

# Joint Strategic Comprehensive Plan 2017 Update

# **Adoption**

Elizabeth Township: May 14, 2018 Lititz Borough: April 24, 2018 Warwick Township: May 16, 2018

#### **ACKNOWLEDGMENTS**

Elizabeth Township, Lititz Borough, and Warwick Township wish to acknowledge the many individuals who participated in the preparation of the third update to the Warwick Region Joint Strategic Comprehensive Plan, entitled Forge the Future 2022. While the below-listed Work Group facilitated this planning initiative, which spanned a nine-month period in 2017, this Update is truly the outcome of public participation, both in-person and on-line. As is documented within this Update, substantial participation was garnered through the six (6) public meetings that were conducted as well as by means of social media.

The elected officials of the region's municipalities are humbled and encouraged by both the public's input and the public's expectation that <u>Forge the Future 2022</u> will be met with the same level of success as the original Plan and its subsequent Updates.

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#### **PART I: INTRODUCTION**

<u>Forge the Future 2022</u> represents the third update to the 1999 Warwick Region Joint Strategic Comprehensive Plan for Lititz Borough and Warwick Township; it is the second update which includes Elizabeth Township.

# A. Purpose and Intent

As is the case with each of the Region's Comprehensive Plan Updates, <u>Forge the Future 2022</u> is intended to supplement each municipality's underlying Strategic/Comprehensive Plan, focusing on the region's Goals and Strategies over the next five to ten year's time. To wit:

- As noted above, Lititz Borough's and Warwick Township's prevailing plan is the Joint Strategic Comprehensive Plan which was adopted in 1999 and subsequently updated in 2005.
- Elizabeth Township's prevailing plan is its Comprehensive Plan which was adopted in 2003.

In 2012, all three municipalities (representing each of the municipalities of the Warwick School District) participated in and adopted <u>IMPACT 2017</u>, which focused on regional Goals and Strategies through 2017. Having achieved a high-degree of accomplishments relative to the region's 2017 Goals and Strategies, <u>Forge the Future 2022</u> was set in motion in Spring 2017 in order to update <u>IMPACT 2017</u>.

# **B.** Overview of Planning Process

<u>IMPACT 2017</u> was a "stakeholder-driven" planning process, in which seven meetings were conducted, attended by a pool of some 52 representatives of various stakeholder organizations. Community input was gained through these stakeholders and through social media and newspaper coverage.

During this update, the planning of Forge the Future 2022 was driven by six public meetings, specifically designed and conducted to gain public input from the community. This time, stakeholders were invited, more often than not, to provide insight to community members. Not only did this process enlighten the community, it engaged community members who, it is hoped, are now encouraged to become future stewards of and leaders responsible for our communities' future. So as to keep the community engaged in the planning process, social media and newspaper coverage was again employed (the results of social media engagement are included in Part V: Appendix B).

Our planning of these public meetings included the intentional selection of meeting venues, scattered throughout the region, which celebrated the successes of prior community planning efforts and gave participants/attendees the chance to experience these places, spaces, and offerings.

# C. Public Meeting/Engagement Process

# Meeting #1: Kickoff (Appalachian Brewing Company, Lititz)

On March 27, 2017, a public Kickoff Meeting was convened, the details of which can be found in Part V: Appendix A.1. In addition to identifying areas of the region that should be targeted for development and/or redevelopment, the 80-some attendees gave the following answers to two questions:

- What are the most important outcomes of the Comp Plan in the last 5 to 10 years?
  - 1. Rock Lititz
  - 2. Downtown Lititz
  - 3. Warwick-to-Ephrata Rail Trail
  - 4. New Housing
  - 5. Protection and Preservation
  - 6. Community Development and Cooperation
- What are the most important issues facing the region in the next 5 to 10 years?
  - 1. Housing
  - 2. Transportation and Infrastructure
  - 3. Planning and Growth
  - 4. Downtowns and Business Community
  - 5. Protection and Preservation

# Meeting #2: Economic Development (Pod 2 on the Rock Lititz Campus, Warwick Township)

On April 20, 2017, 45 to 50 attendees were provided with community demographic and economic development data, before participating in peer discussions. Documented in Part V: Appendix A.2, key topics gleaned from this meeting included the following:

- 1. Declining Warwick School District enrollment is a concern
- 2. Lititz is well-known, but faces some head winds (need for broader promotion/branding while the Borough's land area is constrained)
- 3. Housing is a conundrum; the market is tight, affordability is a challenge, and a range of housing is needed
- 4. While average/median household income is high, there is a large disparity of income levels from low/moderate to high-end; also, the rate/level of college debt is a concern
- 5. Transportation is viewed as an impediment
- 6. The region's capacity for increased commercial and industrial growth and growth in general is important

# Meeting #3: Housing (Brick Gables, Warwick Township)

On May 18, 2017, 40 to 45 attendees were provided with additional community demographic and housing data, before participating in peer discussions and visual preference exercises. Documented in Part V: Appendix A.3, key topics gleaned from this meeting included the following:

- 1. It is extremely difficult to find affordable housing in this region; that's a problem for both employers and employees
- 2. This Update must comport with the on-going Update to the Lancaster County Comprehensive Plan (see Part I.E. Contextual Influences below)
- 3. Public input must be heard and leaders emerge
- 4. Again, declining Warwick School District enrollment is a concern
- 5. A range of housing types must be encouraged to meet market demands and address affordability issues
- 6. Unfortunately, the cost of development, itself, is high

#### Meeting #4: Community Services and Quality of Life (Brickerville Fire Company, Elizabeth Twp.)

On June 15, 2017, 30 to 35 attendees were provided with an extensive overview (via PowerPoint slides) of Community Services that directly contribute to the extraordinary Quality of Life enjoyed in our region. (The PowerPoint slides from this meeting can be found in Part V: Appendix A.4.)

The overwhelming messages from this meeting include the following:

- 1. It will become increasingly more difficult to maintain levels of community services as funding and funding sources contract
- 2. Efforts at retention and recruitment of first responders must become more creative and innovative, possibly including housing and/or tax incentives
- 3. Social service agencies are at risk, not only from declining funding/funding sources but also from turnover in long-tenured leadership

#### Meeting #5: Built, Natural, and Historic Resources (Millport Conservancy, Warwick Township)

On July 20, 2017, 30 to 35 attendees were provided with an overview of water and wastewater utility, stormwater and watershed, technology, transportation and official mapping, agriculture and Transferable Development Right, and heritage infrastructure. (The PowerPoint slides from this meeting can be found in Part V: Appendix A.5.)

The overwhelming messages from this meeting include the following:

- Infrastructure planning in our community doesn't happen by accident (it takes leadership, planning, and execution) and is often successful because we've pursued sustainable, green initiatives
- 2. Innovation in our infrastructure planning can and should be supportive of and help manage the cost of future development, while supporting the industry clusters that our region hosts
- 3. Having said this, there may come a time when our infrastructure is at full capacity and cannot sustain further development

#### D. Emerging Themes

As a result of the foregoing public engagement process, these are the themes that we "heard" and that need to motivate our planning and implementation over the next five to ten years:

- Our Region's Guiding Principles and Goals remain virtually the same as they have existed since 1999. However, due to the complexity and inter-relationship of our challenges, it is our Strategies that need to be updated.
- One of our greatest challenges is housing affordability in a highly desirable Region, coupled with the increasing cost of development and redevelopment.
- We value the existing businesses and industry clusters located in our Region. While looking to expand business opportunities, we must work with our existing employers in terms of retention and expansion, infrastructure needs, and employee retention and recruitment.
- The Borough's downtown business district has been a success, but we cannot be complacent towards its fragility. We also need to look ahead to "what if" scenarios, planning ahead for the very "what ifs" that occurred during the conduct of this Update.
- Nor can we be complacent of the fragile nature of our social and civic service agencies (and the volunteers who serve and lead them); these agencies and volunteers are instrumental to our quality of life.
- Our focus on sound infrastructure planning isn't accidental; we must remain "big thinkers," effecting creativity and innovation. And, when creativity and innovation have been exhausted, we may have to recognize that future growth is unsustainable.
- The leadership of our Region (from elected officials to professional staff, appointees to volunteers) will see considerable change between now and the next Update. New leaders will need to emerge, perhaps from the pool of attendees of the Update's Public Meetings.
- These themes do not exist in "silos." We need to work across these themes to have continued success; therein lies the greatest potential for sustainability.

# E. "Big Ideas"

Prior to finalizing the Updated Goals and Strategies, Public Meeting #6 was conducted (on September 21, 2017 at the Warwick Middle School) by which to present the "Big Ideas" that had emerged from the prior six-month planning process. Some 60 people attended, heard a PowerPoint-based report on the Big Ideas, and provided both verbal and written comments. (The PowerPoint Slides and summary of comments can be found in Part V: Appendix A.6.)

The following are highlights of the report to the community and the feedback received:

- 1. The Goals that have long-driven the Joint Strategic Comprehensive Plan, by-and-large, remain the same; the focus of the Update will be on new and on-going Strategies
- 2. A high level of sustainability can be achieved within the Strategies because they are intertwined across the themes of housing, transportation/infrastructure, planning/growth, economic development, and protection/preservation
- 3. The Big Ideas include the following:
  - Housing: promotion of mixed-residential communities, flexibility in zoning, incentives, and understanding the role of housing
  - Transportation/Infrastructure: "Complete Streets," specific transportation improvements, expansion of inter-modal options, being wired for technology needs, and sustainable community services
  - Planning/Growth: engage our employers, analyze and monitor growth versus infrastructure, revitalize neighborhoods and difficult sites, begin considering the future of Brickerville, and begin recruiting the next generation of leaders
  - Economic Development: evaluate our capacity for commercial/industrial, update/implement Downtown Lititz Master Plan, parking solutions for downtown Lititz, supporting the efforts of the Lititz Regional Community Development Corporation, and continue to engage the agricultural community
  - Protection/Preservation: continue to lead in green infrastructure planning, pioneer regional "banking" for stormwater management, consider rental inspections throughout the region, create a regional extreme-weather resiliency plan, and continue to balance growth/development with protection/preservation
- 4. Many good comments were raised both verbally and in writing; following the Meeting, many of these comments were directly addressed in the Updated Goals and Strategies

#### F. Contextual Influences

It is important to note the following influences that have had and/or will continue to have an impact on the Updated Goals and Strategies (outlined in Part II) and the implementation of same over the foreseeable future.

# <u>Unintended Consequences and Perceptions</u>

<u>IMPACT 2017</u> recommended that the region's municipalities "plan for the unintended consequences of an aging population." Two "unintended consequences" were specifically referenced: 1) possible decline in income tax revenues if younger wage earners/residents are not retained/recruited to the region and 2) effects on the region's housing stock when the "baby boomer bubble" recedes and the need for housing for the elderly begins to decline (in other words, who will reside in senior-housing communities if demand for that housing declines?).

Perhaps overlooked five years ago are two other unintended consequences. First, because our Region is so desirable, many senior citizens are increasingly aging-in-place in their homes; the consequence of which is that housing supply/availability is further limited. Second, within the last five years, two sizable senior housing projects were built in the Region: Traditions of America (in Warwick Township) and Warwick Woodlands (in Lititz Borough). Unfortunately, a third non-age-restricted community (Lititz Reserve in Warwick Township) is perceived as being an age-restricted community because its floorplans (with first-floor master bedrooms) and price points are attractive to an older socio-economic demographic.

These two recognizable phenomena ("desirability of place" and "perception as reality") will continue to exert influence on planning in this region. At the local, municipal level, this region cannot control the rate of wage earning and wealth accumulation, the marketability and price of real estate, nor the ebb-and-flow of employment opportunities. In the face of these phenomena, we must continue to recognize this truth: This Region is a popular place to live, work, and play; with that popularity comes an increasingly tight housing market that is difficult to penetrate if you are a young family, have college debt, or lack qualifying income/financial resources.

Many of the Updated Strategies that follow address the tightness of our Region's housing market, while endeavoring to foster increased diversity in all facets of planning. Just as we have long-recognized the unintended consequences of an aging population, we must understand and address the unintended consequences of a tight housing market. These consequences include increased cost of housing, limited choices in housing for single-parent and family households, potentially impaired retention and recruitment of employees (of our Region's industry clusters) and volunteers (of our service organizations and first-responders).

#### Lancaster County Comprehensive Plan Update

Begun several years ago, the Update to the Lancaster County Comprehensive Plan is targeted for completion in 2018. Unfortunately, the County's Update will not be completed in time to directly influence and/or coincide with the adoption of the <u>Forge the Future 2022</u> Update.

Consequently, the strategies within <u>Forge the Future 2022</u> and their implementation will need to consider planning guidance imparted by the County's Update, once it is adopted. It is too early to speculate on the range of guidance that the County's Update might provide; the municipalities

of the Warwick Region are encouraged to follow the progress of the County's Update from draft (anticipated in early 2018) to final documentation (by mid- to late-2018).

# Warwick School District Feasibility Study

The municipalities of the Warwick Region should also continue to monitor and participate in the Feasibility Study being undertaken by the Warwick School District.

As is documented in this Update, the District has witnessed declining enrollment year-over-year for the last ten years. As noted previously, specific Strategies are included in this Update directly relating to increasing the range of housing that would be affordable across the household-income spectrum (from low/moderate income to high income). In this way, it is anticipated that our community would respond with housing development that is suitable for a range of household types, sizes, and incomes and market conditions including style, cost, and tenure (owner-occupied through rental).

It is anticipated that the District's Feasibility Study will consider other reasons for its declining enrollment as it also determines, with the public's input, how to manage its current buildings and educational campuses. It is anticipated that, as they have in the past, the municipalities and the District will continue to work together to address these complex issues.

#### Our Region is Dynamic

Within the nine short months of this Update's planning process, few things have remained static. The management leadership of Venture Lititz has changed. The underutilized Wilbur Chocolate Building was purchased and plans for its re/development emerged. The crossroads of Route 501 and Route 322 came under commercial development pressure by a national farm-supply retailer. Lititz Borough adopted its Lititz Run Revitalization District at about the same time that BB&T Bank announced the closure of its business/administration functions in downtown Lititz, along with resultant downsizing of staff.

Several Strategies, specifically related to these and other on-going changes, have been crafted into this Update, perhaps none more important than considering "what if" scenarios for when "the next shoe drops."

It is noted that each of the municipalities of the Warwick Region has now employed talented planning staff to inventory, analyze, and recommend courses of action to remain abreast of (if not well-ahead of) an ever-changing region. Just as little else happens by accident in our Region, our success in addressing our communities' dynamic nature will not be by accident either; it will take vision and decisive action.

# **G. Challenges Ahead**

Undoubtedly, the Warwick Region has achieved considerable success in conducting and implementing its various Joint Strategic Comprehensive Plans. In fact, it's really quite rare that several municipalities (let alone one!) would adopt a Comprehensive Plan and routinely update it once, twice, or three times within an eighteen year period.

