294	$41,723	974	15%
	112 - Animal production & aquacu	1120	Animal Production	(282)	958	676	535	$59,327	$54,255	1,211	14%
	113 - forestry and logging	1133	Logging	(37)	20	(17)	31	$66,560	$59,743	14	8%
	115- Support activities for agriculture and forestry	1152	Support Activities for Animal Production	30	80	110	(92)	$61,478	$50,470	18	2%
		1153	Support Activities for Forestry	6	4	10	1	$53,906	$46,996	11	33%
31-33 - Manufacturing	311 - food manufacturing	3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	(264)	305	41	182	$65,789	$53,914	223	8%
		3116	Animal Slaughtering and Processing	(213)	552	338	118	$69,450	$56,954	456	9%
	312 - beverage & tobacco produc	3122	Tobacco Manufacturing	(28)	8	(19)	33	$96,883	$73,591	14	18%
	316 - leather & allied product man	3161	Leather and Hide Tanning and Finishing	(17)	6	(11)	36	$81,769	$64,948	25	46%
	322 - paper manufacturing	3222	Converted Paper Product Manufacturing	(692)	462	(230)	520	$87,040	$69,435	290	7%
	325 - chemical manufacturing	3251	Basic Chemical Manufacturing	(22)	29	7	237	$96,223	$73,761	244	90%
		3252	Resin, Synthetic Rubber, and Artificial and Synthetic Fibers and Filaments Manufacturing	(9)	11	2	47	$97,153	$76,505	49	48%
		3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing	(12)	21	9	13	$93,242	$71,539	22	11%
		3254	Pharmaceutical and Medicine Manufacturing	176	154	330	17	$112,869	$86,612	347	24%
		3256	Soap, Cleaning Compound, and Toilet Preparation Manufacturing	41	116	156	717	$74,199	$56,947	873	82%
		3259	Other Chemical Product and Preparation Manufacturing	(56)	34	(21)	332	$110,761	$84,922	311	98%
	326 - plastics & rubber products n	3262	Rubber Product Manufacturing	(71)	96	24	659	$100,541	$80,193	683	77%
	327 - nonmetalic mineral product production	3271	Clay Product and Refractory Manufacturing	(126)	59	(66)	426	$91,268	$72,630	359	66%
		3279	Other Nonmetallic Mineral Product Manufacturing	31	51	83	258	$94,418	$74,883	341	72%
	331 - primary metal products manufactring	3312	Steel Product Manufacturing from Purchased Steel	(138)	90	(48)	505	$90,099	$71,817	457	55%
		3313	Alumina and Aluminum Production and Processing	(112)	99	(13)	649	$111,688	$88,865	636	70%
	332 - fabricated metal products manufacturing	3324	Boiler, Tank, and Shipping Container Manufacturing	(202)	170	(32)	71	$82,074	$67,326	39	2%
		3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	(542)	392	(149)	441	$70,018	$57,671	292	8%
		3329	Other Fabricated Metal Product Manufacturing	(100)	197	97	241	$80,887	$66,881	338	19%
	333 - machinery manufacturing	3332	Industrial Machinery Manufacturing	56	100	156	314	$95,991	$77,237	470	51%
		3339	Other General Purpose Machinery Manufacturing	(9)	220	212	97	$88,225	$70,960	308	15%
	334 - computer and electronic equiptment manufacturing	3341	Computer and Peripheral Equipment Manufacturing	(9)	8	(1)	40	$112,478	$89,318	39	54%
		3343	Audio and Video Equipment Manufacturing	(3)	2	(1)	77	$76,025	$61,259	76	356%
		3344	Semiconductor and Other Electronic Component Manufacturing	(392)	288	(104)	137	$95,405	$75,800	33	1%
	335 - electrical equipment, applia	3352	Household Appliance Manufacturing	8	8	16	49	$81,240	$59,356	65	88%
	336 - transportation equiptment manufacturing	3361	Motor Vehicle Manufacturing	45	11	56	11	$71,234	$55,608	67	68%
		3362	Motor Vehicle Body and Trailer Manufacturing	542	193	735	371	$74,380	$58,122	1,106	62%
		3364	Aerospace Product and Parts Manufacturing	(26)	23	(3)	181	$98,165	$77,718	179	84%
		3365	Railroad Rolling Stock Manufacturing	(9)	5	(4)	48	$95,124	$75,393	44	101%
		3369	Other Transportation Equipment Manufacturing	214	282	496	1,111	$94,065	$74,473	1,607	62%
	339 - misc manufacturing	3399	Other Miscellaneous Manufacturing	(98)	251	153	96	$79,645	$59,150	249	11%
48-49 - Transportation & Warehousing	481 - air transportation	4811	Scheduled Air Transportation	(42)	38	(4)	165	$132,938	$98,933	161	46%
		4812	Nonscheduled Air Transportation	6	6	12	50	$128,706	$97,951	62	115%
	482 - rail transportation	4821	Rail Transportation	(262)	174	(88)	77	$100,695	$100,695	(11)	(1%)
	484 - truck transportation	4841	General Freight Trucking	808	1,811	2,619	(2,843)	$85,469	$67,351	(225)	(1%)
		4842	Specialized Freight Trucking	34	413	447	(146)	$79,845	$62,056	301	8%
	488 - support activities for transportation	4884	Support Activities for Road Transportation	142	69	210	125	$64,999	$53,135	335	53%
		4885	Freight Transportation Arrangement	281	109	390	(477)	$84,007	$68,458	(86)	(9%)
	493 - Warehousing & storage	4931	Warehousing and Storage	28,624	2,067	30,692	(8,422)	$57,868	$50,272	22,270	117%
62 - Healthcare	621 - ambulatory & health care services	6212	Offices of Dentists	363	690	1,054	(473)	$75,896	$64,086	580	9%
		6213	Offices of Other Health Practitioners	2,289	755	3,045	(2,053)	$60,470	$51,358	992	14%
		6214	Outpatient Care Centers	2,011	416	2,427	899	$73,321	$61,489	3,327	87%
		6215	Medical and Diagnostic Laboratories	247	146	392	(393)	$106,105	$88,396	(0)	(0%)
		6219	Other Ambulatory Health Care Services	181	258	439	431	$54,808	$46,004	870	36%
	622 - hospitals	6221	General Medical and Surgical Hospitals	(1,010)	4,139	3,129	1,513	$94,048	$75,836	4,642	12%
		6223	Specialty (except Psychiatric and Substance Abuse) Hospitals	21	127	148	1,774	$75,752	$61,069	1,922	164%
	623 - nursing & residential care	6232	Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	(273)	645	372	(255)	$51,940	$41,879	118	2%

