



TEAM PENNSYLVANIA

ANNUAL REPORT

2022-23

FROM THE PRESIDENT & CEO

This has been a big year for Team Pennsylvania. We...

- Activated our newly adopted strategic plan
- Wrote an op-ed and released a hydrogen and carbon management policy roadmap, signaling that Pennsylvania is gearing up to be a leader in the energy transition upon us
- Approved a set of core values that guide how we work
- Released the Manufacturing Competitiveness Playbook based on a survey of over 500 manufacturers
- Welcomed our new co-chair, Governor Josh Shapiro, and colleagues across his Administration, and he welcomed our partnership through an Executive Order
- Launched the Pennsylvania Advanced Agriculture Cross-Sector Collaborative, building on the work of the Agricultural Advisory Board and the Agriculture Economic Impact Studies
- Launched the Pennsylvania Manufacturing Competitiveness Cross-Sector Collaborative, leveraging the work of the Pennsylvania Manufacturing Advisory Council
- Submitted a Hydrogen Hub application to the U.S. Department of Energy, competing on the national stage with the eyes of the world upon us
- Convened over 300 organizations - from start-ups to Fortune 500s, from R1 universities to community colleges - along with leaders in labor, NGOs, and the public sector in our new mode of cross-sector collaboration
- Doubled the size of our staff and our operating budget
- Adopted a new brand identity to match this action-oriented, external-facing new way of working

And we're just getting started. As we reflect on this past year, we are inspired by the potential the future holds - and we look forward to working with you to seize the opportunities ahead.

With gratitude and in partnership,



ABBY L. SMITH
President & CEO



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EXECUTIVE ORDER

GOVERNOR SHAPIRO SIGNS EXECUTIVE ORDER REAFFIRMING PARTNERSHIP WITH TEAM PENNSYLVANIA

At the Team Pennsylvania June Board of Directors meeting, Governor Josh Shapiro signed an executive order reaffirming the partnership between the Commonwealth of Pennsylvania and Team Pennsylvania.

The order acknowledges a common mission of accelerating economic growth for all Pennsylvanians by:

- Accelerating economic opportunities to position Pennsylvania as a leader nationally and globally
- Advancing the conditions for innovative, technological, and market-driven solutions to grow the economy and jobs
- Creating equity and economic vitality for all Pennsylvanians
- Addressing complex, visionary, and transformative issues that drive Pennsylvania's economy
- Leveraging collaboration across public and private sectors as a catalyst and enabler for business investment, attraction, retention, and growth

“NOW, THEREFORE, I, Josh Shapiro, Governor of the Commonwealth of Pennsylvania, by virtue of the authority vested in me by the Constitution of the Commonwealth of Pennsylvania and other laws of the Commonwealth, do hereby recognize, affirm, and celebrate the economic development and growth partnership between the Commonwealth and the Team Pennsylvania Foundation... All agencies under the Governor’s jurisdiction shall recognize the Team Pennsylvania Foundation as a unique and trusted partnership with the Commonwealth.”



In June 2022, Team Pennsylvania's Board of Directors adopted a new strategic plan predicated on the idea that Pennsylvania's long-term economic future demanded a long-term and sustained partner, regardless of how the political tides ebb and flow.

In doing so, we identified what the organization was uniquely positioned to do and how the organization was well equipped to accelerate economic growth in Pennsylvania. Team Pennsylvania has a reputation as a trusted and nonpartisan broker and convener. As a foundation, Team Pennsylvania is also inherently well positioned to leverage funding as a critical enabling factor, coupling private and public funds in ways that no one sector can deploy alone.

What emerged was a clear theory of change: by combining intentional, sustained strategic collaboration with intentional, sustained strategic investment, Team Pennsylvania can achieve its mission of accelerating economic growth in the Commonwealth.

Throughout the year, Team Pennsylvania has implemented this model of cross-sector collaboration in each of our high-growth policy areas, enabling us to build lasting networks and convene partners to achieve common goals of accelerating Pennsylvania's economic future.

How Collaboratives Work

A Cross-Sector Collaborative:

- Works at the state level on topics that are difficult for any sector or organization to address independently
- Accelerates economic opportunities to position Pennsylvania as a leader in the U.S. and globally
- Maximizes impact for Pennsylvania
- Creates economic opportunity for all Pennsylvanians

An effective Cross-Sector Collaborative includes participation from the private sector, public sector, academia, organized labor, nonprofit organizations, and others, and participation is open & dynamic.

