

Comprehensive Economic Development Strategy
Eight-County Region of South Central Pennsylvania

South Central Team PA



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Comprehensive Economic Development Strategy (CEDS)

Eight-County Region of South Central Pennsylvania

(Adams, Berks, Cumberland, Dauphin, Franklin, Lancaster, Lebanon and York Counties)

Executive Summary

The South Central Pennsylvania Regional Comprehensive Economic Development Strategy (CEDS) provides a plan for growing and sustaining the economic welfare of the region. The strategy provides a structured plan and goals that will help the region achieve economic success with proper implementation. The goals that will be highlighted by the Comprehensive Economic Development Strategy are linked with economic success in similar regions and create meaningful, challenging, and obtainable objectives to achieve.

The strategy incorporates eight counties that are found in the South Central Pennsylvania region; counties include Adams, Berks, Cumberland, Dauphin, Franklin, Lancaster, Lebanon, and York Counties. The major urban centers that are under this strategy include the Borough of Gettysburg, the City of Reading, the Borough of Carlisle, the City of Harrisburg, the Borough of Chambersburg, the City of Lancaster, the City of Lebanon, and the City of York, respectively. The Comprehensive Economic Development Strategy was developed with the assistance of the South Central Team PA (SCTPA) in addition to members of the private sector and other partners in the regional economic development environment.

The purpose of the completion of a Comprehensive Economic Development Strategy involves the impacts that the economic environment has on the public and private sectors of industry. A joint effort to improve the regional economy will see growth in both sectors and will improve the welfare of the region at large. The members of South Central Team PA are interested in providing guidance and direction for the growth of the region and feel that the completion of a Comprehensive Economic Development Strategy is the best method of guiding and achieving positive results.

As community involvement is critical to gaining support for the Comprehensive Economic Development Strategy, South Central PA Team has worked with the community through committees and surveys designed to gather input and provide a well-formed community opinion for the direction of the Comprehensive Economic Development Strategy.

This Comprehensive Economic Development Strategy highlights the region, providing background on demographics, workforce development and investment strategies, economic clusters, regional geographic and environmental status, transportation, agriculture, and infrastructure. Using that background and information gathered from the community, the strengths and weaknesses of the region are addressed as well as the internal and external opportunities and threats that may be present in the region.

Utilizing the afore mentioned background and analysis; South Central Team PA created a plan of action. The plan of action outlines a strategy and objectives for improving and sustaining the economic efforts that are currently in effect in the region. The plan of action also highlights potential future programs and projects that could be implemented to further the economic efforts of the region. The final piece of the plan of action includes realistic and measurable goals that have performance measures.

The Comprehensive Economic Development Strategy is a collaborative effort developed through localized planning processes. This document is meant to promote and guide sustainable economic development, enhance our local environment, and create an effective balance of development in our region. To satisfy the requirements established by the Economic Development Agency (EDA), the Comprehensive Economic Development Strategy addresses all the necessary and required elements. The Comprehensive Economic Development Strategy provides an opportunity to coordinate new and on-going sub-regional development efforts for the benefit of the entire region.

Organization, Management & Staff Support

Planning Organization

South Central Team PA (SCTPA) partners have been working together for years. Some are co-located in the same offices; some partners provide services directly to other Partners for Regional Economic Performance (PREP) partners, and everyone communicates regularly by phone and email. Each partner is represented and provides input based on existing and ongoing planning efforts in their respective communities.

The SCTPA partners identified in the application receive very high marks for their performance, results and customer service. South Central Pennsylvania is a region with highly skilled, long time economic development professionals who understand how to work through challenges and find opportunities for their clients and the communities they serve. The Harrisburg Regional Chamber & the Capital Region Economic Development Corporation (CREDC) is the SCTPA regional coordinator and will handle all administrative responsibilities regarding the CEDS and the EDA contract.

The Planning Organization includes, but is not limited to:

- Adams County Economic Development Corporation;
- Berks County
- Harrisburg Regional Chamber of Commerce;
- Shippensburg Small Business Development Center;
- Dauphin County Economic Development Corporation;
- Lancaster County Economic Development Corporation;
- York County Economic Alliance;
- Kutztown Small Business Development Center;

- Lebanon Valley Economic Development Corporation;
- MANTEC, Industrial Resource Center;
- Cumberland Area Economic Development Corporation;
- Franklin County Area Economic Development Corporation;
- World Trade Center, Harrisburg

Strategy Committee

The CEDS strategy committee is responsible for developing and updating the CEDS and represents the main economic development interests of the region. The committee includes representation from private sector businesses, non-profit, public officials, community leaders, workforce investment board, higher education, minority and labor groups, and private individuals. It includes, but is not limited to:

- Kevin Perkey, Executive Director, South Central Workforce Investment Board;
- Carolina Martinez, Director of Latino Business Resource Center;
- Lenin Agudo, Director of Community Development for the City of Reading;
- Tom McKeon, Executive Director of the Berks County Industrial Development Authority;
- John Weidenhammer, President of Weidenhammer;
- Dan Fogarty, Director of Berks County Workforce Development;
- Kevin Murphy, President of Berks County Community Foundation;
- Jane Conover, York County Community Foundation;
- Tom Englerth, Site Design Concepts;
- Jeff Vermeulen, York College of Pennsylvania, J.D. Brown Center for Entrepreneurial Education

Staff Support

The York County Economic Alliance (YCEA) staff will take primary responsibility in the completion and updating of the regional CEDS. In order to maintain a clear vision, this initiative will utilize the open interaction between the planning organization, the strategy committee, and all other designated partners. The region will work to continue to strengthen our relationships with existing organizations, state and federal government agencies, and other community groups that are concerned about sustaining an economically healthy regional environment.

Background and Analysis

Community participation in the regional planning efforts:

The CEDS is directly reflective of the community feedback gathered during the survey portion of this process. In 2014 during the creation of the full CEDS, the public was notified and contacted independently by each of the partner counties included in this Strategy. Each County communicated with their existing development-oriented organizations, leaders in their communities, municipalities and cities.

Demographic and Socioeconomic Data

The region and its counties were evaluated to consider the demographic and socioeconomic conditions and any trends that may have an impact on development and improvement opportunities.

Demographics

Regional Population Change: 2000 to 2010

From 2000-2010; Pennsylvania incurred a 3.4% population growth; meanwhile the south-central region counties grew at stronger rates. The overall increase in population was 10.89%.

Total Regional Population	2000	2010	Absolute Change 2000-2010	% Change 2000-2010
Total Race	2,032,451	2,253,938	221,487	10.89%
White	1,833,922	1,950,517	116,595	6.35%
Black	94,163	128,581	34,418	36.55%
Other	51,607	84,349	32,742	63.44%
Hispanic	99,242	186,888	87,646	88.31%
Asian	24,601	39,893	15,292	62.16%
Native American	3,191	5,128	12,101	60.70%

Source: 2000 and 2010 U.S. Census

Population Growth by County and Urban Center: 2000 to 2010

As the region continues to experience population growth, the composition of the population is changing. From 2000-2010; The Commonwealth of Pennsylvania saw a 33.1% decennial minority population percentage growth, but had a lower percentage growth when compared to the south-central region counties. Berks County has the second largest Hispanic population in the state (behind Philadelphia County) which is indicative that the Hispanic population is the fastest growing minority group.

Population	2000	2010	Absolute Change 2000-2010	% Change 2000-2010
Total				
Adams County	91,292	101,407	10,115	11.1%
Borough of Gettysburg	7,490	7,620	130	1.7%
Berks County	373,638	411,442	37,804	10.1%
City of Reading	81,207	88,080	6,873	8.4%
Cumberland County	213,674	235,406	21,732	10.1%
Borough of Carlisle	17,970	18,682	712	3.9%
Dauphin County	251,798	268,100	16,302	6.4%
City of Harrisburg	48,950	49,528	578	1.2%
Franklin County	129,313	149,618	20,305	1.2%
Borough of Chambersburg	17,862	20,268	2,406	13.3%
Lancaster County	470,658	519,445	48,787	10.4%
City of Lancaster	56,348	59,332	2,984	5.3%
Lebanon County	120,327	133,568	13,241	11.0%
City of Lebanon	24,462	24,577	115	0.5%
York County	381,751	434,972	53,221	13.9%
City of York	40,862	43,718	2,856	7.0%
White Race				
Adams County	87,088	94,979	7,891	9.1%
Borough of Gettysburg	6,401	6,441	40	0.6%

Berks County	329,460	342,148	12,688	3.9%
City of Reading	48,059	42,617	-5,442	-11.3%
Cumberland County	201,716	213,934	12,218	6.0%
Borough of Carlisle	15,980	15,754	-226	-1.4%
Dauphin County	194,158	194,910	752	0.4%
City of Harrisburg	15,527	15,181	-346	-2.2%
Franklin County	123,279	137,674	14,395	11.7%
Borough of Chambersburg	15,439	15,616	177	1.1%
Lancaster County	430,456	460,171	29,715	6.9%
City of Lancaster	34,683	32,729	-1,954	-5.6%
Lebanon County	113,662	121,566	7,904	7.0%
City of Lebanon	20,915	18,877	-2,038	-9.7%
York County	354,103	385,135	31,032	8.8%
City of York	24,416	22,398	-2,018	-8.3%
Black Race				
Adams County	1,105	1,561	456	41.3%
Borough of Gettysburg	434	441	7	1.6%
Berks County	13,778	20,143	6,365	46.2%
City of Reading	9,947	11,624	1,677	16.8%
Cumberland County	5,048	7,527	2,479	49.1%
Borough of Carlisle	1,243	1,547	304	24.4%
Dauphin County	42,580	48,386	5,806	13.6%
City of Harrisburg	26,841	25,957	-884	-3.3%
Franklin County	3,016	4,700	1,684	55.8%
Borough of Chambersburg	1,350	1,857	507	37.6%
Lancaster County	12,993	19,035	6,042	46.5%
City of Lancaster	7,939	9,683	1,744	21.9%
Lebanon County	1,548	2,885	1,337	86.4%
City of Lebanon	790	1,506	716	90.6%
York County	14,095	24,344	10,249	72.7%
City of York	10,270	12,248	1,978	19.5%
Other Races				
Adams County	1,559	2,544	985	63.2%
Borough of Gettysburg	350	383	33	9.4%
Berks County	44,178	32,101	-12,077	-27.3%
City of Reading	33,148	26,538	-6,610	-19.9%
Cumberland County	11,958	2,203	-9,755	-81.5%
Borough of Carlisle	1,990	240	-1,750	-87.9%
Dauphin County	57,640	7,284	-50,356	-87.4%
City of Harrisburg	33,423	3,847	-29,576	-88.5%
Franklin County	960	2,849	1,889	196.8%
Borough of Chambersburg	550	1,643	1,093	198.7%
Lancaster County	40,202	18,819	-21,383	-53.1%
City of Lancaster	21,665	11,231	-10,434	-48.2%
Lebanon County	6,665	5,165	-1,500	-22.5%
City of Lebanon	3,547	3,848	301	8.5%
York County	27,648	10,326	-17,322	-62.7%
City of York	16,446	5,510	-10,936	-66.5%
Hispanic				
Adams County	3,323	6,115	2,792	84.0%
Borough of Gettysburg	601	834	233	38.8%
Berks County	36,357	67,355	30,998	85.3%
City of Reading	30,302	51,230	20,928	69.1%
Cumberland County	2,883	6,448	3,565	123.7%
Borough of Carlisle	352	846	494	140.3%
Dauphin County	10,404	18,795	8,391	80.7%
City of Harrisburg	5,724	8,939	3,215	56.2%
Franklin County	2,268	6,438	4,170	183.9%
Borough of Chambersburg	1,140	3,175	2,035	148.5%
Lancaster County	26,742	44,930	18,188	68.0%
City of Lancaster	17,331	23,329	5,998	34.6%

Lebanon County	6,969	12,410	5,441	78.1%
City of Lebanon	4,019	8,177	4,158	103.5%
York County	11,296	24,397	13,101	115.9%
City of York	7,026	12,458	5,432	77.3%
Asian				
Adams County	448	746	298	66.5%
Borough of Gettysburg	96	142	46	47.9%
Berks County	3,785	5,385	1,600	42.3%
City of Reading	1,296	1,039	-257	-19.8%
Cumberland County	3,578	7,072	3,494	97.6%
Borough of Carlisle	288	434	146	50.7%
Dauphin County	4,931	8,580	3,649	74.0%
City of Harrisburg	1,384	1,709	325	23.5%
Franklin County	717	1,310	593	82.7%
Borough of Chambersburg	155	281	126	81.3%
Lancaster County	6,802	9,860	3,058	44.9%
City of Lancaster	1,386	1,773	387	27.9%
Lebanon County	1,067	1,533	466	43.7%
City of Lebanon	249	286	37	14.8%
York County	3,273	5,407	2,134	65.2%
City of York	574	541	-33	-5.7%
Native American				
Adams County	184	213	29	15.7%
Borough of Gettysburg	28	25	-3	-10.7%
Berks County	611	1,285	674	110.3%
City of Reading	356	794	438	123.0%
Cumberland County	272	363	91	33.5%
Borough of Carlisle	26	36	10	38.5%
Dauphin County	415	578	163	39.3%
City of Harrisburg	183	251	68	37.1%
Franklin County	192	302	110	57.3%
Borough of Chambersburg	33	70	37	112.1%
Lancaster County	681	1,195	514	75.5%
City of Lancaster	247	433	186	75.3%
Lebanon County	157	250	93	59.2%
City of Lebanon	69	123	54	78.3%
York County	679	942	263	38.7%
City of York	172	269	97	56.4%

Source: 2000 and 2010 U.S. Census

Population Shifts by County and Urban Center: 2000 to 2010

Regional urban centers - the City of Reading, Carlisle Borough, the City of Harrisburg, the City of Lancaster, the City of Lebanon and the City of York – overall gained population from 2000-2010 in contrast to the 1990's when the urban centers of Carlisle, Harrisburg, Lebanon and York shed population. The regions' urban centers population growth is generally due to an influx of Hispanic populations. The region is continuing to become more racially diverse; a noteworthy characteristic resultant from the population analysis is the increasing proportions of minority persons residing within the region.

Population	2000%	2010%	Absolute Change 2000-2010	% Point Shift 2000-2010
White Race				
Adams County	95.4%	93.7%	7,891	-1.7
Borough of Gettysburg	85.5%	84.5%	40	-1.0
Berks County	88.2%	83.2%	12,688	-5.0
City of Reading	59.2%	48.4%	-5,442	-10.8
Cumberland County	94.4%	90.9%	12,218	-3.5
	88.9%	84.3%	-226	-4.6

Borough of Carlisle	77.1%	72.7%	752	-4.4
Dauphin County	31.7%	30.7%	-346	-1.0
City of Harrisburg	95.3%	92.0%	14,395	-3.3
Franklin County	86.4%	77.0%	177	-9.4
Borough of Chambersburg	91.5%	88.6%	29,715	-2.9
Lancaster County	61.6%	55.2%	-1,954	-6.4
City of Lancaster	94.5%	91.0%	7,904	-3.5
Lebanon County	85.5%	74.1%	-2,038	-11.4
City of Lebanon	92.8%	88.5%	31,032	-4.3
York County	59.8%	51.2%	-2,018	-8.6
City of York				
Black				
Adams County	1.2%	1.5%	456	0.3
Borough of Gettysburg	5.8%	5.8%	7	0.0
Berks County	3.7%	4.9%	6,365	1.2
City of Reading	12.3%	13.2%	1,677	0.9
Cumberland County	2.4%	3.2%	2,479	0.8
Borough of Carlisle	6.9%	8.3%	304	1.4
Dauphin County	16.9%	18.0%	5,806	1.1
City of Harrisburg	54.8%	52.4%	-884	-2.4
Franklin County	2.3%	3.1%	1,684	0.8
Borough of Chambersburg	7.6%	9.2%	507	1.6
Lancaster County	2.8%	3.7%	6,042	0.9
City of Lancaster	14.1%	3.7%	1,744	-10.4
Lebanon County	1.3%	2.2%	1,337	0.9
City of Lebanon	3.2%	5.9%	716	2.7
York County	3.7%	5.6%	10,249	1.9
City of York	25.1%	28.0%	1,978	2.9
Other Races				
Adams County	1.7%	2.5%	985	0.8
Borough of Gettysburg	4.7%	5.0%	33	0.3
Berks County	5.4%	7.8%		2.4
City of Reading	40.8%	30.1%	-6,610	-10.7
Cumberland County	5.6%	0.9%	-9,755	-4.7
Borough of Carlisle	11.1%	1.3%	-1,750	-9.8
Dauphin County	22.9%	2.7%	-50,356	-20.2
City of Harrisburg	68.3%	7.8%	-29,576	-60.5
Franklin County	0.7%	1.9%	1,889	1.2
Borough of Chambersburg	1.8%	8.1%	1,093	6.3
Lancaster County	8.5%	3.6%	-21,383	-4.9
City of Lancaster	38.4%	18.9%	-10,434	-19.5
Lebanon County	5.5%	3.9%	-1,500	-1.6
City of Lebanon	14.5%	15.1%	301	0.6
York County	7.2%	2.4%	-17,322	-4.8
City of York	40.2%	12.6%	-10,936	-27.6
Hispanic				
Adams County	3.6%	6.0%	2,792	2.4
Borough of Gettysburg	8.0%	10.9%	233	2.9
Berks County	9.7%	16.4%	30,998	6.7
City of Reading	37.3%	58.2%	20,928	20.9
Cumberland County	1.4%	2.7%	3,565	1.3
Borough of Carlisle	2.0%	4.5%	494	2.5
Dauphin County	4.1%	7.0%	8,391	2.9
City of Harrisburg	11.7%	18.0%	3,215	6.3
Franklin County	1.8%	4.3%	4,170	2.5
Borough of Chambersburg	6.4%	15.7%	2,035	9.3
Lancaster County	5.7%	8.6%	18,188	2.9
City of Lancaster	30.8%	39.3%	5,998	8.5
Lebanon County	5.0%	9.3%	5,441	4.3
City of Lebanon	16.4%	32.1%	4,158	15.7
York County	3.0%	5.6%	13,101	2.6

City of York	17.2%	28.5%	5,432	11.3
Asian				
Adams County	0.5%	0.7%	298	0.2
Borough of Gettysburg	1.3%	1.9%	46	0.6
Berks County	1.0%	1.3%	1,600	0.3
City of Reading	1.6%	1.2%	-257	-0.4
Cumberland County	1.7%	3.0%	3,494	1.3
Borough of Carlisle	1.6%	2.3%	146	0.7
Dauphin County	2.0%	3.2%	3,649	1.2
City of Harrisburg	2.9%	3.5%	325	0.6
Franklin County	0.6%	0.9%	593	0.3
Borough of Chambersburg	0.9%	1.4%	126	0.5
Lancaster County	1.5%	1.9%	3,058	0.4
City of Lancaster	2.5%	1.9%	387	-0.6
Lebanon County	0.9%	1.1%	466	0.2
City of Lebanon	1.1%	1.1%	37	0.0
York County	0.9%	1.2%	2,134	0.3
City of York	1.5%	1.2%	-33	-0.3
Native American				
Adams County	0.2%	0.2%	29	0.0
Borough of Gettysburg	0.4%	0.3%	-3	-0.1
Berks County	0.2%	0.3%	674	0.1
City of Reading	0.5%	0.9%	438	0.4
Cumberland County	0.1%	0.2%	91	0.1
Borough of Carlisle	0.1%	0.2%	10	0.1
Dauphin County	0.2%	0.2%	163	0.0
City of Harrisburg	0.4%	0.5%	68	0.1
Franklin County	0.1%	0.2%	110	0.1
Borough of Chambersburg	0.2%	0.3%	37	0.1
Lancaster County	0.1%	0.2%	514	0.1
City of Lancaster	0.4%	0.2%	186	-0.2
Lebanon County	0.2%	0.2%	93	0.0
City of Lebanon	0.3%	0.5%	54	0.2
York County	0.2%	0.2%	263	0.0
City of York	0.4%	0.6%	97	0.2

Source: 2000 and 2010 U.S. Census

Racial Shifts by Region, Urban, and Non-Urban: 2000 to 2010

Since the 2010 Census, according to the U.S. Census Bureau's continued data, almost 79% of Pennsylvania's population growth since 2010 is occurring in townships.

