2019 ANNUAL REPORT

BIG BUSINESS.

SMALL BUSINESS.

ALL BUSINESS.

The Statewide Voice of Business™





2019 Annual Report

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Dear Pennsylvania Chamber Member,

Pennsylvania's business community ended 2019 on a high note, reporting record sales and growth while also voicing confidence about the state of the economy, according to results from the PA Chamber's 29th Annual Economic Survey. This economic momentum combined with the positive benefits of the 2017 federal tax reforms, resulted in the Commonwealth of Pennsylvania ending FY 2018-19 with a revenue surplus and an on-time state budget that did not include any new taxes on Pennsylvania employers.

The PA Chamber applauded state elected officials for responsibly transferring \$317 million into the Commonwealth's Rainy Day Fund to serve as a safety net for future economic downturns, and urged elected officials to capitalize on the strength of the economy by enacting pro-business policies that would position Pennsylvania as an ideal location for investment and job growth.

As one of the PA Chamber's key priorities, workforce development remained a primary focus in 2019. For the third consecutive year, we partnered with the mikeroweWORKS Foundation to award a total of \$75,000 in scholarships to 24 deserving Pennsylvania students pursuing careers in the skilled trades. Additionally, we worked collaboratively with a bipartisan coalition of organizations and elected officials on legislative efforts aimed at removing barriers to employment – including civil justice reform and occupational licensure reform.

Through strong, effective advocacy efforts, the PA Chamber earned an array of legislative victories on behalf of our members, including blocking a proposal that would have more than doubled the state's minimum wage rate and warding off additional taxes on the Commonwealth's energy sector. We continued to push back against government mandates and unnecessary regulatory burdens that increase the cost of doing business and hurt Pennsylvania's competitive edge.

Throughout the 2019 election cycle, the PA Chamber played a major role in shaping the political landscape of Pennsylvania state government to one that is focused on job creation and economic growth. Through our political arm, ChamberPAC, we actively supported and endorsed pro-business candidates, and successfully hosted multiple political events that connected the business community with candidates and office holders. Additionally, we implemented a strategic Independent Expenditure campaign that focused on the state Superior Court race.

As of year-end, PA Chamber membership totaled nearly 10,000 businesses of all sizes and representing all industry sectors. Advocacy, Investor and Policy Roundtable membership investments ensured that the PA Chamber remained strategically positioned to protect and represent Pennsylvania companies at all levels of state government, and provided member businesses exclusive access to a wide range of tools and opportunities to participate in this process.

This year, the PA Chamber hosted 25 educational and compliance training events, including webinars, half-day roundtables, conferences and summits covering a variety of key topics of importance to the business community. Approximately 200 companies leveraged the B2B network of the PA Chamber by engaging in sponsorship and exhibitor opportunities. Pennsylvania employers also had access to premier networking events, including the Annual Business Golf Outing and the Annual Chamber Dinner – which brought together more than 1,700 business leaders and elected officials from across the state.

PA Chamber Insurance (PCI) again posted a strong year providing a leading-edge portfolio of employee benefits and human resources solutions that are built to empower a healthy, productive, and secure workforce across the Commonwealth. PCI continued to deliver an enhanced opportunity for clients to attract and retain desirable talent. The PCI Benefits Consortium self-insurance continues to grow in popularity as a way to empower companies to effectively manage their increasing healthcare costs. In the past three years, the program has saved customers nearly \$3.1 million and has maintained 99 percent retention.

As we embark on a new decade, the PA Chamber remains committed to expanding our efforts to promote pro-growth, probusiness policies that position the private sector to thrive. We look forward to working with our broad-based membership to drive economic growth and increase Pennsylvania's competitive advantage in 2020.

Sincerely,

Gene Barr, President & CEO

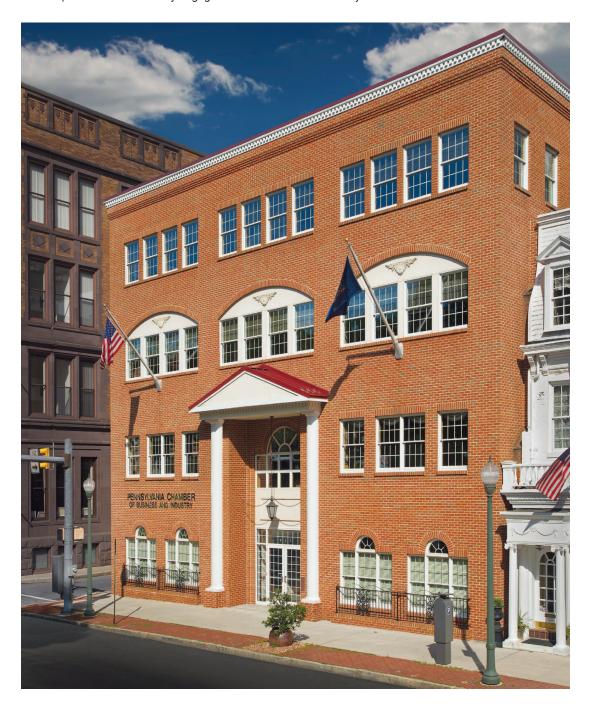
Pennsylvania Chamber of Business and Industry

Our Mission:

To be the Statewide Voice of Business™, advocate for job creation and lead Pennsylvania to greater prosperity for its residents.

Our Vision:

To create a Pennsylvania where employers are attracted to invest and grow, families thrive and young people receive an education that prepares them to be productive and civically engaged members of the community.



Membership

Your Voice Matters

When business owners and executives make the decision to join the PA Chamber, they add to the collective voice and clout of thousands of members across the Commonwealth. It is this statewide effect that enables the PA Chamber to directly impact legislation and regulation that affects the bottom line of businesses statewide. This support is a direct investment in their companies and in the future of the Commonwealth. The PA Chamber is committed to ensuring that the voices of every member business is heard in the halls of the Capitol. At year-end, PA Chamber membership totaled nearly 10,000 business members, including Local Chamber Cooperative Program members.