This year, Team Pennsylvania launched and expanded existing Cross-Sector Collaboratives in three high-impact policy areas primed for economic growth: Agriculture, Energy, and Manufacturing.

In the pages that follow, you will find an overview of our Collaboratives' priorities and achievements thus far. →

ENERGY

Pennsylvania has and must continue to be a leader in energy and innovation. The need and opportunities inherent in decarbonization present a path to transform our economy, elevate industry and manufacturing, create jobs, and reduce emissions.

Pennsylvania must ensure that we work proactively to capitalize on these opportunities for a lower carbon economy.



In its second year of convening, The Energy Horizons Cross-Sector Collaborative continued its work to deploy carbon management and hydrogen technologies, and added a focus on advanced nuclear in order to accelerate the Commonwealth’s economy-wide goals regarding energy transition and decarbonization. Each “workstream” uniquely lends itself to achieving these goals, while continuing to leverage Pennsylvania’s existing energy assets:

Carbon Capture, Utilization, and Storage (CCUS): For key carbon-intensive industries such as steel and cement, carbon capture, utilization, and storage (CCUS) can reduce significant carbon dioxide (CO₂) and carbon monoxide (CO) emissions resulting from production processes. Carbon capture is an essential emissions reduction tool for major industrial sectors in the state that are otherwise difficult to decarbonize.

Hydrogen: Hydrogen can be an important emissions reduction tool for the Commonwealth because it does not generate direct emissions of pollutants or greenhouse gasses at its point of use. Large, difficult-to-abate sectors important to Pennsylvania’s economy, such as trucking, steel and chemicals manufacturing, and industrial and municipal heating, can eliminate their direct emissions using hydrogen as a feedstock.

Advanced Nuclear: In April of 2023, the Collaborative launched a new workstream to accelerate the deployment of advanced nuclear technologies in the Commonwealth. The next generation of nuclear technology presents opportunities for heavy industry, major universities, military installations, and other power-reliant organizations to have access to on-site heat and electricity while leveraging Pennsylvania’s manufacturing strengths. Nuclear energy is carbon free, can be deployed throughout all communities in the Commonwealth, and provides dispatchable baseload power.

Throughout the past year, the Energy Horizons Cross-Sector Collaborative has seen tremendous growth, expanding its participant network by nearly double. The Collaborative now counts over 220 participants from nearly 200 institutions as partners committed to this work.

PA CARBON CAPTURE AND HYDROGEN ROADMAP: RELEASED ON THE GLOBAL STAGE

In September 2022, Team Pennsylvania participated in the Global Clean Energy Action Forum (GCEAF), a worldwide convening of energy and climate leaders in Pittsburgh, to release and discuss a policy roadmap for the deployment of hydrogen and carbon capture infrastructure in Pennsylvania. Authored by the Great Plains Institute (GPI), “Successful Deployment of Carbon Management and Hydrogen Economies in the Commonwealth of Pennsylvania” highlights key priorities for the state to meet its climate goals, maintain a competitive edge in energy production and industrial manufacturing, and secure billions of dollars in federal grants and private investments.

DEEP DIVES & FACT SHEETS: LEVEL-SETTING WITH COMPLEX TOPICS

Hydrogen and carbon management are complex topics, so the participants of the PA Energy Horizons Cross-Sector Collaborative agreed to host a series of four deep dive conversations on the following topics: Property Rights in Pore Space, CO2 Storage Facility Oversight and Liability, Pipelines, and Environmental Justice and Community Engagement. These deep dives each featured an overview of the topic from experts in the field and identified key policy considerations and questions for Pennsylvania policymakers. Hundreds of individuals participated in those discussions, and the Collaborative released a set of fact sheets based on the deep-dive sessions.

LEGISLATIVE BRIEFING: EDUCATION & ENGAGEMENT WITH KEY STAKEHOLDERS

In May 2023, the PA Energy Horizons Cross-Sector Collaborative held a legislative breakfast and briefing as well as a quarterly meeting of the Collaborative. The briefing served as a forum to improve public and legislator understanding of CCUS and H2 technologies, as well as raise the salience of the challenging issues the legislature will need to address to support the adoption and implementation of these technologies. The event also presented the Energy Horizons Collaborative as a key resource for legislators on these issues.



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Listing current as of 12/20/23

AGRICULTURE

The agriculture sector sits at the nexus of the most critical conversations of our time regarding food supply; climate; energy; and human, animal, and environmental health.