And yet, here is <u>Forge the Future 2022</u>, the third Update to the Warwick Region's Joint Strategic Comprehensive Plan. In part, our success is driven by a community that has grown accustomed to being good planners and equally good implementers.

But let's not be mistaken.

Achieving the ambitious New Strategies and continuing to work at the On-Going Strategies (that begin on the next page) are no longer easy tasks. The "low hanging fruit" has been picked; the issues are now harder and more complex. Thankfully, our vision continues to focus on a viable, vibrant, and vital community.

And, in the next five to ten years, the leadership of our Region will begin to shift, both in terms of municipal staff and elected/appointed officials. Thankfully, each municipality in the Region has brought planning expertise on-staff, to assure a high level of continuity.

But that won't be enough.

Our Region will need to recruit new stewards and leaders to the Committees that have had success in implementing prior goals and strategies. Thankfully, by conducting this Update as a series of Public Meetings, attended by new, dedicated faces, a pool of new stewards and leaders has been identified.

And, as has become ever-more clear, less funding is available from formerly reliable sources. We're going to have to do more with less. Thankfully, we've always been a resourceful community, committed to working together to achieve common goals; we know how to do this!

We'll have to be creative...and innovative...and accountable...again.

If you're ready, turn the page.

# PART II: UPDATED GOALS AND STRATEGIES

As we once again update the region's Joint Strategic Comprehensive Plan, it is important to reflect on the expectations and aspirations that have been a hallmark of this Planning Process since its inception in 1999.

#### **Vision Statement**

The Warwick School District Region, made up of Elizabeth Township, Lititz Borough and Warwick Township, seeks to provide a dynamic and viable community, protected and enhanced through collaborative and cooperative efforts, in which all members flourish.

# **Guiding Principles of the Region's Strategic Comprehensive Plan and Updates**

To ensure that the planning process leads to achievable outcomes and measurable results, where possible.

- Turn recommendations into actions and routinely provide evidence of plan follow-through by elected officials, appointed officials, and community planners
- Provide opportunities for the public to commit to the process
- Develop strategies and actions, which are real and doable, not ethereal and philosophical
- Develop a planning process which maintains or improves the quality of life and the community's character
- Focus the planning process on regional cooperation and coordination

#### **2022 Goals and Strategies**

Based on the above-described planning process, the communities have identified the following goals (in bold) and strategies to be undertaken within the next five to ten years.

In reviewing the Goals and Strategies below, please note the following:

- By-and-large, the Goals affirmed and/or re-affirmed during the <u>IMPACT 2017</u> Planning Process (conducted in 2012) remain intact.
- "New Strategies," identified below, are those that have emerged during the planning process to formulate the <u>Forge the Future 2022</u> Update (since the Spring of 2017).
- "On-going Strategies" include all of the Strategies formulated during the creation of the <u>IMPACT 2017</u> Plan which were not subsequently initiated and/or completed. On-Going Strategies that remain include those which have seen some activity, since 2012, but not been completed and those which have not been initiated.

In undertaking the below strategies, the municipalities and stakeholders within the region are encouraged to continue to work cooperatively toward achieving the community's goals and strategies. The Steering Committee for this Strategic Plan Update believes that it is important that the cooperation that already exists within this region, by way of various "Coordinating Committees." should continue.

# A. Housing/Development

Development is inevitable as our region continues to grow and evolve. The goal of this Strategic Plan Update is not to restrict or impede this growth and evolution, but to inspire creative and viable approaches to strengthening and maintaining the region's existing community fabric. An important factor in the residential outlook is the demographic constitution of the region which reflects an aging population. Additionally, strategies will relate to multi-generational living, historic housing stock, and recognition that a continuum of housing, accommodating the needs of all age groups and economic strata, is an asset to the community and its diverse economy. These strategies will strengthen the existing residential and developed fabric of the region.

In reviewing the below Goals and Strategies, consideration should also be given to the community's insight provided with regard to those areas of the Region which should be considered for development and redevelopment. Preferences regarding same were expressed during the March 27, 2017 Kickoff Meeting.

#### 1. Encourage mixed-use development that meets market demands.

#### **New Strategies**

- a. At a minimum, promote mixed-residential communities, ranging from rental to owner-occupied that provides for a range of affordability (low/moderate income to high-end); in the alternative, consider requiring a mix of housing types within the region's residential (and possibly other) zoning districts
- b. Explore the zoning flexibility in Warwick Township, which would allow second floor residential rentals in the Local Commercial Zone
- c. Update the Downtown Lititz Master Plan and include updated information on current businesses located there and the square footage of total and available space (including all floors in multi-story buildings)

- a. Evaluate and update zoning ordinances to promote mixed-use including a mix of retail and dining options, opportunities for employment, and residential/housing for a wide demographic, including people of all ages and stages of life
- b. Evaluate and update zoning ordinances to promote a mix of housing by type, price, and tenure
- c. Create incentives, identified by and appropriate to each municipality, that encourage developers to provide a range of housing types and price
- d. Consider aesthetically pleasing, mixed-use development in Designated Growth Areas by the use of higher-density and low-impact development, so that surrounding resources and rural landscapes will be protected

2. Continue to strive for increased development densities within designated growth areas, matching to/coinciding with available infrastructure.

#### **On-going Strategies**

- a. Complete infrastructure capacity analyses within the region (including but not limited to water, wastewater, transportation, stormwater and energy); imparted in this Strategy is the need to regularly update the municipalities' Act 537 Plans and to track allocated capacities via Chapter 94 Reports
- b. Where supported by infrastructure capacity analyses, encourage higher-density development within the region's Designated Growth Areas that strive for an average density consistent with the County's Growth Management Plan
- c. Encourage accessory housing as a means of enabling increased density within designated growth areas
- 3. Encourage reinvestment/redevelopment and remove barriers in the way, with a strong emphasis placed on properties within the established urban growth areas.

# New Strategies

- a. Encourage infill and redevelopment in order to strive for increased development densities within designated growth areas, and also to mitigate blight
- b. Continue the redevelopment plan of the Local Commercial Zone in Warwick Township
- c. Identify, prioritize, plan-for, and determine funding sources by which to revitalize older, existing neighborhoods
- d. Identify and inventory difficult sites within the municipalities and determine the impediments that stand in the way of beneficial re/development of same
- e. As a means toward encouraging additional investment in the Borough, continue to plan for the development of a downtown parking garage

- a. Create incentives, identified by and appropriate to each municipality, for the adaptive re-use of older homes and historic properties
- b. Recognize reinvestment/redevelopment as a tool for attracting "empty nesters" at both ends of the age spectrum
- c. Inventory vacant and underutilized buildings and properties
- d. Advocate for more-flexible redevelopment building codes, including the "Existing Building" portion of the Uniform Construction Code (UCC)
- e. Identify, then seek to remove the impediments that frustrate efforts at reinvestment and redevelopment (including, but not limited to, education/training, financing, regulatory, and environmental concerns)
- f. Promote reinvestment/redevelopment to for-profit and not-for-profit developers, entrepreneurs and investors
- g. Consider changes to lot coverage and parking regulations (number of spaces required, location and sharing of parking, and the use of public, structured parking) that would incentivize redevelopment and reinvestment

4. Continue to balance new development activities with natural, historic, and cultural resource conservation.

#### New Strategies

- a. Analyze and update the Cluster Development Option ordinance amendment in Warwick Township and adopt revisions to same as an Overlay District within one year; the Cluster Development Option would protect the environmental, natural, and historic features of sites (including woodlands, steep slopes, wetlands, and the like)
- b. Within five years, in concert with the "Lititz Run Revitalization District," implement floodplain improvements and mandated pollution reduction planning along Lititz Run and its tributaries which could set a foundation for additional economic development opportunities paired with green infrastructure and open space

# **On-going Strategies**

- a. Work regionally to protect and prioritize valued natural, historic, cultural, and passive recreation resources within the region for conservation purposes
- b. Undertake, continue, and/or complete natural, historic, and cultural resource inventories
- c. Prioritize those natural, historic, and cultural resources within the region for preservation purposes
- d. Use incentives and requirements as necessary to protect valued resources and community character
- e. Build a comprehensive historic preservation strategy to improve local preservation guidelines and standards that meet State/National mandated requirements and County goals
- 5. Provide safe and affordable housing opportunities for all those that live and work in the region, and any future residents.

- a. Promote housing opportunities that provide for a range of affordability (low/moderate income to high-end)
- b. Encourage residential rentals at appropriate locations to meet market demands
- c. Discuss housing needs with local businesses and employers
- d. Promote employer-assisted housing programs, especially in regard to owner-occupied and first-time homebuyer initiatives
- e. Consider first-time homebuyer and rental-assistance programs for first responders; not only to assist in recruiting new volunteers, but in retaining existing volunteers as well

- a. Encourage infill and redevelopment as two, of many, ways to achieve housing affordability
- b. Consider accessory housing as a means of facilitating affordable housing
- c. Integrate a range of housing types within the residential fabric of the region, to promote a range of tenure (rental to ownership) and a range of affordability
- d. Consider incentivizing affordable housing development activities through zoning, subdivision/land development ordinances and other economic incentives

#### 6. Encourage green building techniques within new and existing developed areas.

# **New Strategies**

a. Consider the option of "tiny houses" as a means of decreasing the footprint of housing while promoting increased housing densities, options, and affordability

#### **On-going Strategies**

- a. Create green-building checklists to help homeowners and business owners understand and incorporate such practices
- b. Consider incentives, identified by and appropriate to each municipality, for the use of green-building and sustainable construction and practices

# 7. Explore the use of regional Transferable Development Rights (TDRs).

#### **On-going Strategies**

- a. Consider a framework in which agricultural, natural, and historic resources within the region are sending areas and existing and/or planned urbanized lands within the region are receiving areas
- b. Explore the option of utilizing TDRs for historic preservation and higher density particularly in Lititz Borough
- c. Elizabeth and Warwick Township should work together to expand the scope of Warwick Township's existing TDR program

# 8. Encourage a high level of property maintenance within the region.

- a. Consider rental inspection programs in Elizabeth Township and Warwick Township, to follow the success of Lititz Borough's rental inspection program; in doing so, consider the following:
  - Formatting the program as a regional initiative
  - Explore staffing needs and approaches
  - Explore funding sources and options
- b. Continue to monitor the effectiveness of Lititz Borough's rental inspection program

- a. Maintain existing structures via property maintenance code enforcement
- b. Maintain rental properties through property inspection programs
- c. Prohibit demolition by neglect

# **B.** Built and Natural Infrastructure

Infrastructure is typically perceived as physical supporting elements such as underground pipes and overhead wires; however, within our region, infrastructure goes well beyond these traditional elements. Natural infrastructure includes our watersheds and their associated water courses, the Pennsylvania Highlands region, our forest land, our agrarian open space, and our wildlife resources. These features coexist with a variety of important built elements including utilities, roads, transportation systems, agricultural uses, historic architecture, sidewalks, and trails. The strategies developed below will retain/maintain, protect, preserve, and promote management of these infrastructure components within the region.

1. Re-examine the location and size of the region's urban growth area, to assess its long-term impact on the region's resources and infrastructure and to determine the need to reconfigure the location and/or modify the size of the boundary.

- Continue to encourage agricultural preservation and creating large contiguous blocks of preserved land
- b. Update the Region's mapping of agricultural preservation efforts
- c. Consider the potential of rezoning some tracts, located north of Newport Road, to Agricultural
- d. Consider possible expansion of the Conservation Zone adjacent to the Millport Conservancy
- e. With particular regard for existing and future transportation infrastructure, begin considering the potential for regional growth in Elizabeth Township, centered around Elizabeth Farms
- f. Continue to analyze future growth potential and how it relates to current zoning and future infrastructure (water, sewer, roads, and stormwater) capacity and demand; if necessary, consider amendments to Designated Growth Areas and Zoning Maps and Districts to reflect the results of this analysis
- g. Determine if and at what point the region has achieved its full development potential, beyond which the region's infrastructure cannot sustain further growth
- h. In achieving this goal, strive for financial sustainability so that the costs associated with new infrastructure are equitably shared between existing residents/rate-payers and new/future residents/rate-payers
- i. Accommodate and support critical infrastructure and related services/businesses, where applicable

- a. Strive to achieve a sustainable growth projection where development is in balance with the region's capacity and fiscal ability to provide adequate schools, infrastructure, utilities, and community services while maintaining environmental quality and community character
- b. Continue to ratchet up the effort for identified opportunity areas and to identify new areas (e.g., former freight station site [AKA: the "Triangle"], north side of Main Street, rail area, Brickerville Village Growth Area)
- c. Continue to work with infrastructure providers to assure that infrastructure keeps pace with community and economic development
- d. The region's municipalities should review and update their Act 537 Plan
- 2. Continue to coordinate land use and transportation planning for the safe, efficient, and convenient movement of people and goods.

#### **New Strategies**

- a. Update the Official Map for Lititz Borough and Warwick Township; possibly expand the Official Map to include Elizabeth Township
- b. Explore potential improvements at the Route 501 and Route 322 intersection
- c. Conduct traffic counts on local and regional truck routes
- d. Monitor Elser Hill Road activities
- e. Explore potential improvements at the intersection of Woodcrest Avenue and West Second Street/Spruce Street
- f. Monitor, promote, and implement "Complete Streets" as appropriate in each municipality
- g. Complete the extension of Sixth Street, west to Orange Street and east to Rothsville Road and Clay Road

- a. Coordinate future land use and roadway functions to maximize efficient use of the region's existing major roads
- b. Coordinate existing roadway functions with appropriate design standards
- c. Coordinate future road improvements with projected roadway functions and adjoining planned land uses
- d. Assure that future developments provide for proper access designs and locations that minimize traffic congestion and safety problems
- e. Identify Borough, State, and Township roads requiring horizontal and vertical realignment and intersections which could be improved in the region
- f. Review and, if necessary, adjust road design or use to minimize traffic congestion and improve safety

3. Continue to develop and promote alternative and multi-modal transportation choices, including the promotion of walkable communities.