Table 22

APPENDIX H: FULL DATASET FOR OCCUPATION CLUSTER VISUAL

Industry	2 Digit	3 Digit	Employed in Industry 2021	2011 - 2021 Change	2011-2021 % Change	% of Total Jobs in Industry 2021	Median Hourly Earnings
Agriculture	11- Management Occupations	11-2000 Advertising, Marketing, Promotions, Public Relations, and Sales Managers	14	9	168%	0.1%	$56.10
		11-1000 Top Executives	124	67	117%	0.7%	$44.75
		11-3000 Operations Specialties Managers	23	6	32%	0.1%	$53.92
		11-9000 Other Management Occupations	9874	726	8%	53.1%	$31.88
	45 - Farming, fishing, and forestry occupations	45-3000 - Fishing and Hunting Workers	<10	2	46%	0.0%	$14.26
		45-2000 Agricultural Workers	5979	889	17%	32.2%	$12.93
		45-4000 Forest, Conservation, and Logging Workers	143	12	9%	0.8%	$18.07
		45-1000 Supervisors of Farming, Fishing, and Forestry Workers	266	20	8%	1.4%	$21.10
	53 - Transportation and Material Moving Occupations	53-2000 Air Transportation Workers	<10	2	113%	0.0%	$37.44
		53-7000 Material Moving Workers	210	50	31%	1.1%	$16.71
		53-3000 Motor Vehicle Operators	310	65	26%	1.7%	$20.27
Manufacturing	11- Management Occupations	11-1000 Top Executives	1,037	471	83%	2.1%	$44.75
		11-2000 Advertising, Marketing, Promotions, Public Relations, and Sales Managers	199	50	34%	0.4%	$56.10
		11-3000 Operations Specialties Managers	921	287	45%	1.9%	$53.92
		11-9000 Other Management Occupations	459	76	20%	0.9%	$31.88
	13 - Business and Financial Operations Occupations	13-1000 Business Operations Specialists	1,507	677	81%	3.0%	$31.95
		13-2000 Financial Specialists	384	71	23%	0.8%	$32.77
	15 - Computer and Mathematical Occupations	15-1200 Computer Occupations	500	111	29%	1.0%	$37.84
		15-2000 Mathematical Science Occupations	11	4	65%	0.0%	$38.75
	17 - Architecture and Engineering Occupations	17-1000 Architects, Surveyors, and Cartographers	<10	0	82%	0.0%	$31.69
		17-2000 Engineers	1,808	425	31%	3.7%	$40.37
		17-3000 Drafters, Engineering Technicians, and Mapping Technicians	706	44	7%	1.4%	$26.77
	49 - Installation, Maintenance, and Repair Occupations	49-1000 Supervisors of Installation, Maintenance, and Repair Workers	253	95	60%	0.5%	$32.80
		49-2000 Electrical and Electronic Equipment Mechanics, Installers, and Repairers	68	(25)	(27%)	0.1%	$25.92
		49-3000 Vehicle and Mobile Equipment Mechanics, Installers, and Repairers	369	239	183%	0.7%	$22.78
		49-9000 Other Installation, Maintenance, and Repair Occupations	2,337	535	30%	4.7%	$23.19
	51 - Production Occupations	51-1000 Supervisors of Production Workers	1,860	489	36%	3.8%	$29.74
		51-2000 Assemblers and Fabricators	5,357	1,259	31%	10.8%	$18.18
		51-3000 Food Processing Workers	2,425	647	36%	4.9%	$16.21
		51-4000 Metal Workers and Plastic Workers	6,079	686	13%	12.3%	$21.54
		51-5100 Printing Workers	278	(4)	(1%)	0.6%	$21.49
		51-6000 Textile, Apparel, and Furnishings Workers	164	86	109%	0.3%	$13.95
		51-7000 Woodworkers	117	39	50%	0.2%	$18.10
		51-8000 Plant and System Operators	112	(33)	(23%)	0.2%	$28.52
		51-9000 Other Production Occupations	10,038	2,429	32%	20.3%	$18.80
Transportation & Warehousing	11 - Management Occupations	11-1000 Top Executives	898	489	119%	1.4%	$44.75
		11-2000 Advertising, Marketing, Promotions, Public Relations, and Sales Managers	65	15	29%	0.1%	$56.10
		11-3000 Operations Specialties Managers	721	254	55%	1.1%	$53.92
		11-9000 Other Management Occupations	122	9	8%	0.2%	$31.88
	13 - Business and Financial Operations Occupations	13-1000 Business Operations Specialists	1,122	605	117%	1.7%	$31.95
		13-2000 Financial Specialists	175	55	46%	0.3%	$32.77
	43 - Office and Administrative Support Occupations	43-1000 Supervisors of Office and Administrative Support Workers	924	492	114%	1.4%	$28.74
		43-2000 Communications Equipment Operators	<10	(10)	(72%)	0.0%	$14.82
		43-3000 Financial Clerks	598	(55)	(8%)	0.9%	$18.97
		43-4000 Information and Record Clerks	1,321	359	37%	2.0%	$16.92
		43-5000 Material Recording, Scheduling, Dispatching, and Distributing Workers	3,130	1,054	51%	4.7%	$19.64
		43-6000 Secretaries and Administrative Assistants	505	115	30%	0.8%	$17.91
		43-9000 Other Office and Administrative Support Workers	1,232	324	36%	1.9%	$18.01