Population	2000%	2010%	% Change 2000-2010	% Point Shift 2000-2010
White				
Region	80.49%	75.38%	-6.34%	-5.11
Urban	69.82%	63.17%	-9.52%	-6.65
Non-Urban	91.15%	87.57%	-3.92%	-3.58
Black				
Region	5.0%	10.54%	110.8%	5.54
Urban	21.1%	15.81%	-25.07%	-5.29
Non-Urban	2.1%	5.27%	150.95%	3.17
Other Races				
Region	3.9%	7.79%	99.74%	3.89
Urban	17.3%	12.36%	-28.55%	-4.94
Non-Urban	1.6%	3.21%	100.62%	1.61
Hispanic				
Region	10.26%	16.69%	61.67%	6.43
Urban	16.23%	25.90%	59.58%	9.67
Non-Urban	4.29%	7.49%	74.59%	3.2

Asian				
Region	1.3%	1.74%	33.84%	0.44
Urban	2.0%	1.81%	-9.5%	-0.19
Non-Urban	1.2%	1.66%	38.33%	0.46
Native American				
Region	0.2%	0.33%	65.0%	0.13
Urban	0.4%	0.43%	7.5%	0.03
Non-Urban	0.1%	0.21%	110.0%	0.11

Source: 2000 and 2010 U.S. Census

Projections (produced by the Pennsylvania State Data Center) show that PA's 2010 Census population of 12.7 million will grow to a projected 14.1 million by the year 2040. This reflects a level of growth of 11.3 percent over the thirty years. While PA as a whole is positioned to see an increase in population overall, not all counties will experience the growth. The trend is an increasing population in the eastern and southeastern counties. All of the CEDS counties, with the exception of Adams, are projected to see between 5.1% to over 20% growth. Lancaster County is estimated to see the third largest population growth in the Commonwealth.

Workforce Development and Investment Strategies

Generally, the counties of the CEDS region have seasonally adjusted unemployment rates, which are lower than the state rate for the same time period. While the unemployment rate in Pennsylvania in August 2014 was 5.8% the CEDS counties were lower, which is a continuing trend. The August 2014 unemployment rates for the CEDS region were: Adams 4.7%, Berks 5.6%, Cumberland 4.7%, Dauphin 5.1%, Franklin 5.2%, Lancaster 4.6%, Lebanon 4.7% and York 5.4%. Unemployment in urban areas tends to trend higher than regional, state, and national averages, with the cities of Reading, York, Harrisburg, and Lebanon sharing the highest unemployment rates.

Labor Force Characteristics: August 2014

Geographic Areas	Civilian Labor Force	Unemployment Rate	Percentage Point Deviation from National Rate
Adams County	54,500	4.1%	-1.0
Borough of Gettysburg	3,507	8.6%	3.5
Berks County	211,800	5.0%	-0.1
City of Reading	38,587	20.6%	15.5
Cumberland County	128,000	3.9%	-1.2
Borough of Carlisle	10,047	9.6%	4.5
Dauphin County	142,000	4.5%	-0.6
City of Harrisburg	23,759	15.8%	10.7
Franklin County	75,500	5.0%	-0.1
Borough of Chambersburg	9,505	9.4%	4.3
Lancaster County	272,400	4.1%	-1.0
City of Lancaster	29,246	16.1%	11.0
Lebanon County	68,900	4.5%	-0.6
City of Lebanon	12,365	14.3%	9.2
York County	229,500	4.6%	-0.5
City of York	20,114	21.3%	16.2
Pennsylvania	6,409,000	5.3%	0.2
United States	156,715,000	5.1%	

Source: Civilian Labor Force Data, Pennsylvania Department of Labor and Industry, September 2015; U.S. Census Bureau, 2009-2013 American Community Survey

The major employers in the region are reflective of the region's primary employment industry sectors. According to the Pennsylvania Department of Labor and Industry's Center for Workforce Information & Analysis, the largest employment industry sectors for the region include: Health Care & Social Assistance, Manufacturing, Retail Trade, and Educational Services. While many of the industry sectors have consistent employment numbers with the Commonwealth, the area of Manufacturing holds a higher concentration in the region.

Regional Occupations by County

	Adams County	Berks County	Cumberland County	Dauphin County	Franklin County	Lancaster County	Lebanon County	York County	Region
Agriculture & Forestry	3.3%	1.9%	1.1%	0.7%	2.7%	2.7%	2.6%	0.9%	1.6%
Construction	7.7%	5.7%	4.8%	4.9%	7.1%	8.3%	5.2%	7.2%	6.0%
Manufacturing	18.3%	18.3%	8.1%	8.7%	15.5%	17.1%	17.2%	18.0%	14.6%
Wholesale Trade	3.1%	3.3%	3.0%	3.1%	2.5%	3.9%	4.7%	3.3%	3.5%
Retail trade	10.5%	12.4%	13.1%	10.9%	12.8%	12.5%	11.1%	12.1%	12.0%
Transportation Warehousing	4.6%	4.8%	5.5%	6.1%	4.2%	4.5%	5.1%	5.4%	5.2%
Information	1.2%	1.4%	1.6%	1.6%	1.5%	1.5%	1.4%	1.6%	1.5%
Finance & Insurance	3.7%	5.9%	8.5%	8.2%	4.8%	5.0%	4.4%	5.3%	6.2%
Professional Service	6.3%	8.8%	10.5%	9.4%	7.4%	7.3%	6.3%	8.7%	8.5%
Educational Services	22.6%	23.5%	23.2%	22.3%	23.4%	21.9%	24.7%	21.0%	22.8%
Arts & Entertainment	9.1%	7.2%	7.1%	8.9%	6.6%	7.7%	8.3%	7.0%	7.70%
Other Services	4.0%	4.5%	4.8%	4.5%	5.7%	5.2%	4.6%	4.9%	4.75%
Public Administration	5.5%	2.5%	8.7%	10.6%	5.9%	2.6%	4.4%	4.6%	5.57%

Source: U.S. Census, American Community Survey 2008-2012

Regional urban centers have similar employment industry sectors as their surrounding counties in the region, with concentrations of Manufacturing, Retail Trade and Educational Services as the most prevalent. However, the urban centers of the CEDS region also have a higher percentage of Arts Entertainment and Professional Services employment opportunities than in the surrounding counties and in the state. This is an indicator of the on-going revitalization of the urban centers' images and economics. The urban revitalization effort has been successful in attracting individuals who want to live and create in the region's urban environments.

Regional Occupations by City

	Gettysburg Borough	Reading City	Carlisle Borough	Harrisburg City	Chambersburg	Lancaster City	Lebanon City	York City	Region
Agriculture Forestry	0.9%	4.0%	0.6%	0.7%	1.8%	0.6%	0.6%	0.1%	1.1%
Construction	2.0%	4.1%	2.1%	2.5%	5.5%	6.4%	2.9%	6.2%	4.03%
Manufacturing	7.8%	23.8%	7.3%	6.9%	13.8%	18.3%	20.1%	19.0%	15.9%
Wholesale Trade	0.5%	3.1%	3.6%	2.5%	3.4%	2.8%	6.1%	2.9%	3.5%
Retail trade	7.7%	12.7%	12.5%	10.8%	13.5%	13.2%	10.9%	12.8%	12.2%
Transportation Warehousing	4.1%	4.3%	5.4%	5.4%	3.3%	3.4%	4.4%	4.0%	4.5%
Information	0.6%	1.4%	1.8%	2.0%	1.0%	1.3%	1.7%	2.5%	1.8%
Finance Insurance	3.2%	3.4%	5.3%	8.5%	3.9%	3.3%	2.9%	2.8%	4.4%
Professional Service	5.3%	9.4%	7.9%	10.7%	9.7%	8.1%	8.4%	10.5%	9.2%

Educational Services	46.2%	19.4%	31.3%	20.2%	24.0%	22.6%	22.7%	20.6%	22.8%
Arts Entertainment	13.1%	8.1%	12.6%	10.3%	9.0%	12.5%	11.7%	12.3%	11.3%
Other Services	3.3%	4.4%	4.1%	5.2%	5.8%	5.2%	4.3%	3.6%	4.5%
Public Administration	5.3%	2.0%	5.6%	14.3%	5.3%	2.4%	3.1%	2.8%	5.0%

Source: U.S. Census, American Community Survey 2008-2012

Highest Educational Attainment: 2012

In terms of educational attainment, the regional labor market is reflective of the manufacturing orientation of the region, having a significant portion (and the highest category by percentage) of people with high school diplomas and without higher education levels.

Highest Educational Attainment	No High School Diploma	High School Diploma	Some College, No Degree	Associate Degree	Bachelor Degree	Graduate or Professional Degree
Adams County	9.0%	42.3%	16.6%	7.0%	11.6%	7.8%
Borough of Gettysburg	9.3%	32.0%	16.0%	6.6%	13.8%	17.0%
Berks County	10.0%	38.7%	16.0%	7.0%	14.7%	7.7%
City of Reading	19.7%	35.8%	15.6%	4.3%	6.4%	2.6%
Cumberland County	6.2%	34.9%	16.6%	7.2%	20.3%	12.1%
Borough of Carlisle	6.5%	34.0%	16.5%	5.7%	18.6%	15.8%
Dauphin County	8.0%	36.0%	17.2%	8.0%	17.0%	10.5%
City of Harrisburg	15.0%	37.6%	17.8%	5.3%	12.1%	6.7%
Franklin County	9.9%	43.0%	15.2%	7.5%	12.3%	7.0%
Borough of Chambersburg	6.2%	34.9	16.6%	7.2%	20.3%	12.1%
Lancaster County	9.3%	38.8%	15.1%	6.1%	15.6%	7.9%
City of Lancaster	15.1%	37.8%	15.8%	5.1%	10.8%	6.3%
Lebanon County	9.5%	44.7%	14.9%	6.6%	12.4%	6.7%
City of Lebanon	17.0%	46.3%	12.6%	5.2%	6.2%	3.4%
York County	8.2%	41.8%	16.4%	8.0%	14.2%	7.5%
City of York	17.4%	44.8%	13.0%	5.8%	6.8%	2.7%
Region	11.83%	39.27%	15.63%	6.19%	12.93%	7.49%
Pennsylvania	7.9%	37.2%	16.5%	7.5%	16.6%	10.4%

Source: U.S. Census, American Community Survey 2008-2012; persons 25 years and over

The percentage of residents in the region attaining a high school diploma has remained consistent; in 1990 the region had an average of 39.9% attaining a diploma. As of 2012 the region had an average of 39.27% attaining a diploma. The percentage of residents without a diploma has trended in a positive direction in correlation with the State's trend, showing a declining percentage over the same time span (26.9% of the region not having a diploma in 1990 down to 11.83% in 2012).

Estimates of Income and Poverty

The percentage of people living in poverty has increased, uniformly, across the CEDS region and in the state. However, the percentage of people living in poverty can vary greatly depending on the type of household.

Poverty in the CEDS region according to the American Community Survey of 2008-2012, US Census Bureau statistics:

- In Adams County, the percent below poverty by family type; female householders with children 25.8%, married couples with children 4.7%, families with children 9.2%. Childless households fared some better with female householder 20.2%, married couples 2.9% and families 5.5%.
- In Berks County, the percent below poverty by family type; female householder with children 43%, married couples with children 6.1%, families with children 17%. Again, fewer childless households live in poverty; female householder 33.3%, married couples 4%, families 9.9%.
- In Cumberland County, the percent below poverty by family type; female householder with children 26.5%, married couples with children 4.3%, families with children 9.4%. Again, fewer childless households live in poverty; female householder 19%, married couples 2.5%, families 5.2%.
- In Dauphin County, the percent below poverty by family type; female householder with children 36.8%, married couples with children 5.6%, families with children 16.6%. Again, fewer childless households live in poverty; female householder 27.9%, married couples 3.3%, families 9.5%.
- In Franklin County, the percent below poverty by family type; female householder with children 31.1%, married couples with children 5%, families with children 11.4%. Again, fewer childless households live in poverty; female householder 22.4%, married couples 3.9%, families 7%.
- In Lancaster County, the percent below poverty by family type; female householder with children 37.2%, married couples with children 5.3%, families with children 12%. Again, fewer childless households live in poverty; female householder 28%, married couples 3.6%, families 7.1%.
- In Lebanon County, the percent below poverty by family type; female householder with children 41.4%, married couples with children 4.6%, families with children 14%. Again, fewer childless households live in poverty; female householder 30.6%, married couples 3%, families 7.5%.
- In York County, the percent below poverty by family type; female householder with children 35.3%, married couples with children 2.8%, families with children 11.3%. Again, fewer childless households live in poverty; female householder 27.1%, married couples 2.2%, families 6.7%.

Median Household Income and Percentage of Persons in Poverty – 2000 to 2012

Geographic Areas	Median Household Income 2000	Median Household Income 2012	% Change in Median Household Income 2000 to 2012	% of all Persons in Poverty 2000	% of all Persons in Poverty 2012
Adams County	\$42,704	\$58,465	36.9%	7.1%	8.5%
Berks County	\$44,714	\$55,021	23.05%	9.4%	13.5%
Cumberland County	\$46,707	\$60,883	30.35%	6.6%	8.2%
Dauphin County	\$50,974	\$54,066	6.06%	9.7%	12.7%
Franklin County	\$40,476	\$52,167	28.88%	7.6%	10.3%

Lancaster County	\$52,513	\$56,172	6.96%	7.8%	10.3%
Lebanon County	\$40,838	\$54,259	32.86%	7.5%	10.2%
York County	\$45,268	\$58,747	29.77%	6.7%	9.6%
Pennsylvania	\$40,106	\$52,267	30.32%	11.0%	13.1%

Source: U.S. Census, American Community Survey 2008-2012; 2000 Census

Change in Employment: 1999 to 2012

Employment	% Change 1999 to 2002	% Change 2002 to 2008	% Change 2008 to 2012
Adams County	-4.46%	19.21%	-13.71%
Berks County	-0.33%	5.14%	-2.90%
Cumberland County	3.54%	2.20%	-3.62%
Dauphin County	4.80%	3.67%	-2.63%
Franklin County	-2.20%	19.09%	-7.62%
Lancaster County	4.59%	2.19%	-2.36%
Lebanon County	1.73%	21.70%	-3.15%
York County	5.55%	5.76%	-4.14%
Region	3.36%	6.46%	-3.12%

Source: U.S. Census, County Business Patterns

Change in Annual Payroll: 1999 to 2012

Annual Payroll	% Change 1999 to 2002	% Change 2002 to 2008	% Change 2008 to 2012
Adams County	2.43%	37.37%	-2.34%
Berks County	6.46%	29.50%	3.68%
Cumberland County	10.19%	25.52%	1.01%
Dauphin County	12.36%	27.81%	6.45%
Franklin County	8.20%	42.13%	3.18%
Lancaster County	17.23%	18.47%	5.14%
Lebanon County	15.20%	37.69%	4.55%
York County	11.87%	25.49%	3.11%
Region	12.22%	27.41%	3.99%

Source: U.S. Census, County Business Patterns

While the rate of attaining high school diploma has increased, and changes in annual payroll have been a slight increase, those increases have not directly translated to increased household incomes. The change in median household income from 2008-2010 to 2011-2013 (in 2013 inflation-adjusted dollars) has been mostly a decline for the region. Adams, Berks, Dauphin, Franklin, Lancaster and Lebanon counties have seen a decline of \$2,999 or less. While Cumberland and York counties has seen a decline of \$3,000 or more.

Change in Number of Employment Establishments: 1999 to 2012

Annual Payroll	% Change 1999 to 2002	% Change 2002 to 2008	% Change 2008 to 2012
Adams County	3.07%	10.80%	-9.55%
Berks County	4.03%	2.33%	-4.12%
Cumberland County	0.56%	6.00%	-1.93%
Dauphin County	1.78%	4.59%	-2.05%
Franklin County	3.84%	9.52%	-3.53%
Lancaster County	2.79%	4.92%	-0.12%
Lebanon County	1.14%	3.78%	-0.45%

York County	2.38%	4.57%	-2.10%
Region	2.11%	4.37%	-1.80%

Source: U.S. Census, County Business Patterns

Annual Employment Growth Rate Trends: 1999 to 2012

Employment	Long Term Trend % Change 1999 to 2012	Short Term Trend % Change 2008 to 2012
Adams County	-1.72%	-13.71%
Berks County	1.74%	-2.9%
Cumberland County	1.98%	-3.62%
Dauphin County	5.79%	-2.63%
Franklin County	7.59%	-7.62%
Lancaster County	4.37%	-2.36%
Lebanon County	19.90%	-3.15%
York County	7.01%	-4.14%
Region	4.92%	-3.67%

Source: U.S. Census, County Business Patterns

Annual Payroll Growth Rate Trends: 1999 to 2012

Annual Payroll	Long Term Trend % Change 1999 to 2012	Short Term Trend % Change 2008 to 2012
Adams County	37.42%	-2.34%
Berks County	42.95%	3.68%
Cumberland County	39.72%	1.01%
Dauphin County	52.88%	6.45%
Franklin County	58.69%	3.18%
Lancaster County	46.03%	5.14%
Lebanon County	65.87%	4.55%
York County	44.77%	3.11%
Region	46.60%	3.88%

Source: U.S. Census, County Business Patterns

Annual Establishment Growth Rate Trends: 1999 to 2012

Establishments	Long Term Trend % Change 1999 to 2012	Short Term Trend % Change 2008 to 2012
Adams County	3.29%	-9.55%
Berks County	2.06%	-4.12%
Cumberland County	4.54%	-1.93%
Dauphin County	4.27%	-2.05%
Franklin County	9.71%	-3.53%
Lancaster County	7.73%	-0.12%
Lebanon County	4.49%	-0.45%
York County	4.81%	-2.10%
Region	5.14%	-2.25%

Source: U.S. Census, County Business Patterns

Long-term occupational employment projections for metropolitan statistical areas are used primarily as a reference tool for career guidance, job search assistance and training program planning. It is also utilized for High Priority Occupations lists.

For the Metropolitan Statistical Areas (MSAs) within the CEDS region the High-Priority Occupations are relatively succinct and similar across the counties. Health Care Professionals & Support, Office & Administrative Support and Transportation are high-priority occupations within the CEDS counties MSAs.

Consistently, projections for the CEDS region, from 2010-2020 indicate strong figures for Transportation and Professional Services.

The Pennsylvania Department of Labor and Industry offers these projections within the 2010-2020 timeframe. Projections for the CEDS region indicate Agriculture & Forestry projections decrease (-0.4%) to minimal (2%) increase. Projections for the CEDS region indicate Manufacturing projections decrease (-3.2%) to some (4.5%) potential increase. Projections for the CEDS region indicate Transportation is expected to realize strong increases (10.9-19.3%) across the MSAs of the region. Projections for the CEDS region indicate Professional Services is also expected to have strong figures with expected increases averaging 12.5%. Projections for the CEDS region indicate Architecture & Engineering Occupation projections increasing steadily (generally under 10%). Projections for the CEDS region indicate Retail Sales projections will be somewhat random, with 2% in one upwards to over 8% in other MSA areas of the region. Projections for the CEDS region indicate Farming, Fishing & Forestry projections will be mostly flat with minimal, flat or potentially negative growth. Projections for the CEDS region indicate Construction Trade projections will be steady within a range of 4% to over 15%.

Long-Term Occupational Employment Projections for Metropolitan Statistical Areas

Employment	Agriculture & Forestry (NAICS 11) 2010	Agriculture & Forestry 2020	Agriculture & Forestry % Change	Manufacturing (NAICS 31-33) 2010	Manufacturing 2020	Manufacturing % Change
York-Hanover	2,750	2,740	-0.4%	32,630	31,620	-3.1%
Harrisburg-Carlisle	4,510	4,580	1.6%	19,950	20,430	2.4%
Lancaster	7,150	7,290	2.0%	36,030	34,870	-3.2%
Lebanon	1,510	1,520	0.7%	8,600	8,990	4.5%
Reading	2,550	2,580	1.2%	27,490	28,070	2.1%

Source: Pennsylvania Department of Labor and Industry

Long-Term Occupational Employment Projections for Metropolitan Statistical Areas

Employment	Transportation (NAICS 48-49) 2010	Transportation 2020	Transportation % Change	Professional Services (NAICS 54) 2010	Professional Services 2020	Professional Services % Change
York-Hanover	7,180	8,460	17.8%	5,160	5,780	12.0%
Harrisburg-Carlisle	20,090	22,270	10.9%	14,120	16,370	15.9%
Lancaster	9,320	11,120	19.3%	7,220	7,810	8.2%
Lebanon	---	---	---	910	1,050	15.4%
Reading	---	---	---	6,180	6,870	11.2%

Source: Pennsylvania Department of Labor and Industry (--- data not reported)

Long-Term Occupational Employment Projections for Metropolitan Statistical Areas

Employment	Architecture & Engineering Occupations (SOC 17-0000) 2010	Architecture & Engineering Occupations 2020	Architecture & Engineering Occupations % Change	Retail Sales (SOC 41-2000) 2010	Retail Sales 2020	Retail Sales % Change
York-Hanover	3,390	3,640	7.4%	12,570	13,100	4.2%
Harrisburg-Carlisle	5,590	5,910	5.7%	19,700	21,190	7.6%
Lancaster	2,450	2,640	7.8%	17,380	18,080	4.0%
Lebanon	540	590	9.3%	3,420	3,490	2.0%
Reading	3,100	3,410	10.0%	11,360	12,280	8.1%

Source: Pennsylvania Department of Labor and Industry

Long-Term Occupational Employment Projections for Metropolitan Statistical Areas

Employment	Farming, Fishing & Forestry (SOC 45-0000) 2010	Farming, Fishing & Forestry 2020	Farming, Fishing & Forestry % Change	Construction Trade Workers (SOC 47-2000) 2010	Construction Trade Workers 2020	Construction Trade Workers % Change
York-Hanover	1,780	1,770	-0.6%	7,090	8,180	15.4%
Harrisburg-Carlisle	2,910	2,920	0.3%	10,710	11,150	4.1%
Lancaster	4,840	4,930	1.9%	11,170	12,610	12.9%
Lebanon	1,040	1,050	1.0%	1,590	1,670	5.0%
Reading	1,630	1,630	0.0%	5,470	6,290	15.0%

Source: Pennsylvania Department of Labor and Industry

The Center for Workforce Information & Analysis' Occupational Employment Statistics Survey and Employment Projections indicate that the region's High-Priority Occupations are relatively consistent across the counties. Health Care Professionals & Support, Office & Administrative Support and Transportation are high-priority occupations within the CEDS counties.