Advocacy Membership

The support of Advocacy members strengthens the PA Chamber's ability to protect and represent Pennsylvania companies at all levels of state government and provides member businesses exclusive access to a wide range of tools and opportunities to participate in this process. Members decide how involved they want to be, and how much information they want to receive:

- Representation by the most influential statewide business advocacy group at the State Capitol
- Ability to contribute input on proposed legislation
- Action alerts on issues that impact business
- Member-only access to quarterly Government Affairs webinars and DEP Quarterly Meetings
- Opportunity to engage with ChamberPAC
- Access to the PA Chamber's interactive Legislative Scorecard
- High-level networking opportunities with business and political leaders
- Opportunity to gain statewide brand visibility and leverage B2B connections
- Member-only alerts, issue bulletins and publications featuring the latest legislative and business insights
- Access to a range of money-saving programs and business solutions
- Member-only preferred pricing on PA Chamber signature events and educational/training programs with continuing education credits available
- Member-only advertising opportunities

Investor Member Program

The PA Chamber Investor Member Program is comprised of a committed group of individuals and companies dedicated to investing in the future of their own businesses as well as the economic future of the Commonwealth. Since its inception in 2002, the program has successfully grown from a founding cohort of 55 members to 224 members at the end of 2019. The minimum annual investment of the Investor Member program is \$5,000 and is tiered upward. The dues for a new member averages \$6,500.

Prospects for Investor level membership generally include companies with an employee base of 500 or more. Fortune 100 and 500 corporations as well as smaller organizations and business owners who wish to engage in the legislative process and realize greater development through B2B connections may also choose to participate in the program.

Benefits & Opportunities

One designated individual from each Investor member organization receives an exclusive invitation to sit on the **Government Affairs Roundtable**, which helps establish PA Chamber legislative advocacy priorities and regularly interfaces with public officials. This forum provides member organizations with an opportunity to engage in dialogue regarding the business climate in the Commonwealth, specifically, the legislative and regulatory issues that directly affect their ability to conduct business. Investor members also have the opportunity to serve on influential committees and workgroups and attend quarterly meetings with leaders from the Pennsylvania Department of Environmental Protection.

Investor member companies gain unprecedented access to and coordination with the PA Chamber's Government Affairs team. Our experienced and influential Government Affairs team is "on the hill" everyday serving as our members' eyes and ears in Harrisburg. Investor members communicate directly with the Government Affairs team to address their policy, legislative and regulatory issues and concerns.

Additionally, Investor members receive **timely legislative updates** regarding the PA Chamber's positions and strategies on key legislation in areas of interest to their operations. We offer several digital publications that keep Investor members informed of the issues pertinent to the Commonwealth's evolving business climate. The *Investor Insider*, sent on Monday mornings of each legislative session week, lists a brief description of House and Senate bills (Business Agenda) scheduled for floor or committee votes, along with an informative video message (Two Minute Warning) of our Vice-President of Government Affairs that provides a brief synopsis of the week ahead in the General Assembly.

In an ongoing effort to provide Investor companies with the best possible member experience while simultaneously increasing our visibility throughout the Commonwealth, the PA Chamber has **dedicated Membership Executives in Eastern and Western Pennsylvania** to supplement our core Membership team based in our **Harrisburg headquarters**. This regional presence has driven increased engagement and exposure throughout the state. Member Executives regularly attend and support events, sponsored and attended by Investor members to visibly demonstrate support for their initiatives as well.

As part of our commitment to member satisfaction, we conduct an **annual membership review** for all Investor member companies. At a minimum, one annual, personal visit is coordinated by our Membership Executives, with support from the Government Affairs team, and/or our President/CEO. At this meeting, we discuss our working relationship, verify that the appropriate individuals within the organization are receiving relevant and useful information related to their job function(s), and ensure that membership is meeting or exceeding expectations. This meeting also provides Investor Members with another in-person opportunity to discuss legislative and regulatory issues affecting their business with our knowledgeable, experienced staff.

Investor members receive numerous exclusive invitations to Investor-only meetings and events with high-ranking public officials, including the Governor, Administration officials, and House and Senate leadership.

The popular Investor Gala Reception is held annually in June at the Pennsylvania Governor's Residence and provides an opportunity for Investor members to engage with peers and interact with influential government leaders. We also offer several smaller Regional Investor events throughout the year including intimate dinner and conversation events with PA Chamber President and CEO Gene Barr. These Investor-only events are included the member's dues investment.

Investor members also realize tremendous value as guests of the Annual Chamber Dinner – the premier gathering of business leaders and elected officials in Pennsylvania. With 1,600 – 1,800 attendees annually, the evening boasts two networking receptions, a full-course meal, and a dynamic speaking program. Based on their Investor level membership tier, companies receive a designated number of invitations to attend the exclusive Chairman's Reception. Past Annual Chamber Dinner speakers include: George W. Bush, Condoleezza Rice, Karl Rove, James Carville, Colin Powell, Dennis Miller, and Tom Brokaw, Ambassador Nikki Haley.

Benchmarks to Ensure the Investor Program's Relevancy

The hallmark of the Investor Member Program is the individualized attention given to each member to maximize ROI. Three dedicated Membership Executives are each tasked with providing tailored support to a select group of Investor Members. Additionally, the Director of Membership is very active with Investor members to monitor engagement and increase overall value of the membership investment. Together, the membership team works collaboratively to effectively (1) retain current members, (2) achieve member alchemy, and (3) recruit new Investor members.

The PA Chamber Membership team strives to build member-centric relationships with Investors that support growth in membership dues revenue annually. Consistently, the PA Chamber maintains a goal of 95% renewal retention of Investor members, which is achieved through individualized member attention and by fostering member participation in advocacy and through engagement in other PA Chamber programs and services. The PA Chamber's annual new member goal is assessed on achieving a set investment revenue goal collectively.

The Policy Roundtable

A unique and exclusive membership for presidents (or the senior Pennsylvania executive in a firm headquartered out-of-state), CEOs, COOs, CFOs and corporate chairpersons, the Policy Roundtable is a forum in which corporate officers meet on a peer-to-peer basis to formulate public policy proposals to the most pressing issues of economic growth and competitiveness.

The Policy Roundtable provides executives the opportunity to:

- Interact extensively with the state's senior policymakers, policy experts, media, and other stakeholders to leverage concerns and interests
- Meet with state senators and representatives, cabinet members and other state officials to discuss current challenges and legislation
- Participate in policy evaluation
- Vote on long-term public policy strategy
- Guide the PA Chamber's advocacy and policy education efforts
- Understand the impact of the legislative and political landscape through updates from senior PA Chamber executives.

The Local Chamber Cooperative Program

Introduced in 2013, the Local Chamber Cooperative Program (LCCP) gives our local chamber partners the ability to offer their member companies with 10 and fewer employees a free membership with the PA Chamber.