#### **New Strategies**

- a. Continue to develop and promote alternative and multi-modal transportation choices, including "Complete Streets"
- b. Continue toward completion of the Rail-Trail from Lititz Borough to Ephrata Borough
- c. Coordinate with the Red Rose Transit Authority (RRTA) and Commuter Services of Pennsylvania
- d. Building on the success of bicycle rentals in Warwick Township, consider bicycle rentals and/or sharing in Lititz Borough

#### **On-going Strategies**

- a. Support continued local and regional trail development, as a low-cost means of recreation and alternative transportation
- b. Bolster the region's ties to mass transit and intermodal connections through:
  - linking to nearby employment, shopping, and recreational opportunities
  - linking to the City of Lancaster and surrounding Boroughs
  - linking to air and rail (both passenger and freight) service
  - the creation of park/ride lots
  - retaining and enhancing bus service on Red Rose Transit Authority's (RRTA)
    Route 10, improving each of RRTA's bus stops to a common level of service that
    encourages the use of mass transit, and encouraging pay-as-you're-able fares or
    fares that are subsidized by local employers
  - continuing to build the transportation network with the addition of intermodal connections: park and ride lots, transit stops, trails, and bus routes
- c. Continue with efforts to eliminate freight rail service east of Route 501 and consequently seek re-use of existing freight station as rail-to-trail related amenity
- d. Consider requiring sidewalks within new community designs, especially within Urban Growth Areas (UGAs)
- e. Within Urban Growth Areas, consider retrofitting older neighborhoods with sidewalks, or trail systems in lieu of sidewalks
- f. Continue the implementation and connectivity of human-scale transportation systems including sidewalks, trails, bikeways, and greenways
- h. Continue to address the transportation needs of a diverse agricultural economy including the movement of implements from field-to-field and farm-to-farm and produce to market
- i. Continue to address the unique needs of the Amish community's mobility

# 4. Develop a sub-regional transit system.

# **New Strategies**

a. Actively engage with RRTA to develop meaningful and efficient Borough-to-Borough transit routes which would replace the current Borough-to-Lancaster-Borough routes

(for example, replace the current Lititz-to-Lancaster-to-Manheim bus route with a Lititz-to-Manheim route)

#### **On-going Strategies**

- a. Expand RRTA's service by creating a sub-regional bus service serving Brickerville, the region's employment centers, the region's senior living campuses, and the region's restaurants, retail, and entertainment destinations (consider this service as a possible off-shoot and/or replacement of each retirement community's bus/van service)
- Coordinate with RRTA to help promote transit routes and ridership and encourage employers to participate in the Susquehanna Regional Transportation Partnership Programs
- 5. Reduce traffic congestion in the region's borough and villages without negatively impacting the transport of goods and services to and from the region.

# **New Strategies**

a. Update existing data, analyze, revise, and implement "Destination Studies" for Route 772, East Main Street, and Route 501

# **On-going Strategies**

- a. Continue the work of the Built and Natural Infrastructure Committee and seek to broaden participation to other municipalities that share common transportation networks e.g., Manheim and Penn Townships
- b. Reflecting the results of the "Destination Studies" addressed above, implement the Route 772 Relocation Feasibility Study and move study recommendations forward
- 6. Continue to maintain existing built infrastructure, coordinating infrastructure with land use.

- a. Through an update to its Act 537 Plan, analyze the Borough's capacity to provide wastewater treatment to support development and redevelopment efforts
- b. Determine the schedule for updating the Elizabeth Township Act 537 Plan; consider updating same as a result of visioning the Township's future growth
- c. Continue to routinely/regularly update the Warwick Township Municipal Authority's "Water and Sewer Evaluation Study"
- d. Coordinate public water and sewer services within Growth Areas, to more-closely align utility service areas with Growth Areas
- e. Continue the regional Municipal Separate Storm Sewer System (MS4) program
- f. Consider a management and funding mechanism for stormwater mitigation

- a. Continue to assess and maintain the region's infrastructure (including but not limited to water, wastewater, transportation, stormwater and energy) through inspection programs and prioritize funding for improvements in low and moderate income areas
- b. Maintain the utilization of on-lot water supply and on-lot sewage disposal systems throughout Elizabeth Township
- c. Encourage cooperation and coordination among providers of public facilities and services
- d. Consider establishing a regional "bank" for stormwater management facilities maintenance

# 7. Continue to promote the conservation of infrastructure needs, while promoting the development and use of clean energy within the region.

#### **New Strategies**

- a. Inventory existing and planned alternative and renewable energy projects/initiatives within the region and consider new initiatives aimed at promoting same
- b. Consider the development of electric-car charging stations within the Borough and key locations within the region

#### **On-going Strategies**

- a. Promote practical means of conserving water and energy, recognizing the multiple benefits of environmental efficiency and economic savings
- b. Encourage the development and use of solar, geothermal and/or wind energy by adopting permissive renewable systems ordinances
- c. Consider amending Subdivision and Land Development Ordinances (SALDOs) to require, to the greatest extent possible, orientation of homes for maximum solar gain, and encourage south-facing roofs whenever possible
- d. Consider encouraging energy audits that could significantly reduce energy use in the region, while reducing costs
- e. Consider developing incentives that encourage and promote "green" or energy or water-efficient construction (such as LEED- or Energy Star-certified buildings)

#### 8. Continue to lead the way in green infrastructure and environmental planning.

- a. Coordinate floodplain analysis, where the floodplain may have been reduced due to floodplain restoration and projects; then, encourage applying for FEMA map amendments
- b. Continue to work regionally, through projects and programming, in order to meet MS4 and Pollution Reduction Plan requirements
- c. Create a regional extreme-weather resiliency plan
- d. Simultaneously consider means by which regional sustainability efforts (MS4, environmental credits, etc) can help to reduce the cost of development; meanwhile,

- incentivize development activities that provide environmental gains and promote sustainability
- e. Conduct advanced headwater planning in collaboration with other planning initiatives, possibly to include:
  - Regional stormwater management facilities
  - Municipal "bank" and "credit" exchange for stormwater rate, volume, and quality attainment
  - Watershed-based planning
- f. While continuing to improve the Lititz Run Watershed, begin focusing on the Hammer Creek Watershed next

- a. Continue to strive for full MS4 compliance
- b. Continue to expand efforts in natural restoration
- c. Promote the preservation of woodlands and the expansion of tree canopy/coverage, particularly along the region's creeks and streams
- d. Encourage the "greening" of large lots held in private, public, and quasi-public ownership
- e. Continue to plan-for and implement Green Infrastructure initiatives
- f. Simple, low-cost initiatives should be undertaken regarding water quality, such as a rain-barrel program, low flow toilets, and the like (possibly involving local business partners)
- g. Encourage green roof design and construction through investigating and proposing economic incentives
- h. Consider developing a regional Climate Action Plan, which focuses on both emissions reductions and climate change adaptation
- Within urbanized areas of the region, promote parking management and the development of new parking facilities to support activities related to live, work, and play.

#### **New Strategies**

a. Continue to plan for the development of a parking garage in downtown Lititz

- a. Develop proactive parking management strategies within the region's boroughs and villages
- b. Encourage shared parking and structured parking facilities
- c. Develop better and consistent way-finding signage, directing motorists to public parking facilities
- d. Develop creative solutions for parking during special events (eg: (Park)ing Day, regional sports tournaments, Second Friday, etc)

#### 10. Continue to implement various community planning and infrastructure initiatives.

# **New Strategies**

- a. Plan to expand/promote technology assets, high speed internet, and other telecommunication infrastructure (and map their locations), including during development and roadway improvement projects
- b. Work with Norfolk Southern and Johnson & Johnson to explore options for the Warwick to Ephrata Rail Trail (WERT) extension to Broad Street in Lititz Borough
- c. Complete the Warwick-to-Ephrata Rail Trail by 2019
- d. Maintain vigilance toward "Distributed Access Systems" for better control of appurtenances placed and/or located within public rights-of-way

# **On-going Strategies**

- a. Downtown Lititz Master Plan and Parking Management Study, as addressed above
- b. Greenway and Trail Plan for Lititz
  - Relating to Lititz's portion of the regional Rail Trail system, collaborate with municipalities, Norfolk Southern, Lancaster County Economic Development Corporation, and other stakeholders to eliminate the need for rail service east of Route 501
  - Support Lititz Borough's efforts to acquire, stabilize and redevelop the former freight station
  - Finalize the design, secure necessary funding, acquire rights of way, and implement the Rail Trail improvements
- c. Warwick-to-Ephrata Rail Trail
  - Continue efforts at implementing rail trail improvements from Warwick Township Municipal Campus to downtown Ephrata
- d. Lititz Run Greenway
  - Develop a feasibility study to implement a Greenway from the Lititz Springs Park to the confluence of the Conestoga River
- e. Watershed Plans, as addressed above
- f. PA Highlands Initiative
  - Collaborate with other municipalities, counties, Commonwealth agencies, conservation organization, and others in the protection and enhancement of this naturally and culturally diverse region of eastern Pennsylvania
- g. Monitor and update the "Warwick Region Carbon Audit" (note: this is a simple name correction, replacing the "Sustainable Communities Assessment")

# 11. Promote and strengthen the Lititz Borough Historic District as well as other historic properties of the region.

- a. Identify and promote the preservation of the high priority historic sites in the region
- b. Celebrate successes that are achieved

- a. Understand the location, concentration, and contribution to the cultural heritage, character and economic development of the region.
- b. Update the regional historic inventory and make it more user-friendly for the public
- c. Prioritize opportunities for government involvement through the expansion or creation of new historic districts based on known information, research and criteria regarding the concentration and historic significance of this region's resources
- d. Consider municipal ordinance changes that enable the adaptive re-use of historic buildings and structures through increased use opportunities and modifications to area and bulk requirements
- 12. Establish formal mechanisms and assistance at the local level to strive to effectively protect historic and archeological resources.

#### **On-going Strategies**

- a. Develop and encourage a nongovernmental historic preservation advocacy network to provide individual property owners or organizations with preservation design, technical and/or regulatory assistance and training
- b. Explore the coordination of efforts with other community, County and Commonwealth historic preservation organizations
- c. Consider municipal ordinance changes that enable the adaptive re-use of historic buildings and structures through increased use opportunities and modifications to area and bulk requirements, and prevent demolition by neglect

#### C. Community Services and Quality Of Life

The fabric of our region is comprised of many physical components and quality of life aspects that definitively shape who we are. Planning for community gathering places like libraries, community and recreation centers, and churches represent the physical manifestations, while planning for police, fire, and emergency response professionals affects the perceptions of health and welfare directly related to quality of life. These strategies demand the attention and focus of dedicated efforts so that their continued support, growth, and long-term vitality are maintained. These strategies focus on existing uses and services while providing guidance for expansion, maintenance, and development of new services.

1. Continue to hold biannual meetings with governing bodies and staff of the Warwick School District and municipalities.

#### **New Strategies**

a. Actively engage with the Warwick School District on their on-going Demographic Analysis (to examine and understand the causes for declining enrollment) and Feasibility Study (to anticipate the impacts of district-wide facility options/choices)

- b. Approach the planning and implementation of "next generation" recruitment efforts with a sense of urgency, noting that many social service agencies are managed by "older generation" leaders
- c. Expand Lititz Borough's "Junior Council Member" program to include other boards and commissions and consider expanding these programs into Elizabeth and Warwick Townships

- Publicize meetings and send out special notices to community organizations (e.g., library, community center) that might have an interest or role to play in discussion topics
- b. Encourage participation by all community interests and stakeholders
- c. Coordinate activities, calendars, cooperation, and volunteer efforts
- d. Communicate the results/minutes of meetings by relating same to the Region's Comprehensive Plan; do so through traditional and social media outlets in order to capture the range of generations within our community
- 2. Continue to explore opportunities for cooperation between the public works departments and to meet increasing service demands.

#### **On-going Strategies**

- a. Support joint purchase agreements with the County Cooperative and/or between the three municipalities, when cost effective
- b. Maintain written agreements for intermunicipal projects when necessary to ensure responsibilities and liabilities are addressed
- c. Support cooperative exchanges on an on-going basis between the three public works departments
- 3. Continue to improve emergency services and response through Warwick Emergency Services Commission (WESC).

#### **New Strategies**

- a. Continue to recruit young volunteers for fire and ambulance companies, while also focusing on retaining existing volunteers
- b. Explore enhancement of the volunteer fire and ambulance companies' fund drives
- c. Develop and implement housing incentive programs for first responders
- d. If volunteerism continues to wane, consider potential future need to provide emergency services via paid staff

#### **On-going Strategies**

a. Monitor the work of WESC, striving to match the needs of the community with the services provided (and the cost of those services) for the next 5 years and beyond

- b. Continue to reach out to the community with regard to the Hometown Heroes volunteer recruitment and retention program by actively recruiting volunteer staffing for the region's fire and ambulance services
- c. Move forward with the hiring of a regional coordinator/director and the establishment of a Regional Emergency Services Council
- 4. Plan for the future need of improved police protection.

- a. Increase service delivery while maintaining cost containment
- b. Provide accountability in measurable outcomes
- c. Continue joint efforts between the State Police, Lititz Borough Police Department (LBPD) and Northern Lancaster County Regional Police Department (NLCRPD)
- 5. Continue to support and celebrate activities and events, which express the region's character and maintain an orientation to family including, but not limited to, the activities of the Recreation Center, Regional Recreation Commission, Venture Lititz, Lititz Public Library and the Manheim Consortium.

#### **New Strategies**

- a. Plan for the sustainability of the Lititz Public Library
- b. Coordinate with the Lititz recCenter to finalize the pool feasibility study, conduct a capital campaign, and apply for grants to fund the pool upgrades
- c. Continue to improve the scheduling of and parking management related to park and recreation facilities, especially during tournaments
- d. Complete construction of the Veterans' Honor Park of Lancaster County

- a. Continue a regional approach to recreation and provide linkages to the region's centers of activities
- b. Continue to work with the Warwick Regional Recreation Commission (WRRC) and assist on moving forward with their goals, as stated in the Comprehensive Recreation, Park and Open Space Plan
- c. Encourage connections to and within Elizabeth Township such as the PA Highlands and State Gameland areas, connecting Camp Mack, Speedwell Forge, Segloch Run, Horseshoe Trail, and Middlecreek
- d. Continue to financially support the Lititz Public Library, the region's library; strive toward municipal contributions equally \$5.00 per capita.
- e. Continue to support the Lititz recCenter as the region's activity and fitness center

6. Maintain a high level of administrative services to keep pace with the demand of the growing region.

#### **New Strategies**

a. In transitioning of municipal staff and elected/appointed leaders, strive for leaders with vision and a commitment to the Region's legacy of planning and implementation

# **On-going Strategies**

- a. Continue to evaluate administrative staff levels and needs to meet the day-to-day local government operations
- b. Look for cooperative opportunities between the three government entities that will help to reduce workloads
- c. Evaluate regionalizing automated and geographic information systems (GIS) to better manage and monitor the impacts of growth and development on the region
- d. Continue to explore new ways of utilizing technology to facilitate routine government functions and project development.
- 7. Acknowledge the special needs of residents, including: older adults, with a focus on those who are living in neighborhoods and are not having their needs met by retirement communities; people with disabilities; children and youth; and the unemployed.

#### **New Strategies**

- Recognize increased rates of poverty, as witnessed by the increasing need for free school lunches, services of the community pantry/community chest, and meals-onwheels
- b. Provide opportunities for engaging, collaborating, and coordinating with service providers, so as to streamline and avoid gaps in services
- Consider conducting community wide needs assessments (possibly through Millersville University) to identify current and potential trends

#### On-going Strategies

- a. Identify the community service, housing, health care, recreation, transportation, and dietary needs of special groups
- b. Anticipate that an aging population likely lessens the ability to staff volunteer and emergency services

#### D. Economic Development

The concept of economic gardening or cultivation is perhaps the most universal catalyst of planning. New and expanded business and industry have wide-felt impacts which reach housing, infrastructure, community services, and the economics of place. This region is fortunate to have several unique industry clusters that continue to be a focus of and an

inspiration for economic development. Vacant and underutilized properties present development opportunities that can contribute to the success of local businesses and grow segments of our industrial and agricultural sectors. Meanwhile redevelopment and infill concepts can bolster our downtown retail and tourist trades. These strategies focus on enhancing a barrier-free economic growth environment within the region.