Fastest Growing Occupations in Pennsylvania, 2008-2018 Projections

Training Level Required	Associate Degree	Bachelor's Degree	Work Experience Plus Degree	Master's Degree
	Registered Nurses	Computer Software Engineers	Farm & Agricultural Managers	Mental Health Counselors
	Dental Hygienists	Computer Systems Analysts	Medical & Health Services Managers	Physical Therapists
	Paralegals & Legal Assistants	Network Systems Analysts	Education Administrators	Mental Health & Substance Abuse Social Workers
	Radiologic Technologists & Technicians	Accountants & Auditors	Computer & Information Systems Managers	Substance Abuse & Behavioral Counselors
	Medical & Clinical Laboratory Technicians	Network & Computer Systems Administrators	Education Administrators, Preschool & Child Care	Rehabilitation Counselors

Source: Center for Workforce Information & Analysis, Long-Term Projections

Regional Industry Payroll Growth Performance Matrix

Annual Payroll	Annual Percentage Growth 1999 to 2012	Absolute Change 1999 to 2012 (\$1,000)	Percentage Component of Regional Change 1999 to 2012
Region			
Manufacturing	-2.32%	\$20,162	0.30%
Transportation	150.85%	\$846,765	85.89%
Wholesale	55.91%	\$842,029	56.22%
Retail	36.71%	\$712,359	34.46%
Financial	55.56%	\$758,860	51.70%
Professional Services	113.00%	\$1,160,780	96.61%
Other	60.60%	\$480,488	63.69%
Regional Average	67.19%	\$688,778	55.55%

Source: U.S. Census, County Business Patterns

In the data below, Franklin County showed an increase of 373% in the transportation industry with Lebanon close behind at a 275% increase over 1999 to 2012 time period. The manufacturing industry showed the least amount of growth of only 0.30% as a region and showed a decrease in Cumberland, Dauphin, and Lancaster counties. The professional services industry showed the largest annual payroll growth as a region with an increase of 96.61%.

County Industry Payroll Growth Performance Matrix: 1999 to 2012

Annual Industry Payroll	Annual Percentage Growth Rate 1999 to 2012	Absolute Change 1999 to 2012 (\$1,000)
Adams County		
Manufacturing	9.35%	\$20,756
Transportation	134.39%	\$21,733
Wholesale	-8.72%	-\$4,114
Retail	47.39%	\$24,014
Financial	48.40%	\$7,792
Professional Services	106.82%	\$11,746
Other	40.51%	\$7,544
Berks County		
Manufacturing	3.17%	\$48,533
Transportation	124.58%	\$106,859
Wholesale	62.80%	\$165,537
Retail	32.45%	\$122,827
Financial	55.77%	\$120,222
Professional Services	106.82%	\$153,529
Other	40.51%	\$60,980
Cumberland County		
Manufacturing	-24.92%	-\$115,933
Transportation	65.06%	\$214,545
Wholesale	15.09%	\$22,854
Retail	36.58%	\$99,662
Financial	31.58%	\$133,220
Professional Services	118.32%	\$269,538
Other	84.33%	\$77,843
Dauphin County		
Manufacturing	-19.60%	-\$95,821
Transportation	-6.15%	-\$14,995
Wholesale	27.72%	\$97,540
Retail	29.78%	\$81,060
Financial	48.59%	\$192,945
Professional Services	89.75%	\$229,282
Other	23.06%	\$49,063

Franklin County		
Manufacturing	2.37%	\$9,148
Transportation	373.59%	\$105,158
Wholesale	55.28%	\$28,925
Retail	53.44%	\$56,896
Financial	62.25%	\$19,088
Professional Services	167.31%	\$62,182
Other	65.06%	\$20,008
Lancaster County		
Manufacturing	-8.62%	\$155,541
Transportation	126.23%	\$171,249
Wholesale	39.02%	\$154,273
Retail	19.81%	\$112,045
Financial	78.23%	\$182,786
Professional Services	108.81%	\$267,132
Other	85.31%	\$138,834
Lebanon County		
Manufacturing	17.39%	\$51,082
Transportation	275.37%	\$70,330
Wholesale	145.37%	\$68,357
Retail	41.15%	\$46,754
Financial	70.41%	\$15,554
Professional Services	110.41%	\$25,512
Other	64.38%	\$16,981
York County		
Manufacturing	2.28%	\$36,070
Transportation	113.72%	\$156,715
Wholesale	110.75%	\$261,532
Retail	33.06%	\$118,436
Financial	49.28%	\$71,155
Professional Services	95.75%	\$130,863
Other	81.65%	\$90,617

Source: U.S. Census, County Business Patterns

In the data below, manufacturing showed the largest employment loss as a region and transportation showed the largest gain in employment across the region.

Regional Industry Employment and Establishment Growth Performance: 1999 to 2012

Regional Industries	Absolute Change 1999 to 2012 Employment	Absolute Change 1999 to 2012 Establishments	Percentage of Regional Change: Employment	Percentage of Regional Change: Establishments
Region				
Manufacturing	-58,569	-336	-30.34%	-10.70%
Transportation	13,976	390	42.17%	34.94%
Wholesale	3,861	-30	8.84%	-1.22%
Retail	2,534	-654	2.15%	-7.95%
Financial	-2,446	257	-6.06%	10.04%
Professional Services	9,184	689	28.86%	19.22%
Other	5,021	360	11.85%	5.69%

Source: U.S. Census, County Business Patterns

Regarding industry employment and growth by County: Adams County at 433% and Franklin County at 167% had significant increases in employment in the public administration industry (NAICS 56). York had a significant increase in employment in the Ag industry 564% (NAICS 11). Manufacturing decreased across the entire region in a consistent manner. Retail had a slight increase in employment regionally as well. While the rest of the region decreased in establishments in the construction industry (NAICS 23), Lancaster County increased by 11.99%.

While the region as a whole decreased in manufacturing (NAICS 31) establishments, only Franklin and Lebanon Counties showed a slight increase.

- Every county in the region decreased in retail establishments (NAICS 44).
- Every county except for Lebanon showed an increase in educational establishments (NAICS 61).
- Every county except Berks showed an increase in arts establishments (NAICS 71).

County Industry Employment and Establishment Growth Performance: 1999 to 2012

County Industries	Absolute Change 1999 to 2012 Employment	Absolute Change 1999 to 2012 Establishments	Percent of Change Employment	Percent of Change Establishments
Adams County				
Agriculture & Forestry	---	-1	---	-12.5%
Construction	-182	-36	-12.91%	-15.0%
Manufacturing	-2,012	-17	-25.74%	-13.07%
Wholesale Trade	-712	-9	-45.99%	-10.22%
Retail trade	119	-2	3.86%	-0.59%
Transportation & Warehousing	621	15	104.89%	29.41%
Information	-312	2	-45.68%	9.52%
Finance & Insurance	-99	-6	-14.68%	-7.59%
Professional Service	97	31	23.15%	32.63%
Educational Services	---	2	---	13.33%
Arts & Entertainment	23	4	6.18%	9.52%
Other Services	36	-14	2.71%	-5.85%
	767	37	433.33%	67.27%
Berks County				
Agriculture & Forestry	---	1	---	7.14%
Construction	-371	-31	-6.06%	-3.66%
Manufacturing	-10,066	-88	-25.23%	-15.14%
Wholesale Trade	1,072	1	15.07%	0.23%
Retail trade	266	-163	1.32%	-11.39%
Transportation & Warehousing	1,834	33	59.33%	16.5%
Information	-300	3	-16.69%	3.09%
Finance & Insurance	330	67	5.90%	15.95%
Professional Service	119	64	1.84%	10.0%
Educational Services	425	18	18.86%	27.27%
Arts & Entertainment	-138	-19	-6.72%	-11.87%
Other Services	230	58	3.10%	5.51%
	-1,265	75	-15.35%	19.43%
Cumberland County				
Agriculture & Forestry	---	-5	---	-83.33%
Construction	-1,173	-37	-23.79%	-8.46%
Manufacturing	-5,719	-26	-42.05%	-12.26%
Wholesale Trade	494	-19	14.40%	-7.08%
Retail trade	1,162	-126	7.87%	-12.88%
Transportation & Warehousing	2,511	63	25.95%	50.0%
Information	-2,122	-32	-46.06%	-27.35%
Finance & Insurance	-2,241	17	-20.28%	3.97%
Professional Service	1,944	141	34.44%	28.14%
Educational Services	805	9	19.43%	18.0%
Arts & Entertainment	371	1	45.24%	1.44%
Other Services	1,507	46	31.75%	6.51%
	1,203	23	18.51%	7.79%
Dauphin County				
Agriculture & Forestry	---	-1	---	-16.66%
Construction	-783	-31	-13.16%	-6.35%
Manufacturing	-5,446	-32	-41.23%	-14.54%
Wholesale Trade	-582	11	-6.33%	3.21%

Retail trade	4	-79	0.02%	-7.43%
Transportation & Warehousing	-2,476	37	-31.84%	26.81%
Information	-539	26	-14.25%	20.80%
Finance & Insurance	-468	18	-4.55%	4.55%
Professional Service	910	90	14.56%	14.46%
Educational Services	1,144	17	64.16%	25.75%
Arts & Entertainment	3,174	6	134.77%	5.50%
Other Services	-1,857	26	-19.70%	2.68%
	-297	88	-3.74%	31.42%
Franklin County				
Agriculture & Forestry	---	-3	8.95%	-23.07%
Construction	-510	-1	-20.99%	-0.31%
Manufacturing	-4,013	5	-33.29%	2.63%
Wholesale Trade	51	31	2.67%	32.63%
Retail trade	788	-42	12.11%	-7.98%
Transportation & Warehousing	2,462	22	227.33%	25.88%
Information	37	1	6.91%	2.5%
Finance & Insurance	-168	19	-12.92%	13.97%
Professional Service	798	40	62.34%	21.5%
Educational Services	155	8	17.24%	38.09%
Arts & Entertainment	-381	0	-33.45%	0.0%
Other Services	183	52	7.98%	12.90%
	1,735	40	167.30%	37.38%
Lancaster County				
Agriculture & Forestry	-22	1	-8.73%	3.12%
Construction	4,520	167	31.48%	11.99%
Manufacturing	-19,192	-89	-36.43%	-9.38%
Wholesale Trade	-350	-11	-2.96%	-1.65%
Retail trade	-942	-89	-3.09%	-4.42%
Transportation & Warehousing	3,851	124	83.55%	45.75%
Information	-808	21	-23.85%	16.8%
Finance & Insurance	341	58	5.10%	10.15%
Professional Service	3,455	168	50.07%	21.21%
Educational Services	1,949	32	47.23%	35.95%
Arts & Entertainment	-381	6	17.88%	4.0%
Other Services	3,286	102	32.87%	6.85%
	442	115	4.94%	24.26%
Lebanon County				
Agriculture & Forestry	4	1	11.76%	12.5%
Construction	-165	-15	-9.55%	-5.61%
Manufacturing	-962	1	-10.16%	0.49%
Wholesale Trade	1,206	0	77.40%	0.0%
Retail trade	355	-16	5.60%	-3.56%
Transportation & Warehousing	2,167	30	180.43%	46.81%
Information	351	2	94.10%	5.55%
Finance & Insurance	120	10	15.52%	8.47%
Professional Service	285	37	34.17%	23.12%
Educational Services	286	-2	27.98%	-11.11%
Arts & Entertainment	437	14	102.74%	34.14%
Other Services	127	8	6.99%	2.13%
	871	25	76.33%	23.14%
York County				
Agriculture & Forestry	96	8	564.70%	114.28%
Construction	-390	-15	-4.14%	-12.35%
Manufacturing	-11,159	-90	-25.23%	-13.71%
Wholesale Trade	2,682	-34	37.77%	-7.40%
Retail trade	782	-137	3.74%	-9.59%
Transportation & Warehousing	3006	66	58.79%	36.46%
Information	-389	8	-16.33%	7.61%
Finance & Insurance	-261	74	-6.49%	18.0%
Professional Service	---	118	39.09%	20.06%

Educational Services	1,576	33	---	76.74%
Arts & Entertainment	1,017	4	48.89%	3.14%
Other Services	1,689	82	24.54%	7.48%
	1,146	87	15.68%	24.09%

Source: U.S. Census, County Business Patterns (--- information not reported)

Economic Clusters

A location quotient (LQ) is a measure of the concentration of an industry in the local economy. If the LQ is greater than 1, it suggests that the local industry is more concentrated locally than in the comparison economy (state or nation), and there may be some competitive advantage. For instance, if a LQ is more than 1, products and services from that industry are being exported out of the County. If the LQ is less than 1, it indicates that the industry may not be as strong locally as in the comparison economy. Therefore, businesses and people in a County need to import products and services in that industry from outside the County's geographic boundaries.

Location Quotients: Each County Relative to the Region (Annual Wages LQ)

Annual Wages	Historical Value 2001	Historical Value 2012	Absolute Change 2001 to 2012
Adams County			
Defense & Security	.15	.51	.36
Manufacturing	1.25	1.17	-.08
Agribusiness & Food Processing	5.94	6.36	.42
Mining	6.41	3.57	-2.84
Transportation & Logistics	.81	1.14	.33
Information Technology	.79	.25	-.54
Business & Financial Services	.20	1.33	1.13
Educational Services	1.35	1.07	-.28
Arts & Entertainment	1.03	1.33	.30
Printing & Publishing	1.61	1.17	-.44
Biomedical/Biotechnical	1.05	.97	-.08
Berks County			
Defense & Security	.29	.31	.02
Manufacturing	2.01	1.82	-.19
Agribusiness & Food Processing	2.40	1.46	-.94
Mining	.99	.89	-.10
Transportation & Logistics	.97	.83	-.14
Information Technology	.98	.89	-.09
Business & Financial Services	.67	.53	-.14
Educational Services	.83	.90	.07
Arts & Entertainment	.67	.52	-.15
Printing & Publishing	1.05	.75	-.30
Biomedical/Biotechnical	1.04	1.05	.01
Cumberland County			
Defense & Security	1.55	1.36	-.16
Manufacturing	.51	.41	-.10
Agribusiness & Food Processing	.94	1.02	.08
Mining	.60	.43	-.17
Transportation & Logistics	3.32	3.51	.19
Information Technology	.97	.75	-.22
Business & Financial Services	1.24	1.18	-.06
Educational Services	1.04	1.02	-.02
Arts & Entertainment	.34	.44	.10
Printing & Publishing	.92	.95	.03
Biomedical/Biotechnical	.72	.65	-.07
Dauphin County			
Defense & Security	.69	.61	-.08
Manufacturing	.66	.65	-.01

Agribusiness & Food Processing	2.09	.73	-1.36
Mining	.33	.15	-.18
Transportation & Logistics	1.16	1.00	-.16
Information Technology	.59	.84	.25
Business & Financial Services	.81	.81	0.0
Educational Services	.94	.81	-.13
Arts & Entertainment	.85	1.21	.36
Printing & Publishing	.65	.51	-.14
Biomedical/Biotechnical	1.11	1.01	-.10
Franklin County			
Defense & Security	.85	1.43	.58
Manufacturing	2.29	2.89	.60
Agribusiness & Food Processing	3.79	2.28	-1.51
Mining	2.07	.97	-1.10
Transportation & Logistics	1.55	3.62	2.07
Information Technology	.54	.47	-.07
Business & Financial Services	.33	.48	.15
Educational Services	.52	.65	.13
Arts & Entertainment	.52	.36	-.16
Printing & Publishing	1.08	.59	-.49
Biomedical/Biotechnical	1.08	1.01	-.07
Lancaster County			
Defense & Security	.58	.42	-.16
Manufacturing	1.30	1.36	.06
Agribusiness & Food Processing	3.52	3.24	-.28
Mining	1.36	.95	-.41
Transportation & Logistics	.81	1.32	.51
Information Technology	.56	.37	-.19
Business & Financial Services	.49	.48	-.01
Educational Services	.77	.74	-.03
Arts & Entertainment	.64	.70	.06
Printing & Publishing	2.16	1.84	-.32
Biomedical/Biotechnical	1.06	1.03	-.03
Lebanon County			
Defense & Security	.65	.67	.02
Manufacturing	1.40	1.37	-.03
Agribusiness & Food Processing	3.48	3.68	.20
Mining	2.03	.08	-1.95
Transportation & Logistics	1.05	1.86	.84
Information Technology	1.03	1.15	.12
Business & Financial Services	.29	.24	-.05
Educational Services	1.07	.41	-.66
Arts & Entertainment	.46	.27	-.19
Printing & Publishing	.85	.48	-.37
Biomedical/Biotechnical	1.65	1.83	.18
York County			
Defense & Security	1.04	.99	-.05
Manufacturing	2.22	2.08	-.14
Agribusiness & Food Processing	1.89	2.01	.12
Mining	2.27	1.88	-.39
Transportation & Logistics	1.02	1.62	.60
Information Technology	.48	.41	-.07
Business & Financial Services	.42	.41	-.01
Educational Services	.43	.46	.03
Arts & Entertainment	.53	.46	-.07
Printing & Publishing	1.42	.89	-.53
Biomedical/Biotechnical	.93	.92	-.01

Source: StatsAmerica

The biomedical/biotechnical industry cluster is the largest in the region with over \$4 billion in wages for 2012. The smallest industry cluster for the region is mining with \$81 million in wages in 2012.

Location Quotients: The Eight County Region Relative to the Pennsylvania Economy

Annual Wages	Historical Value 2001	Historical Value 2012	Pennsylvania 2012
Region			
Defense & Security	.73	.79	.75
Manufacturing	1.46	1.47	.92
Agribusiness & Food Processing	3.01	2.60	.78
Mining	2.01	1.12	.92
Transportation & Logistics	1.34	1.86	1.04
Information Technology	.74	.64	.82
Business & Financial Services	.56	.68	.92
Educational Services	.87	.76	1.11
Arts & Entertainment	.63	.66	.68
Printing & Publishing	1.22	.90	.84
Biomedical/Biotechnical	1.08	1.06	1.18

Source: StatsAmerica

Methodology of Clusters

Cluster mapping creates a dataset on the presence of clusters across geographies, based on a standardized set of benchmark cluster definitions that group individual industries uniquely into cluster categories. Industries are first classified as "traded" or "local." Traded industries are industries that are concentrated in a subset of geographic areas and sell to other regions and nations. Local industries are industries present in most (if not all) geographic areas, and primarily sell locally. Within the two large groups, sets of traded industries are then organized into traded clusters based on an overall measure of relatedness between individual industries across a range of linkages, including input-output measures, use of labor occupations, and co-location patterns of employment and establishments. Local industries are grouped primarily based on similarities in activities reflected in aggregated U.S. industry categories.

Source: U.S. Cluster Mapping

Agricultural Inputs and Services Cluster – 2012

The agricultural services cluster includes the sub-clusters of: agricultural services, farm management and labor services, and fertilizers. The data is based on employment, wages, and job creation. The CEDS region is strong overall in this cluster and boasts farmland and production.