	49 - Installation, Maintenance, and Repair Occupations	49-1000 Supervisors of Installation, Maintenance, and Repair Workers	220	98	80%	0.3%	$32.80
		49-2000 Electrical and Electronic Equipment Mechanics, Installers, and Repairers	89	22	33%	0.1%	$25.92
		49-3000 Vehicle and Mobile Equipment Mechanics, Installers, and Repairers	1,207	285	31%	1.8%	$22.78
		49-9000 Other Installation, Maintenance, and Repair Occupations	1,032	448	77%	1.6%	$23.
	51 - Production Occupations	51-1000 Supervisors of Production Workers	53	(6)	(11%)	0.1%	$29.
		51-2000 Assemblers and Fabricators	172	35	25%	0.3%	$18.
		51-3000 Food Processing Workers	30	24	444%	0.0%	$16.
		51-4000 Metal Workers and Plastic Workers	106	4	4%	0.2%	$21.
		51-5100 Printing Workers	<10	4	61%	0.0%	$21.
		51-6000 Textile, Apparel, and Furnishings Workers	39	20	105%	0.1%	$13.
		51-7000 Woodworkers	26	18	200%	0.0%	$18.
		51-8000 Plant and System Operators	<10	(11)	(64%)	0.0%	$28.
		51-9000 Other Production Occupations	408	90	28%	0.6%	$18.
	53 - Transportation and Material Moving Occupations	53-1000 Supervisors of Transportation and Material Moving Workers	1,875	561	43%	2.8%	$27.
		53-2000 Air Transportation Workers	259	(50)	(16%)	0.4%	$37.
		53-3000 Motor Vehicle Operators	17,201	1,868	12%	26.0%	$20.
		53-4000 Rail Transportation Workers	703	(77)	(10%)	1.1%	$30.
		53-5000 Water Transportation Workers	<10	(6)	(82%)	0.0%	$24.
		53-6000 Other Transportation Workers	92	1	1%	0.1%	$14.
		53-7000 Material Moving Workers	29,332	14,940	104%	44.4%	$16.
Healthcare	11 - Management Occupations	11-1000 Top Executives	509	135	36%	0.5%	$44.
		11-2000 Advertising, Marketing, Promotions, Public Relations, and Sales Managers	46	22	91%	0.0%	$56.
		11-3000 Operations Specialties Managers	380	63	20%	0.4%	$53.
		11-9000 Other Management Occupations	1,747	335	24%	1.8%	$31.
	13 - Business and Financial Operations Occupations	13-1000 Business Operations Specialists	1,272	571	81%	1.3%	$31.
		13-2000 Financial Specialists	353	35	11%	0.4%	$32.
	15 - Computer and Mathematical Occupations	15-1200 Computer Occupations	638	80	14%	0.7%	$37.
		15-2000 Mathematical Science Occupations	63	42	198%	0.1%	$38.
	19 - Life, Physical, and Social Science Occupations	19-1000 Life Scientists	163	81	99%	0.2%	$33.
		19-2000 Physical Scientists	19	(1)	(3%)	0.0%	$32.
		19-3000 Social Scientists and Related Workers	730	74	11%	0.8%	$37.
		19-4000 Life, Physical, and Social Science Technicians	79	21	36%	0.1%	$20.
		19-5000 Occupational Health and Safety Specialists and Technicians	31	5	22%	0.0%	$33.
	21 - Community and Social Service Occupations	21-1000 Counselors, Social Workers, and Other Community and Social Service Specialis	3,307	773	31%	3.5%	$22.
		21-2000 Religious Workers	90	17	23%	0.1%	$21.
	29 - Healthcare Practitioners and Technical Occupations	29-1000 Healthcare Diagnosing or Treating Practitioners	35,831	8,421	31%	37.5%	$37.
		29-2000 Health Technologists and Technicians	12,875	1,379	12%	13.5%	$22.
		29-9000 Other Healthcare Practitioners and Technical Occupations	617	415	206%	0.6%	$24.
	43 - Office and Administrative Support Occupations	43-1000 Supervisors of Office and Administrative Support Workers	1,630	164	11%	1.7%	$28.
		43-2000 Communications Equipment Operators	211	(77)	(27%)	0.2%	$14.
		43-3000 Financial Clerks	1,961	(1,112)	(36%)	2.1%	$18.
		43-4000 Information and Record Clerks	4,128	(356)	(8%)	4.3%	$16.
		43-5000 Material Recording, Scheduling, Dispatching, and Distributing Workers	461	166	57%	0.5%	$19.
		43-6000 Secretaries and Administrative Assistants	6,957	1,961	39%	7.3%	$17.
		43-9000 Other Office and Administrative Support Workers	2,046	(482)	(19%)	2.1%	$18.
	49 - Installation, Maintenance, and Repair Occupations	49-1000 Supervisors of Installation, Maintenance, and Repair Workers	41	7	19%	0.0%	$32.
		49-2000 Electrical and Electronic Equipment Mechanics, Installers, and Repairers	<10	(3)	(61%)	0.0%	$25.
		49-3000 Vehicle and Mobile Equipment Mechanics, Installers, and Repairers	44	36	421%	0.0%	$22.
		49-9000 Other Installation, Maintenance, and Repair Occupations	455	(12)	(3%)	0.5%	$23.