This program enhances membership benefits for local chamber partners, while also enabling the PA Chamber to build stronger grassroots advocacy efforts with small businesses statewide. LCCP members receive:

- Information on legislation and advocacy efforts that affect their business
- Action alerts on pressing, key issues
- Grassroots involvement with the PA Chamber's Government Affairs lobbying team
- Discounted, members-only pricing on the PA Chamber's renowned educational and compliance programs and publications
- Monthly newsletter, Small Business Big Voice, featuring articles and information on advocacy issues and efforts affecting their business
- Increased visibility in the marketplace and in the state legislature

As of December 2019, this highly successful program accounted for approximately 7,000 members and included 25 local chambers as partners in the program:

African American Chamber of Commerce
Alle Kiski Strong Chamber
Back Mountain Chamber
Beaver County Chamber of Commerce
Bedford County Chamber of Commerce
Blair County Chamber of Commerce
Chamber of Business and Industry of Centre County
Chester County Chamber of Business and Industry
Clarion Area Chamber of Business and Industry
Erie Regional Chamber and Growth Partnership
Gettysburg Adams Chamber of Commerce
Harrisburg Regional Chamber
Huntingdon County Chamber of Commerce

Indiana County Chamber of Commerce
Lebanon Valley Chamber of Commerce
Mon Valley Regional Chamber of Commerce
Pittsburgh Airport Area Chamber of Commerce
Pittsburgh North Regional Chamber
Schuylkill Chamber of Commerce
Shippensburg Area Chamber of Commerce
TriCounty Area Chamber of Commerce
Upper Bucks Chamber of Commerce
Venango Area Chamber of Commerce
West Shore Chamber of Commerce
Williamsport-Lycoming Chamber of Commerce

Government Affairs

Issue Advocacy Campaigns

The PA Chamber regularly utilizes grassroots advocacy campaigns to promote an issue or position on various policy and legislative proposals. The strategies implemented include targeted social media ads and e-mail blasts, creation of issue-specific web pages and a specific "take action" component. Throughout the year, the PA Chamber's strategically-developed grassroots campaigns ensured that the business community's voice was heard in the halls of state government on the following issues:

- Proposed Overtime Rule Change In 2019, the Pennsylvania Department of Labor and Industry unveiled a revised proposal to dramatically expand overtime eligibility rules in Pennsylvania. During the public comment period, the PA Chamber rallied the state's business community to provide feedback to the Independent Regulatory Review Commission expressing concerns with the proposed changes which included significant increases to the cost of providing services or doing business, but also the reality that this dramatic change would damage workplace culture and morale, as more employees would have to be shifted from earning a salary to being paid by the hour. Despite outcry from a broad range of industries about the negative impact this rule change would have, the IRRC ultimately approved the revised proposal in January of 2020.
- Severance Tax The development of the Marcellus Shale has helped to revitalize Pennsylvania's economy; creating jobs and reducing energy costs. However, the threat of additional punitive tax burdens jeopardize the natural gas industry's future in the Commonwealth. For the past five years, the PA Chamber has been leading a diverse coalition through its 501(c)4 Citizens to Protect PA Jobs in fighting attempts to enact a severance tax. Our 2019 campaign included a brand refresh with new messaging and imagery on the coalition's website, www.stopnewenergytaxes.com, touting the benefits of natural gas. Additionally, throughout the year, the coalition held a statewide media call followed by targeted regional media calls featuring local elected officials and business leaders opposing additional taxes on the natural gas industry. The PA Chamber-led coalition was successful in defeating this tax in 2019.

2019 Legislative Victories

As the Statewide Voice of Business[™], the PA Chamber has a dual focus of promoting pro-jobs, pro-growth legislation; while at the same time combating policies that would negatively impact Pennsylvania employers. Throughout 2019, the PA Chamber and its partners in the business community have celebrated successes on both fronts.

- Enactment of a state-based health insurance exchange for Affordable Care Act individual market plans (Act 42 of 2019).

 The federal agency Centers for Medicare & Medicaid Services issued new guidance for states seeking more flexibility through waivers, allowing for greater innovation in finding tools and solutions that help to reduce premium costs. This legislation will bring stability and reduced costs to Pennsylvania's health care sector.
- Increase in the Educational Improvement Tax Credit program by \$25 million. Though the governor vetoed legislation supported by the PA Chamber that would have increased the EITC program by \$100 million, the final 2019-20 budget agreement did include an increase to the program. The PA Chamber supports the EITC because it allows the state's business community to help Pennsylvania students gain access to alternative educational opportunities.
- Passage of a Senate Resolution S.R. 20 that directs the Legislative Budget and Finance Committee to conduct an analysis of the impact of the medical malpractice venue reforms implemented in 2002. This resolution was a direct reaction to a proposed change to the venue rule by the Pennsylvania Supreme Court. The Court's Civil Procedural Rules Committee proposed taking Pennsylvania backwards by undoing medical malpractice venue reforms implemented in 2002 and allowing medical liability lawsuits to be filed in other jurisdictions beyond the county where the alleged malpractice occurred. The resolution was adopted by the Senate; the Court has decided to await the results of the Legislative Budget and Finance Committee report before considering the rule change.

- Fought off attempts to place an additional punitive tax on the natural gas industry.
- Combatted efforts to increase entry level wages by more than 65 percent through a mandated hike to the state's minimum wage this proposal would have especially hurt small business owners.
- A bipartisan effort to close the jobs skills gap (House Bill 265). Lawmakers from both sides of the aisle passed an omnibus workforce development bill which was strongly supported by the PA Chamber, incorporating a number of workforce development proposals to expand information available to students in order to help them better prepare for their post-secondary education.

Citizens to Protect PA Jobs — 501(c)4

Citizens to Protect PA Jobs is the PA Chamber's 501(c)(4) and serves as the grassroots arm of the organization.

Through its website, www.protectpajobs.com, the C4 communicates a pro-jobs, pro-growth message to the general public. The website is updated regularly with news articles and educational materials that relate to topics of importance to the state's business community. This information is also posted on the C4's social media channels. Regular e-mails are also sent to the C4 audience — which consists of nearly thirty thousand individual e-mails.

Additionally, the C4 is often utilized for issue-specific campaigns. These campaigns often include the creation of micro-websites explaining the issue to a broad audience. Digital social media ads and brief informational videos are also sometimes created to garner attention and encourage action — which often means sending a pre-written communication to a legislator or the governor.