	Employment Growth Rate	Specialized Location Quotient	Employment	Job Creation
Adams County	-4.33%	2.05	70	-60
Berks County	8.57%	2.14	316	216
Cumberland County	-4.83%	0.08	10	-10
Dauphin County	-13.80%	0.08	10	-70
Franklin County	6.76%	2.61	100	60

Lancaster County	-2.36%	1.15	234	-93
Lebanon County	-5.63	2.31	100	-125
York County	8.16%	0.62	90	60

Source: U.S. Cluster Mapping

Business Services Cluster – 2012

The business services cluster includes the sub-clusters of: employment placement services, consulting services, engineering services, architectural and drafting services, ground passenger transportation, business support services, computer services, and corporate headquarters. The data is based on employment, wages, and job creation. The region has experienced above average employment growth in this cluster.

	Employment Growth Rate	Specialized Location Quotient	Employment	Job Creation
Adams County	5.95%	0.32	1,134	629
Berks County	2.52%	0.59	8,973	2,640
Cumberland County	0.23%	1.12	13,737	442
Dauphin County	0.31%	0.97	12,033	516
Franklin County	9.87%	0.57	2,263	1,657
Lancaster County	1.62%	0.45	9,419	1,898
Lebanon County	-0.36	0.25	1,114	-58
York County	-0.38%	0.43	6,450	-351

Source: U.S. Cluster Mapping

Transportation and Logistics Cluster – 2012

The transportation and logistics cluster includes the sub-clusters of: trucking, ground transportation support activities, specialty air transportation, bus transportation, and air transportation. The data is based on employment, wages, and job creation. The eight county region includes a network of transportation corridors including Interstate 83, many State Routes, and the Pennsylvania Turnpike.

	Employment Growth Rate	Specialized Location Quotient	Employment	Job Creation
Adams County	-7.49%	0.31	160	-316
Berks County	0.55%	0.55	1,227	90
Cumberland County	-0.98%	2.19	3,957	-583
Dauphin County	-0.72%	0.75	1,359	-144
Franklin County	4.23%	0.62	357	157
Lancaster County	0.71%	0.50	1,540	145
Lebanon County	15.63%	2.84	1,863	1,619
York County	0.75%	0.77	1,704	169

Source: U.S. Cluster Mapping

Medical Devices Cluster – 2012

The medical devices cluster includes the sub-clusters of: surgical and dental instruments and supplies, and optical instruments and ophthalmic goods. The data is based on employment, wages, and job creation.

	Employment Growth Rate	Specialized Location Quotient	Employment	Job Creation
Adams County	---	1.34	120	120
Berks County	0.45%	5.55	2,145	131
Cumberland County	-2.85%	0.06	20	-10
Dauphin County	2.94%	0.38	120	40
Franklin County	-100%	---	---	-10
Lancaster County	-3.92%	0.34	180	-135
Lebanon County	-4.83%	0.26	30	-30
York County	-8.03%	0.80	305	-679

Source: U.S. Cluster Mapping

Printing Services Cluster – 2012

The printing services cluster includes the sub-clusters of: printing inputs, greeting card printing and publishing, support activities for printing, and printing services. The data is based on employment, wages, and job creation.

	Employment Growth Rate	Specialized Location Quotient	Employment	Job Creation
Adams County	-6.53%	2.70	445	-700
Berks County	-4.67%	1.16	830	-791
Cumberland County	-3.65%	2.24	1,295	-885
Dauphin County	-6.55%	0.48	281	-444
Franklin County	-9.25%	1.44	266	-770
Lancaster County	-3.22%	4.47	4,411	-2,564
Lebanon County	-5.49%	1.12	235	-283
York County	-4.58%	3.02	2,131	-1,979

Source: U.S. Cluster Mapping

Education Cluster – 2012

The education cluster includes the sub-clusters of: colleges, universities, professional schools, educational support services, professional organizations, training programs, and research organizations. The data is based on employment, wages, and job creation. The south-central CEDS region boasts many strong educational institutions of higher education.

	Employment Growth Rate	Specialized Location Quotient	Employment	Job Creation
Adams County	0.08%	1.79	1,790	20
Berks County	1.37%	0.57	2,464	427
Cumberland County	1.64%	1.42	4,970	1,011
Dauphin County	3.00%	0.40	1,406	477
Franklin County	-4.01%	0.43	485	-375
Lancaster County	5.21%	0.99	5,933	3,019
Lebanon County	5.87%	1.45	1,840	1,012
York County	1.44%	0.62	2,647	481

Source: U.S. Cluster Mapping

Electric Power Generation and Transmission Cluster – 2012

The electric power generation and transmission cluster includes the sub-clusters of: fossil fuel electric power, alternative electric power, and electric power transmission. The data is based on employment, wages, and job creation.

	Employment Growth Rate	Specialized Location Quotient	Employment	Job Creation
Adams County	---	1.22	60	60
Berks County	10.24%	1.10	235	175
Cumberland County	---	---	---	---
Dauphin County	---	4.33	750	750
Franklin County	---	0.18	10	10
Lancaster County	-5.81%	0.27	80	-105
Lebanon County	---	0.96	60	175
York County	0.94%	5.38	1,135	140

Source: U.S. Cluster Mapping

Geographic, Climatic, Environmental, and Natural Resource

Geographic

The CEDS region includes the region of South Central Pennsylvania plus Berks County. The South Central Pennsylvania region is the third largest region in Pennsylvania following the Southeast and Southwest. This CEDS region includes the contiguous counties of Adams, Berks, Cumberland, Dauphin, Franklin, Lancaster, Lebanon and York which encompass the Combined Statistical Areas (CSAs) within those counties of the Harrisburg-Carlisle-Lebanon, PA CSA and the York-Hanover-Gettysburg, PA CSA; as well as the Metropolitan Statistical Areas (MSAs) within those counties of the Harrisburg-Carlisle, PA MSA; the Lancaster, PA MSA; the Lebanon, PA MSA; the York-Hanover, PA MSA; the Gettysburg, PA MS; the Lancaster, PA MSA; and the Reading-PA MSA.

Early land use patterns in the CEDS region reflect its early growth around the urban centers – Carlisle, Gettysburg, Harrisburg, Lancaster, Lebanon, Reading and York – which were, and have remained, centers of commerce and industry. The outlying areas surrounding the urban centers were farms and small settlements, while the urban centers provided a source of trade and industry. As the region entered the Industrial Revolution, the growth pattern became more regional as industrial activities occurring in the urban centers flowed benefits into the outlying areas. Urban populations grew and an out-migration occurred resulting in concentric growth patterns from the urban centers to a created suburbia. Farmland was converted to residential uses and many small settlements expanded in size, while some industry moved to greenfield locations. For the most part, the contemporary land use pattern of the CEDS region is a larger-scale, matured outcome of these development patterns.

The CEDS regional topography shows some signs of glaciation. Typical in the region is wooded areas, rolling terrain with pastoral landscapes and valleys and mountain ranges throughout the region. The region's valleys contain many depressions and are surrounded by forested hills and mountains. The region has both natural and man-made lakes. The Susquehanna River and the

Schuylkill River, along with their tributaries, act to drain the majority of the region to the Chesapeake Bay, located just south of the region.

The geology is mostly reflective of ridges, hills and valleys comprised of limestone formations. The forests have been depleted in many areas. A large percentage of the total land area is suitable for cultivation. The growing season ranges from 170 to 194 days with the average season in the region being 184 days.

Climate

The CEDS region has a humid continental climate. Weather conditions are variable, reflective of the temperate climate and the diverse landscape. The average temperature in the region ranges from 52 to 54 degrees Fahrenheit. The mountainous areas have generally cooler temperatures and a shorter growing season with slightly more precipitation.

Environmental

The main environmental issues facing the region include the preservation of wetlands, contaminants in the groundwater and the effective reuse of contaminated industrial sites (brownfields). The wetlands preservation issue primarily impacts new development on greenfield sites.

Pesticides and by-products of farming and contaminants from industrial processes leaching into the groundwater represent one of biggest environmental concerns. This concern has increased in cognizance even more following the development of the hydraulic fracturing process providing access to the natural gas contained within the Marcellus Shale deposits. None of the counties in the CEDS region have been identified as containing the shale deposits and none have active wells. However, large quantities of water are needed and contaminated during the "fracking" process, so groundwater and run-off water contamination is an environmental issue statewide, in the CEDS region and other non-Marcellus Shale regions.

Pesticides and by-products of farming and contaminants from industrial processes running into the Chesapeake Bay watershed is also an environmental concern. The CEDS region functions under the Chesapeake Bay Watershed Agreement, as signed by the Governors of Delaware, Maryland, New York, Pennsylvania, Virginia and West Virginia, and the Mayor of Washington, D.C., the Agreement guides the restoration of the Chesapeake Bay, the nation's largest estuary. According to the Chesapeake Bay Program, the Agreement's goal outcomes will lower nutrient and sediment pollution which will help ensure that waters are free of toxic contaminants; thereby

- sustaining fisheries, blue crabs, oysters and forage fish;
- restoring wetlands, underwater grass beds and other habitats;
- conserving farmland and forests;
- boosting public access to and education about the Bay and its tributaries;
- and increasing the climate/natural disaster resiliency of the watershed's resources, habitats and communities.

The federal Clean Water Act has implemented stormwater management requirements that in Pennsylvania are administered by the PA Department of Environmental Protection. According

to the US Environmental Protection Agency, the Municipal Separate Storm Sewer (MS4) Program addresses how polluted stormwater runoff is ordinarily conveyed through MS4s, from which it is often discharged unprocessed into local bodies of water. To prevent unsafe pollutants from flowing into an MS4, operators must obtain a National Pollutant Discharge Elimination System (NPDES) permit and develop a stormwater management program. Under the NPDES, permits are issued by the DEP to ensure the application of a management program to lessen the effects from stormwater runoff. Minimum control measures (MCMs) are required of permit holders' stormwater management programs. Those MCMs include an aspect of public educational outreach, participation by the public, control of runoff from construction sites, management of stormwater in all new developments and redevelopments, the ability to detect/eliminate unlawful runoff and preventing pollution. All counties in the CEDS region are acting under MS4s within urbanized areas.

Annual Climatological Summary - 2014

	High Temperature	Low Temperature	Total Precipitation	Total Snow Fall
Adams County	94	-4	45.78	41.2
Berks County	91	-6	47.73	43.7
Cumberland County	92	-3	47.93	30.7
Dauphin County	94	0	43.64	39.2
Franklin County	92	-3	41.30	41.6
Lancaster County	95	0	52.38	49.7
Lebanon County	90	-3	42.72	45.4
York County	93	3	42.59	50.8

Source: National Oceanic & Atmospheric Administration - National Climatic Data Center

Annual Mean Max Temperature Change and Projections

	1950 to 2005	2050-2074	Change
Adams County	62.4 F	69.3 F	6.8 F
Berks County	61.3 F	68.2 F	6.8 F
Cumberland County	62.1 F	68.9 F	6.8 F
Dauphin County	61.0 F	67.6 F	6.7 F
Franklin County	62.1 F	68.7 F	6.7 F
Lancaster County	62.2 F	68.9 F	6.7 F
Lebanon County	61.3 F	68.0 F	6.7 F
York County	62.8 F	69.4 F	6.7 F
Pennsylvania	58.8 F	65.7 F	6.8 F

Source: United States Geological Service, National Climate Change Viewer (NCCV)

Annual Mean Precipitation Change and Projections

	1950 to 2005	2050-2074	Change
Adams County	11.4 in/day (x100)	12.6 in/day (x100)	1.2 in/day (x100)
Berks County	12.2 in/day (x100)	13.4 in/day (x100)	1.2 in/day (x100)
Cumberland County	11.0 in/day (x100)	12.2 in/day (x100)	1.2 in/day (x100)
Dauphin County	11.4 in/day (x100)	12.6 in/day (x100)	1.2 in/day (x100)
Franklin County	11.0 in/day (x100)	12.2 in/day (x100)	1.2 in/day (x100)
Lancaster County	11.4 in/day (x100)	12.6 in/day (x100)	1.2 in/day (x100)
Lebanon County	11.8 in/day (x100)	13.0 in/day (x100)	1.2 in/day (x100)
York County	11.0 in/day (x100)	12.2 in/day (x100)	1.2 in/day (x100)
Pennsylvania	11.4 in/day (x100)	12.6 in/day (x100)	1.2 in/day (x100)

Source: United States Geological Service, National Climate Change Viewer (NCCV)

Natural Resources

Natural resources commonly found in the CEDS region include waterways and watersheds, floodplains and wetlands, prime farmland, changing topography and steep slopes. While the floodplains act as a natural barrier, the wetlands provide a diverse ecosystem as well as help control flooding by storing or detaining storm water. Farmland is also a critical component of a greenway system, and the natural areas add to the enjoyment of the greenway experience.

Economic resources commonly found in the region include: oil and gas, mineral industries, coal, and coal bed methane. These are all naturally occurring earth materials that are in demand for one or more specific uses.

Transportation Access

Intercity passenger rail service is operated by Amtrak as part of its national passenger rail system. This is available to a majority of the CEDS region with the exception of Franklin and Adams Counties. Fixed route bus service is provided on a repetitive, fixed schedule along a specific route with vehicles stopping to pick-up and deliver passengers to specific locations. Fixed route service is available to all counties in the region with the exception of Adams County. Another option for public transportation is Shared-Ride/Demand Response. Shared-Ride/Demand Response service offers the community door-to-door transportation services throughout Pennsylvania and subsidizes the cost of that service for senior citizens. Passengers must make trip requests at least one working day in advance of the trip, and must be willing to share the vehicle with other passengers. This service is available state wide.

With a focus on transit, Commuter Services of Pennsylvania recognized that as the current regional trends in jobs and housing continue, the need for innovative transportation solutions increases all the while Pennsylvania's transportation needs exceed the funding that is available. The resulting situation has transportation demand stretching beyond traditional county boundaries and their associated transit services and presents a challenge to fund transportation solutions to meet these mobility needs. Ultimately, having fewer people drive to work alone in their cars translates into better quality of life for everyone who lives and works in south central Pennsylvania. With goals to increase and improve commuters' choices of transportation options and the ease of integrating those options into their daily routines, a regional study was conducted by Commuter Services of Pennsylvania.

The Regional Transit Coordination Study included all of the CEDS counties (plus Perry County). Some of the top findings from the study include:

- Projected population growth between 2000 and 2030 is significant in the south central Pennsylvania region
- The need for more express services, multimodal linkages and Park & Rides was identified
- A common way to pay for fares on different transit systems is essential
- Transit is viewed as a choice for the younger generation
- Separate funding for inter-county transit service coordination is needed in legislation with local political support

- Partnerships with local government and employers are very important for regional transit coordination

Commuter Services of Pennsylvania states that the benefits of implementing regional transit service coordination include congestion reduction, air quality improvement, greater transit access for area residents, increased ridership, and ultimately an increase in transportation options.

Community partnerships are encouraged and enabled by Commuter Services of Pennsylvania. Focusing on how employers have been partnering with transportation providers to encourage employees to use alternative means of transportation to get to work beyond a single-occupant vehicle. There are several ways that employers have been promoting the use of existing transportation services including:

- Covering the cost of transit passes/providing pre-tax transit benefits
- Providing information on the available options of transit
- Offering shuttle service to nearby transit connections
- The potential for public-private partnerships (P3s)

Public-private partnerships will continue to be an important relationship between businesses and transit agencies and it is essential to educate businesses on “what’s in it for them.” These benefits include increased access to a larger geographic area from which to draw employees, and reduced employee absenteeism and tardiness. P3s are one way to advance additional park and-ride locations, which are a key ingredient to the success of regional transit coordination in the study area.

Assessment of Regional Roads: 2013

	PennDOT Roadway Linear Miles	Other Agencies Linear Miles	Turnpike Linear Miles	Local Municipal Linear Miles
Adams County	543.68	31.55	0.0	832.73
Berks County	874.55	52.66	4.75	2395.18
Cumberland County	555.75	51.72	37.85	1305.59
Dauphin County	557.08	0.24	12.90	1337.26
Franklin County	612.88	8.33	14.9	1050.50
Lancaster County	1040.73	7.93	30.60	2815.39
Lebanon County	369.73	1.30	5.85	827.61
York County	1133.07	13.49	6.45	2653.24
Pennsylvania	39786.57	1,579.15	551.04	78008.48

Source: Pennsylvania Department of Transportation, 2013 Annual Report (Most recent data available)

Assessment of Regional Airports

Adams County	Berks County	Cumberland County	Dauphin County	Franklin County	Lancaster County	Lebanon County	York County
Gettysburg Regional Airport	Reading Regional Airport	Carlisle Airport	Harrisburg International Airport	Franklin County Regional Airport	Lancaster Airport	Deck Airport	York Airport

Hanover Airport	Grimes Airport	Shippensburg Airport	Bendigo Airport		Smoketown Airport	Farmer's Pride	Capital City Airport
Mid-Atlantic Soaring Center Airport	Morgantown Airport	---	---	---	Donegal Springs Airpark	Keller Brothers	Baublitz Airport
Southern Adams County Heliport (classified as a general service airport)	---	---	---	---	McGuinness	Reigle Airport	Bermudian Valley Airpark
---	---	---	---	---	---	---	Kampel Airport
---	---	---	---	---	---	---	Shoestring Aviation Airport

Source: Review of Comprehensive Plans for the Complete Region

Regional Public Transportation

Adams County	Berks County	Cumberland County	Dauphin County	Franklin County	Lancaster County	Lebanon County	York County
Adams County Transit Authority	Berks Area Reading Transportation Authority (BARTA)	Cumberland County Transportation Department	Capital Area Transit	Franklin County Integrated Transportation System	Red Rose Transit Authority	County of Lebanon Transit Authority	York County Transportation Authority
Freedom Transit	---	Capital Area Trailways	Capitol Bus Company	---	Bieber Transportation Group	---	Rabbittransit
Rabbit EXPRESS	---	Greyhound	Fullington Trailways	---	---	---	---

Source: Review of Comprehensive Plans for the Complete Region

Commuter and Commercial Rail Access

Adams County is served by two freight rail service providers. CSX Transportation provides rail freight service over the “Hanover Subdivision Line” which connects Baltimore, Maryland with Hagerstown, Maryland. The Gettysburg Northern Railroad Company operates primarily as a freight line, connecting CSX Transportation and Norfolk Southern lines over its 25 miles of track between Gettysburg and Mount Holly Springs (Cumberland County).

There are approximately 125 linear miles of operational railroad lines in Berks County. The vast majority (approximately 101 miles or 81%) of the rail line mileage in the County is owned and operated by Norfolk Southern. There is currently no passenger rail service in Berks County. Passenger rail service last operated between Philadelphia and Reading in 1981.

Though Cumberland County does not currently receive interregional rail service, the national passenger railroad Amtrak does provide service to the Harrisburg area. Amtrak serves the Harrisburg area with two train stops, one in Middletown, the other at the Harrisburg Transportation Center in downtown Harrisburg. Most Keystone Corridor trains also stop at the

Middletown station, currently located near the intersection of Union and Mill Streets in Middletown.

Amtrak serves the Dauphin County/Harrisburg area with two train stops, one in Middletown, the other at the Harrisburg Transportation Center in downtown Harrisburg. Harrisburg is the western terminus for Amtrak's Keystone Corridor trains, which provide extensive weekday and weekend service between Harrisburg, Lancaster, Philadelphia, and New York.

Amtrak provides Lancaster County with passenger rail service through its Keystone Corridor, one of the Nation's federally-designated high speed rail corridors, which connects Lancaster County to Harrisburg and Pittsburg to the west, and Philadelphia and the northeast corridor to the east.

In York County, there are several rail freight providers that are responsible for the movement of goods and services in and out of the county. These rail freight providers play an important role in York County's transportation system by reducing the number of trucks on the roadways and by connecting local companies with suppliers and retailers across Pennsylvania and the United States. Providers include: York Railway Company, Norfolk Southern, and CSX.

Forecasts of freight movement through the year 2030 estimate an 80% increase in truck tonnage (2.2% annual increase) and 54% in rail tonnage (1.6% annual increase). This large volume of freight growth will have significant impacts on the performance of the region's transportation system, including increased congestion, added wear and tear on roads and bridges, concerns about increased conflicts between cars and trucks, increased noise, railroad capacity chokepoints and other issues.

Agriculture

The regional rural areas offer a strong potential for agriculturally related economic development. For these counties, actions to enhance the viability of agriculture, to protect agriculture, to provide awareness of new economic opportunities for farmers, to expand agritourism, and to support agriculturally related businesses is extremely important.

It is imperative to develop programs that address gaps in the region's food system, advocate for and advise on the implementation of a food policy, and cultivate diverse partnerships that strengthen the connections between food, health, natural resource protection, economic development, and the agricultural community.