Table 23


PENNSYLVANIA PUBLIC–USE AIRPORTS
pennsylvania
DEPARTMENT OF TRANSPORTATION
ERIE
CRAWFORD
MERCER
LAWRENCE
BEAVER
BUTLER
VENANGO
WARREN
FOREST
CLARION
JEFFERSON
ARMSTRONG
ALLEGHENY
WASHINGTON
GREENE
FAYETTE
WESTMORELAND
INDIANA
CAMBRIA
SOMERSET
BEDFORD
BLAIR
HUNTINGDON
FULTON
FRANKLIN
McKEAN
ELK
CAMERON
CLEARFIELD
CENTRE
CLINTON
POTTER
TIOGA
LYCOMING
MIFFLIN
JUNIATA
PERRY
CUMBERLAND
ADAMS
YORK
UNION
SNYDER
NORTHUMBERLAND
MONTOUR
COLUMBIA
DAUPHIN
LEBANON
LANCASTER
SULLIVAN
BRADFORD
SUSQUEHANNA
WYOMING
LACKAWANNA
LUZERNE
SCHUYLKILL
CARBON
WAYNE
PIKE
MONROE
NORTHAMPTON
LEHIGH
BERKS
BUCKS
MONTGOMERY
CHESTER
DELAWARE
PHILADELPHIA
ERIE INTERNATIONAL TOM RIDGE FIELD
BRADFORD REGIONAL
VENANGO REGIONAL
DuBOIS REGIONAL
PITTSBURGH INTERNATIONAL
ARNOLD PALMER REGIONAL
JOHN MURTHA JOHNSTOWN CAMBRIA COUNTY
ALTOONA – BLAIR COUNTY
UNIVERSITY PARK
WILLIAMSPORT REGIONAL
WILKES-BARRE–SCRANTON INTERNATIONAL
LEHIGH VALLEY INTERNATIONAL
HARRISBURG INTERNATIONAL
LANCASTER
PHILADELPHIA INTERNATIONAL
PREPARED BY:
BUREAU OF PLANNING & RESEARCH
GEOGRAPHIC INFORMATION DIVISION
JANUARY 2020
LEGEND
COMMERCIAL AVIATION / PAVED RUNWAYS
GENERAL AVIATION / PAVED RUNWAYS
GENERAL AVIATION / TURF RUNWAYS
GENERAL AVIATION / SEAPLANE BASES
PUBLIC HELIPORTS