Simultaneously, agriculture contributes \$132.5 billion in annual economic impact and supports 593,600 jobs across the Commonwealth, making it a critical asset and driver of economic growth in Pennsylvania.

Advanced Agriculture is a term used to describe three key, interrelated areas of development that are highly applicable to Pennsylvania agriculture that build upon our strongest opportunities and address some of our biggest threats. These key areas include:

Agri-Tech: *Transformative technologies like robotics, automation, artificial intelligence, and augmented reality have widespread applications across agricultural production and processing while addressing some of agriculture's biggest challenges.*

Pennsylvania is well positioned to leverage existing in-state assets, like applying the power of the Robotics, Automation, and AI Cluster in the southwest region of the state, toward solving real-world problems for farms, foresters, and other agricultural businesses in the Commonwealth.

Controlled Environment Agriculture (CEA): *These indoor, high-tech farming operations maximize resource efficiency to support year-round production and present an opportunity for rapid development of novel, transformational technologies given their controlled and stable environment.*

Pennsylvania already has long-held, demonstrated leadership in CEA with its more than 100-year-old mushroom industry, leading the country in both production volume and value of sales. Given this history and dense industry concentration, Pennsylvania is in a tremendous position to capitalize on CEA-targeted advancements, prove out new technologies, and expand local production of food and biopharma crops, while simultaneously capturing revenue from what is currently a heavily import-dependent market.

Climate-Smart & Organic Agriculture: *This describes both biological and technology-enabled methods for reducing greenhouse gas emissions, sequestering carbon, and protecting soil health while contributing to a waste-to-value economy.*

Pennsylvania's organic agriculture sector, in particular, has seen a surge in production acreage and sales over the last decade that far outpaces the national average, presenting the Commonwealth with a tremendous opportunity to grow its global leadership in this area.

The Collaborative is set up to mobilize and sustain the long-term, public-private commitment needed for the Commonwealth to realize the numerous, transformative economic opportunities presented by Advanced Agriculture.

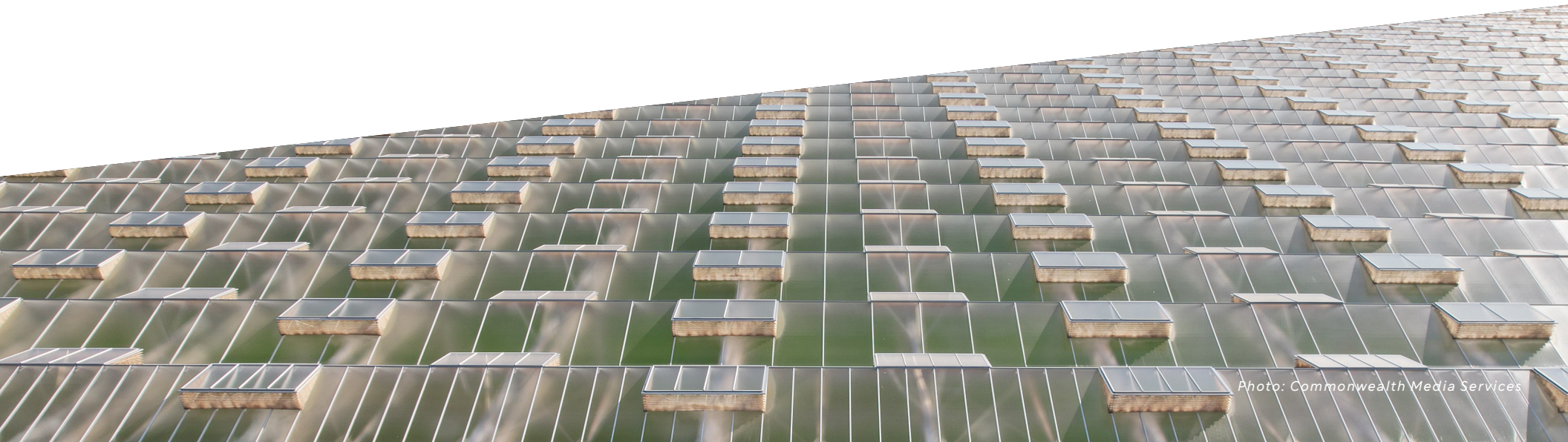
LAUNCHED THE PENNSYLVANIA ADVANCED AG COLLABORATIVE

In April 2023, Team Pennsylvania launched the Pennsylvania Advanced Agriculture Collaborative, a statewide public-private network focused on creating the conditions for innovative, technological, and market-driven solutions that will bolster agriculture as a legacy industry in Pennsylvania's economy while sustaining and creating jobs. This effort builds upon our partnership with the Pennsylvania Department of Agriculture and our hosting of the former Agriculture Advisory Board.