In 2010, the United States House of Representatives declared October National Farm to School Month, recognizing the strong role the Farm to School program plays in promoting good health and strong economies. The Farm to School program provides a variety of benefits to students, parents, schools, communities and farmers. A brief summary of these include strengthening children's and community members' knowledge about and attitudes toward agriculture, food, nutrition, and the environment; increasing student participation in school meal programs; increasing consumption of fruits and vegetables; increasing market opportunities for farmers, fishers, ranchers, food processors and food manufacturers; and supporting economic development across numerous sectors.

Important economic drivers not to be missed are agritourism opportunities such as winery tours, corn mazes, festivals, and pick your own programs. Agriculture is an important component of the Region's economy. Efforts to engage the farming and agritourism communities are ongoing and are important to continue.

Value of Wheat Production: 2007 to 2012

The majority of the region increased in wheat sales with the exception of Adams County showing a decrease of 18%. A recent study from Pennsylvania State University stated that there has been an explosion of interest in locally grown wheat. For Pennsylvania farmers, wheat most often refers to the soft winter varieties that producers are accustomed to growing as a commodity crop, but an emerging market for specialty grains is available to those interested in value-added grain production.

	Field Crop (Wheat) 2007 \$ Value	Field Crop (Wheat) 2012 \$ Value	Percent of Change 2007 to 2012
Adams County	\$3,267,000	\$2,668,000	-18.33%
Berks County	\$3,042,000	\$4,700,000	54.50%
Cumberland County	\$2,314,000	\$2,623,000	13.35%
Dauphin County	\$1,043,000	\$1,517,000	45.44%
Franklin County	\$2,793,000	\$4,715,000	68.81%
Lancaster County	\$4,487,000	\$6,881,000	53.35%
Lebanon County	\$1,559,000	\$2,170,000	39.19%
York County	\$7,077,000	\$9,347,000	32.07%
Region	\$25,582,000	\$34,621,000	35.33%
State	\$45,332,000	\$63,847,000	40.84%

Source: Pennsylvania Department of Agriculture, Census of Agriculture

Value of Livestock Production: 2007 to 2012

The majority of the region increased in cattle/livestock sales although Dauphin County had a 313% jump and York county showed a decrease of 18%. Overall, the sale of livestock and livestock products accounts for 69% of Pennsylvania's farm income.

	Livestock (Cattle) 2007 \$ Value	Livestock (Cattle) 2012 \$ Value	Percent of Change 2007 to 2012
Adams County	\$9,209,000	Not Reported	---
Berks County	\$24,122,000	\$40,345,000	67.25%
Cumberland County	\$25,120,000	\$27,048,000	7.67%
Dauphin County	\$7,042,000	\$29,093,000	313.13%
Franklin County	\$29,530,000	\$47,670,000	61.42%
Lancaster County	\$122,624,000	\$158,610,000	29.34%
Lebanon County	\$17,550,000	\$23,136,000	31.82%
York County	\$17,125,000	\$13,822,000	-18.28%
Region	\$252,322,000	\$339,724,000	34.63%
State	\$556,192,000	\$1,231,768,000	121.46%

Source: Pennsylvania Department of Agriculture, Census of Agriculture

Value of Soybean Production: 2007 to 2012

There was a significant increase in soybean sales across the region averaging a regional increase of almost 154%. As a feed product for animals and livestock, the growth of soybeans is closely linked to growth in other agricultural products.

	Field Crop (Soybean) 2007 \$ Value	Field Crop (Soybean) 2012 \$ Value	Percent of Change 2007 to 2012
Adams County	\$4,252,000	\$14,018,000	229.68%
Berks County	\$7,416,000	\$19,590,000	164.15%
Cumberland County	\$3,748,000	\$11,081,000	195.65%
Dauphin County	\$3,599,000	\$7,622,000	111.78%
Franklin County	\$3,741,000	\$14,649,000	291.57%
Lancaster County	\$11,432,000	\$24,931,000	144.32%
Lebanon County	\$4,351,000	\$12,119,000	178.53%
York County	\$13,128,000	\$26,997,000	105.64%
Region	\$51,667,000	\$131,007,000	153.56%
State	\$122,103,000	\$309,882,000	153.78%

Source: Pennsylvania Department of Agriculture, Census of Agriculture

Value of Poultry Production: 2007 to 2012

In Pennsylvania, The combined value of the poultry production industry from broilers, eggs, and turkeys, plus the value of chicken sales was \$644 million in 2000. Lancaster accounts for nearly 1/3 of the total sales.

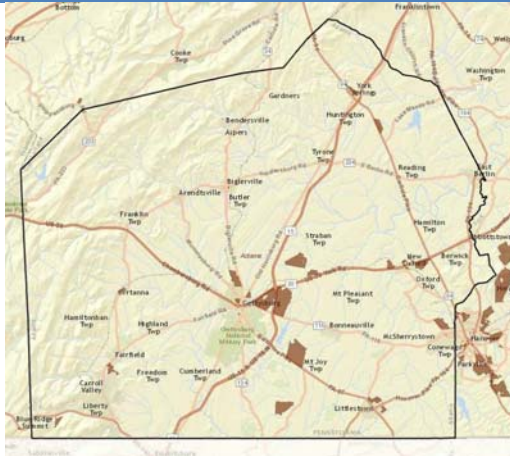
	Poultry (Chickens, Broiler) 2007 \$ Value	Poultry (Chickens, Broiler) 2012 \$ Value	Percent of Change 2007 to 2012
Adams County	\$1,485,200	\$989,169	-33.39%
Berks County	\$9,603,987	\$13,027,727	35.64%
Cumberland County	\$2,722,429	\$3,317,288	21.85%
Dauphin County	\$4,048,257	\$4,611,432	13.91%
Franklin County	\$3,692,710	\$3,410,364	-7.64%
Lancaster County	\$55,740,849	\$53,586,627	-3.86%
Lebanon County	\$15,626,022	\$21,933,581	40.36%
York County	\$2,633,566	\$2,680,037	1.76%
Region	\$95,553,020	\$103,556,225	8.37%
State	\$150,102,682	\$166,691,355	11.05%

Source: Pennsylvania Department of Agriculture, Census of Agriculture

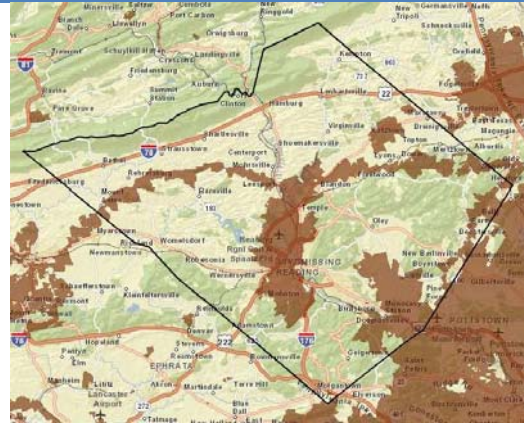
Infrastructure & Utilities

The Northeast Corridor, between New York City and the DC metro area, is home to over 40% of the United States' population. It includes the headquarters of some of the world's largest financial and technology institutions and it's also the home of the seat of governmental power for the entire country. Communications in this area is crucial to a functioning society. The graphics below indicate the fiber availability as of June 30, 2014.

Availability of Fiber by County



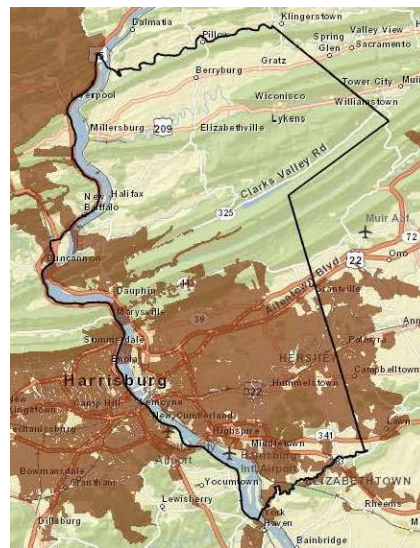
Adams County



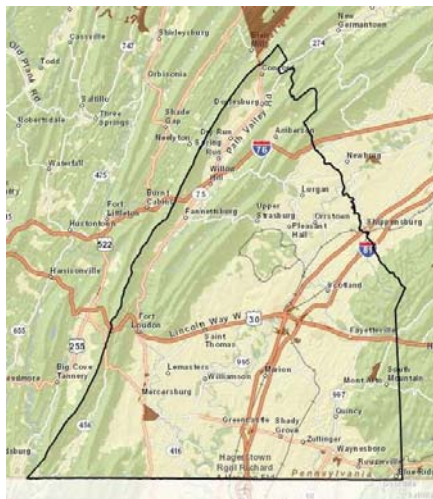
Berks County



Cumberland County



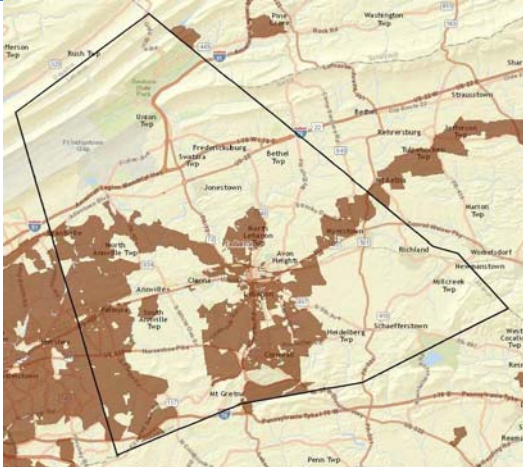
Dauphin County



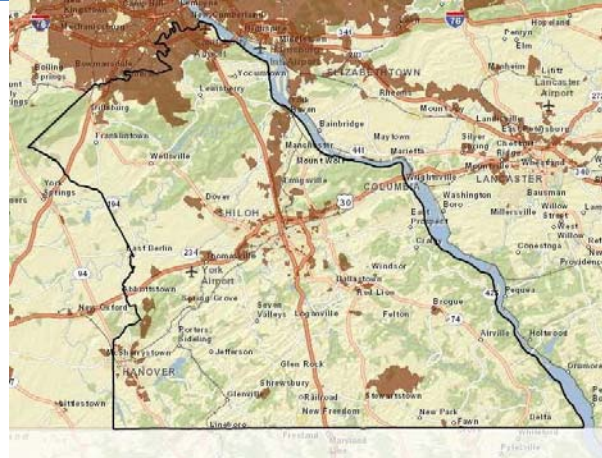
Franklin County



Lancaster County



Lebanon County



York County

Speed Download Greater than 25 Mbps

Statewide, none of the South Central Region falls in the top 10 counties with download speeds greater than 25 mbps. Dauphin, Lancaster, and Berks are in the top 15 in the State. Franklin ranked lowest in the State at number 29.

	Speed Download DL>25	Provider Wireline no>2
Adams County	92.0%	94.3%
Berks County	98.4%	96.4%
Cumberland County	93.8%	97.6%
Dauphin County	97.6%	98.3%
Franklin County	90.6%	97.5%
Lancaster County	97.1%	97.9%
Lebanon County	94.6%	87.4%
York County	96.3%	84.7%

Source: National Telecommunications & Information Administration – June 2014

Technology Assessment Comparison: County vs. State % of Population

Adams and Franklin Counties have the lowest access to fiber with Lancaster County not too far behind at 4.1%.

	Adams	Berks	Cumberland	Dauphin	Franklin	Lancaster	Lebanon	York	Pennsylvania
DSL	93.6%	95.2%	85.8%	85.7%	95.7%	97.5%	79.2%	83.2%	93.5%
Fiber	2.6%	35.3%	56.8%	68.7%	1.8%	4.8%	36.5%	7.5%	50.6%
Cable	89.0%	97.8%	95.3%	97.2%	86.8%	96.9%	93.5%	95.6%	94.6%
Wireless	99.5%	100%	100%	100%	100%	100%	100%	100%	99.7%

Source: National Telecommunications & Information Administration – June 2014

Available Internet Providers Comparison: County vs. Nationwide % of Population

Regionally, 3 to 4 internet service providers are the average, although the national average is 2 to 3 providers.

	Adams	Berks	Cumberland	Dauphin	Franklin	Lancaster	Lebanon	York	Nationwide
0	1.9	0.4	0.2	0.1	1.5	0.2	1.8	1.7	3.0
1	3.8	3.3	2.2	1.7	1.0	1.9	10.9	13.6	8.8

2	7.7	13.1	5.6	5.5	10.4	21.0	8.8	3.3	32.4
3	84.5	28.6	41.5	37.9	83.9	40.3	36.7	73.1	36.9
4	1.8	34.8	46.3	45.5	3.0	30.0	33.0	7.2	13.7
5	0.3	18.4	3.8	7.2	0.3	5.8	8.8	1.1	3.6
6	0.0	1.4	0.2	1.6	0.0	0.8	0.1	0.1	1.3
7	0.0	0.2	0.2	0.6	0.0	0.0	0.0	0.0	0.4
8+	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1

Source: National Telecommunications & Information Administration – June 2014

Utilities

General utilities are provided by private companies under the jurisdiction of the Pennsylvania Public Utilities Commission. The Pennsylvania Public Utility Commission, which was created by the Pennsylvania Legislative Act of March 31, 1937, balances the needs of consumers and utilities; ensures safe and reliable utility service at reasonable rates; protects the public interest; educates consumers to make independent and informed utility choices; furthers economic development; and fosters new technologies and competitive markets in an environmentally sound manner.

There are two nuclear energy stations in the CEDS region.

- Peach Bottom Atomic Power Station is a two-unit nuclear generation facility located on the west bank of the Conowingo Pond (Susquehanna River) in Delta, Pennsylvania. The power station consists of two nuclear reactors with 2,224 megawatts of electrical capacity, located in York County, PA, on the western shore of the Susquehanna River. Peach Bottom employs 700 full-time employees and 200 long-term contractors. Peach Bottom Units No. 2 and 3 began generating electricity in 1974. Peach Bottom has received approval from the Nuclear Regulatory Commission in May 2003 to extend operating licenses of the two units by 20 years. The units are now licensed to run until 2033 and 2034.
- Three Mile Island is a nuclear power plant located in central Pennsylvania about 10 miles south of Harrisburg in Londonderry Township. Exelon owns and operates Unit 1 of the power plant which is built on an island in the Susquehanna River and began commercial operation on September 2, 1974. Three Mile Island Unit 1 is a pressurized water reactor designed by Babcock and Wilcox. The unit is capable of generating 852 net megawatts (MW), enough electricity to power over 800,000 average American homes.

Electric service providers in the region include: Allegheny/West Penn Power Co. a First Energy Company, Pennsylvania Electric Co. a First Energy Company, PECO Energy Co., PPL Utilities Corp., and Metropolitan Edison Co. a First Energy Company

Energy Conservation

As the population grows, and with it increased energy dependence, our non-renewable energy resources are being exhausted at an increasing rate. How we use our resources, and how technology can lessen the negative effects of energy production, will have a profound impact on future generations. As business, industry and the public become more aware of energy

concerns, changes will have to be made in land uses, development types, and transportation technologies.

Harnessing the kinetic energy from wind movement, light energy from the sun, and heat energy from inside the earth can save on energy production and reduce the amount of non-renewable resources needed to create energy. Using these forms of energy reduces the amount of pollution created from the burning of non-renewable resources and fossil fuels.

Solar fields are essentially arrays that connect to an energy suppliers' power grid. Excess energy generated from the solar field that is not used can be sold back to the supplier company to provide additional power to the power grid.

Geothermal energy converts the heat energy found inside the earth into heating and cooling for homes and businesses. Below the surface of the earth, the temperature remains a constant 50 to 60 degrees Fahrenheit throughout the entire year. A series of pipes is buried underground at a point where the temperature remains constant. The pipes are filled with fluid which connects to a compressor and an exchange system. In the summer, the fluid carries the heat from the house into the pipes in the ground where it cools. When it comes back up to the exchange system the cooler fluid helps cool the house. In the winter, the fluid warms slightly and is carried up to the exchange system to help warm the house.

Incentives

The separation of land uses that require more driving, the underuse of public transportation, and the increase on energy dependent devices all waste energy and promote pollution. Incentives help encourage the public to transition from energy demanding habits to energy conserving habits. Many energy generating companies are providing incentives for their consumers as funding is available. Some companies provide programs that can help identify areas in a home where energy is being lost or wasted and offer solutions to the problems.

Historical and Regional Changes

Population

The Region has experienced a 64.7 % change in total population from 1960-2010. For that same time period, Pennsylvania experienced a 12.2% change in population. According to the U.S. Census Bureau Decennial Census 1960-2010 the Region's counties experiencing the greatest change were: Adams County by 95.3%, Cumberland by 88.6%, Lancaster by 86.6%, York by 82.5%, Franklin by 69.6%, Berks by 49.3%, Lebanon County by 47%, Dauphin by 21.7%. Typically the change experienced by the region was greater than the state as a whole. This is reflected in other statistics as well.

The Percent of Minority Population in Pennsylvania increased from 15.9% Minority in 2000 to 20.5% in 2010. In Adams County the minority population change was 6.3 - 9.4%, in Berks the change was 15.2 – 23.1% over the same time frame, in Cumberland the change was 6.4 – 10.6%, in Dauphin the change was 24.4 – 30.1%, in Franklin it was 5.5 – 9.8%, in Lancaster County the change was 10.7 – 15.1%, in Lebanon it was 7.7 – 13.1%, in York it was 8.5-13.8%. This brings the total percent minority population change from 2000-2010 as 11.6-16.9%.

Employment Growth

From 1980-1997 employment growth in the region was led by employment growth in Cumberland, Dauphin and Lancaster counties as employment growth in those three counties exceeded the regional rate. From 1999-2012 employment growth in the region was led by employment growth in Lebanon County that saw a long term change percentage change of more than double the other regional counties (19.9%). Franklin and York displayed employment growth rates above the region's overall employment growth rate change.

From a regional perspective, employment growth has declined with the annual employment growth rate trend for the region going from 4.92% in 1999-2012 to -3.67% in 2008-2012.

Payroll

Historically, from 1980-1997, like regional employment, annual payroll growth was led by growth in Cumberland, Dauphin and Lancaster counties as payroll growth rates exceeded the regional growth rate. From 1999-2012, payroll growth was more consistent in the area with most of the region falling between 37.42% (Adams) and 65.87% (Lebanon). The region as a cumulative region was 46.6% annual payroll growth rate.

Similar to employment growth, a slowing of annual payroll growth has been experienced by all counties in the region. The annual payroll growth rate has slowed to 3.88% from 2008-2012 as a short term trend percentage change.

Number of Establishments

During the 1980-1997 period, growth in the number of establishments was led by growth occurring in Cumberland and Lancaster counties as those county growth rates exceeded the regional rate. In the 1980's, York County joined the counties displaying establishment growth rates above the regional rate.

The annual establishment growth rate trends from 1999-2012, ranged in the region from a high of 9.71% in Franklin County to a low of 2.06% in Berks County. The short term changes from 2008-2012 saw the entire region with negative percentage changes.

Similar to employment and payroll growth rates, the region has experienced a slowing of establishment growth rate, so that while the region overall experienced growth, the rates were generally lower than historical averages.