Figure 48

APPENDIX J: PENNSYLVANIA STATE MAP OF BROADBAND DOWNLOAD SPEEDS

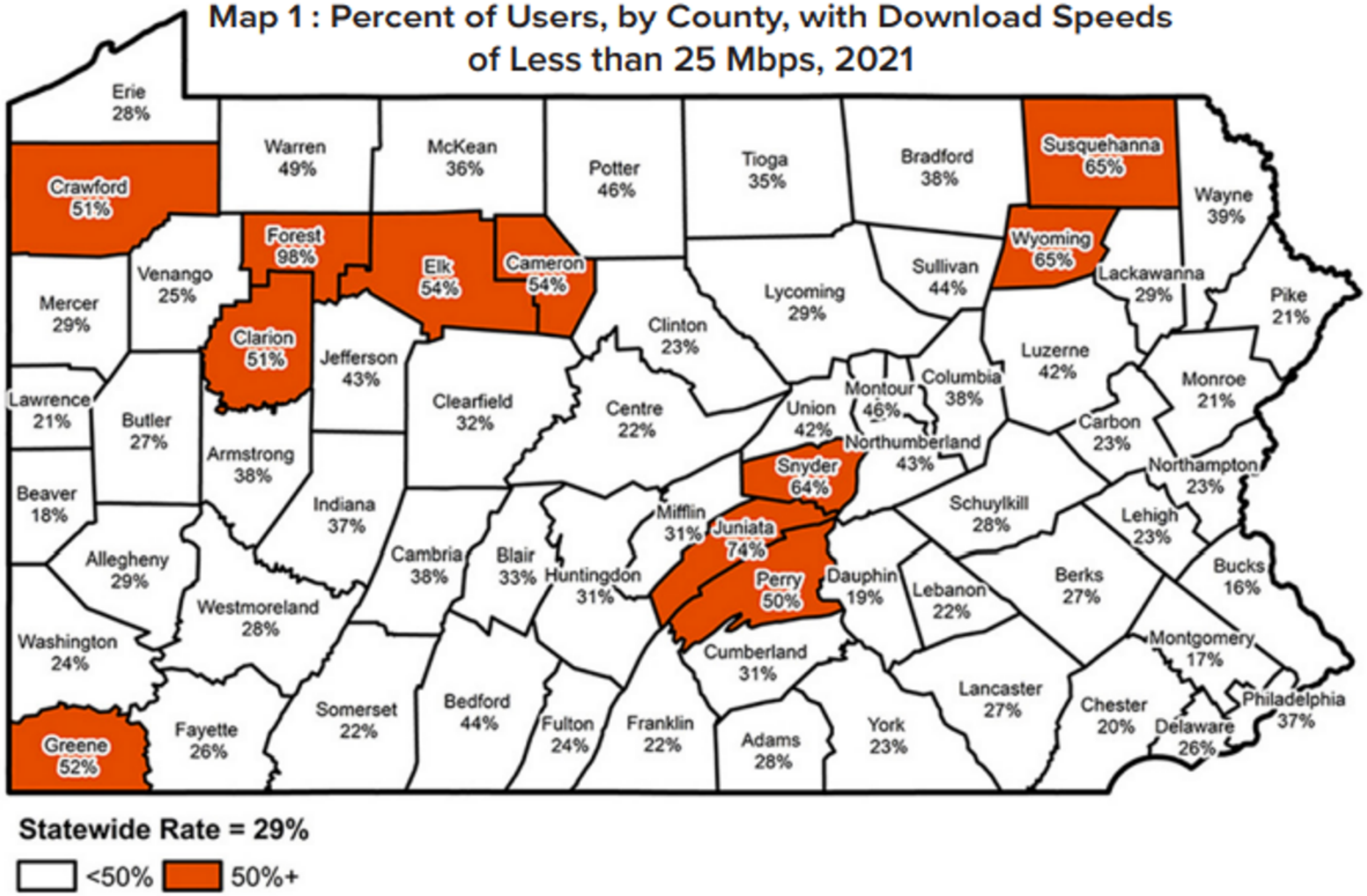


Figure 49: Center for Rural Pennsylvania, Pennsylvania Broadband Access: A Speed Test Analysis (Feb 2022).