Key External Challenges

Thanks in large part to the 2017 federal tax reforms that helped to jumpstart the economy, Pennsylvania had a strong fiscal outlook in 2019. Larger than anticipated revenue collections throughout the 2018-19 Fiscal Year led to an on-time budget that responsibly put surplus revenues in the state's Rainy Day Fund. However, those strong revenue collections have slowed in the current Fiscal Year. The growth of mandated expenses in government programs — including the state's pension obligations — and the desire to increase spending in areas such as education and infrastructure, continue to threaten the state's long-term fiscal stability. Continued calls for higher energy taxes combined with costly government regulations and mandates negatively impact the state's broad-based employer community and overall business climate.

As part of our ongoing mission to improve the economic climate for businesses of all sizes, we are urging lawmakers to focus on the following public policy issues in order to improve the Commonwealth's business climate and competitive edge in 2020:

Workforce Development

Pennsylvania has an aging workforce and one that often does not offer a labor pool with the requisite skills and expertise to fulfill the demands of Pennsylvania's employers. This results in a lack of qualified candidates for many available job opportunities. A greater focus on effective job training and workforce development programs and encouraging youth employment, will help to prepare students and current employees with career readiness skills needed for Pennsylvania's evolving jobs market. The PA Chamber is also encouraging elected officials to support policies that remove barriers to entering the workforce — including criminal justice reform and occupational licensure reform.

Improve the Business Tax Structure

Policymakers should look to reforming and aligning the Commonwealth's tax structure with the recent pro-growth initiatives enacted at the federal level. Our corporate net income tax rate must be reduced in order for our employers to prosper in a global economy. The PA Chamber will advocate for comprehensive changes to the state tax structure that embody the principles of competitiveness, predictability, fairness and simplicity. These changes include addressing the manner by which local taxes are levied and administered.

Affordable and accessible health care

High health-care costs remain an impediment for many businesses who wish to offer or maintain appropriate health-care benefits to their employees either through traditional coverage or alternative options in the marketplace. A high level of quality care and accessibility for employees must be made available at reasonable and affordable prices without undue regulatory burden and bureaucracy. The PA Chamber will continue to advocate for policies that will encourage competition in the provision of healthcare while also giving employers the most flexibility when making health care decisions.

Flexibility in energy markets and science-based environmental requirements

Numerous state and federal environmental regulations and energy mandates are hindering the state's economic positions. The PA Chamber opposes the imposition of new, and the expansion of existing, mandates and will continue to advocate for thoughtful, science-based development and flexible implementation of environmental law.

Creating an equitable civil justice system

Pennsylvania's legal climate is conducive to frivolous lawsuits and lacks protections that create a fair, balanced and common sense civil litigation system. The business community supports legal reforms that help prevent lawsuit abuse while protecting the right of legitimate plaintiffs to seek justice. The PA Chamber supports lawsuit abuse reform proposals that provide for full and timely compensation of parties legitimately injured; give employers predictability and certainty; change the judicial system to achieve greater efficiencies and unbiased justice; and contribute to greater productivity and economic prosperity.

Modern, safe, efficient and reliable infrastructure systems

Pennsylvania must construct and maintain adequately funded and reliable transportation and utility systems and other infrastructure. The PA Chamber will continue to advocate for greater efficiencies in their construction, maintenance and delivery, including streamlined permit and regulatory processes. The business community supports expanded reliance on public-private partnerships to help the Commonwealth meet its infrastructure needs in a manner consistent with the imperative for fiscal restraints.

Balanced labor and employment laws and regulations

State policies that govern labor relations and employment rules in Pennsylvania often fail to consider adverse impacts on employers. The PA Chamber supports public policy that helps facilitate a fair work environment without triggering unintended consequences that hurt employers. The business community supports eliminating misuse and improving the financial condition of the unemployment compensation system; and facilitating a workers' compensation system that roots out abuse and, most importantly, focuses on returning injured workers to full health and function. Employers oppose excessive mandates that unnecessarily increase the cost of doing business.

Quality educational opportunities

The PA Chamber supports a public education system based on rigorous standards, with appropriate transparency and robust accountability measures, to help ensure Pennsylvania students graduate high school as prepared as possible for the next phase of their lives. The PA Chamber further supports initiatives that help provide families with options to best fit the specific education needs of students.

Political Activity

The 2019 election cycle featured judicial elections as well as several Special Elections for open legislative seats. Through its political action committee and the use of Independent Expenditures, the PA Chamber actively worked to get pro-business candidates elected to office. Additionally, as part of the Chamber's "Get Out the Vote" effort, the PA Chamber utilized direct communications to its members and social media platforms to provide information on the ChamberPAC endorsed candidates and polling location information.



ChamberPAC, the political arm of the PA Chamber, supports and endorses pro-job, pro-growth candidates for state office. Supported by contributions from individuals in the business community, PA Chamber employees and political action committees, ChamberPAC plays a major role in shaping the political landscape of Pennsylvania state government to one that is focused on job creation and economic growth.

ChamberPAC held several events throughout 2019, including: the "Business Meets New Legislators" breakfast; the Spring "Taste of PA" event for the House Republican Campaign Committee and the Fall "Taste of PA" event for the Senate Republican Campaign Committee.

Through its political action committees, the PA Chamber raised more than \$168,000 in 2019 to support candidates who either pledge or have a proven record of supporting policies that make Pennsylvania a better place in which to do business.

ChamberPAC Participation Rates

- Pennsylvania Chamber Board of Directors: 93 percent in 2019
- Pennsylvania Chamber employees: 100 percent in 2019

ChamberPAC 2019 Election Results

In last year's General Election, ChamberPAC endorsed Republican candidates Judge Christylee Peck and Megan McCarthy King for state Superior Court. Megan McCarthy King was successful in her bid to fill one of two open seats on the court. The second seat was filled by Philadelphia Common Pleas Court Judge Daniel McCaffery (D).

Additionally, five legislative Special Elections were held throughout the year to fill open seats. ChamberPAC endorsed D. Raja (R) for the 37th Senatorial District, Doug Mastriano (R) for the 33rd Senatorial District, Joe Pittman (R) for the 41st Senatorial District, Marci Mustello (R) for the 11th House District and David Rowe (R) for the 85th House District. All of the ChamberPAC candidates who were endorsed in the aforementioned Special Elections — with the exception of D. Raja — were elected to office.

Independent Expenditures

As part of the PA Chamber's election efforts, a comprehensive Independent Expenditure campaign was developed for the 2019 Judicial Election. This campaign strategically promoted ChamberPAC's endorsed judicial candidates — Judge Christylee Peck and Megan McCarthy King through a variety of mediums; including: TV, direct mail and digital ads. These efforts aided in the election of Megan McCarthy King to the state Superior Court.