Regional Economic Performance Comparisons between Urban and Non-Urban Areas

Regional Economic Indicator	Urban Area	Non-Urban Area
Population Change 2000 to 2010	5.64%	11.10%
Industry Employment 1999 to 2012		
Agriculture & Forestry	28.46%	-12.18%*
Construction	0.94%	2.04%
Manufacturing	-20.50%	-30.34%
Wholesale Trade	-12.23%	8.84%
Retail trade	1.93%	2.15%
Transportation & Warehousing	-4.07%	42.17%
Information	-29.09%	-23.26%
Finance & Insurance	-14.14%	-6.06%
Professional Service	18.16%	28.86%

Educational Services	12.30%	19.24%*
Arts & Entertainment	14.82%	41.56%
Other Services	-5.87%	11.85%
Public Administration	-13.38%	11.15%
Mean Area Household Income	\$45,678	\$69,516
Educational Attainment		
-No HS Diploma	13.9%	8.8%
-Earned College Degree	5.6%	8.3%
Occupations		
Management, Business, Science & Arts	26.03%	32.69%
Service Occupations	23.44%	16.85%
Sales & Office Occupations	23.76%	24.49%
Natural Resources, Construction & Maintenance	6.64%	9.39%
Production, Transportation & Material Moving	20.09%	16.95%
Area Unemployment Rate	8.2%	4.8%

Source: U.S. Census, County Business Patterns (* Does not include all counties in the region), U.S. Census American Community Survey

Comparative Performance

Comparative Performance: U.S and Region – 1999 to 2012

Category	% Change 1999 to 2002 United States	% Change 1999 to 2002 Region	% Change 2002 to 2008 United States	% Change 2002 to 2008 Region	% Change 2008 to 2012 United States	% Change 2008 to 2012 Region
Employment	1.53%	3.36%	7.56%	6.46%	-4.10%	-3.12%
Annual Payroll	10.92%	12.22%	30.11%	27.41%	5.53%	3.99%
Number of Establishments	2.74%	2.11%	5.56%	4.37%	-2.22%	-1.80%

Source: U.S. Census, County Business Patterns

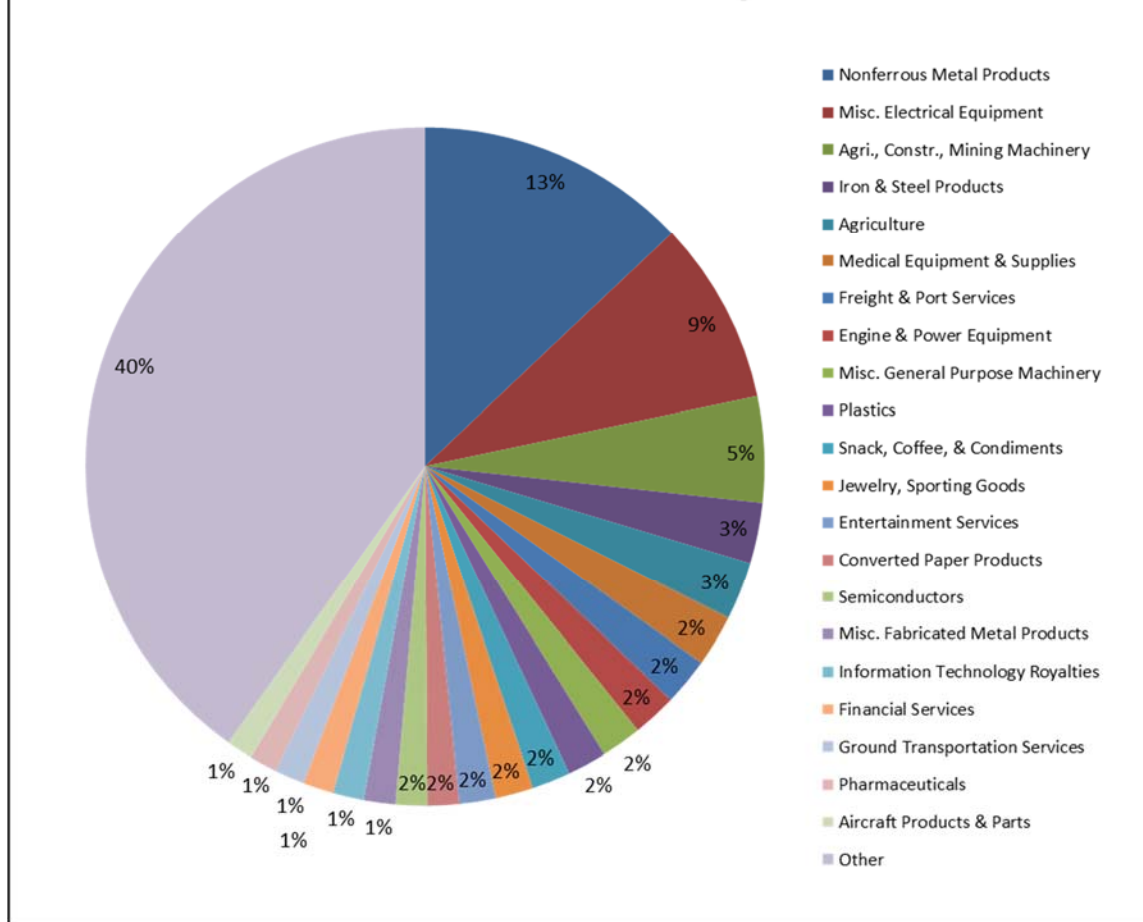
Regional Exports

The state of Pennsylvania (PA) is broken into ten Regional Export Networks and World Trade Center Harrisburg is the trade assistance provider for the eight counties that comprise the South Central region of Pennsylvania, including Adams, Berks, Cumberland, Dauphin, Franklin, Lancaster, Lebanon, and York. The South Central region also encompasses five small Metropolitan Statistical Areas (MSA), including Harrisburg-Carlisle, Lancaster, Lebanon, Reading, and York-Hanover.

According to Brookings Institute's Export Nation 2013 report, exports have played a critical role in the ongoing economic recovery since the recession of 2008-2009. The economy of the United States attributes global trade as the driving factor of post-recession growth to the country overall, as well as in its metropolitan areas.

The South Central region of Pennsylvania is fortunate to have an extremely diverse array of industries within its bounds. Since there is no dominant industry sector in the South Central region, the assortment of industries have insulated the region from deeper economic decline. The region as a whole exported over \$14.4 billion dollars in 2012, which includes over one hundred different types of products and services. As shown below, the top five exports by value are nonferrous metal products; miscellaneous electrical equipment; agriculture, construction, and mining machinery; iron and steel products; and general agriculture.

Figure 5: Industry Share of Combined Real Exports by Value in the Southcentral Region 2012



Every county in the region has increased the value of their exported goods and services and the below data compares the percentage changes in real export value among the eight counties. Dauphin County records the highest percent increase between 2003 and 2012, with an almost eighty percent increase. The region, as a whole, increased real export value, over the same time period, by almost fifty-five percent.

The World Trade Center Harrisburg serves companies in central Pennsylvania by promoting global trade and delivering relevant educational programs, up-to-date trade information, practical trade assistance, and research & referral services for our members and clients to help them compete and prosper in a global economy. They are a licensed member of the World Trade Centers Association and the regional coordinator for Pennsylvania's free export assistance services.

Percent Change in Real Exports by Value 2003 to 2012

Adams	52.74%
Berks	66.66%
Cumberland	67.15%
Dauphin	78.70%
Franklin	77.35%
Lancaster	32.57%
Lebanon	48.32%
York	49.66%
Regional	54.92%

Total Real Exports for the South Central Region 2003 to 2012

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Services	1916	2108	2182	2673	2320	2878	2745	2891	3013	3002
Goods	7409	7653	8380	9549	9992	10959	9148	10008	11158	1142
Total	9324	9761	10562	11869	12665	13837	11893	12899	14171	14445

Source: World Trade Center Economic Impact Report, above value in millions

SWOT Analysis

Strengths

- Ideal location for transportation: Within 1 day drive of 40% of the US population
- Significant transportation infrastructure (Railways, highways)
- Large number of higher education establishments to help drive economic development
- Natural beauty and tourism
- A wide variety of outdoor recreational opportunities for people of all ages and interests
- The region has numerous tourism opportunities in the form of parks, forests, rivers and waterways, lakes, and other natural and scenic resources.
- Established workforce: As part of the region's commercial and industrial base there exists a long-established and specialized workforce. The most prevalent specialization comes in the form of manufacturing and health-care related jobs.
- Unique lifestyle opportunities as a result of topography, waterways, etc.: The region possesses natural amenities that offer potentially attractive lifestyle choices to its residents who prefer a naturalist lifestyle.
- Low population density: Many people prefer the privacy and a lack of commercial development near their homes that the region offers in abundance.
- Good transportation access to major markets: The CEDS region is located to serve and supply the markets of the North Eastern U.S. with relative ease. There is excellent highway access to these markets via I-83, I-81 and I-78. Also, Norfolk Southern Railroad's main line bisects the county, while Harrisburg International Airport is less than

an hour away. Additionally, there is close proximity to major cities such as: New York City, Philadelphia, Pittsburg, and Baltimore.

- Workforce with a strong work ethic: The region's workforce has historically had a strong work ethic. Its founding fathers were strong-willed and industrious, seeking to provide for their families and communities.
- Workforce training resources: There are many workforce development and training resources available to place able workers in gainful employment and to assist employers in recruitment and retention of qualified employees.
- A base of stable industries: Top industries in the region include but are not limited to; agriculture, manufacturing, educational services, transportation, and retail.
- Localized government and municipal system
- Room to grow: The region has an ample supply of industrial and commercial sites available for new businesses or for expansion of existing businesses.
- Quality of life/Quality of place: The region is also known for the high quality of life that residents enjoy, including a "small town" character, low cost of living, very good schools and community facilities, and opportunities for recreation.

The regional attributes most strongly identified as "Strengths" generally included those associated with the rural character of the region. The findings of the "Strengths" component of the SWOT Analysis were consistent with many of the responses from the public survey.

Specifically, the issues or attributes most strongly identified as "Strengths" during the comment period were the following:

- Quality of life
- Higher education establishments
- Natural beauty and rural character
- Heritage of the area
- Natural Resources
- Strong workforce ethic
- Historic area

Weaknesses

- Aging population and core workforce: Due to an exodus of young workers, the population and workforce demographics are trending toward older residents and workers
- Underdeveloped telecommunication and broadband infrastructure: A lack of true high speed internet availability, combined with sub-standard wireless telecommunication coverage is a significant deterrent for businesses and individuals who may look to locate in the area
- Workforce: While the workforce is primarily considered a strong point, there are also some weaknesses, particularly in this period of very low unemployment. Many of their skills are not matched to the types of family sustaining, high tech jobs the region would like to attract. Another weakness related to the workforce is the inability to retain and attract young educated people.

- Localized road congestion: Even though there is very good highway access to destinations inside and outside the region, internal circulation is more challenging. First, traffic volumes continue to increase throughout the county, and particularly along the primary access corridors. There is also limited public transportation service available in the county.

The community attributes most strongly identified as “Weaknesses” generally included those issues associated with difficulties many municipalities face with when dealing with growing communities. Often, these attributes are associated with the costs of development, primarily with regard to public infrastructure and facilities. Specifically, the attributes most strongly identified as “Weaknesses” during the public comment period were the following:

- Transportation challenges
- Aging workforce
- Lack of telecommunication infrastructure
- Lack of higher paying jobs
- Aging infrastructure

Opportunities

- Educational assets: Institute programs at all education levels that will serve to promote and enhance the regions priority industries.
- Higher education programs: Addressing these needs through formal educational programs will be helpful to both new and ongoing regional economic development efforts.
- Labor force specialization: Develop the necessary skills and aptitudes that are required to drive the support
- Small to medium size business retention: Develop formalized programs that will allow existing businesses to adapt to and capitalize on emerging markets and opportunities by becoming supply chain partners.
- Small business expansion: more communities are following the “buy local” movement. There is an opportunity to expand on the retail and service industry options in downtowns and main streets.
- Cost of doing business in South Central Pennsylvania. The cost of living and proximity to population is an attraction for small businesses to want to relocate to the area.
- Outside expertise and experiences: Investigate what efforts have and have not worked in other areas and use this research as a benchmark to inform regional efforts and measure their progress and growth.
- Foreign investment and “re-shoring” of jobs: Promote the region’s positive attributes to foreign business interests to encourage the financial investment necessary to bring lost jobs back to the area.
- Young workforce: Develop systematic programs to capture and train regional youth on the necessary skill sets that will enable them to assimilate into the opportunities afforded by industries.

- Industry involvement in education: Solicit the participation of regional industries to drive the development of educational programs that will look to place future workers in local opportunities.
- Regional institutions of higher education: The various educational institutions in the CEDS region are excellent resources; not only for their role as educators, but also for the promotion and encouragement of innovation and new business start-ups, and their involvement in the local community.

The community attributes most strongly identified as “Opportunities” included responses directed both toward activities to promote the continuation of rural character and the improvement of some of the conditions associated with the identified “Weaknesses” of the region. Generally, public survey participants understand that local governments have a role to play with regard to many of the issues the local community faces. Specifically, the attributes most strongly identified as “Opportunities” during the Public Meeting were the following:

- Downtowns and main street programs
- Young workforce
- Educational opportunities
- Business retention programs

Threats

- Missed opportunities due to lack of skilled workforce and extenuating circumstances.
- Lack of a regional economic development database: No system in place to capture regional institutional knowledge, experiences, and data.
- Inability to adjust to the pace of change and innovation: A lack of agility will likely leave the region behind the competition.
- Lack of entrepreneurial and technology development apparatus regionally: A failure by the region to provide and/or attract visionaries and risk takers will cripple the overall economic development efforts
- Loss of agricultural production and land: A significant source of revenue for the region will disappear if the region’s agricultural industrial base continues to shrink by any large degree.
 - If not carefully managed and directed, land use changes can impair the region’s ability to offer a sufficient supply of sites for its targeted industries, and can also irrevocably damage the vitality of its agricultural sector, agribusiness industries, and forest products industries.
 - Certain land use changes may hinder the achievement of economic development goals directly by using the site in a less than optimal use (e.g., commercial use of land that has rail access, housing development on prime agricultural land).
 - A land use change can affect the supply of lands supporting economic development indirectly by placing an incompatible use adjacent to another parcel (e.g., heavy industry next to a tourism destination).

- Lack of financial capital access: For the past several years there has been a significant reduction in the amount of grant monies and funding available for economic development efforts. Additionally, venture capital has become incredibly scarce, and prohibitively expensive when available.
- Competition against other regions: The CEDS region has competition trying to leverage the same economic development opportunities. Larger communities in the tri-state area such as Pittsburgh, Cleveland, Baltimore, and Buffalo are all positioned to attract industries and workers through their own unique attributes.
- Costs of fully developing infrastructure systems: The costs associated with repairing and maintaining aging infrastructure combined with the associated costs of needed upgrades and enhancements could potentially thwart economic development opportunities.
- Aging population's effects on industry longevity: A lack of business succession planning combined with a deficit of qualified workers to replace the current aging workforce could serve to potentially drive industry from the region.
- Globalization: Global competition continues to increase and has had a significant impact on the entire state, particularly the manufacturing sectors. The county will need to identify its role in the "new economy" and target its economic development efforts to achieve that role.
- Changes in Agriculture: Farming faces the challenge of dealing with environmental restrictions and increasing pressure of competing land uses and increasing land prices. Land use planning and zoning, the continued support of agriculture land preservation efforts and assistance in meeting environmental mandates are ways to support agriculture in the region. Also, farming is supported directly and indirectly when there are thriving local food products industries that use local agricultural products. Agribusiness, in turn, depends on the continued vitality of farming to provide sufficient markets for its products and services.

The community issues most strongly identified as "Threats" includes those issues, similar to those identified in the "Weaknesses" component, that involve potential changes to local rural character and the costs associated with potential development pressure. Again, these responses appear to acknowledge that local governments have the ability to address some of these issues. Specifically, the issues most strongly identified as "Threats" during the public comment period was the following:

- Aging population
- Regional competition
- Infrastructure costs
- Land use change

Regional Resources

Partners integral to the implementation of the CEDS include, but is not limited to the following organizations:

Federal Government:

U.S. Economic Development Administration (EDA)
U.S. Department of Housing and Urban Development (HUD)
U.S. Department of Agriculture (USDA)

Commonwealth of Pennsylvania:

Department of Community and Economic Development (DCED)
Department of Environmental Protection (DEP)
PA Department of Labor and Industry
PA Department of Agriculture
PA Department of Conservation and Natural Resources

Counties:

Adams County
Berks County
Cumberland County
Dauphin County
Franklin County
Lancaster County
Lebanon County
York County

Urban Centers:

Gettysburg Borough
Reading City
Carlisle Borough
Harrisburg City
Chambersburg Borough
Lancaster City
Lebanon City
York City

Municipalities:

The individual townships and boroughs within the region

Institutions:

Regional based Financial Institutions
Regional based Educational Institutions
Regional based Chambers of Commerce
Regional based Business Community Partners
Regional based Health Care Institutions

Economic Development Corporations:

Greater Berks Development Fund
Cumberland Area Economic Development Corporation
Dauphin County Economic Development Corporation
Franklin County Area Economic Development Corporation
Lebanon Valley Economic Development Corporation
Economic Development Company of Lancaster County
York County Economic Alliance
Harrisburg Regional Chamber & Capital Region Economic Development Corporation
Adams County Economic Development Corporation

Public Utilities:

First Energy Corporation
Peachbottom Atomic Power Plant
Three Mile Island
Columbia Gas Corporation

Resources and Service Providers:

Ben Franklin Development Partnership

World Trade Center of South Central PA
 Colleges and Universities
 Technical Schools
 Technology Centers
 Workforce Investment Board
 Office of Workforce Development of York
 County
 Life Sciences Greenhouse of Central PA
 Workforce Investment Boards &
 CareerLinks (South Central & Lancaster)
 WednetPA Network
 Community First Fund
 York County Community Foundation
 PennTAP
 Susquehanna Riverlands

South Mountain Partnership
 Hershey Center for Applied Research
 (HCAR)
 Hospitals and Health Care Systems
 Innovation Transfer Network (ITN)
 SCORE (multiple chapters in region)

Local/municipal economic development
 groups
 Downtown Investment Districts
 Elm Street/Main Street communities
 Chambers of Commerce
 County & Local Governments
 Manufacturer's Association
 Members of the General Assembly
 Visitors Bureaus
 Keystone Opportunity Zones
 Keystone Innovation Zones
 City Revitalization Improvement Zones
 International Airport
 Small Runway Airports
 Keystone Communities Program
 Business and Industrial Parks
 Industrial Development Corporations and
 Authorities
 Redevelopment Authorities
 Housing Authorities
 Transportation Authorities
 Planning Commissions

List of documents reviewed

Adams County: Adams County Comprehensive Plan, Adams County Stormwater Management Plan, Adams County Long Range Transportation Plan, Parks, Recreation, and Open Space Plan

Berks County: Berks County Comprehensive Plan, Berks County Transportation Plan, Berks County Community Facilities Plan,

Cumberland County: Cumberland County Comprehensive Plan, Cumberland County Natural Environment Study, Cumberland County Transportation Plan, Cumberland Community Facilities Plan

Dauphin County: Dauphin County Comprehensive Plan, Dauphin County Parks, Recreation, Open Space, and Greenways Study

Franklin County: Franklin County Comprehensive Plan, Parks and Open Space Plan

Lancaster County: Lancaster County Comprehensive Plan, Lancaster City Green Infrastructure Plan

Lebanon County: Lebanon County Comprehensive Plan, Lebanon County Transportation Plan, Lebanon County Community Facilities Plan, Lebanon County Economic Development Plan

York County: York County Comprehensive Plan, York County Economic Development Plan, York County Community Facilities Report.

Other: South Central Workforce Investment Board; Workforce Investment Act (WIA) Local Plan; Program Year 2012-2016, South Central PA Regional Action Plan 2009, Pennsylvania Department of Community and Economic Development annual report 2012-2013, Pennsylvania Association for Conservation Districts

Goals and Objectives

Goals of a regional plan are specific desired outcomes which will require regional cooperation. This cooperation will lead to greater prosperity and quality of life. Part of the mission of SCTPA is to investigate, coordinate, and administer all matters that have a direct and/or indirect impact upon the CEDS region to maintain the highest quality of life and quality of place for its inhabitants, maintain a balance between urban centers and rural areas, and to meet the needs of the regional population without compromising the needs of future generations. Regional goals include, but are not limited to:

- Improving productivity and competitiveness as a region
- Retaining and attracting a more diverse workforce
- Enhancing the quality of life services and amenities
- Proactively recruiting companies located outside of the region to locate within the region creating new jobs.

Community & Private Sector Participation

Extensive socio-economic data has been compiled to understand the role each county plays in the region's economic position and to compare the region to state and national figures. A strong plan for sustainable economic development begins with a clear vision for economic growth. The regional vision for economic development, which was informed by the input of a variety of public and private stakeholders through a public survey, may be summarized through a listing of overarching goals for economic development, a description of where such economic growth is desired to occur, and an identification of what type of economic development is envisioned. During the gathering of the data, the public was asked to share their assessment of critical issues, visions, and strategies. The survey provided an opportunity to gather additional information and ask key questions that could potentially identify new projects, additional key focuses, and to learn if the public is aware of specific resources.

The public and private stakeholders were asked: What do you feel are the priorities for the future of agriculture in your area? 60.77% of the respondents felt that having additional

sustainable farming strategies, both business sustainability and land sustainability, were their top priority. 58.37% stated that conservation of rural and scenic areas should remain a top priority. 47.85% stated that in their area, they felt that businesses that support agriculture (e.g. farm implements, seed stores, farm markets, etc.) should remain a focus. Other suggested priorities identified in the public comment period included: agriculture related tax incentive programs, and agritourism, which could include but is not limited to bed and breakfasts, corn mazes, hayrides, and farmers markets.

A sample of additional comments and suggestions made by both public and private stakeholders during the comment period:

- Agriculture, if used correctly can help improve water and air quality, be socially responsible, and create jobs. If we keep using the same industrial system then we will be doomed to lose the few "food" farms we have left. Based on the 2012 USDA Census report, we have lost many small farms from 2007 to 2012. Let's change this in the next five years.
- Incentives for land owners to not sell out to commercial developers, along with disincentives to industrial use developers.
- Zoning, Land Use, Soil Conservation regulations that provide for opportunities for all types of farming; crop growing as well as animal production. Following with this would be technical and financial assistance to accommodate soil conservation and run-off/nutrient regulations.
- Educational programs for our school children on actual farm living. (Where our meat comes from and how processed, how to garden, milk processing, eggs etc.) Maybe start a community farm and/or agricultural charter school.
- Innovation in creating commercial food markets for a wide variety of agricultural products.
- Establish better food security specifically in urban areas.