1. Continue to promote and strengthen business opportunities in Downtown Lititz as the central hub and "gathering place" for the region, while preserving the community character.

# New Strategies

- a. Recognizing the fragile nature of business within a regional setting, actively conduct "what if" scenarios in anticipation of shifts in the regional business fabric; specifically, develop alternatives in anticipation of the loss of employers (both large and small) and recognize the opportunity of the vacant building/land
- b. While updating the Lititz Borough Master Plan, also update the Shade Tree Plan
- c. Encourage the redevelopment of underutilized properties within the Borough and neighboring Warwick Township, especially in the south end of the Borough and south along Route 501 in the Township
- d. Evaluate the re/development capacity of the Borough, followed by evaluating the capacity of the region's villages
- e. Consider Public/Private Partnerships (P3) as a means of supporting re/development efforts in the Borough

#### **On-going Strategies**

- a. Work with Venture Lititz to continue building the Main Street model
- b. Standardize pedestrian trail, lighting and signage design features throughout the region
- b. Prioritize main routes into/from the downtown and to/from other activity areas to improve safety e.g., lighting, sidewalks, street trees, etc.
- c. Continue to develop a multi-faceted public relations program as the basis for educating, promoting activities and celebrating accomplishments in meeting the objectives and strategies for growth management, tax-base and the economy, infrastructure, environment, community service, volunteerism, etc.
- 2. Work with the Lititz Regional Community Development Corporation (LRCDC) to retain existing employers and recruit new businesses to the region.

- a. Analyze options for the potential expansion of Rohrer's Quarry
- b. Support the work of the LRCDC as it endeavors to become a funding source for business retention and growth

- a. Encourage new, complementary commercial activities on the north and south sides of Lititz Borough
- b. Encourage the retention of existing business, the redevelopment of outdated and underutilized commercial properties, and creation of new commercial enterprises
- c. Evaluate "gap analysis" data to determine those new business enterprises that should be recruited to the area; augment this data with "what would you like to see" surveys of the communities' stakeholders
- d. Plan for and recruit a skilled workforce, sustained by living-wage jobs
- 3. Develop a tourism plan which maximizes the benefits of tourism while retaining the region's community's character.

#### **New Strategies**

a. Consider creative means by which to continue promoting the Region in the face of declining financial support for countywide tourism

# On-going Strategies

- a. Promote heritage tourism as a tool for economic development, heritage and natural conservation
- b. Study the impact of tourism, both recreational and heritage, on community character and the local economy. Work to implement policies that address the opportunities and challenges identified
- c. Assist in implementing the Lancaster County Strategic Tourism Development Plan
- d. Encourage local tourism infrastructure such as trails and greenways, visitor information, lodging accommodations, parking for buses and cars, dining options, way-finding signage, hours of operation, and historic connections
- 4. Identify and promote economic development opportunities related to an aging population, allowing some to "age in place."

- a. Inventory the need for lawn care/property maintenance, home health and elder care, transportation, and other services needed by the elderly
- b. Promote the entrepreneurial opportunities that exist within the region to provide services to those who "own too much land to maintain" or "feel trapped in their homes" due to their advancing age

5. Work with major, local employers to create programs/incentives to support their employees' residing locally or, if not, using mass-transit.

#### **New Strategies**

- a. Support the Lititz Area Business Association (LABA) in its creation of a directory of the region's businesses, services, and employers
- b. Working with the region's employers, determine the means by which to assist in meeting their employees' needs for housing
- c. Working with the region's employers, determine the means by which to assist in meeting their public transit needs

# On-going Strategies

- Study models for such programs already in use in Lancaster County (LGH and F&M, for example)
- b. Identify and work with the region's major employers to consider programs/incentives for their employees so that they might live in the same community in which they work or to promote the use of mass-transit if they choose to reside outside of the region
- 6. Promote economic development opportunities related to green energy and green jobs.

#### **On-going Strategies**

- a. Explore ways of making this region a hub for research and development
- b. Actively seek the implementation of projects that advance green energy and related job opportunities
- 7. Expand local agricultural industry/opportunities.

# **New Strategies**

- a. Meet with members of the agricultural community to determine what needs they have in order to remain viable and integral to the Region's economy
- b. Maintain the balance between farming and farm-related businesses

- a. Promote fresh, local foods
- b. Enhance farmers' ability to get produce and products to market
- c. Encourage cooperative and community/demonstration gardens
- d. Review and revise ordinances to allow "small" farm support activities on residential lots (eg: fruit trees, small livestock)
- e. Permit farm occupations and farm-based businesses to supplement farm income
- f. Promote enrollment of farms in Agricultural Security Areas and in the Clean and Green tax deferral program as ways to provide benefits to farmers
- g. Consider creating a master plan to maintain and enhance the Lititz Farmers Market

- h. Consider the potential of Act 4 of 2005 (freezes millage on preserved farms and open space) and its extension to the entire school district.
- 8. Promote "experiential" business opportunities, while respecting those opportunities that currently exist in the region.

- a. Within downtown Lititz, encourage businesses to expand their hours to meet the needs of their expanding clientele
- b. Promote a range of dining, visual and performing arts, and entertainment opportunities that appeal to different audiences, including different age groups, families, and individuals, residents and visitors
- 9. Support and promote the region's industry clusters.

# **New Strategies**

a. Evaluate the region's capacity for commercial and industrial development in support of existing and emerging industry clusters

#### **On-going Strategies**

- a. Agriculture and agricultural support
- b. Live event and related industries
- c. Healthcare/Retirement
- d. Landscaping/Tree Farms
- e. Other Industry (electronic, food processing, pharmacy, etc)
- f. Tourism
- g. Downtown Retail
- h. Other federally recognized industry clusters within the region by the Workforce Investment Board (WIB)

#### E. Education and Outreach

Successful planning requires collaboration and the taking of responsible ownership, which grows out of education and outreach. Within our region, there are multiple organizations, consortiums, committees, and volunteers working to maintain the reputation and value of our community and its way of life. Variable change occurs constantly, requiring steady understanding of the goals, the necessary leadership, and labor force to ensure progress is being made. The below strategies will continue the efforts made in the community to educate and involve the region's stakeholders in the planning process and its outcomes.

1. Provide meaningful outreach to the communities' stakeholders, especially targeting the "next" generations.

#### **New Strategies**

- a. Specifically recognizing that none of our region's successes happen by accident, strive to better communicate the advancements that we are making toward achieving the Goals and Strategies of our Strategic Comprehensive Plan and its Updates
- b. Develop specific action plans by which to recruit new leaders from the "next generation," leaders to include elected and appointed officials, leaders of social service agencies, and the like

#### On-going Strategies

- a. Recognize the accomplishments of the last 5 years and educate on various aspects of the Strategic Plan moving forward
- b. Develop action plans and committees responsible for implementing these strategies
- c. Recruit members for these committees, including a cross section of the region's age and demographic spectrum
- d. Communicate plans and documents through various sources of media through print electronic means (newspapers, update websites and social media, etc)
- 2. Continue to promote healthy lifestyles.

#### On-going Strategies

- a. Promote "buy fresh/buy local" initiatives
- b. Promote the activities of the Healthy Communities and Healthy Use Program in cooperation with the Warwick School District.
- c. Encourage and expand resident participation in the region's recreational activities
- 3. Recognize and promote affordable housing as an asset of this region.

# **New Strategies**

a. Use case studies, imagery, and facts to confront the myths of affordable housing

- a. Measure and quantify the range of housing affordability in the region
- b. Promote the availability of affordable housing across the economic spectrum
- c. Continue to create awareness that housing must be affordable and inclusionary across the range of the region's socio-economic demographics
- d. Encourage businesses and residents to re-locate to this region, which will strengthen our diversity
- e. Coordinate with other organizations, such as the Lancaster County Planning Commission, Venture Lititz, Lancaster County Association of Realtors, etc to promote this region as affordable across economic spectrums

4. Continue to educate the community on Transferable Development Rights (TDR's).

# On-going Strategies

- a. Provide educational opportunities to municipalities and stakeholders of the region on the value of TDRs
- b. After the community has gained an understanding of TDRs consider implementation of regional TDRs
- 5. Promote the region as a tourist destination for heritage, agricultural and ecological tourism, while maintaining community character.

# **On-going Strategies**

- a. Identify opportunities that could be developed in regard to tourism
- b. Coordination with Lititz Welcome Center, Venture Lititz, PA Dutch Visitors Bureau to develop those opportunities and increase tourism within the region
- c. Educate the region on the cost benefit of providing tourist infrastructure
- 6. Expand the awareness of and efforts at addressing diversity within the region.

#### **New Strategies**

 Hold honest and forthright community conversations regarding the lack of diversity in our region

#### **On-going Strategies**

- a. Encourage support of local food banks
- b. Continue support of new and existing community organizations that meet the needs of under-served populations
- 7. Continue to investigate and implement broad partnerships between municipalities and community organizations.

- a. Municipalities should continue to work together to leverage resources and grants to enable various planning and infrastructure investment
- b. Coordinate and cooperate with the Warwick School District
  - Continue to work on common areas of interest: work with the Schools on coordination /participation on watershed work throughout the region and extend the effort beyond the Lititz Run Watershed, enhance life-long learning activities, expand child care opportunities and after school programs, and focus on wellness and health awareness for children and youth
  - Continue to coordinate land development activities with the School District, so they can be a part of advanced planning for dealing with the impact on enrollments, bus routes, and trail locations

c. Use Warwick Township and Lititz Borough's Official Map as a public information piece by updating existing features, posting this map on municipal websites, tying the map to projected projects, and encouraging Elizabeth Township to undertake its own Official Map

# 8. Educate and promote environmental sustainability.

#### New Strategies

 a. Create a Municipal Separate Storm Sewer System (MS4) education program for residential usage

# On-going Strategies

- a. Educate the public regarding watershed protection, disposal of contaminants and solid wastes, and opportunities to reduce noise and air pollution and work with the public school system towards meeting this objective
- b. Continue to educate rural residents on the proper care and maintenance of individual on-lot sewage treatment systems
- c. Continue to promote local utilization of the available recycling and household hazardous waste management programs
- d. Continue the Lititz Run Watershed Alliance (LRWA) work of the last 12 years. Pull in recommendations of the Susquehanna River Basin Commission Report
- e. Support existing efforts and look for new opportunities to protect the region's natural environment including, but not limited to floodplains, wetlands, steep slopes, stream banks, forested areas, agricultural soils and wildlife habitats
- f. Encourage residents to plant native species, edible plants and fruit trees
- g. Provide outreach to the public on the simple steps they can take to be more energyefficient in their homes, using as an example Warwick's energy success story
- h. Provide outreach to the public on the likely local impacts of climate change
- i. Provide outreach to the public on the results of the Warwick Region Carbon Audit

# 9. Continue to educate the community regarding the importance of natural, historic, and cultural preservation.

- a. Through a public input process, identify the historic and cultural resources that are most important to the community
- b. Educate residents and business owners about the positive role that historic, cultural, and natural resources play in the region's identity and economy
- c. Promote the development or expansion of historic districts
- d. Consider new and revised ordinances that prevent the destruction or insensitive alteration of existing structures and/or historic districts
- e. Continue to partner with existing and emerging local and regional conservation organizations to help preserve the region's natural, historic, and cultural resources

# **PART III: SAMPLE ACTION PLANS**

It is important to note that the success with which our Region's 1999 Strategic Comprehensive Plan and its Updates has been met is due, in large part, to our Region's leadership and the "committee structure" that was established following the adoption of the 1999 Plan. It is equally important to note again, however, that:

- Our Region's leadership will continue to transition in many ways and "to new faces" and Committee members over the next five to ten years.
- The challenges that lie ahead are increasingly complex and inter-related.

Therefore, for the next generation of leaders, it is important to "map out" how these challenges are, in fact, inter-related and how the initial steps in "rising to the challenge" can be easily formulated into "Action Plans." But therein lies the rub. The below Sample Action Plans do represent the <u>initial</u> steps involved in addressing particular challenges. Further steps and actions will undoubtedly be necessary; from actually conducting community conversations on diversity to possibly adopting new Designated Growth Area boundaries and Zoning Ordinances, possibly funding a "municipal stormwater bank" to considering the incentivizing of first-responder and emergency services (if/when that time comes), and many other initiatives inbetween.

Based on the foregoing explanation and as outlined in Part II, the <u>Updated Goals and Strategies</u> are categorized into the following four principal areas:

- A. Housing/Development
- B. Built and Natural Infrastructure
- C. Community Services and Quality of Life
- **D. Economic Development**

In order to assist in the implementation of the Strategies within these focus areas, below you will find four Sample Action Plans that relate to specific Updated Goals and Strategies found in Part II. These Action Plans are intended to demonstrate the steps necessary to set the course for achieving success in completing each Goal/Strategy.

Once <u>all</u> of the Updated Goals and Strategies have been assigned and prioritized, it is recommended that each responsible group or committee (IE: "champion") would create Action Plans for their assigned Goals and Strategies, following the below samples as a guide.

Please note that the Goals and Strategies outlined in **E. Education and Outreach** are generally supportive of and over-arch the Goals and Strategies documented in the above-listed focus areas. It is anticipated that each champion group/committee will take steps to implement necessary Education and Outreach efforts that support and/or advance their work. (Having said the above, the most-notable exception to these instructions includes Strategy E.6.a: "Hold

honest and forthright community conversations regarding the lack of diversity in the region." This Strategy deserves its own Action Plan, once it is assigned to and prioritized by its champion group/committee.)

# **Action Plans**

# A. Housing/Development

The following sample Action Plan addresses Updated Goal/Strategy A.3.a, c, and d:

- 1. Determine our region's definition of "blight"
- 2. Identify, inventory, and map the region's:
  - a. Designated Growth Areas
  - b. Blighted properties
  - c. Difficult and under-utilized sites
  - d. Tax delinquencies
- 3. Prioritize individual properties through entire neighborhoods that could/should be revitalized
- 4. Research best practices as to how to improve existing conditions through community development initiatives and programs (opportunity zones, tax increment financing, conservatorships, and the like)
- 5. Develop specific re/development strategies for each property and/or neighborhood
- 6. For each high-priority property/neighborhood, prepare a specific plan which includes:
  - a. Clear vision for the preferred outcome
  - b. Identification of the impediments and barriers to re/development
  - c. Plan for removing the impediments/barriers and achieving successful re/development

As noted above, at the completion of the above actions, it is likely that further, detailed steps will be required to achieve full implementation of these Strategies.