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APPENDIX L: 30-DAY PUBLIC COMMENTING PERIOD

Press Release

HARRISBURG REGIONAL
CHAMBER & CREDC SM
BOLD LEADERSHIP. VISIONARY MEMBERS. POWERFUL RESULTS.

FOR IMMEDIATE RELEASE

Media Contact:
Tyler Schwind
Communications Director
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tschwind@hbgrc.org

Comprehensive Economic Development Strategy
Public Comment Now Open

Harrisburg, Pa. (February 17, 2023)- The Capital Region Economic Development Corporation (CREDC) in partnership with South Central Pennsylvania Partnership for Economic Performance (PREP) is requesting your participation in the public comment survey of a Comprehensive Economic Development Strategy. Public Comment will be open until March 20, 2023.

The South Central Pennsylvania Partnership for Economic Performance (PREP) is a regional partnership designated by the Pennsylvania Department of Community & Economic Development. Statewide, the PREP Program is designed to encourage regional coordination of economic development efforts and superior customer service to the business community as part of a comprehensive, statewide economic development delivery strategy. The South Central PREP region collaborated with Thomas P. Miller & Associates to assist in the creation of the CEDS.

A Comprehensive Economic Development Strategy (CEDS) is a unified, regionally focused action plan that provides a framework for an area's economic growth and community development.

To read the full Comprehensive Economic Development Strategy please click here.

To participate in the public comment survey, please click here.

About Harrisburg Regional Chamber & CREDC
Harrisburg Regional Chamber & CREDC serves as a catalyst for promoting growth and quality of life in Cumberland, Dauphin and Perry Counties through bold leadership, visionary members and powerful results. Building on its 136-year history, the organization provides a unique blend of business, community/economic development and advocacy services under one roof to boost economic vitality and livability across the region. The Chamber & CREDC is 5-star accredited by the United States Chamber of Commerce, a distinction achieved by less than five percent of chambers across the nation.

# # #

Summary

The 30-day public commenting period opened February 17, 2023 and closed on March 20, 2023. Public comments were gathered via a survey form which provided space for open-ended responses. The survey included the following eleven (11) questions:

1. Please identify your relationship with the South Central Pennsylvania region (e.g resident, non-resident, an employer, or employee)
2. Please provide where, specifically, you reside within the region (e.g town, city, community).
3. What county is your primary residence, place or business, or employment located?
4. Please provide your general feedback for Goal 1: Foster & Maintain an Economically Competitive Region
5. Please provide your general feedback for Goal 2: Build, Develop, & Maintain the Region's Talent
6. Please provide your general feedback for Goal 3: Improve & Modernize Infrastructure Networks to Maintain Locational Advantages
7. Please provide your general feedback for Goal 4: Enhance & Promote the Development of Regional Quality of Life Features
8. How can the region better plan for economic resiliency? (The region's ability to avoid, withstand, & recover from economic shifts, natural disasters, etc.)
9. How can the region's economic development strategies (as a whole) be more inclusive & equitable? (Ex. Targeted Technical Assistance, Access to Alternative Funding, Coworking Spaces)
10. What general feedback do you have in regard to the 2023-2028 CEDS draft?
11. Would you like us to follow up with you regarding your responses? (If so, please leave your name and how we can contact you in the box below).

Accepted

In Review

Flagged for more in-depth discussion and consideration

A total of twenty (20) responses were collected. Of those responses, seven (7) participants only answered questions regarding their location relationship with the region (questions 1-3). Approximately six (6) participants answered all questions. Participants responding to questions 4-11 came from the following counties: Berks (4), Cumberland (3), Daughin (2), Lebanon (3), and Perry (1). No responses were submitted from Adams, Franklin, Lancaster, or York on questions 4-11. All comments for questions 4-11 are listed in the following pages. Two (2) individuals requested and received a follow up regarding their responses. Beside each comment submitted for questions 4-10, icons have been assigned to indicate the status (accepted, in review, or flagged for discussion) of the content feedback.

	Q4: Please provide your general feedback for Goal 1: Foster & Maintain an Economically Competitive Region
	Yes, very important, but not among counties in regions, but with other regions around the nation and the world
	Critically important to the future of this region. We have found that purchasers are always looking for competitive advantages and incentives when making site location decisions. Incentives such as LERTA, tax credits for job creation, infrastructure assistance, etc., are extremely important as many surrounding jurisdictions and states offer such incentives to attract new business.
	Housing that fits all lifestyles, salary levels, including independent elderly living.
	Unless the current team suddenly comprehends the need for collaboration, responsivity and transparency - this is an overreach
	Retain existing employers, provide opportunity for existing employers to expand, attract new employers.
	Berks County needs support for urban infill and infrastructure redevelopment if it expects to improve its competitiveness. Once home to one of the largest companies in the world (Reading Railroad) it now has infrastructure in dire need of support due to the market unable to support it.
	Agree. Also, tangible objectives are needed as this is a broad goal.
	Pleased with the words "foster & maintain" as we are grateful for having a generally strong economy insulated from the high highs and low lows
	Generally a good analysis