Pennsylvania's Advanced Ag Collaborative is focused on unlocking opportunities presented by "Advanced Agriculture," which broadly describes innovative approaches to growing and processing agricultural products with the intention of higher quality, increased efficiency and farm profitability, and reduced impact on the environment through technological and biological methods.

PENNSYLVANIA REPRESENTED AT GLOBAL INDOOR AGTECH INNOVATION SUMMIT

Several participants of the Advanced Ag Collaborative were among over 500 controlled environment agriculture leaders representing 30 countries at the Indoor AgTech Innovation Summit in New York City in June 2023. The event showcased two days of panels featuring business, nonprofit, and government leaders discussing CEA's critical role in the food-water-energy nexus and food security. By convening delegations of Pennsylvanians and elevating Pennsylvania's presence at global conferences like these, Team Pennsylvania aims to raise Pennsylvania's profile on both the national and international stage.



**PARTICIPATING
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INCLUDE:**

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MANUFACTURING

Pennsylvania's manufacturing sector has a strong legacy as a critical driver of economic growth and has served as the heart of the Commonwealth's economic engine for over 250 years.

Today, the manufacturing industry presents a path toward a technologically integrated future in which Pennsylvania leads as an innovator in the development and deployment of cutting-edge technology.



THE MANUFACTURING COMPETITIVENESS COLLABORATIVE

The Manufacturing Competitiveness Collaborative was established in May 2023 to build on the work of the Pennsylvania Manufacturing Advisory Council (PA MAC) by providing a unified, statewide voice for manufacturers across the Commonwealth. The Collaborative catalyzes the continued strength and growth of Pennsylvania’s manufacturing sector through cross-sector collaboration and collective action; a key focus for the Collaborative is to support technology innovation and adoption in manufacturing production and distribution.

Today, the Collaborative convenes nearly 150 individuals from labor, industry, academia, public and private sectors, and nonprofits to build on and actualize the game changers recommended by PA MAC’s Playbook for Manufacturing Competitiveness.

Since its launch, the Manufacturing Competitiveness Collaborative established and convened a working group of industry leaders focused on Game Changer 2: Accelerating the Commonwealth’s transition to the “Factory of the Future” by supporting a framework for interconnected factories and technological advancement.

The Collaborative’s focus on the adoption and integration of advanced manufacturing technology presents a huge opportunity for Pennsylvania to boost its competitive edge in a legacy industry that cuts across multiple high-impact policy areas primed for economic growth, including Agriculture, Energy, and Life Sciences. Team Pennsylvania will continue to look to the Collaborative to elevate this work, capitalizing on our momentum to ensure Pennsylvania’s position as a national leader in manufacturing technology and innovation.

Factory of the Future refers to the integration of information technology (IT), operational technology (OT) systems, and the adoption of AI.

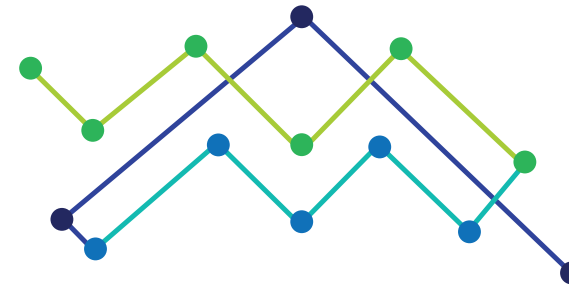
Connected factories are capital intensive, driven by data shared through interconnected devices across the supply chain, and staffed with highly skilled workers focused on responding to rapidly changing markets.

COLLABORATIVES / MANUFACTURING

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DNA

DECARBONIZATION NETWORK
OF APPALACHIA

In addition to the work of the PA Energy Horizons Cross-Sector Collaborative, Team Pennsylvania formed the Decarbonization Network of Appalachia to serve as the prime applicant for a U.S. Department of Energy Hydrogen Hubs grant.

In April 2023, Team Pennsylvania served as the prime applicant for federal funding through the U.S. Department of Energy (DOE) Regional Clean Hydrogen Hubs program (H2Hubs). As the prime applicant, Team Pennsylvania joined industry leaders and established the Decarbonization Network of Appalachia (DNA) H2Hub, which represented a collective vision for emissions reduction and economic revitalization driven by increased GDP, the creation of new family-sustaining jobs, an expanded and shared concept for community-level investments, and new business opportunities for local supply chains.