#### **B.** Built and Natural Infrastructure

The following sample Action Plan addresses Updated Goal/Strategy B.8.a, d, and e:

- 1. Prepare mapping of:
  - a. Watershed boundaries
  - b. Floodplain boundaries
  - c. Regional stormwater and green-infrastructure improvements
  - d. Current Zoning
  - e. Future Land Use

- 2. Identify sites where regional stormwater, flood control, and water-quality improvements could be implemented to yield highly-sustainable outcomes
- 3. Research best practices and begin to outline "bank" and credit programs and formulas that address:
  - a. Ownership structure [by individual(s) and/or authority(-ies)]
  - b. Operational structure of "bank"
  - c. Facility/improvement designs
  - d. Cost structure
  - e. Criteria for and value of credits
- 4. Emphasize to the community the benefits derived, relating to efficiency, sustainability, and affordability

Again, at the completion of the above actions, it is likely that further, detailed steps will be required to achieve full implementation of these Strategies.

## C. Community Services and Quality of Life

The following sample Action Plan addresses Updated Goal/Strategy C.3.a and c:

- 1. Inventory recruitment and retention measures, those that have succeeded and those that haven't
- 2. Compile demographic analyses of current volunteers
- 3. Meet with the volunteers (both current and former, if possible) and discuss:
  - a. Why they serve/volunteer
  - b. What they value in their service
  - c. What frustrates them in their service
  - d. What incentives would they value, if offered
- 4. Summarize the findings in Steps 1 and 3, focusing on:
  - a. Consistency and inconsistency between initiatives that have succeeded/failed versus volunteer's expectations
  - b. Easily achieved, yet unrealized initiatives that would yield big dividends (IE: "low-hanging fruit")
  - c. Identifying those more-complicated initiatives that, given proper consideration, could yield long-lasting benefits
- 5. For those initiatives identified in Step 4.c, brainstorm new programs/initiatives by which to retain and recruit volunteers

6. Research best practices by which to implement those initiatives identified in Step 4.c (including, for example, housing incentives)

Again, at the completion of the above actions, it is likely that further, detailed steps will be required to achieve full implementation of these Strategies.

## **D. Economic Development**

Recognizing that, during the completion of the <u>Forge the Future 2022</u> Update, BB&T Bank closed its operations in Downtown Lititz, the following sample Action Plan has been developed to address Updated Goal/Strategy D.1.a, b, and e. Further, the below Action Plan could be utilized in the event that other major shifts occur within the fabric of our business community (such as the decline of "bricks-and-mortar" retail stores versus online shopping).

- 1. Conduct "threat assessments" related to existing businesses that:
  - a. have closed-down and/or left the region or
  - b. are vulnerable to doing so
- 2. In the case of those businesses that have closed, yielding vacant/under-utilized properties:
  - a. Identify the potential uses that could replace the former use
  - b. Assess and determine what future/replacement use would constitute a net-gain for the community; having done so, prepare a strategy for recruiting such a desirable new use, focusing on:
    - Community demographics
    - Market conditions
    - Site specific solutions
    - Public/Private partnerships
  - c. Assess and determine what future/replacement use would constitute a net-loss for the community; having done so, prepare a strategy for making the best of a difficult situation
- 3. In the case of those businesses that, if they closed or moved, would leave an indelible mark:
  - a. Conduct similar "what if" scenarios as identified in Step 2 above
  - b. Be constantly engaged with the business community to be assured that it is strong and viable
  - c. When signs of weakness appear, engage the business community in retention efforts, providing resources by which to retain a strong business community
  - d. Specifically for those businesses within Downtown Lititz, update the Downtown Lititz Master Plan to provide specific insight and the planning of what if scenarios

Again, at the completion of the above actions, it is likely that further, detailed steps will be required to achieve full implementation of these Strategies; to that end, the above Actions are a good start.

## **PART IV: MAPPING**

## A. Overview and Intent

The following maps are characterized as follows:

- A. **Maps 1, 2 and 3** inventory areas of land available for development in Elizabeth Township, Lititz Borough, and Warwick Township, respectively
- B. **Map 4** documents transportation infrastructure improvements that have been completed within the last five years (including bridge, traffic signal, capacity-building, and widening and resurfacing improvements); **Map 5** illustrates those similar transportation improvements that will be completed within the foreseeable future
- C. The next four maps document the regional utilities and public sewer and water systems that serve the region:
  - Map 6 identifies the region's electric and gas utility services
  - Maps 7 and 8 identify those areas of Lititz Borough and Warwick Township that are served by public sewer and water, respectively
  - Map 9 further illustrates the land area established within these municipalities for the protection of the waters that source the public water service
- D. The next five maps document the principal assets and resources that make-up the region's "green infrastructure:"
  - Map 10 inventories the region's watershed-based restoration efforts including conservation areas and easements; stabilization areas, riparian buffers, and grass swales; BMP's (Best Management Practices) and/or created wetlands and other stormwater/water quality features; bioretention facilities and detention basins; and, the region's MS4 (Municipal Separate Storm Sewer System) Urbanized Area
  - **Map 11** identifies the application of tools used to preserve the region's valued farmland including zoning, purchase of easements (agricultural preservation), agricultural security, and TDR's (Transferable Development Rights)
  - Map 12 demonstrates the manner in which the region is and will be provided with a range of recreation, park, and open space opportunities including trails and greenways, smaller community and neighborhood parks, larger non-profit and regional facilities, and public school lands and athletic fields
  - Map 13 and 14, respectively, delineate the primary and secondary conservation areas (including valued resource land areas and corridors) and the attributes that constitute (or "source") these conservation areas (including water bodies, wetlands and floodplains, steep slopes, and forested areas)

E. **Map 15** assimilates all of the above factors and attributes into a Future Land Use Map for the region, which depicts the balance to be maintained between resource protection, available infrastructure, and development/growth

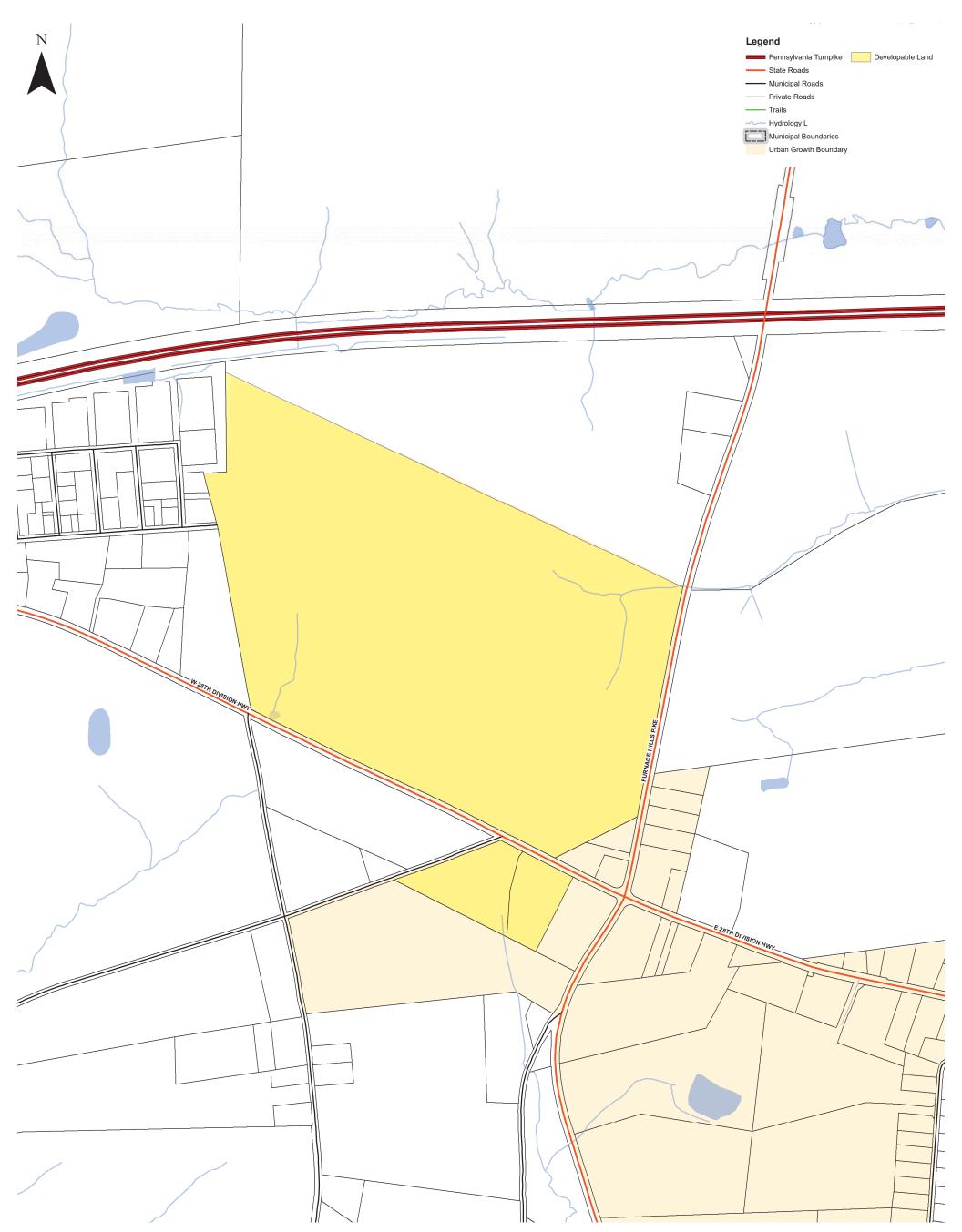
Upon close examination, there is very little difference between Map 15 (Regional Future Land Use Map) of this <u>Forge the Future 2022</u> Update and the Future Land Use Map included in the immediately-preceding IMPACT 2017 Update. This observation is indicative of:

- The Region's success in managing its growth by "surgical means" (and mostly by focusing growth within "Urban Growth Boundaries") as opposed to "large-scale change;" this approach assures the balance of resource protection, infrastructure, and development.
- The Region's consistent, on-going evaluation of change on its merit, then recording these changes via on-going updates to its municipalities' Zoning and Official Maps.

Undoubtedly, in a community as dynamic as this Region is, the next five to ten years may see changes to the municipalities' Zoning and Official Maps (possibly even including changes to the Region's "Urban Growth Boundaries"). These changes may be initiated by a consensus of the municipality and/or stakeholders or be set in motion by the very Goals and Strategies outlined in this Update. By whatever means these changes might be initiated, each of these maps should serve as tools by which to continue balancing growth, available infrastructure, and resource protection.

## B. Index

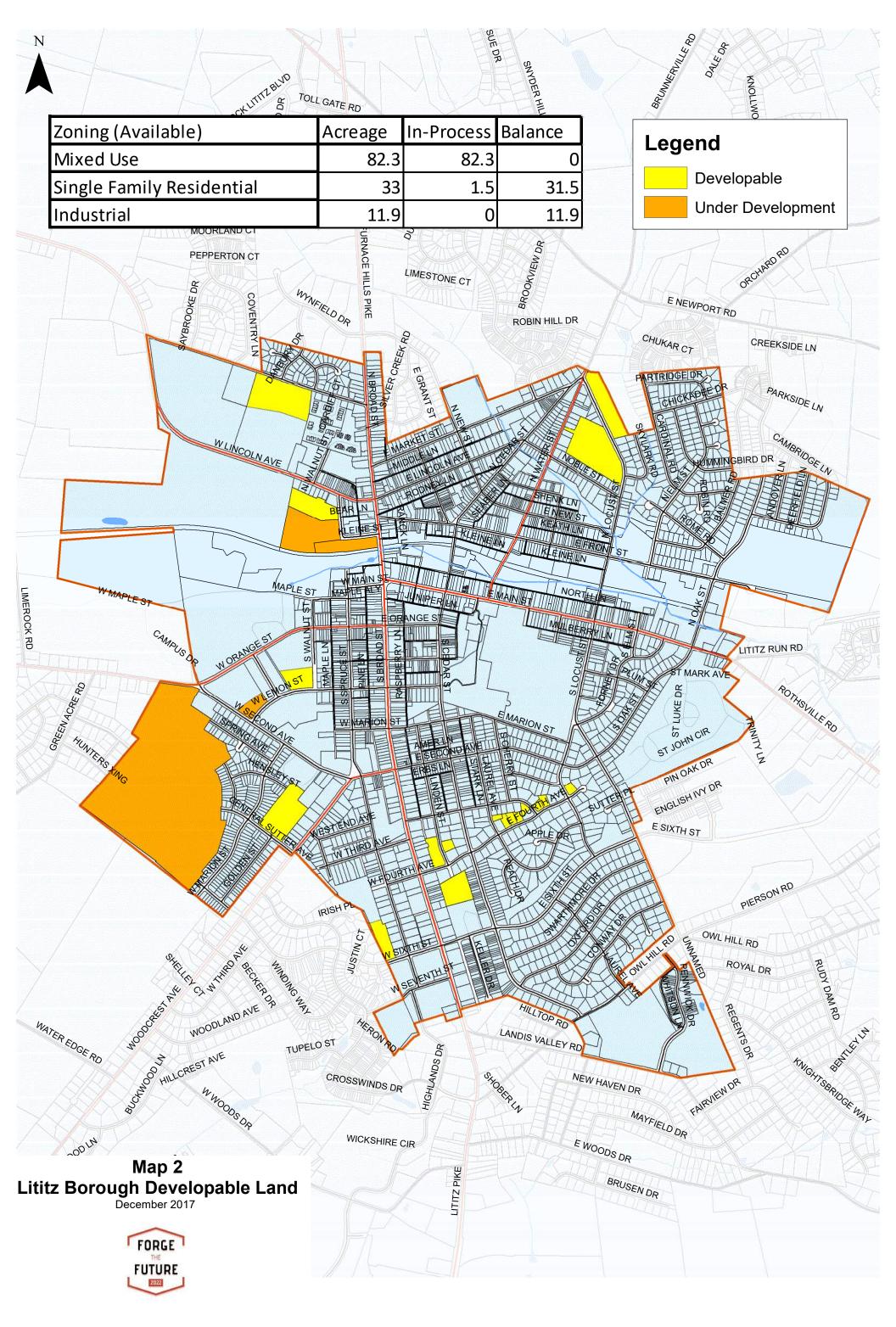
Map 1	Elizabeth Township Developable Land
Map 2	Lititz Borough Developable Land
Map 3	Warwick Township Developable Land
Map 4	Regional Past Transportation Projects (2012 – 2017)
Map 5	Regional Future Transportation Projects
Map 6	Regional Utilities Map
Map 7	Regional Public Sewer Service Area
Мар 8	Regional Public Water Service Area
Map 9	Lititz Borough/Warwick Township Wellhead Protection Area Map
Map 10	Regional Watershed Restoration Map
Map 11	Regional Farmland Preservation Map
Map 12	Regional Recreation, Park & Open Space Map
Map 13	Regional Primary and Secondary Conservation Delineation Map
Map 14	Regional Primary and Secondary Conservation Source Map
Map 15	Regional Future Land Use