	Q5: Please provide your general feedback for Goal 2: Build, Develop, & Maintain the Region's Talent
	Very important. Workforce is every regions biggest challenge today. Retain, attract, grow
	One of the first things prospective purchasers assess is the availability and proximity of qualified employees and labor pools. Having nearby programs to assist with business-specific training and education is a plus.
	Job training for all. From basic skills, resume building , interviewing, job boards available to non-profits that support communities to make referrals.
	This is not the role of the EDC. They are a partner at the table. The definition of the EDC from Wikipedia is :An economic development corporation ("EDC") is an organization common in the United States, usually a 501(c)(3) non-profit, whose mission is to promote economic development within a specific geographical area. These organizations are complementary to Chambers of Commerce. Whereas a Chamber of Commerce promotes the interests of businesses in a particular geographic area, an EDC typically focus on longer-term economic growth by attracting new businesses. Generally, an EDC can be found at the state level to attract business to a particular state. The state level EDC often works closely with local EDCs and may offer low interest loans, grants, tax credits and other economic incentives to attract businesses.
	Enhanced training for existing and new employees.
	Retaining, maintaining, and training workforce is extremely important given the current economic environment and low unemployment rate. I applaud any and all efforts in this area.
	Housing is a huge challenge in the region and support is needed for working class and working professional housing, as the market cannot support their construction.
	Agree. Also, tangible objectives are needed as this is a broad goal.
	This is our #1 priority. We need the talented bodies to fill jobs and to be available for high quality employers considering this location.
	Pretty solid analysis but the prepandemic data used is likely dated. Newer data may look different on key metrics.

	Q6: Please provide your general feedback for Goal 3: Improve & Modernize Infrastructure Networks to Maintain Locational Advantages
Accepted	Roads, bridges, sewer and water plants, fiber, wi-fi do not build and maintain themselves. Investment in infrastructure is an investment in the future
Accepted	We are fortunate that south central Pennsylvania is strategically located and has access to major interstates to access 40% + of the U.S. population within a days' drive. But improvements to and maintenance of infrastructure are always beneficial.
Flagged	Words used are to intentionally provide information and resources to partners -not be the lead. What is proposed already happens -why would you recreate the wheel -perhaps collaborate?
Flagged	Poor and absent broadband is a huge regional problem, styming growth of existing businesses in the region. Regional rail and multimodal transportation is also essential.
Accepted	Agree. Also, tangible objectives are needed as this is a broad goal such as Counties should provide grant funding for specific projects.
Flagged	We could be plugged in even better to other major metros with improvement here, BUT we need to stop focusing, at least from an attracting talent perspective, on locational advantages. They do exist, but we have many of the same features/attractions as our neighbors and need to promote them better.

	Q7: Please provide your general feedback for Goal 4: Enhance & Promote the Development of Regional Quality of Life Features
Accepted	Yes, linked directly to workforce
Accepted	Quality of life issues are important and essential to maintaining growth and attracting new businesses. Employers view it as an important factor when making site location decisions. Quality of life issues have become even more important in the aftermath of the world-wide pandemic.
Flagged	Critical Quality of Life skills -once again -Specific to all topics - These regional partners do now work together and have their own comprehensive strategic plans. Why would the function of the EDC be the lead? Once again - why recreate the wheel?
Accepted	The collaborative promotion of regional tourism assets will help all industries in the region, and make our area a preferred place to live.
Flagged	The region offers a great quality of life but the incomes do not support maintenance of those assets.
Accepted	Agree. Also, tangible objectives are needed as this is a broad goal.
In Review	Promoting...yes. money towards enhancing might not be such a priority, at least not right now.
Accepted	Concur - this is a nice area to live. Affordable and good access to major metro areas.

Accepted

In Review

Flagged for more in-depth discussion and consideration

	Q8: How can the region better plan for economic resiliency? (The region's ability to avoid, withstand, & recover from economic shifts, natural disasters, etc.)
	Diverse economy
	BUilding partnerships
	The EDC should not be the lead -simply a partner to understand what is already in place and provide. Suggesting that the EDC is the primary to support a community post-disaster is not well thought out and dismissive of already existing infrastructure, resources and expertise.
	More diverse employers.
	We are a strong region that should see continued investment for resliency.
	Diversify!
	Intentionally suport our critical manufacturing sector which generates most of our good paying jobs, including opporutnity occupations which should be noted,

	Q9: How can the region's economic development strategies (as a whole) be more inclusive & equitable? (Ex. Targeted Technical Assistance, Access to Alternative Funding, Coworking Spaces)
	All of the above
	Housing opportunities need to be diversified throughout the region.
	Outreach to minority populations should be a priority.