Balancing growth (residential, commercial, and industrial) and focusing growth to areas with existing infrastructure is crucial. The public and private stakeholders were asked: What do you feel is needed to *retain* existing or new commercial and/or industrial uses in your area? (e.g. tax incentives, road improvements, zoning changes, utility upgrades)

The majority of the respondents stated that road improvements and tax incentives were their highest priority for their area. Numerous other areas received comment including: workforce development, utility upgrades, zoning changes, community walkability improvements, infrastructure improvements, telecommunication upgrades, educational programs, and alternative transportation ex. trails between communities, electric charging stations and public transportation.

A sample of additional comments and suggestions made by both public and private stakeholders during the comment period:

- Being rural, business development would benefit by some Zoning changes but most business development in this rural area must have the support of Broadband which we are lacking. We are not close enough to a Major Artery of transportation so our business community tends to be home based and agriculturally based. Broadband has become essential for us to have any growth.
- Better information sharing regarding financing programs, incentives, available properties third-party codes administrators and inspectors have been a deal-killer for many would-be businesses who handle situations differently, add huge costs and time to a project.
- Definitely zoning changes/preservation in that farm land should not be easily converted to residential or commercial property. Public hearings should continue to be held and more widely publicized for residents input.
- Right to Work legislation, business friendly tax policies, less cumbersome regulation, fast track permitting, quality infrastructure to accommodate growth demands, competitive incentive tools.
- Qualified Workforce, Tax Incentives, Property Tax Reform, Infrastructure Improvements (Transportation System, Road Improvements, etc.) Redevelopment of Downtown for talent attraction

What do you feel is needed to *attract* new commercial and/or industrial uses in your area?(e.g. Tax Incentives, Road Improvements, Zoning Changes, Utility Upgrades). The majority of the respondents stated that their answers were the same as the previous question. The main priorities included but were not limited to: tax incentives, road improvements, zoning changes, and workforce.

The public and private stakeholders were asked: What is your opinion of the status of the workforce in your area? 54.19% of the respondents stated that employers are having trouble finding qualified workers. 40.22% stated that the area workforce is aging and we should focus in attracting as younger workforce. 34.64% stated that employers are having trouble retaining highly skilled workers. It was also noted that additional training and educational programs should be a focus.

A sample of additional comments and suggestions made by both public and private stakeholders during the comment period:

- Workforce is stable but in need of more and better opportunities which could be realized by attracting more industry
- I feel that there is a good work force already present in the county, however, I think there is a disconnect between the employer and the work force that prevents skilled jobs from being filled locally.
- A work force that is trained to meet the needs of the particular use, as well as tax incentives that make the region an attractive community.
- Workforce development for existing businesses to stay, supply chain relationships so as a whole we are more valuable than our individual companies and we thrive off each other's success

- I believe that we need a higher minimum wage and jobs that can support them. It has been proven in many larger cities that increasing the minimum wage is not just great for lower income bracket but it also helps to stimulate the economy.
- Attracting more businesses in the tech and services sectors would reduce the number of people this area and riding down Interstate 83 to Maryland. Bringing jobs of caliber back to PA could increase the number of younger people who stay in the area.

The public and private stakeholders were asked to define the technology amenities in their area. 57.54% of respondents stated that there is a need for more technology based businesses in their area. 51.40% stated that there is a need for more technology educational programming. 47.49% stated that there is a need for faster internet speed and bandwidth in their area.

A sample of additional comments and suggestions made by both public and private stakeholders during the comment period:

- Hi tech is an emerging market - focus on this for future business growth retention and recruitment
- We need to better promote the technology training that is available in the area. We've many schools that provide it, but many don't know that they exist.
- The tech industry doesn't produce lots of jobs, but the ones it does produce are highly-paid. They'd be an asset to our area.

The public and private stakeholders were asked: What industries, or industry clusters, do you feel should receive investment and incentives for the benefit of the regional economy? In order of priority status according to the public comments: Manufacturing, Agriculture & Forestry, Educational Services, Arts & Entertainment, Information, Professional Services, Construction, Transportation & Warehousing, Retail Trade, Finance & Insurance, Wholesale Trade, Other, Public Administration.

A sample of additional comments and suggestions made by both public and private stakeholders during the comment period:

- Small scale farming and a healthy local food system should be a top priority and need tax incentives to compete with subsidized, imported products. More small scale farming would also provide significant jobs to the local economy.
- We need a good mix of real full-time producing jobs in the manufacturing area. Example what are we doing to attract feeder businesses to the I-81 corridor in Cumberland County that could service the manufacturing taking place at Volvo in Shippensburg. Specialty tool & die, electronics and even plastics would be a welcome addition. We need to take advantage of the rail yards added in Chambersburg. I was never for the change of zoning in Carlisle there on Rt 34 / Spring Rd. We have empty commercial and retail space all over our area. We should have recruited light industrial in my opinion.
- Investing in the attraction of new and expanded Manufacturing and Tech/Information would trickle down to the construction and wholesale trades as well as the Finance & Insurance and Professional Services. Then ultimately to the other areas.

- Investment yes, but not a fan of incentives if it involves pitting one municipality or county against another. We should be looking at our region and the clusters that appear in the various areas of the region and then supporting those appropriately.
- We need a program to clean up, demo buildings (if necessary), and tee up existing under-utilized manufacturing and commercial properties to make them more attractive and easier for developers to use.

The public and private stakeholders were asked if their municipality has a “Main Street”, “Downtown”, or “Square”. 32.96% stated that the question was not applicable to their area. 29.05% stated that yes, but they need a business attraction program. 28.49% stated that yes, but it needs to be branded and promoted. Additional responses included that their downtowns: contain a variety of businesses, feels safe, and attracts non-residents. Only 7.26% stated that their downtown area did not feel safe.

A sample of additional comments and suggestions made by both public and private stakeholders during the comment period:

- Need to attract all types of people downtown. It seems that the group that lives and thrives downtown makes up just a fraction of the community
- It was built to attract non-residents but it ignores the needs of those who live here and ostracizes those who have been here through it all in favor of gentrification and whitewashing. The diversity gets undervalued and even put down rather than celebrated as it should be in an urban area.
- We need to attract residents to live downtown. By supplying jobs and housing. So we need to attract business and industry to move here
- Most of the "attraction" programs that work on these settings are focused on building tourism. We need a countywide attraction program focused on attracting residents and locals to patronize downtowns.
- I believe it is safe, but it suffers from a perception problem amongst others. The biggest problem is that the downtown isn't attractive (in terms of amenities)
- Advocate for structural changes to existing laws and government that will level the playing field for boroughs and cities; and advocate for incentives to local governments that regionalize.

The public and private stakeholders were asked: Does your area have sufficient infrastructure to support growth? 53.67% of the respondents stated that yes; they have access to sufficient highways and other transportation corridors. 35.59% stated that yes, they have sufficient infrastructure in the areas of sewer, water, gas, and electric, while 28.81% stated that they do not. 33.33% stated that they have underutilized land and buildings, many of which are brownfield sites.

A sample of additional comments and suggestions made by both public and private stakeholders during the comment period:

- The quantity is sufficient, but the quality needs improved.

- More public transportation would be helpful.
- Roads also need updating and maintenance to keep up with growth.
- Many of our roads were not designed for the level of traffic they now carry. Many entrance ramps are too short. Road services deteriorate and are not adequately and rapidly repaired.
- We have a lot of vacant or underused properties, and when there is any traffic issue on the major highways, the local roads cannot handle the traffic.
- Our shortage is in available buildings that will suit modern business needs, particularly for industrial and manufacturing.

The public and private stakeholders were asked: What is the status of business retention and recruitment in your area? 46.89% of the respondents stated that they need resources for small business retention and expansion. 39.55% stated that they need to focus on diversification of manufacturing and industrial based development. 31.07% stated that they need office and industrial growth directed at existing industrial and business parks. 28.81% of the respondents stated that they do not have anyone actively recruiting businesses.

A sample of additional comments and suggestions made by both public and private stakeholders during the comment period:

- Responses vary by location in county. e.g., City needs retail, but not the suburbs.
- We need more SMALL businesses and recruitment should reflect that. We are flooded with retail outlets that are ugly, siphoning off local money (corporate) and requiring expenditures on infrastructure
- We need to expand upon and exploit the “Buy Local” movement.
- We need a more active, forceful program to attract tech and other business from the southern corridor to this area. Residents are leaving this area every morning and driving south, so we know these workers exist. Let’s focus on marketing to those businesses for satellite offices in this area.
- We need incentives for infill development and re-use of existing structures.

Meaningful public involvement ensures that the communities most affected by the CEDS have the opportunity to provide input at critical junctures throughout the plan development, refinement, and implementation. Community participation is critical to making the CEDS a successful document. In addition to input from the general public, the SCTPA development process afforded the opportunity for local agencies, organizations, government officials and others affected to participate in identifying needs and determining the best future improvements for the region. The selection process that produced the list of recommended projects and improvements was developed to balance the variety of community concerns in a clear and productive manner.

Projects, Programs, & Activities

Adams County / Borough of Gettysburg

1. **Tyrone Township Municipal Projects:** Tyrone Township is most in need of grants to promote economic growth and business retention here in the following three (3) categories:
 - a. DCED PA Small Water and Sewer grant to expand our fledgling public wastewater collection system so that we may attract businesses to and near the Village of Heidlersburg. If our existing collection system is expanded from the Village of Heidlersburg east along Route 234, additional “pads” for development can be established that will attract new small businesses, i.e., retail, professional services, finance and/or insurance, grocery store and bring several needed jobs to our municipality. The newly-upgraded treatment plant has unused capacity.
 - b. Something similar to a DCED Flood Mitigation Program grant that will enable our municipality to contribute 15% towards the total cost of establishing and improving existing storm water management systems along Township roadways. Flooded Township roadways hamper commerce in Tyrone Township and dissuade business owners from expanding or locating here.
 - c. Funding for the construction of a multipurpose structure that will serve as a salt and antiskid material depot, salt brine production plant, garage for housing a salt brine direct application system and related equipment and a recyclable materials center. One key element to attract new businesses to our municipality is the ability to consistently provide safe and passable Township roadways for businesses’ employees, trucking and delivery firms serving these businesses and patrons/patients of the businesses to assure business owners that Tyrone Township is a good area in which to locate their ventures. Our municipality has the necessary skills and labor but only some of the needed equipment and infrastructure to properly service the roads, particularly during inclement weather.
2. **Municipal Projects:** Tyrone Township is desperately in need of:
 - a. A multipurpose building (~\$180,000) that will permit the Township to safely stock road salt and antiskid material
 - b. The multipurpose building would house a salt brine production plant (~\$45,000) and a salt brine direct application system (~\$30,000) to permit the municipality to pre-treat roadways in advance of inclement weather, thus assuring that commerce here will never be hampered by inclement weather and severe storms. A sufficient water source (well) would be needed (~15,000). Tyrone Township could reach out to business owners highlighting that their employees, trucking and delivery endeavors and the businesses’ patrons, patients, etc. will

be able to safely traverse to and from their facility situated in Tyrone Township. This will permit the Township, with Adams County Economic Development Corporation's guidance and assistance, to promote the Township's highway and industrial zone just east of the Village of Heidlersburg (please see the attached) as an ideal area, e.g., the intersection of U.S. Route 15 and State Route 234, to establish their business, i.e., bank and/or insurance branch office, medical clinic, restaurant, grocery store, etc.

3. **Municipal Projects:** ACEDC assistance to Tyrone Township in securing one or more grants, for the opportunity to provide a two-fold yield from every grant.
 - a. purchasing a salt brine direct application system and a salt brine production plant from an Adams County-based business (we have such a company here in Adams County).
 - b. Hiring of multiple Adams County-based contractors to construct a multipurpose building (there are several Adams County-based firms that provide all the necessary construction services and materials)
 - c. Drilling a water well (there are a few Adams County-based well drillers).
4. **Municipal Projects:** Additional projects identified by Adams County Economic Alliance
 - a. Gettysburg Inner Loop – Gettysburg, PA; Construction of a Bicycle Trail allowing for greater pedestrian activity throughout Gettysburg Borough.
 - b. New Oxford Municipal Authority Wastewater Infrastructure Improvements
 - c. Construction of a centralized bio-solids facility.
 - d. Baltimore Street Revitalization Project – Streetscape and beautification improvements along major historical corridor in Gettysburg linking Stienwehr Avenue to Old Town
 - e. New York Square Revitalization Project
 - f. Barlow/Greenmount Wastewater Infrastructure Improvements - Construction and expansion of existing wastewater infrastructure to allow for further development
 - g. Borough of Gettysburg - Mixed use development on 2.4 acres in the center of town adjacent to the Lincoln Train Station.
5. **Main Street Gettysburg:**
 - a. Economic and community development for the small town of Gettysburg PA is greatly needed and Main Street Gettysburg's mission. This small town has a huge impact not only on Adams County, but the region and state. There are more than 3 million visitors a year from not only the US but around the world. The Baltimore Street Economic Revitalization Project (BSERP) will improve the safety, beauty and attraction of this important corridor for businesses (both existing and new) and residents. Baltimore Street is the most historic street in Gettysburg. Ordinances that protect the historic fabric of the town create limitations to build up or out for larger business buildings. The six-block street connects the northern and southern commercial areas within a town that is 1.5 miles in diameter and landlocked by the national park on three sides. The project will include beautification, safety, business recruitment, arts and culture enhancements, as well as collaborative marketing with the regional counties. The South Mountain Partnership has contributed both financially and in the

planning process because they see the economic value of tying Gettysburg's national historic attraction to the surrounding agri-business opportunities.

- b. This \$11 million Baltimore Street Economic Revitalization Project builds upon the success of the \$7.5 million Steinwehr Avenue Revitalization project that has to date resulted in 29 new businesses and millions of private investment dollars. The Steinwehr accomplishments spurred a ten-year Main Street Gettysburg revitalization plan that will ultimately completely upgrade the Gettysburg town in a way that incorporates a collaborative partnership with the surrounding counties. Gettysburg is the national attraction that, if done properly, can have a wide-spread economic impact. The revitalization planning incorporates not only the core brand of Gettysburg's history, but also blends the natural resources and beauty of our area. The 3 million visitors are growing each year, so we have to ensure that Gettysburg stays attractive to everyone.

Berks County / City of Reading

1. **Post Office Building** – 51 N 5TH Street. Pending acquisition of historic building to be repaired and developed in 2017.
2. **Penn Square Properties** – 401, 431, and 437 Penn Street. City owned properties in the heart of Downtown; development will be key for the revitalization of the City
3. **Penn Street Corridor improvements** - Revitalization of the broader redesign corridor enhanced layout with bicycle lanes. The corridor extends over two-miles between City Park in Reading through the downtown area, across the Penn Street Bridge into West Reading as well as the bicycle line connection with Schuylkill River Trail.
4. **Berks Park 183:** Site selection consultants found that a major weakness that limits Berks County's economic development potential is a lack of shovel-ready sites. In response, the BCIDA built Berks Park 78 and was rewarded with over a thousand jobs as the location for PetSmart and Dollar General's new distribution facilities.

The BCIDA is attempting to repeat that success with the development of its next industrial park on 155 acres located adjacent to the Reading Regional Airport. Obstacles to the redevelopment of this blighted, brownfield site have been: the need to relocate a deteriorating mobile home park; the relocation of a police shooting range; and the demolition of former barracks buildings.

The site has had several conceptual plans including one that proposed the site as a food industry research center. The most recent concept is based on a market study by Gruen, Gruen and Associates, Chicago, Illinois. It envisions the property being developed primarily as flex space with building sizes from 30,000 to 220,000 SF. The estimated build-out is expected to be over 750,000 SF.

The BCIDA has hired a team of real estate, engineering and construction management consultants to complete a series of pre-development activities. In addition to the market study, there are environmental and traffic studies that are being completed. The Township has approved a conditional use ordinance that will allow the property to be developed to its full potential. Core borings and engineering studies have been completed for Aviation Road. Applications for Redevelopment Assistance Capital Program funds have been made to the PA Office of the Budget. Approvals of a Business in Our Sites Loan and a Multi-modal fund grant are before the Commonwealth Financing Authority. The BCIDA has paid Met-Ed for an initial load study that estimates it will cost about \$1.2 M to bring 3 MW of power to the site. It is also working with UGI to extend natural gas. The property is served by water and sewer with 50,000 gpd reserved in the sewage treatment plant that is on site.

At the conclusion of pre-development activities, the BCIDA will proceed with permitting and more detailed estimates of infrastructure costs. In addition to State help, assistance such as EDA public works grants will be needed to achieve the goal of a break even project whose return to the community will be jobs and tax base.

The development of the property has been highlighted as a priority in the Ride to Prosperity report and is important to adding to the supply of shovel-ready sites in Berks County. The overall industrial park project has the potential to create 600 much needed jobs. Other estimated impacts to the area include:

- \$33.5M in projected assessed valuation from land and buildings.
- \$1.3M per year in real estate taxes for the Township, County and School District.
- 220 indirect jobs created by support/supplier industries attracted by the project.
- 750 non-permanent direct (construction) jobs created by the project.
- Private capital investment for building construction, machinery and equipment of approximately \$85M.

Cumberland County / Borough of Carlisle

1. **Revitalization Projects:** Shippensburg Borough, New Cumberland Borough, Mount Holly Springs Borough and Newville Borough have been actively engaged in revitalization efforts. Each community has formed committees to develop revitalization strategies and tasks. Funding opportunities will be critical for them to move forward with economic development planning and larger revitalization projects.
2. **Waterfront Project: (Priority)** The West Fairview Waterfront in East Pennsboro Township is an opportunity for Cumberland County to develop a major recreation and community asset in Cumberland County. A combination of partnerships and funding will be used to develop the waterfront, revitalizing West Fairview and encouraging future utilization of the Cumberland County Susquehanna River waterfront for community purposes across municipal boundaries.

3. **Redevelopment Project:** The former Domestic Castings property at 275 N Queen Street in Shippensburg Township, Cumberland County has been vacated since 2015. The property has been a foundry since the early 1900s and requires extensive remediation. Through the use of economic development entities and partnerships, the property is slated for clean-up and redevelopment. The project will be a catalyst for redevelopment in the Shippensburg area.
4. **Airport Project:** The Carlisle Airport is a privately owned general aviation airport in South Middleton Township. The airport is seeking public ownership and has been working to develop future expansion and infrastructure plans. Currently, the airport is at full capacity and has opportunity for development of a business park and expansion of the runway. Public ownership remains an important part of the process and the ability to access funding following public acquisition.
5. **Tourism Project: (Priority)** In 2016, a Destination Sales Study was completed for the Cumberland Valley Visitors Bureau. The study informed a strategy to increase tourism related infrastructure and opportunities. In 2017, a Sports Market Feasibility Study was conducted to determine the demand and potential for increasing tourism related to the youth sports industry. The study concluded that there is an opportunity to develop a facility that meets current unmet demands of regional youth sports organizations; as well as, attract additional sports related visitors to the Cumberland Valley.
6. **Carlisle Borough** – implementation of the Carlisle Urban Redevelopment Plan, which includes three brownfields: Carlisle Springs Road, College Street, Hamilton Street. Improvements include commercial development and transportation and stormwater management infrastructure improvements.

Dauphin County / City of Harrisburg

1. **Hershey Center for Applied Research:** The project is designed to attract life sciences companies and new business starts on a tract of land next to the Penn State Milton S. Hershey Medical Center in Derry Township. Building #1, an 80,000-square foot facility is nearly filled. Depending on amount of EDA funding available project could be construction of building #2, or fit out of specific space in building #2.
2. **Transit Revitalization Investment District:** Downtown Harrisburg in the area around the Harrisburg Transportation Center, where all forms of mass transit connect. Plans include housing along Market St., the KOZ bluff site and redevelopment of commercial applications around the Train Station, including old Post Office, Patriot News building, and other parcels.
3. **Technology Incubator/Business Accelerator:** Discussions are being held between local EDC, PSU and others about the need for such a facility that may include consolidation of Harrisburg Region entrepreneurial efforts in one of these locations in Harrisburg.
4. **Swatara Marketplace:** This is a mixed-use facility that is being constructed in the area of Paxton Street, Mushroom Hill Rd, and US 322. The area will include a mix of retail, restaurants, and office buildings.