Pennsylvania Chamber Insurance (PCI)



The PA Chamber is proud to be The Statewide Voice of Business™, and PA Chamber Insurance (PCI) takes that charge seriously. A lot more than a broker, PCI's express purpose is to curate a leading-edge portfolio of employee benefits and human resources solutions — built to empower a healthy, productive, and secure workforce across the Commonwealth—while delivering an enhanced opportunity for clients to attract and retain desirable talent. Offering solutions for both small and large size businesses, PCI consultants focus on building deep and strategic relationships with client partners to drive value for their operations.

Designing and purchasing employee health benefits has never been more challenging, or more important. No single strategy or complement of approaches will fit all employers. PCI leverages its dedicated team of consultants, HR compliance and workforce development staff, and participation in national advisory boards to drive leading-edge results. New insights into care delivery models, reimbursement strategies, consumer behaviors and social influences of health are offering novel methods to engage employees and the provider community while making benefit designs more effective.

As a thought-leader in this space, PCI is working diligently to:

- Measure the impact of efforts to increase health care value and understand the efficacy of various cost-mitigation efforts
- Define organizational value based on a detailed understanding of employee populations, local market conditions and strategy
- Deploy insights from behavioral economics to improve employee/member health
- Evolve away from transactional renewal management toward engineering long-term solutions

PCI Benefits Consortium

The PCI Benefits Consortium self-insurance continues to grow in popularity among small and mid-size companies as a way to manage their increasing healthcare costs. In the past three years, the Benefits Consortium has saved customers nearly \$3.1 million.



In 2019, PCI continued to see an increase in quoting self-insurance as an alternative to traditional healthcare plans under both the Benefits Consortium product and also carrier sponsored plans. Self-funded benefit plans can now be quoted for companies with as few as 2 employees. PCI continued to educate organizations on self-insurance and the Benefits Consortium program throughout 2019 through informational webinars. Additionally, the PCI Benefits Consortium program has:

- Maintained 99 percent retention since the inception of the Benefits Consortium program
- Currently manage 33 groups
- The average group size in the consortium is 43 employees

New Partnerships and Expansion of Programs

- Exclusive, competitively priced benefits including dental, vision, life and disability with guaranteed issue and no minimum participation requirements
- Turn-key Medicare education, evaluation, and enrollment services for employees/beneficiaries who are Medicare-eligible
- International health plan supplements and expat coverage for employees traveling/working/vacationing abroad
- Executive benefits and operational reviews including key person coverage, succession planning/exit strategies, and closely held business valuations
- Employee wellbeing services focused on physical, emotional, and financial drivers

Launch of PCI Video

PCI unveiled a new video that showcases why they are a lot more than a broker and reviews the portfolio of programs and benefits they offer to businesses across Pennsylvania. Since healthcare continues to be a top concern for employers, the PCI solutions brings a consultative approach to finding the right mix of benefits and coverages that meet both the employer's and the employee's needs. The video was featured on the homepage of the PCI website and was used on social media and at the PA Chamber's Human Resources events.

Human Resource Consulting Services

Human Resources Consulting services continues to grow as a valuable benefit for PCI customers. Critical Human Resources questions and assistance has been sought in the following areas:

- Difficult terminations
- Disability accommodation
- Background Checks
- Deductions from wages
- Sexual Harassment training
- Diversity training
- Recruiting
- Drug Testing
- **ERISA** Compliance



The PCI "HR Blog" continued to cover important topics, including cross-training and succession planning, interviewing, dress code policy assistance and measuring HR success. PCI's Chief HR and Compliance Officer also conducted a webinar for HR professionals, "Back to Basics: the Fundamentals of HR" and covered the key topic of Exit Interviews at the PA Chamber's Fall Human Resources Roundtables.

PCI recognizes that overall employee health plays a key role in business outcomes — while driving harmony for employees. While many large employers capitalize on this mindset, PCI is working to introduce this concept across the business continuum. When employers execute effectively, they work with advisory partners to view human capital risk holistically — recognizing that employee health, productivity and organizational performance are inextricably tethered together. Acquiring top talent, maintenance of the asset and retaining strong teams in a competitive market are important — all of which remain a core focus of effective employee benefits programs.

Communications and Marketing

Visibility in the Media

The PA Chamber is committed to serving as the leading go-to expert on business-related policy in Pennsylvania. In 2019, the PA Chamber developed and executed a strategic communications plan aimed at promoting the PA Chamber's pro-business message across traditional news outlets (print, television and radio) and social media platforms (Twitter, Facebook and LinkedIn).

Print

- Members of the PA Chamber's Government Affairs team are regularly interviewed by print news outlets throughout the state. Over the past year, the PA Chamber was either mentioned, quoted or authored opinion pieces in more than 250 different articles in various print publications.
- In 2019, the PA Chamber authored more than 30 opinion columns and letters to the editor that were published in newspaper outlets throughout the state. Opinion pieces, which covered a wide range of topics from minimum wage to environmental policy, and regulations to necessary reforms within the state's workers' compensation system, were regularly published in each of the Commonwealth's major media markets.

Television and Radio

- PA Chamber Government Affairs staff makes regular appearances on television and radio broadcasts to highlight key advocacy goals. This includes segments on *Pennsylvania Newsmakers*, a statewide public affairs TV program that is underwritten in part by the PA Chamber; *Comcast Newsmakers*, a public and community affairs focused interview program; and *Behind the Headlines*, a television production by the Susquehanna Valley Policy Center that is underwritten in part by the PA Chamber; as well as regular appearances on the *Pennsylvania Cable Network's* various programs, including the *PCN Call-In Show* and *On the Issues*.
- Members of the PA Chamber Government Affairs staff are often interviewed for television and radio news programs on a variety of topics. These interviews air throughout the state.
- Media outlets are occasionally invited to attend educational and special events hosted by the PA Chamber and the PA Chamber Educational Foundation.

Membership Communications

A popular benefit of PA Chamber membership is receiving timely updates on legislation and having the ability to take action on important policy goals for the business community. Our wide range of publications also affords members the opportunity to share their stories, gain practical advice and learn how their peers are inciting innovation and achieving success.

Catalyst

Premiering in 2006, the PA Chamber's full-color, statewide quarterly magazine, *Catalyst*, features insightful articles and regular features including member business profiles; member news; legislative and regulatory updates; and practical advice for business. The print and electronic versions of the magazine reach more than 15,000 business leaders and elected officials statewide.

morningNews

A daily report featuring some of the top headlines trending across Pennsylvania in the world of politics and business.