Map 1 Elizabeth Township Developable Land

January 2018







ZONING (available)	Acreage	In process	Balance
•		•	
CC - Community Commercial	48.50	0.00	48.50
I-1 - Industrial 1	116.74	0.00	116.74
I-2 - Campus Industrial	154.31	55.50	98.81
LC - Local Commercial	16.13	0.00	16.13
R-1 Residential	481.49	0.00	481.49
R-2 Residential	74.56	28.90	45.66
RE - Rural Estate	431.19	0.00	431.19

## Legend

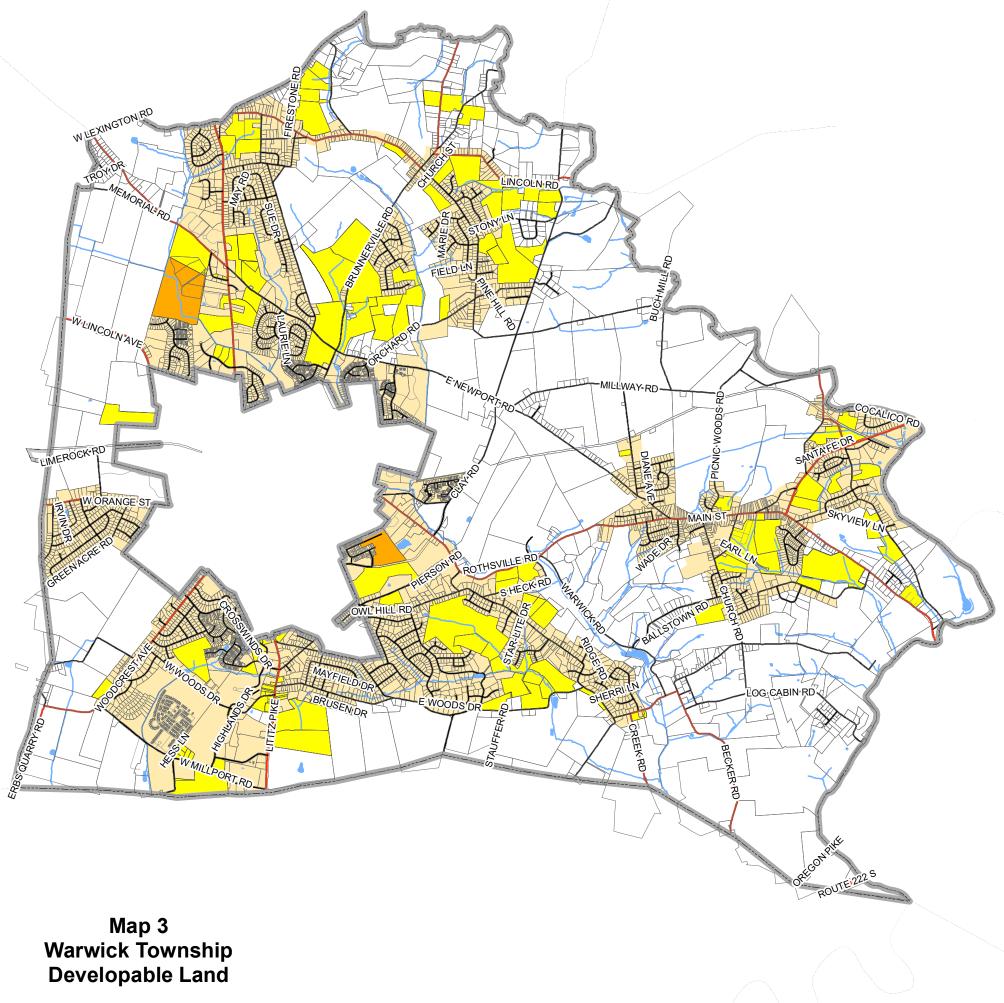
Municipal\_Boundaries

Developable Land:

Developable Land:

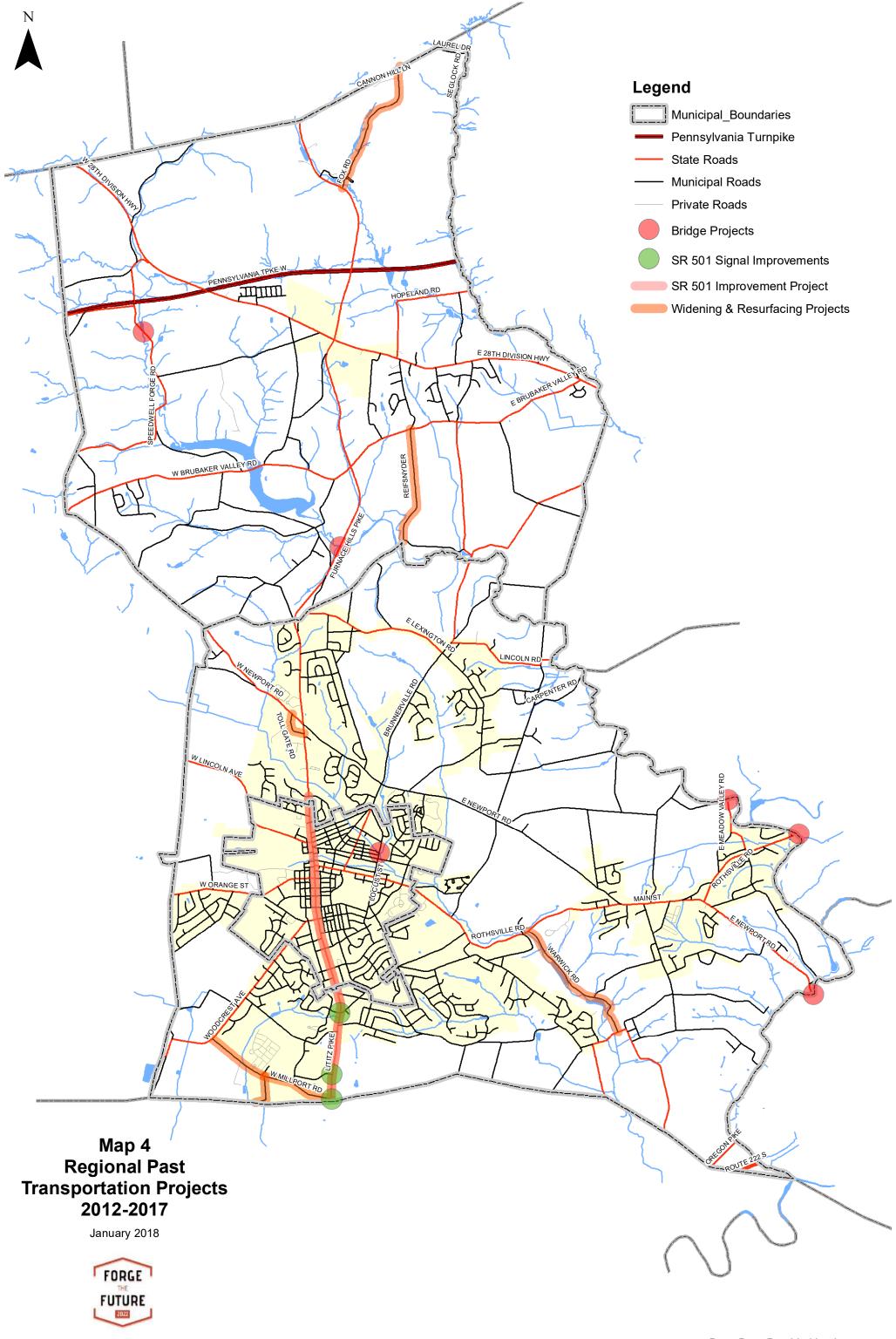
Projects under Development

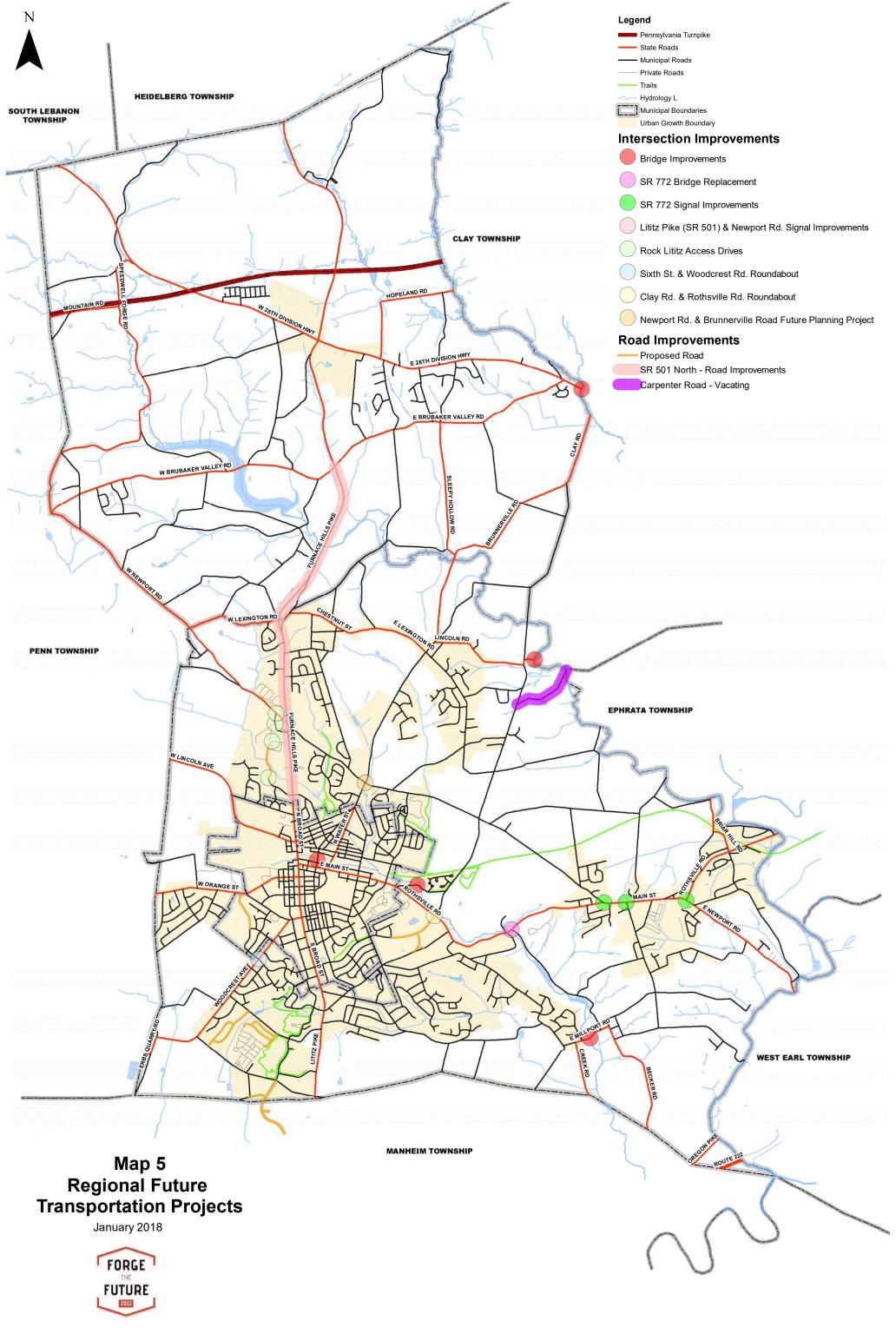
Urban Growth Boundary

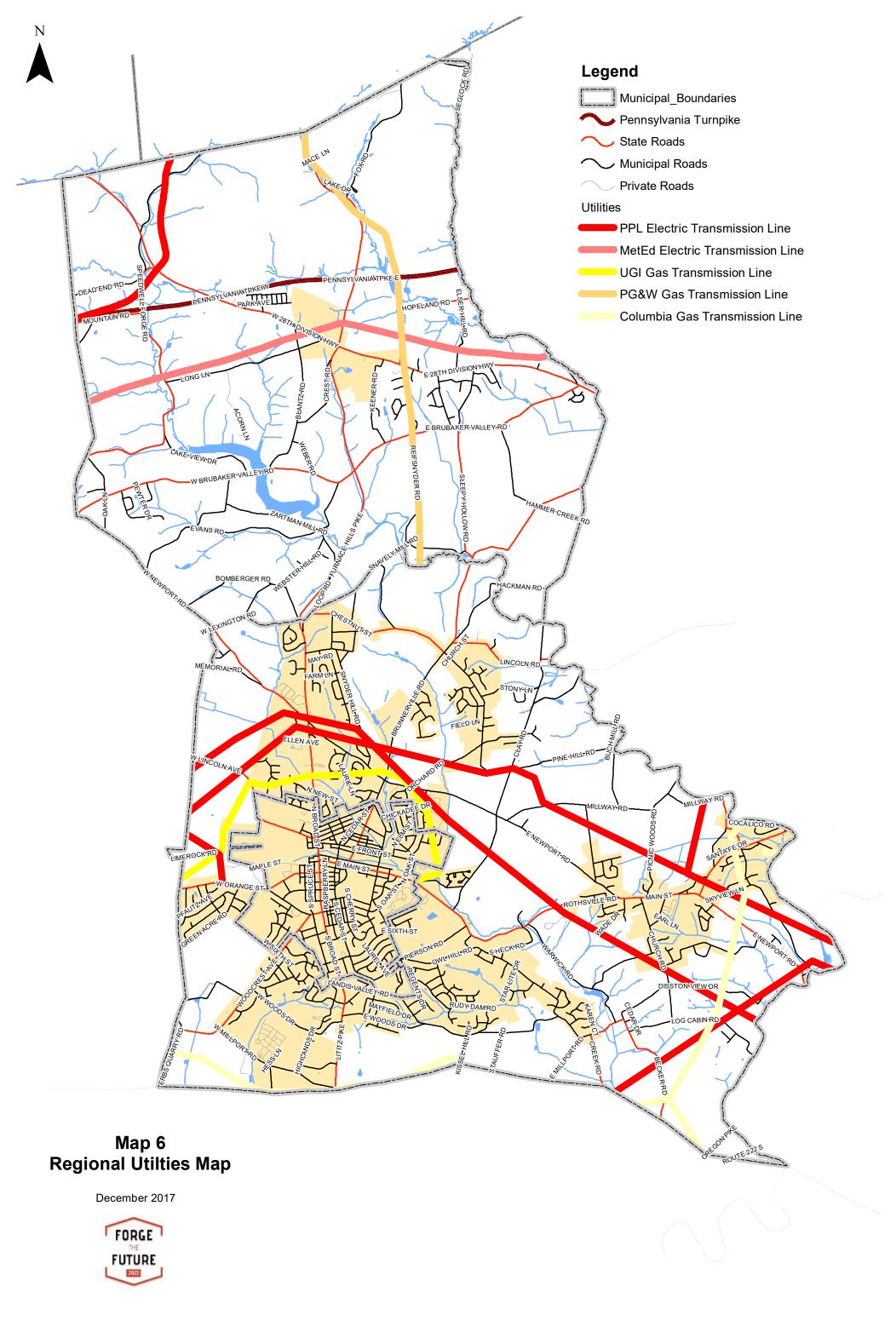


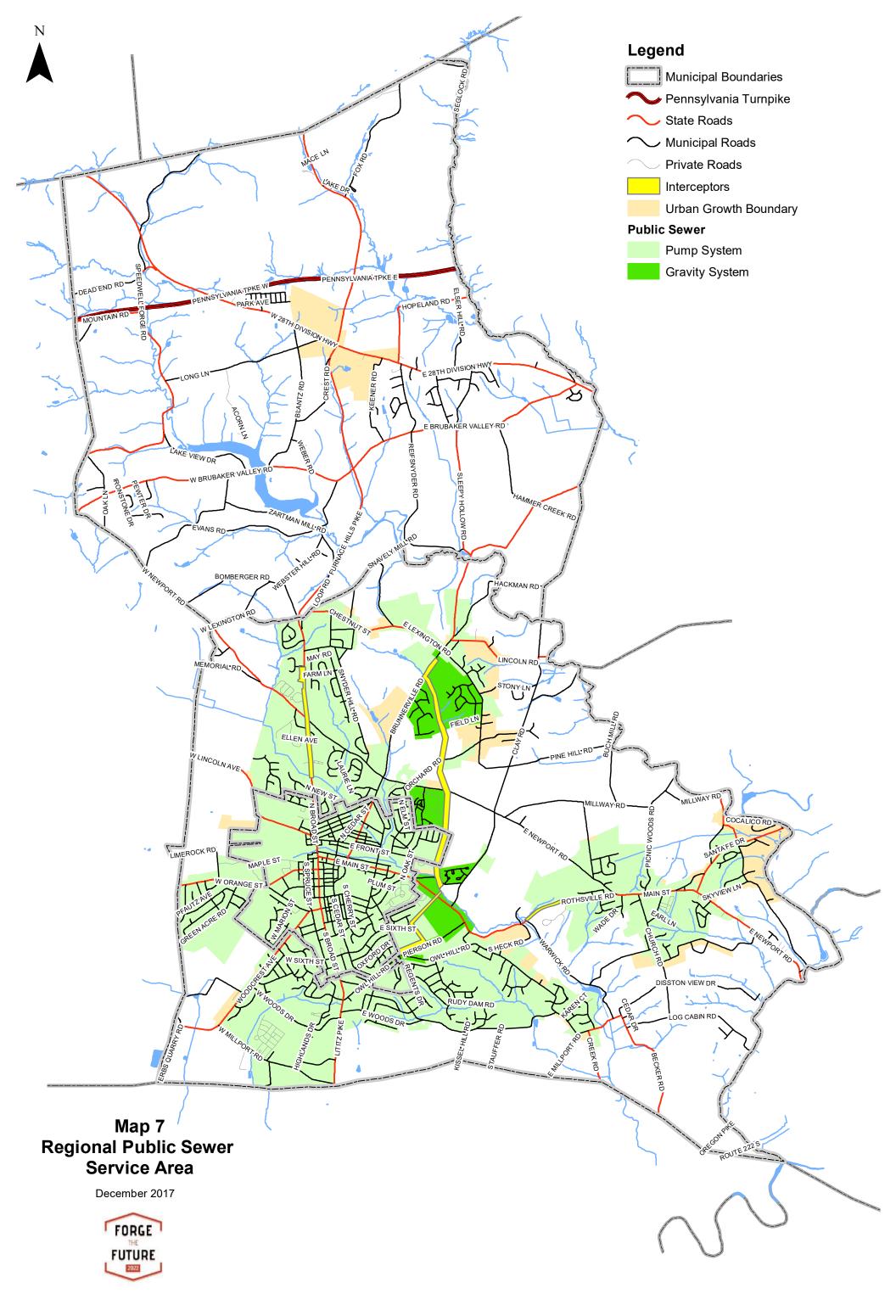


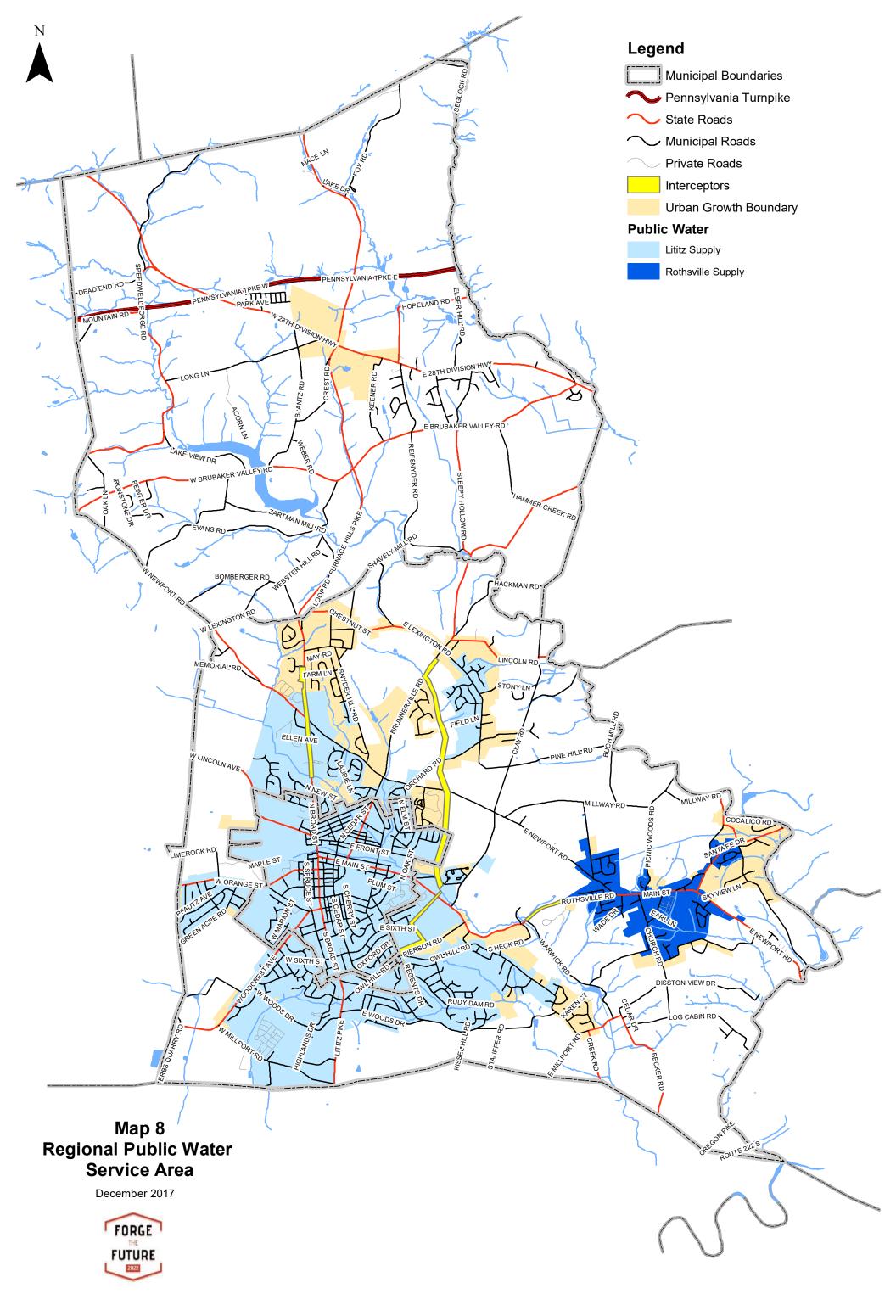