	Q10: What general feedback do you have in regard to the 2023-2028 CEDS draft?
	1. Nicely done, thx to all
	2. There is a typo in Table 10 on page 45. The counties served by the South Mountain Partnership includes Franklin.
	3. To be honest - I am struggling with this report - not the data -more of the overall expectation of the role of the local EDC. And in all honesty -not sure that the EDC function is to manage/oversee all of the strategies outlined. There are multiple partners and ecosystems that do excellent work and perhaps the EDC should be a supportive partner rather than the primary. Within a few of the counties listed the associated EDC is not collaborative, transparent, or responsive and is territorial in nature. I recognize that this is not what you want to hear however this plan is overambitious, will not succeed with the current design and significantly downplays other organizations that already do this work and well. I do not see reference to any of the existing state and regional comprehensive long-term strategic plans that exist for 3/4 of the goals and objectives listed - giving the impression that they are not of value, the existing work is not valuable, and not applicable. Perhaps the EDC 's should do what they are set up for initially and prove that success and share with others before you add additional strategies. This may be very harsh -however if you feel that regional EDCs have this type of bandwidth -what are they doing now? They certainly are not meeting their primary focus now and they get significant funding and support.

	"Well - this is quite an interesting document. While the first 75 pages or so provide a lot of very interesting information, I was tempted quite a few time to quit reading. Actually I was surprised at how well Perry County fared in comparison to other counties in the area. The action plan at the end seems to be well done. I really like the talk about leadership dissonance!! That really hits it on the head. I am sure the recommendations on DEI will not go far up here. Now I see where your remarks on affordable housing come from. So many of those action items dovetail with our revitalization initiatives in the boroughs. Actually, I think PCEDA should use a number of the Goals/Objectives as a basis for Marti's discussion of future efforts. Some comments on the text of the report - 1) Page 12 - paragraph on Perry County - I think this write-up should talk more about the natural/recreational resources in the county - the rivers and streams for fishing and boating, the Appalachian Trail should be brought in here also. 2) Page 33 - the graph lines in the upper chart need to be labeled or a key provided. 3) Page 34 - the term LFP should be defined. 4) Page 49 - what is the meaning/purpose of the map and the color coding of the counties - they do not seem to relate to the text on the page. 5) Page 47 - third paragraph of text - ""elective vehicles"" should this be electric? Also, the concern over the increase in natural gas consumption is not explained. 6) Page 62 - second block on manufacturing - "establishing growth individual professional growth pathway"- something is not right in that phrase. 7) Page 77 - there are two X's in the text that need to be removed. 8) Page 83 - ""...lack of inaccurate information.."" in #3? A couple of other points - This report continues the misconception that a college degree is needed to solve all our labor problems. In reality, most of the jobs that are going unfilled today or will be need by new businesses do not required a college degree. The needed for skilled labor with good math skills, people skills, and the like is being overlooked. The training like you offered this past year is really right in line with many of the points in this report. Emergency response plans are needed. With all the rail traffic flowing through this area and the train derailment out in Ohio, we need to have emergency response teams trained in how to handle those kinds of situations as well as they do for floods and the other typical disasters we experience in this area."
	Page 12, under Berks County, it's Conrad Weiser not Conran. Page 39 barely mentions Norfolk Southern which has a large Berks County presence for continental freight.
	"The Strategies listed under every goal (Goal 1 - Goal 4) do not identify a responsible person or organization to manage the work necessary to complete that part of the plan. Who (by name) is the responsible person or owner of each Objective. Identifying the objective owner will provide accountability. The Timelines are all medium (2-4 years) or long (4-5 years). What are we doing now (year 1) to implement the plan. Metrics for success are not measurable or specific. Example: Goal 1, Objective 1, Metrics for Success ""Number of business engaged in business/ training services across the region"". How many business are engaged now? What is the number necessary to successfully meet the objective?"

Response

- Accepted
- In Review
- Flagged for more in-depth discussion and consideration

We appreciate all of the feedback submitted for this process. All comments submitted are in consideration to improve the strategy and the collaborative process used to develop it (includeing local representatives from the private, public, workforce, education, and nonprofit sectors).

While some comments prompted immediate corrections within the document, others serve as context and considerations for how collaboration, implementation, and prioritization may occur moving forward. This document will be updated regularly, providing ample opportunity for integrating suggestions.

While the South Central PA PREP as coordinated by Capital Region Economic Development Corporation (CREDC) is responsible for developing and maintaining the regional CEDS, the deployment of this CEDS requires that wok on these objectives will be advanced by many organizations within the ecosystem across our respective areas. We seek to share information and better coordinate and align efforts within the ecosystem with this strategy. There is no intention of duplicating the work of groups within the reigon that are making progress in these areas. Rather, we seek to amplify their intended results in line with the CEDS and, whenever possible, coordinate improvement efforts on a regional basis.

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