Sentinel

Weekly news about the business community's key policy issues. Includes the popular **PA Chamber Minute** monthly video message from PA Chamber President Gene Barr, which keeps members up to date on the critical issues that impact their business.

The Pulse of PA Politics

A weekly compilation of political and policy-based news briefs of interest to the broad-based business community.

business|CAPITOL

For all member companies with 11 or more employees, this monthly newsletter highlights the top advocacy issues of the day, opportunities for involvement and features upcoming member events such as our Educational Leadership Series, compliance conferences, Annual Chamber Dinner and more. The newsletter also showcases member-exclusive money saving programs and the latest news from Pennsylvania Chamber Insurance.

Small Business Big Voice

Designed specifically to educate employers in the LCCP program about advocacy issues that could impact smaller businesses, **Small Business Big Voice** provides a brief, powerful monthly snapshot of legislative and regulatory activity, along with grassroots calls to action.

Investor Insider

Exclusive to Investor members and sent on Monday morning of each week the General Assembly is in session, Investor Insider gives the latest news and updates on legislative activity, including the state legislature's anticipated voting schedule and a brief description of significant bills and the PA Chamber's official position; and an overview of PA Chamber media coverage. The *Two Minute Warning* video message from the PA Chamber's Vice President of Government Affairs provides Investor members with a quick overview of the week ahead in the General Assembly and at the PA Chamber. This

newsletter also features information on upcoming educational seminars, members-only meetings and Investor events that the PA Chamber hosts throughout the year. Starting in 2018, the newsletter also encourages reader feedback on our advocacy efforts through periodic, interactive poll questions; and highlights prior and upcoming Investor-member exclusive events.



Issue Bulletins and Alerts

These notifications provide critical information on the issues members indicate are important to them. Delivered via email, these reports discuss pending legislation, regulatory proposals, monthly tax collection updates from the state Department of Revenue and policy-related matters. Members are sometimes called upon to take action.

Social Media and Digital Marketing

In 2019, we realized steady growth across all of our digital platforms, gaining more than 1,000 new followers across all social media platforms and eclipsing more than 1 million impressions.

We continue to see tremendous results with our paid social media and display advertising campaigns. Through strategic targeting efforts we were able to attract new followers and spread our message beyond our captive audience to include those professionals and businesses we targeted for each campaign. In 2019, the PA Chamber's social media advertising efforts were focused across three main platforms: Facebook, Twitter and LinkedIn.

Our Instagram audience doubled in 2019 and our interaction with member companies and prospects was greatly enhanced by our efforts on this platform. We anticipate that Instagram will be an important tool in 2020 for social media growth.

Our 2019 branding campaign produced significant results in our web traffic. This significant increase is largely due to our digital display branding campaign. However, we also saw growth in website traffic coming from organic search, email campaigns and social media. We expect steady growth into 2020 that should benefit all areas of the PA Chamber including membership, events and PCI.

Coinciding with the launch of our new database in 2020, the new influx of data will allow our digital ad campaigns to be even more strategically targeted toward potential members, event attendees and PCI clients.

The ALL BUSINESS Podcast

The PA Chamber continued to feature member companies and their incredible stories in the ALL BUSINESS podcast. Business leaders from across the state shared valuable insight into how their organizations are contributing to the economic landscape of Pennsylvania. The ALL BUSINESS podcast featured these dynamic member companies in 2019:

- Dawood Engineering
- AHEDD
- Olney Charter School
- The Hospitality Asset Management Company
- Highmark
- PA Department of Corrections
- PA Chamber Insurance
- Klock Entertainment
- JFC Staffing



Member Services

35th Annual Chamber Dinner

Over 1,700 guests joined the PA Chamber for the 35th Annual Chamber Dinner on Monday, September 23, 2019. This highly anticipated gathering of Pennsylvania's decision makers featured keynote speaker Nikki Haley, U.S. Ambassador to the United Nations (2017-2019). Ambassador Haley shared a captivating look into her remarkable political rise, pro-business philosophy, political insights and more.

The PA Chamber partnered with Allegheny College to present the third annual "Allegheny College Prize for Civility in Public Life in Pennsylvania" award to the four chairs of the General Assembly's Criminal Justice Reform Caucus — Senators Camera Bartolotta, R-Greene, and Art Haywood, D-Philadelphia, and Representatives Sheryl Delozier, R-Cumberland, and Jordan Harris, D-Philadelphia. The four legislators received the prize for their efforts to build bipartisan consensus on reforms to the state's criminal justice system; with the goal of reducing recidivism and helping individuals who have learned from past mistakes re-enter into the workforce.

The PA Chamber's Annual Dinner is the premier event of the year for the Commonwealth's business community. Each year we feature a keynote speaker who will bring attention to important issues in the world of business, politics, and public affairs. Previous keynote speakers have included former President George W. Bush, Condoleezza Rice, Gen. Colin Powell, Tom Brokaw, Ted Koppel and Michael Strahan. As a result of the high-quality program the PA Chamber has produced year-after-year, the event annually attracts between 1,600-1,800 business leaders and elected officials.

16th Annual PA Chamber/ PA Chamber Insurance Business Golf Outing

More than 200 business leaders from across Pennsylvania enjoyed an exciting day of networking, fun and challenges on *Hershey® Country Club's* famed East and West Courses at the 16th Annual PA Chamber/PA Chamber Insurance Business Golf Outing on Monday, August 19, 2019. A four person scramble format and shotgun start, the event challenged golfers to a variety of contests, including prizes for best scores, longest drive, longest putt and more. In addition, every golfer received a deluxe gift package courtesy of Exclusive Platinum Sponsor UPMC Pinnacle. This year's mulligan sales were designated for the PA Chamber Education Foundation's support of the mikeroweWORKS Work Ethic Scholarship Program





Educational Events

In 2019, the PA Chamber held 25 educational events throughout the state including webinars, half-day roundtables, conferences and summits. These compliance training events covered critical information on topics including:

- Spring HR Conference An off-shoot of the popular Fall HR Conference, this full-day program covered critical topics facing HR professionals including: Preventing Retaliation and Abusive Employee Conduct; Workplace Conflict Resolution; Anxiety, Obesity, and Tough Issues with Expanded ADA; Top Mistakes Companies Make in Complying with the FMLA; and Employment Law Update.
- Business Continuity Summit This critical program addressed Why Business Continuity Planning is Imperative; Core Components of a Business Resiliency Program for Organizational Continuity; Implications for Cyber Liability Insurance; Validating, Testing, Exercises and Simulation; Crisis Communication and Coordination with External Agencies; Plan Implementation Strategies and Action Review.
- Human Resources Manager Webinar Series This series of convenient webinars covered Avoiding Common Wage and Hour Mistakes; The Emerging Law of LGBT Rights in the Workplace; and Best Practices to Manage Your Harassment Claims.
- Annual IT Security Conference This popular annual event focused on Today's Most Serious Threats and the Biggest Mistakes Companies are Making; Hands-on Workshop: Offensive and Defensive Security Tactics; The Many Layers of the Dark Web; and Protecting your Company.
- Annual Environmental Conference and Trade Show Pennsylvania's premier energy and environmental conference, this program featured EPA National Perspective; Environmental Sustainability and Governance Panel; Water Issues Compliance and Best Practices; Best Practices for Transporting Products Safely through Environmental Controls; Residual Waste Compliance; and Complying with New Storage Tank Regulations.
- Fall Environmental Conference Hosted in Pittsburgh, Harrisburg and Philadelphia, this series of events highlighted Environmental Law under the State Constitution; region-specific environmental issues in Pennsylvania; Residual Waste and Management of Fill Policy; and Permitting for Above Ground Storage.
- Annual Human Resources Conference Attracting HR professionals statewide, this popular conference featured dynamic sessions on The Silver Tsunami and Succession Planning; Annual Labor Law Update; Medical Marijuana Implications for Workplaces; Shaping a Positive Corporate Culture; Managing Challenges that Arise When the Employee Relationship Ends; ADA and Reasonable Accommodations; Talent Acquisition and Retention; Tying Employee Health Outcomes to Business Performance; and Workplace Interactions, Conduct and Civility.



Sponsorships

In 2019, approximately 200 companies sponsored and exhibited at PA Chamber events including the Annual Chamber Dinner, Annual Business Golf Outing and numerous educational events. Through the development of promotional packages customized to fit various budgets and business development goals, participating organizations successfully increased brand awareness and marketed their products and services to the PA Chamber's diverse B2B network of nearly 10,000 member companies.

Sponsors and exhibitors not only gained valuable exposure at high-profile events throughout the state, but also aligned themselves with Pennsylvania's largest and most respected broad-based business association, fostered new business relationships and networked with CEOs, business leaders and elected officials. The PA Chamber greatly appreciates the support of these companies in helping us to bring quality programs and events to the Pennsylvania business community.

PA Chamber Foundation



The PA Chamber Foundation seeks to enrich discussions among policymakers, business leaders and the public concerning ways to improve Pennsylvania's economy and business climate, and lead to a more prosperous Pennsylvania for all its citizens. The Pennsylvania Chamber of Business and Industry Educational Foundation, dba PA Chamber Foundation, is a registered 501(c)(3) organization created to fund timely and insightful research and educational programs that will positively impact Pennsylvania's economic future and enhance the quality of life for all Pennsylvanians.

Workforce Update:

PA Chamber President, Gene Barr Co-Chairs Governor's Economic and Workforce Development Command Center

In 2019, Pennsylvania Governor Tom Wolf announced the creation of the Governor's Economic and Workforce Development Command Center to address the needs of the state's evolving job market. PA Chamber President and CEO Gene Barr was named cochair of the Command Center to represent the Commonwealth's broad-based business community.

The Command Center is addressing workforce shortages to help Pennsylvania compete. It will recommend ways to better coordinate workforce and economic development programs across state agencies and identify barriers that may prevent someone from working or prevent businesses from hiring skilled workers.

Examples include lack of child care or transportation, as well as outdated professional licensure, certification and continuing education requirements. The Command Center will also review the recommendations of the Auditor General and implement those that will deliver the best results.

PA Chamber Hires Workforce Development Executive

Iln 2019, the PA Chamber announced an expansion of its far-reaching workforce development efforts with the hire of Allen Norton as the organization's first workforce development executive.

Since embracing workforce development as a cornerstone of our mission in 2016 and making it an essential element of our strategic plan, the PA Chamber has made great strides in closing the jobs skills gap through programming that connects the business and education communities with students. Workforce concerns are plaguing employers in every region of the state, as evidenced by the PA Chamber's 2018 Economic Survey — which found for the first time that employers' top of mind concern was finding qualified workers to fill open positions.

Given the continued growth of our workforce development efforts, the PA Chamber deemed it necessary to invest in a full-time employee who is solely focused on further expanding our organization's work in this arena.

Mr. Norton brings vast experience to the role, with a long and successful career in higher education. He first began working with non-traditional students in 2003 before moving into community and high school relations where he focused on workforce development needs. For the last seven years, he has been primarily focused on promoting trade, technical and health career programs at Harrisburg Area Community College.

As the Chamber's Workforce Development Executive, Mr. Norton is working to expand the PA Chamber's workforce efforts, including the "Start the Conversation Here" initiative, by enhancing and developing partnerships between the education community, business and the public sector and identifying creative solutions to ensure that future generations of workers are skilled and prepared to meet the state's changing workforce needs.

Start the Conversation HERE.com

Through Start the Conversation HERE, the PA Chamber Foundation's workforce initiative, we are actively addressing workforce issues faced by businesses across the Commonwealth. In addition to the investment in dedicated staffing, the PA Chamber's website, **starttheconversationhere.com**,



showcased trusted resources and actionable strategies for employers, students and their parents, including:

- Free resources for employers to help attract the talent they need
- A listing of in-demand jobs in Pennsylvania, including the education and skillset needed to obtain them as well as the associated salary potential
- Workforce spotlight features businesses successfully tackling workforce challenges and best practices that can be implemented
- Student success stories including the mikeroweWORKS Work Ethic Scholarship recipients from Pennsylvania
- The PA Chamber Educational Foundation partnership with the mikeroweWORKS Foundation to help award scholarships to Pennsylvania students

The PA Chamber Foundation is strategically planning an expansion of the website and its resources in 2020. One key feature will be the Your Career Starts HERE Career Calculator, an interactive tool that allows site visitors to calculate the ROI on their educational investment based on their selected career field and learning institution. Based on data pulled from the state and federal government, site visitors can determine their job prospects in a particular field, the average starting salary, the training or educational requirements; as well as the educational costs and potential loan payments upon graduation. Site visitors can also compare the costs associated with obtaining the degree/training for a specific career at different schools across the Commonwealth.

[Note: The Career Calculator was launched in January 2020.]