Leveraging innovative, proven, and industrial-scale technologies, the DNA H2Hub leaned into the strengths of Appalachia's people and natural environment – a capable workforce and competitive edge in natural gas and power production, nimble universities and research institutions, and favorable geography – and proposed deploying low-carbon blue hydrogen across the tri-state region. Thanks to these assets, DNA H2Hub aimed to unlock affordable, clean hydrogen and decarbonize the supply chains, manufacturing, and power production in America's industrial heartland.

Although the DNA H2Hub was ultimately not selected to receive funding from the DOE, the team was very proud of the application effort, which offered a vision of Appalachia as a leader in energy and industrial decarbonization.

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University City Science Center
University of Pittsburgh
Washington & Jefferson College

**“This year we got clear
about who we are and
what we do so we’re
better positioned to
deliver on a vibrant
and innovative future
for Pennsylvania.”**

**Brian Jackson
Co-Chair,
Team Pennsylvania**

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Development Officer
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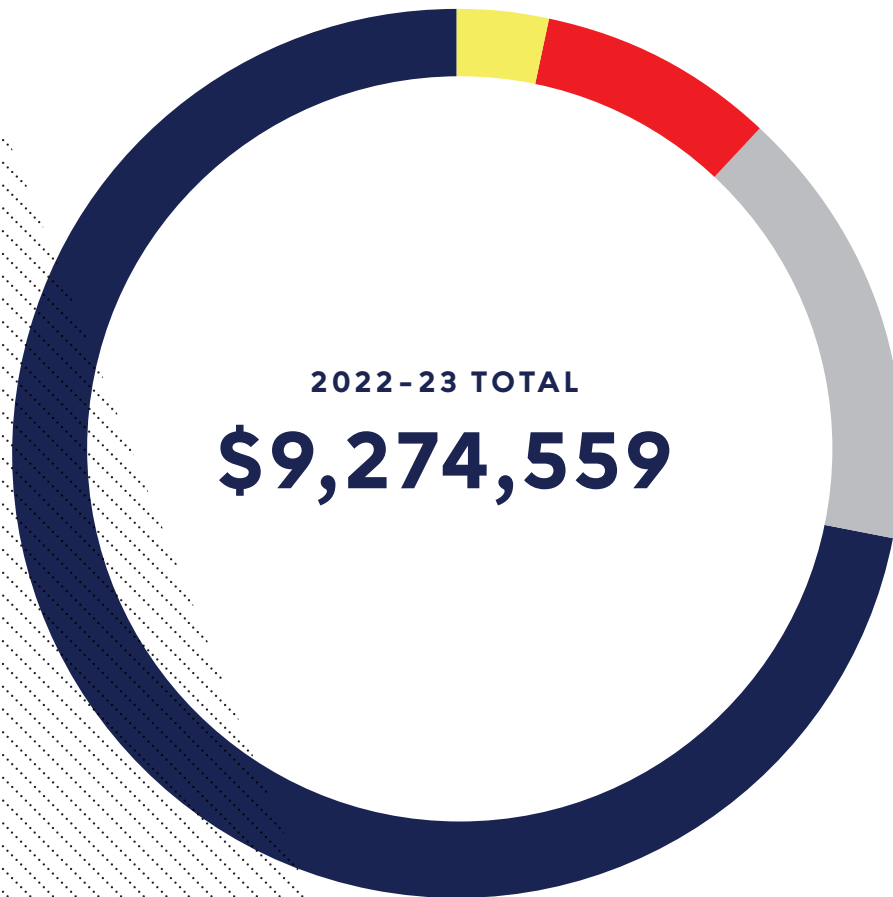
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Secretary
PA Office of Administration

Susan Yee

CEO
Active Data, Inc.

FINANCIAL RESOURCES



\$331,646 / Short-Term Strategic Resources

Discretionary funds that provide flexibility to fund program opportunities as they arise

\$794,311 / Operating Resources

Reflect a strong financial position, as they exceed 100% of core, non-programmatic expenses

\$1,489,691 / Strategic Programs Resources

Private and public grants, as well as restricted investor contributions, available to support policy priorities and the organizational mission.

\$6,658,911 / Long-Term Strategic Resources

Board-designated endowed funds

Accelerating
economic
growth
through
public-private
partnership



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