5. **Meade Heights:** This is a redevelopment area near the Harrisburg International Airport and Penn State Harrisburg Campus. Recently, the area has seen an upgrade in the traffic management and interchange designs to better handle increased truck traffic to the industrial park behind the Penn State Campus. These improvements have opened up capacity for additional development along Meade Ave and in the adjacent Thrift Shopper Shopping complex.
6. **Jednota Flats:** One of the largest development opportunities is in the Jednota Flats section of Middletown. Though there are no specific plans for this site, there are approximately 500 acres of open land available for development between the airport connector highway and I-76.
7. **South 17th Street Corridor** — This is an industrial redevelopment corridor surrounding the Hamilton Health Center that was built a few years ago. This section of 17th Street from I-83 to Market Street and from 16th to 18th Streets has a mixture of active industrial uses along with abandoned industrial buildings. There has been some interest in redevelopment of these properties for commercial uses and most recently a new medical facility opened near the south end of the corridor. There is also a manufacturing plant on that same block that is planning an expansion in the next 3 years.
8. **Cameron Street Corridor** – This corridor in the City of Harrisburg along Cameron Street from Maclay Street to Paxton Street is the former industrial corridor in the City of Harrisburg. The area recently has seen the completion of a new mixed use commercial office tower and has interest from developers in working with other properties in the area. Other potential projects include environmental remediation of a former state warehouse and a proposed project to help make space for a manufacturing expansion in the corridor. A recent study outlines a plan for the redevelopment of the Bridges District from State Street to Mulberry Street and calls for more multi-modal transit development options to coincide with the Harrisburg Amtrak station.

Franklin County / Borough of Chambersburg

Franklin and Chambersburg projects to be determined

Lancaster County / City of Lancaster

1. **Conestoga Plaza, City of Lancaster: (Priority)** Mixed use development site primarily located at the intersection of Chesapeake Street and South Duke Street in the SE quadrant of Lancaster City. Led by SACA Development, City of Lancaster and Lancaster City Alliance.
2. **Redevelopment of Lancaster Square East: (Priority)** Inclusive of the Hotel Lancaster, the former Bulova building and City-owned public space in the 100 block of North Queen Street. Led by City of Lancaster.
3. Various sites in/around the Lancaster Amtrak Train Station bounded by McGovern and Keller Avenue, Manheim and Lititz Pike (inclusive of property in both Lancaster City and Manheim Township). The Economic Development Company of Lancaster would be the lead for this project.
4. Northwest Gateway/Norfolk-Southern redevelopment/land located between Harrisburg Avenue, Prince and Liberty Streets in the City of Lancaster. City of Lancaster, F&M College and Lancaster General Health as the lead.

5. Former Lancaster Stockyards site located on the 1300 block of Marshall Avenue in Lancaster City. Led by City of Lancaster.
6. **Municipal Project: (Priority)** Former McGinness Airport site at 1020 Manor Street in Columbia Borough. Columbia Borough would be the lead for this project.
7. **Municipal Project:** Redevelopment of multiple identified tracts in Marietta, including several sites in the downtown district and along the rezoned riverfront district, in Marietta Borough. Led by the Lancaster County Redevelopment Authority and Marietta Borough.
8. **Municipal Project:** Former Hotel Locust/Hotel Columbia Properties in downtown Columbia. Led by the Columbia Economic Development Corporation and Columbia Borough.
9. **Municipal Project:** Columbia Market House restoration and redevelopment. Led by Columbia Borough.
10. **Municipal Project:** Realignment of railroad tracks and construction of a parking garage to facilitate commercial expansion in downtown Lititz. Led by the Lancaster County Housing & Redevelopment Authority and Lititz Borough.
11. **Municipal/Non-Profit Partnership:** "Projects and programming to implement the City of Lancaster 2015 *Building on Strength Economic Development Strategic Plan* including infrastructure and facility development."
12. **Municipal/Non-Profit/For-Profit Partnership:** Southern Market, 100 South Queen Street, Lancaster redevelopment as a multi-purpose facility to support entrepreneurs including potential uses as a commercial kitchen production space, event venue, co-working space and makerspace.
13. **Municipal/Non-Profit/For-Profit Partnership: (Priority)** Projects and programming to implement the 2015 Columbia Downtown Master Plan including public infrastructure planning and improvements and catalytic redevelopment projects. Led by Columbia Borough in partnership with Columbia Economic Development Corporation.
14. Redevelopment opportunities at the intersection of East Walnut Street and North Plum Street in the City of Lancaster, including a mixed-use development titled Tobacco Road. Led by City of Lancaster and Lancaster City Alliance.

Lebanon County / City of Lebanon

Lebanon County projects to be determined

City of Lebanon:

1. **North Side of the City:** The North side of the City is in need of some help with economic development initiatives. The businesses on this side of the City receive limited assistance. Many of the buildings need façade improvements. Much like the City focuses on the downtown the Hispanic community would like to see attention given to their business district. Funding assistance would be helpful for façade improvements, marketing efforts and employee/employer initiatives.
2. **Partridge Street Project:** This is a vacant site that is being prepared for a grocery store that will benefit the community with low cost food products. Help with infrastructure improvement costs could really help the developer.

- 3. Lebanon Rails Business Park:** This industrial park has been stalled by a slow economy. Assistance with infrastructure improvements can help to make the sites more attractive to perspective buyers.

York County / City of York

- 1. Municipal Project:** Road improvements throughout the Borough of Felton. Project would be led by Felton Borough management.
- 2. Municipal Project:** Road improvements and sewer improvements throughout the Borough of Dover. The project would be led by Dover Borough officials.
- 3. Municipal Projects:** Road improvements and the installation of sidewalks and curbing throughout the borough. This initiative will be led by North York Borough
- 4. Municipal Park Improvements:** Improvements to both Glen Rock Borough parks to bring into compliance with ADA law and improve park facilities. Glen Rock Borough has recognized the need in providing proper access to our park facilities to those with disabilities and has recently completed several enhancements to provide access to several areas of the Community Park. This effort needs to continue in other areas of the Community Park as well as the Veterans Memorial Park. There is also a need to add facilities at the Community Park such as a walking path around the park and install an event pavilion on the north side.
- 5. Glen Rock Downtown Revitalization:** We would like to continue to improve their downtown area to make it more attractive to business and residents. They would like to see improved lighting, upgraded storefronts, and other projects that add to the appeal of our small town. Glen Rock Borough management would be the lead on the project.
- 6. Historic Renovations:** Renovations and restorations to the historic Yorktowne Hotel and the Zion Church on Duke Street, both in downtown York City. This project would direct focus on an anchor tenant of downtown York City. Additionally, this project will spur additional investment in the City through meeting space at the hotel, a satellite restaurant and would spur other local support businesses.
- 7. Unit Block of West Market Street Targeted Buildings Renovation Project.** The City of York Economic Development Department in concert with Downtown Inc, the York Redevelopment Authority, the York County Community Foundation and several private real estate developers have targeted the unit block of West Market Street for a major commercial and residential renovation initiative. While this block should be the prime economic generator for the center city, it has languished from disinvestment over the past two decades. Substantial vacancies of the upper floors coupled with underutilization of the first-floor commercial spaces, lack of adequate building maintenance and infrastructure improvements has created block of blight and opportunity. Nine buildings exhibiting these characteristics have been targeted for concentrated City code enforcement, acquisition by qualified developers and a coordinated renovation program. Various funding sources and financing mechanisms are being evaluated in order to create economically viable, open market residential and commercial projects. These investment tools are anticipated to be private equity, tax credits, community equity funds,

state economic development stimulus funds and commercial loans. Total investment is expected to exceed \$15 million. The simultaneous renovation of all nine buildings is central to creating the critical mass and synergy for this major economic initiative. This project is underway with three primary buildings targeted for renovation. New Market Tax Credits, RACP and private sources for funding.

- 8. Northwest Triangle Infrastructure:** The Northwest Triangle, nestled in the northwest corner of York's Central Business District, consists of the recently remediated Brownfield northwest of Continental Square in downtown York, bounded generally to the north and the west by the Codorus Creek and to the east by North George Street, the Northwest Triangle will become a thriving live-work-play downtown neighborhood, providing a high-quality sense of place in our City. One of the City's larger economic development project in recent history, the Northwest Triangle is a mixed-use project that will feature market-rate residential, commercial office space, retail, and recreational space, including the pending extension of the popular York County Heritage Rail Trail. The Triangle's development will enhance the renaissance currently underway in downtown York by expanding on the retail base and bringing more residents and consumers to downtown; providing additional spending power, job creation and recreational enhancements. Adaptive reuse of the Keystone Colorworks building is currently underway in the development of new market rate residential apartments. It is hoped that the project will spur interest in the development of the remaining acreage.
- 9. Downtown Hanover Property Redevelopment:** redevelopment of numerous downtown Hanover strategic properties including, the Hanover Theater, the Montgomery Ward building, the McAllister Building, and Commercial Square property. Also included in the list of strategic properties is the Hanover Heritage Conference Center. A feasibility study and architectural study were completed for this building. Structural review, code review, and schematic design were presented and probable costs are in hand. Redevelopment of this property would support the concept, tested through the feasibility study, of a multi-use facility consisting of a conference center, a heritage center, and retail business anchor would be viable in downtown Hanover.
- 10. Downtown Hanover Streetscape:** Downtown Hanover Design and Beautification Plan will provide guidance for the physical improvements and infrastructure improvements in Center Square that will include, but are not limited to, new street furniture, pedestrian-scale street lights and signals, landscaping, sidewalks and crossings with decorative hardscapes, wayfinding and street signage enhancements, public art, gateways, aesthetics and cleanliness, traffic flow and stormwater maintenance, MS4 recommendations.
- 11. Codorus Corridor Projects:** a plan to develop an area roughly four miles long and one-half mile wide consisting of five municipalities, three school districts, and the heart of downtown York. The project is to complete a comprehensive land use study and redevelopment strategy. Once the corridor is defined, a detailed parcel inventory will be assembled. The parcel inventory will include basis data about all the parcels within the corridor and will highlight certain key parcels for more in-depth analysis. These key parcels may be industrial or commercial properties, known or suspected Brownfields, public amenities, identified project sites, and the like. Infrastructure elements (water,

sewer, electric, gas, telephone, cable, broadband access, wireless, roads, rail, etc.) will be identified and evaluated with respect to their capacity and deficiencies within the corridor.

- 12. Municipal Projects:** The York County Economic Alliance through their municipal outreach program can assist York County municipalities with data and planning for future growth and redevelopment of their downtowns. Using the recently released 2014 Economic Development Plan for the County of York as a guideline, the YCEA will assist with data gathering and analysis to determine the proper use or reuse of parcels. This data can include basic demographics, trade analyses, retail leakage, travel times and daytime worker traffic. Utilizing such data appropriately will assist with business attraction and infrastructure development that will look to the future.
- 13. Brownfield Redevelopment:** Brownfield sites across the County have been targeted for redevelopment. Various municipalities have specific projects in the works or are in need of assistance to bring their projects to fruition.
- 15. Land Bank Authority & Blighted Property Review Committee:** The establishment and implementation of both entities. This would include the County adoption of multiple ordinances and creation of the Authority, the establishment of internal processes, and intake procedures, and demolition plans. The Redevelopment Authority of the County of York would be the lead on the project working in conjunction with the York County Economic Alliance, and the York County Planning Commission.
- 16. Municipal Project:** 1) Transportation network improvements. Construct an at-grade railroad crossing at Davies Drive between East Market St (SR462) and Concord Rd. Develop a 20-year Transportation Master Plan. Reconstruct/improve intersections at Memory Lane/Industrial Highway, Northern Way/Market St, Edgewood/Kingston, Mill St/Eastern Blvd, Eastern Blvd/Haines Rd. Create pedestrian corridors along Mount Zion (SR24), Industrial Highway, Memory Lane. 2) Water management infrastructure. Kreutz Creek tributary streambank restoration Eastern Blvd/Locust Run to Stonewood Rd. Both initiatives would be led by Springettsbury Township

Regional Projects

- 1. Conservation Land Initiatives:** There are multiple Conservation Land Initiatives in the eight (8) County region. These are funded by DCNR and used to promote, protect and create public awareness/conversations about critically identified natural and historical heritage areas in the state. There are many potential options for regional collaboration between these groups as well as joint projects.
- 2. Revolving Loan Fund** to serve the eight-county area identified in the South Central Comprehensive Economic Development Strategy. The Strategy advocates for the reduction of poverty in small cities and towns by creating opportunities for building wealth in lower income communities; by supporting entrepreneurship and the creation of jobs to bolster the economy; by increasing the availability of quality, affordable housing; and by supporting nonprofit organizations that provide life enhancing community services for local residents. The RLF will also finance development of projects that include the rehabilitation of vacant and blighted commercial real estate, especially for the purpose of owner occupancy. Commercial Real Estate loans typically range from \$50K to \$1MM. Most clients cannot obtain loans from banks due to the small-scale size of the

property and limited equity into the project. This initiative will be led by the Lancaster County Community First Fund

Plan of Action

CEDS administration and implementation involves a variety of supporting activities. The most important aspect of which is the sincere commitment of each County and their local officials to achieve the goals and objectives set forth in the CEDS in a mutually supportive manner. It is imperative that both the public and private sectors fully realize the implications of a sincere commitment to the planning process.

A Regional Action Plan rests on the premise that investments, whether from private, local, state, or federal sources, need to be linked with outcomes of regional impact, such as increasing regional economic productivity and competitiveness, retaining and attracting more people, residents, employees, and visitors – and enhancing the quality of life, because the cumulative result will improve the standard of living and prosperity of the region. Municipal and private sector partnerships will play a growing role in the implementation of the CEDS projects.

Promotion of Economic Development and Opportunities

South Central Team PA is promoting participation and local dialogue, connecting people and their resources for better employment and a higher quality of life.

Fostering Affective Transportation Access

Having a strong transportation network is critical to attracting jobs, promoting future investment, and protecting the safety of the regions residents. Throughout Pennsylvania, there is increasing recognition of the linkages between land use and transportation, namely how land use impacts the efficiency and effectiveness of the transportation system. Proactive planning in anticipation of growth is critical to mitigate the impacts of the population increases expected for the region.

It is important to coordinate transportation maintenance and improvements with each County's Comprehensive Plan goals, particularly land use, utility infrastructure, and natural and cultural resource protection, in order to sustain the economic vitality and quality of life in the CEDS region.

Enhancement and Protection of the Environment

Adams County, Cumberland County, Dauphin County, Franklin County, Lancaster County, Lebanon County, and York County all have a local Conservation District office responsible for advocating natural resource conservation. That local leadership continues to work with landowners and our state and federal partners to protect and serve the regions natural resources. They provide conservation education, technical services, and financial assistance, to enable the citizen to be good stewards of the regions natural resources. They accomplish this mission through educational programs and the administration of laws and regulations for the Pennsylvania Department of Environmental Protection, Pennsylvania Department of Agriculture and the State Conservation Commission.

Maximizing Effective Use and Development of Workforce

The South Central Workforce Investment Board (SCWIB) local plan is based on a thorough understanding of the economic strengths and workforce needs and skills of the Local Workforce Investment Act (LWIA), in alignment with the governor's vision, strategies, and goals and in the best interests of local jobseekers and employers.

The SCWIB's vision guides investments in workforce preparation, skill development, education and training, and other initiatives through the various methodologies identified in this local plan. Targeted investments in these approaches to overall workforce development align with the SCWIB's goal to act as the main intermediary and promote partnerships among businesses, local non-profit agencies, educational institutions, and community-based organizations. By working together, stakeholders enhance the skills needed for workforce inclusion, employability, and educational and training levels of the current and future workforce.

Investments also take into consideration regional dynamics starting with the fact that this WIB serves the south central Pennsylvania Region. This region has the largest civilian labor force of all the workforce investment areas in the Commonwealth, with over 91,000 workers employed in the manufacturing sector alone. The region also operates the second largest multi-county Employment, Advancement and Retention Network (EARN) Program in the state. The regional dynamics also include over 200,000 youth that could qualify for youth program services and over 123,000 adults are not proficient in reading and math. In order to serve these demographics, the SCWIB must be agile and inclusive of regional partners, which include but are not limited to, economic development agencies, educational providers, federal, state and local governmental agencies, community based organizations and the philanthropic community.

The SCWIB's vision aligns with strategies from the Governor's JOBSFirst PA initiative because local investments are driven by the overall responsiveness to employer and worker needs as identified in the State Integrated Workforce Plan. At a minimum, the SCWIB aligns with the Governor's Plan in the following four areas: Skill Gaps, Career Pathway Systems, Job Matching, and Education and Training.

Promotion of the use of Technology in Economic Development

Technological innovations represent a way for counties and regions to foster economic development and improve levels of education and training.

Wireless technology and infrastructure development is also vital for entrepreneurship and small business development. In many areas, it is a major challenge to gain access to capital and market information. Some rural areas specifically do not have functioning infrastructure or much in the way of financial resources, a simple mobile phone has been proved to assist people to communicate with one another, access market information, sell products across geographic areas, reach new consumers, enter mobile payment systems, reduce fraud and crime, and empower the disadvantaged.

Balancing Resources

Balancing the regional resources will sustain the local economy, enhance the character of the region, and maintain or improve the quality of the environment. As a pattern of denser development occurs in the Urban Growth Areas not only must the treasured places be preserved within the changing form but new ones with a distinctive sense of place should be created. A challenge for planners and economic developers is to identify how to effectively manage growth in order to maintain a sustainable course for economic development.

Definition of Sustainable Economic Development

Diversifies the economic base
Enhances the region's competitive position and image, nationally, and even globally
Balances jobs, housing, and services, providing current commuters with opportunities to work near home in the future, and providing residents with retail goods and services
Builds from and preserves quality of life assets such as culture and history
Attracts high-quality, high-paying jobs, particularly in emerging industries
Expands the base of industries working in renewable energy development
Capitalizes on local agricultural industries with "buy local" initiatives
Supports public transit initiatives
Focuses non-rural development away from prime farmlands that could be used for agriculture
Builds from the region's dedicated workforce with its strong work ethic
Occurs in part as a result of clear, coordinated, effective, and efficient economic development and workforce development programs

Obtaining and Utilizing Funding

There are programs available that offer funding assistance for municipal and multi-municipal planning. One of these is the States Land Use Planning and Technical Assistance Program (LUPTAP). Funds are available yearly with a required local match. Additional resources available through the Department of Community and Economic Development (DCED) include, but are not limited to: Brownfield programs, Energy programs, the Local Share Account Program, Tax Credits, PA First Grant Program, Next Generation Farmer Loan Program, Ben Franklin Technology Program, and Keystone Communities.

The Keystone Communities Program (KCP) Assists Pennsylvania's communities in achieving revitalization. The program designates and funds communities that are implementing Main Street, Elm Street, Enterprise Zone efforts or other community development efforts by supporting physical improvements to designated and/or other communities that are undertaking revitalization activities within the community.

Incentive programs include, but are not limited to: Foreign Trade Zones (FTZ), Keystone Innovation Zones (KIZ), Keystone Opportunity Zones (KOZ), Neighborhood Improvement Zones (NNIZ), Regional Export Network (REN), City Revitalization and Improvement Zones (CRIZ), and Procurement Technical Assistance Centers (PTACs)

Methodology

The mission statement of the DCED is to foster opportunities for businesses to grow and for communities to succeed and thrive in a global economy and to improve the quality of life for Pennsylvania citizens while assuring transparency and accountability in the expenditure of public funds. This CEDS tailors our goals and objectives to work in conjunction with the state objectives. Pennsylvania's Keystone Principles for growth, investment, and resource conservation, adopted by the Pennsylvania Economic Development Cabinet in 2005 include:

- Redevelop first
- Provide efficient infrastructure
- Concentrate development
- Increase job opportunities
- Foster sustainable businesses
- Restore and enhance the environment
- Enhance recreational and heritage resources
- Expand housing opportunities
- Plan regionally, implement locally
- Be fair

Performance Measures

Performance measures will be developed on an individual project basis, program specific, and aggregate. Aggregate results will represent the entire region's economic performance, while individual performance measures will be agreed upon by the lead partner(s) involved in the project or program.

The following are examples of criteria that will be evaluated on an annual basis. These include, but are not limited to: jobs created after implementation, number and types of investments undertaken in the region, number of jobs retained in the region, amount of private sector investment, changes in the economic environment of the region, and consistency with the enhancement of the targeted industry groups.

At the end of each calendar year, an updated or revised CEDS will be submitted to the EDA. The CEDS will continue to evolve with the changing circumstances of the region and may be amended due to any unforeseen changes in the economic conditions or opportunities. The annual report will contain a clear evaluation of the performance measures and the effectiveness of the CEDS goals and objectives.

Regional Map