Start the Scholarships HERE

Workforce development remains a major focus for the business community. As a cornerstone of the PA Chamber's mission, our organization — through our Start the Conversation Here initiative — is working to bridge the gap between Pennsylvania employers' current and future employment needs and the skills of today's workforce. Pennsylvania's diverse employment needs across a wide range of industries provide ample job opportunities, however, the business community reports that jobs remain open without qualified workers to fill them. Students, their families and educators continue to overlook the good-paying, in-demand careers that are available in the skilled trades.

Over the past three years, the PA Chamber Foundation has partnered with the <u>mikeroweWORKS Foundation</u> to change the negative perception about careers in the skilled trades — many of which are vitally important to the economy and must be filled in order to close the skills gap. In August 2019, we awarded \$75,000 in scholarships to 24 Pennsylvania students through the mikeroweWORKS Work Ethic Scholarship Program. The scholarship recipients are attending technical schools located within the Commonwealth to pursue careers in the skilled trades. Their success stories are featured on the <u>Start the Conversation HERE website</u>.

Since 2016, the PA Chamber Foundation — with the support of the Commonwealth's business community — has contributed nearly \$195,000 towards the Work Ethic Scholarship Program, and 94 Pennsylvania students have received financial assistance to attend technical schools in the Commonwealth.

The PA Chamber Educational Foundation thanks the following companies who generously contributed to the scholarship in 2019:

Leaders of Industry







Air Products

AT&T

Customers Bank

Job Creators







AmeriHelath

United Healthcare

High Industries



Monroe Energy

Skill Builders







Pixelle Specialty

Post Brothers

NWON



ESPY Transport



NextEra Energys

In the Footsteps of Leaders: Gettysburg Leadership Program

Introduced in 2016, the PA Chamber Foundation's In the Footsteps of Leaders: Gettysburg Leadership Program has proven to be a highly coveted leadership training program for business leaders of all industry sectors.

Many Pennsylvania businesses report a shortage of employees ready to move into management positions. And with baby boomers retiring in increasing numbers — taking a lifetime of expertise and knowledge with them — some of the most critical issues facing today's businesses are the development of leaders and the need for business succession planning.

Using powerful and dramatic real life examples of leadership lessons learned from one of the most important battles ever fought on American soil, this dynamic program introduces participants to the lessons learned by Gettysburg's most famous leaders during the Civil War. They gain a deeper understanding of the decisions made during the Battle of Gettysburg, their important consequences and their immediate relationship to team management, communication and cohesiveness.

Because of the program's popularity, the PA Chamber Foundation offered two programs in 2019 — one in the spring and one in the fall.



Economic Survey PA Chamber's 29th Annual Economic Survey

Pennsylvania employers reported record sales figures and growth, but concerns over the skills gap remained according to responses from the PA Chamber's 29th Annual Economic Survey. Conducted in August 2019 by Susquehanna Polling and Research, the survey was completed in partnership with The Initiative for Family Business and Entrepreneurship at Saint Joseph's University.

According to the survey, which included responses from 650 employers, job creators are feeling confident and positive about the economy, with many expecting to increase sales in the months ahead. Yet, despite this positive news, respondents noted difficulties finding skilled and qualified employees to fill open positions as the biggest problems facing their companies. This represents the second consecutive year that workforce has been employers "top of mind" issue. Only a combined 43 percent rated the quality of the state's workforce as either "excellent" or "good" — the second lowest ranking on record — with 20 percent rating it as "poor" — a new high in this category.

When asked about the issues that should top business advocates and lawmakers' "to-do" lists, they overwhelmingly again cited concerns with the state's tax structure. Nearly 55 percent of respondents listed lowering business taxes as one of the top issues they want legislators to focus on in Harrisburg. The PA Chamber is urging state elected officials to follow the lead of the federal government and make much needed changes on the state level. To that end, we continue to advocate for a reduction in the state's Corporate Net Income Tax — which remains one of the highest in the nation — as well as for reforms to that would streamline and simplify the state's Tax Code and regulatory environment.

Sixth Annual Economic Forecast Summit

The PA Chamber Educational Foundation and the PA Bankers Association hosted the Sixth Annual Economic Forecast Summit in Harrisburg, PA on February 26, 2019. The summit welcomed over 200 business leaders and executives from across Pennsylvania to engage on key topics that focused on the economic growth and success of organizations throughout the Commonwealth.

Topics and speakers who were featured included:

- Top national economist Dr. J.D. Foster, Senior Vice President, Economic Policy Division, and Chief Economist, U.S. Chamber of Commerce presented the national economic perspective and its impact on business.
- Rep. Bryan Cutler, Majority Leader, Pennsylvania House of Representatives, presented an overview of the economic challenges currently facing Pennsylvania businesses and anticipated economic activity that may be occurring over the next few years.
- Bill Benjamin, Partner, The Institute for Health and Human Potential, described the science behind emotional intelligence which can lead to an innovative and agile workforce culture that adapts to change during times of disruption and transformation.
- Linda McMahon, Administrator, U.S. Small Business Administration, Member of President Trump's Cabinet—and advocate on behalf of 30 million small businesses provided the national perspective on economic news and smaller businesses.
- Curt Steinhorst, Founder of Focuswise and bestselling author, explained how organizations can overcome the distinct challenges of the constantly connected workplace, employees and customers.



J.D. Foster, Ph.D.



Rep. Bryan Cutler



Bill Benjamin



Linda McMahon



Curt Steinhorst



PA Chamber Cares

Iln 2019, the Pennsylvania Chamber successfully planned and executed a United Way campaign. With 51 employees and 100 percent participation, the PA Chamber exceeded its financial goal, donating a total of \$35,410.20 to the United Way of the Capital Region.

The Chamber's 2019 campaign, titled "It's Our City, Our Community," featured a Monopoly board game theme and inspired staff to participate through incentives ranging from daily raffle prizes to team-based prizes.

Chamber employees also participated in the United Way of Capital Regional leadership giving programs including:

Women's Leadership Network and Bridges Society — Twelve employees are members of the WLN and 18 employees serve as members of the Bridges Society. These employees participate in volunteer programs and/or projects throughout the year. Members of the WLN and the Bridges Society contribute \$500 or more annually to the United Way.

Leaders in Giving — Seven employees are United Way Leaders in Giving. Leaders in Giving contribute \$1,000 or more to the United Way.

100 Percent Employee Participation — The PA Chamber has achieved 100 percent employee participation for a record 18 consecutive years. This is a source of pride for employees at all levels of the organization.

United Way Day of Caring —

Thirteen employees participated in the "United Way Day of Caring," volunteering their time to provide assistance cleaning and landscaping Vision Resources in Harrisburg.