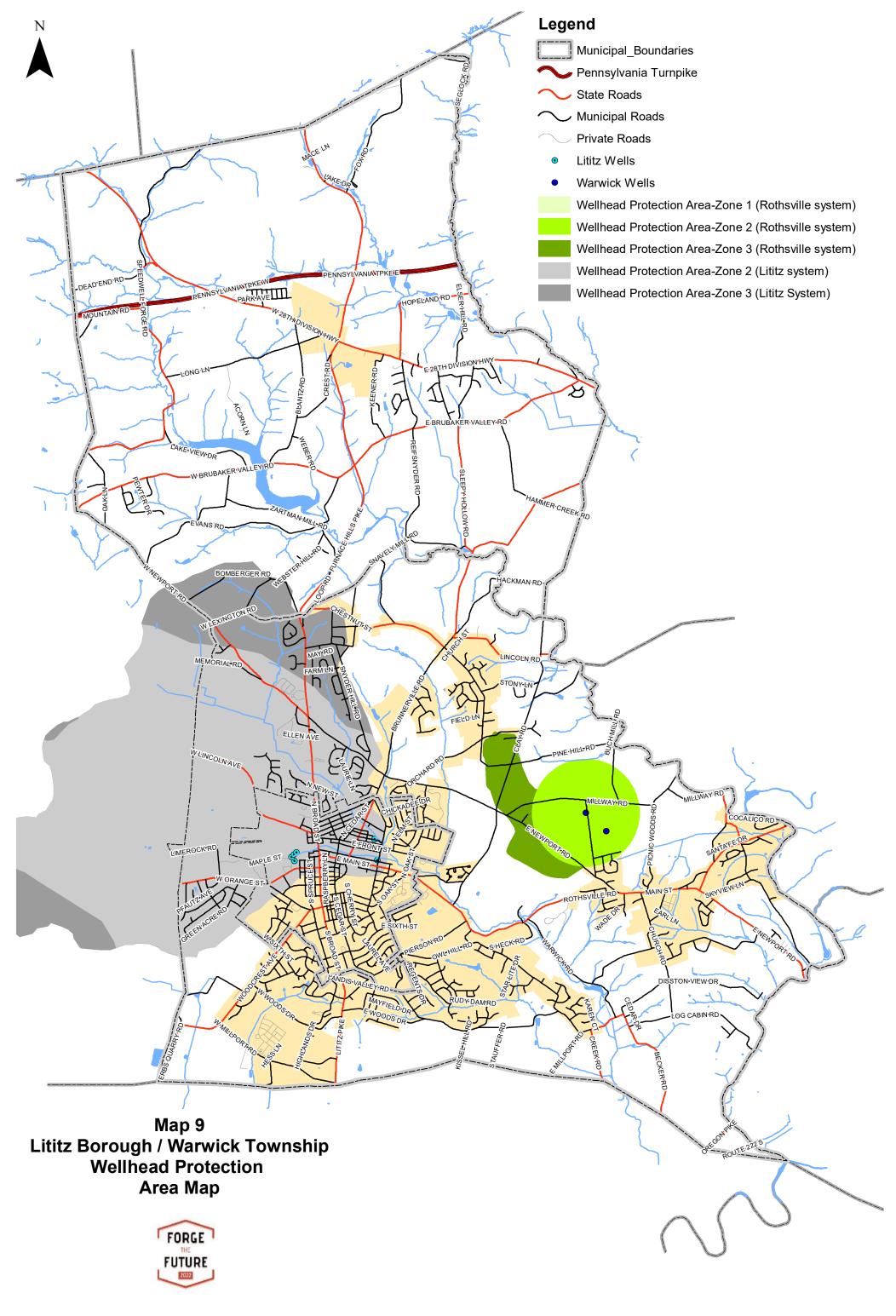


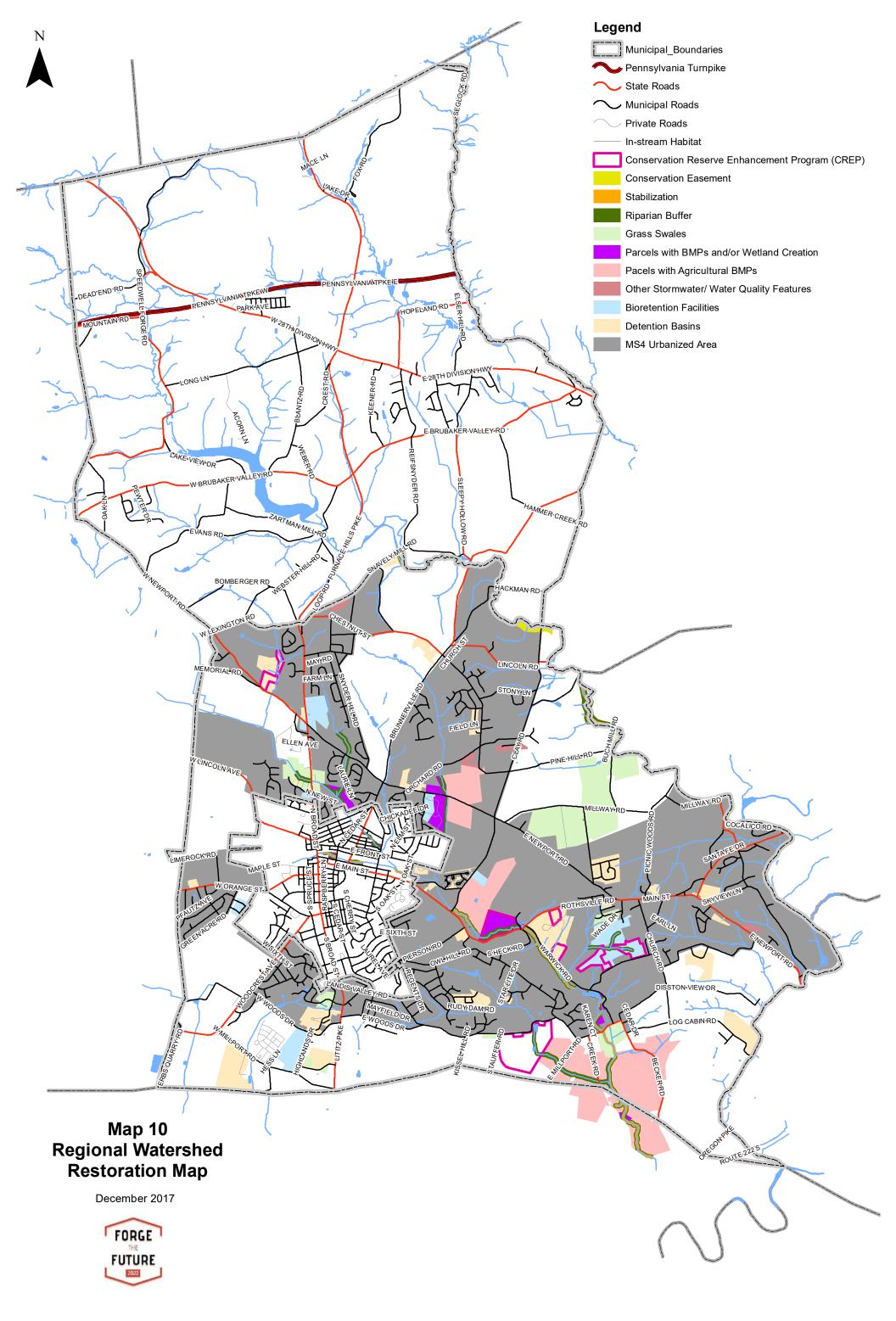


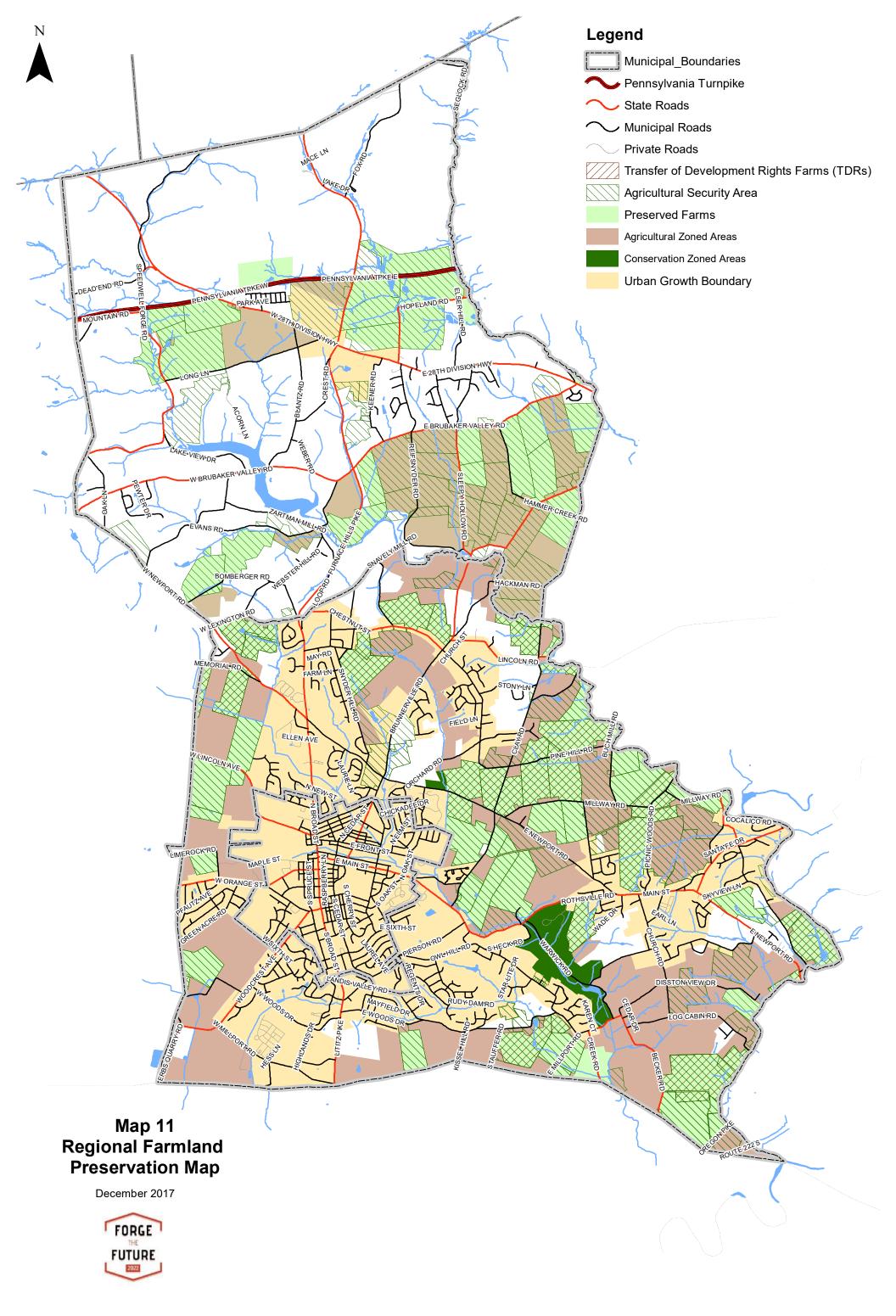


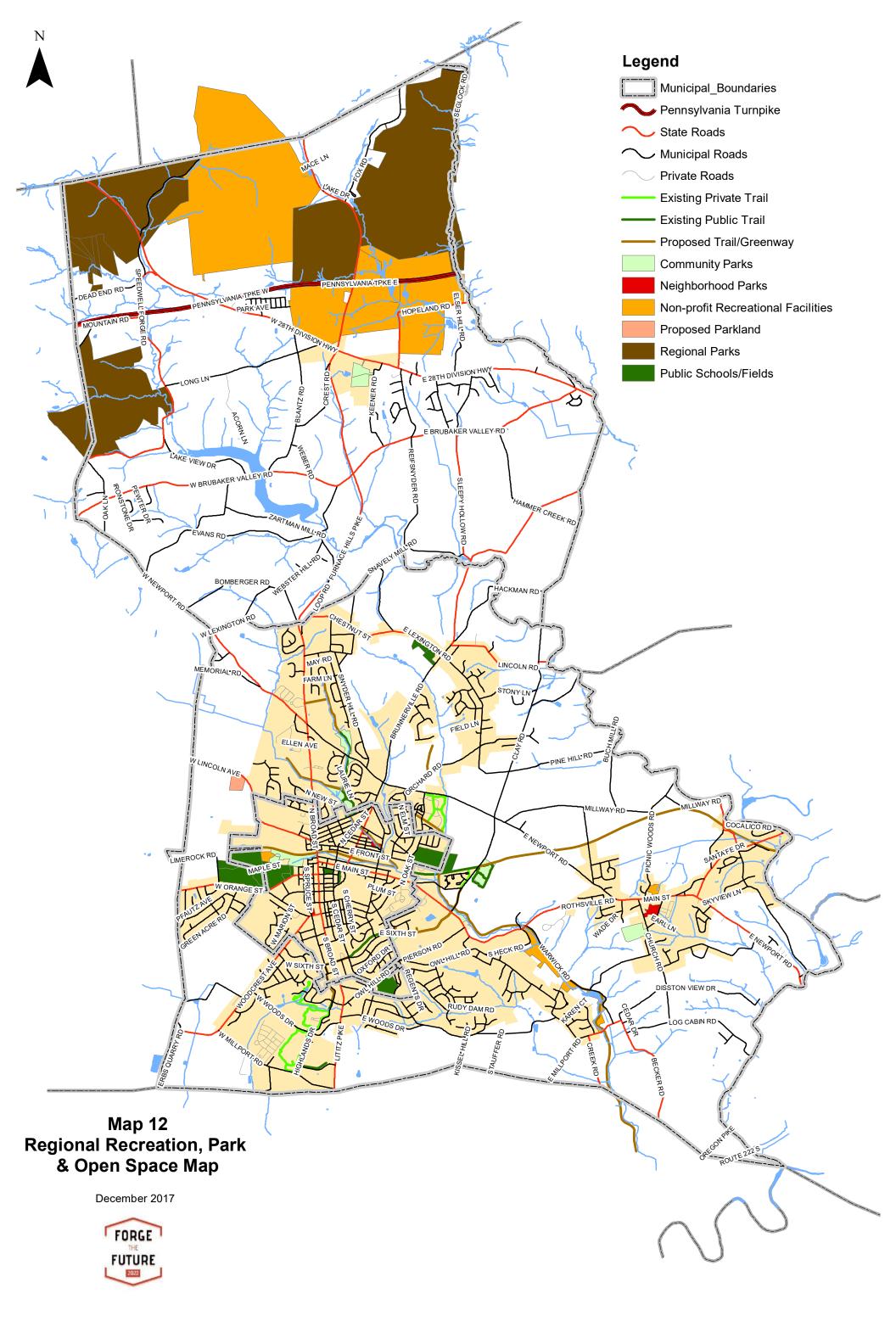


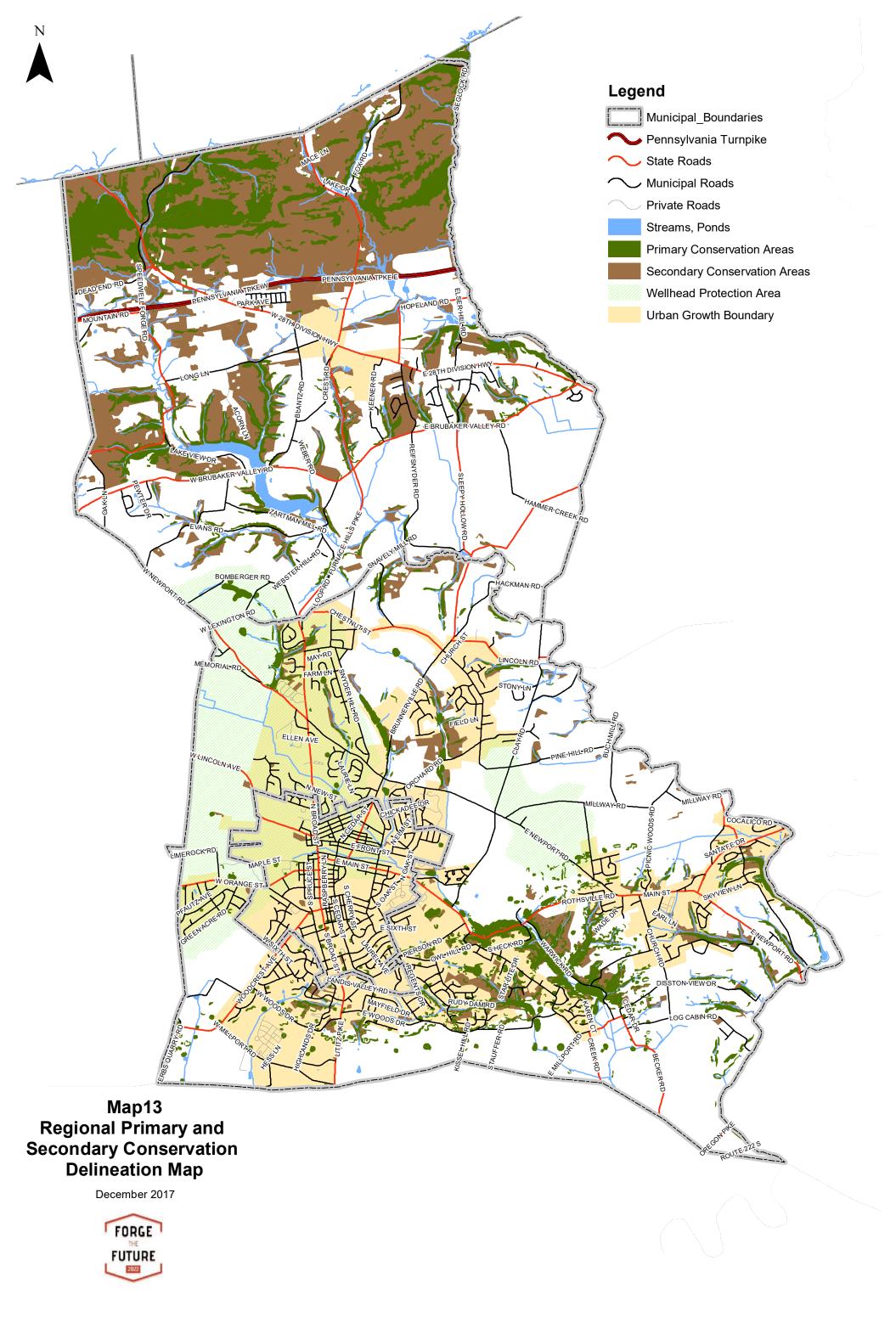


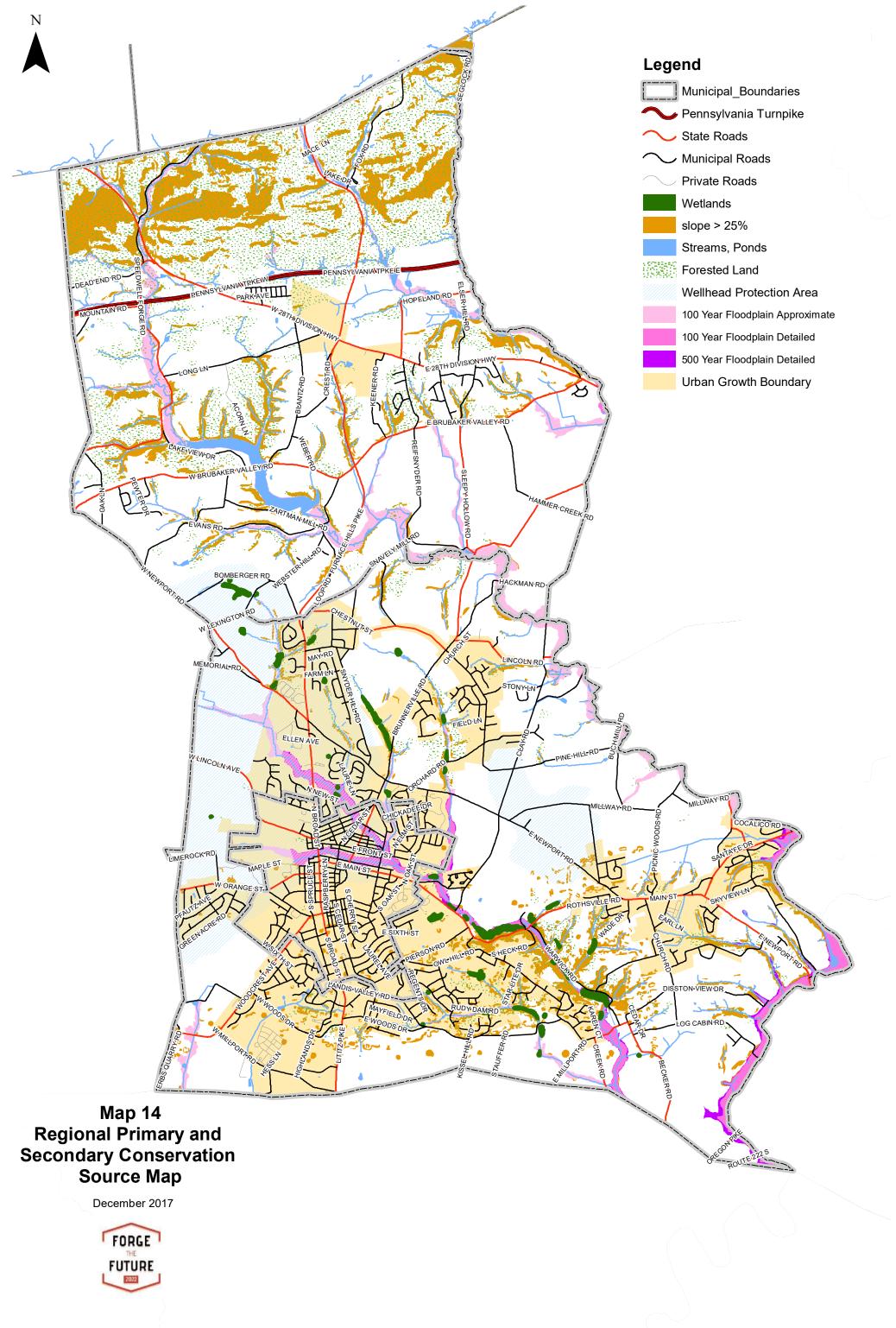


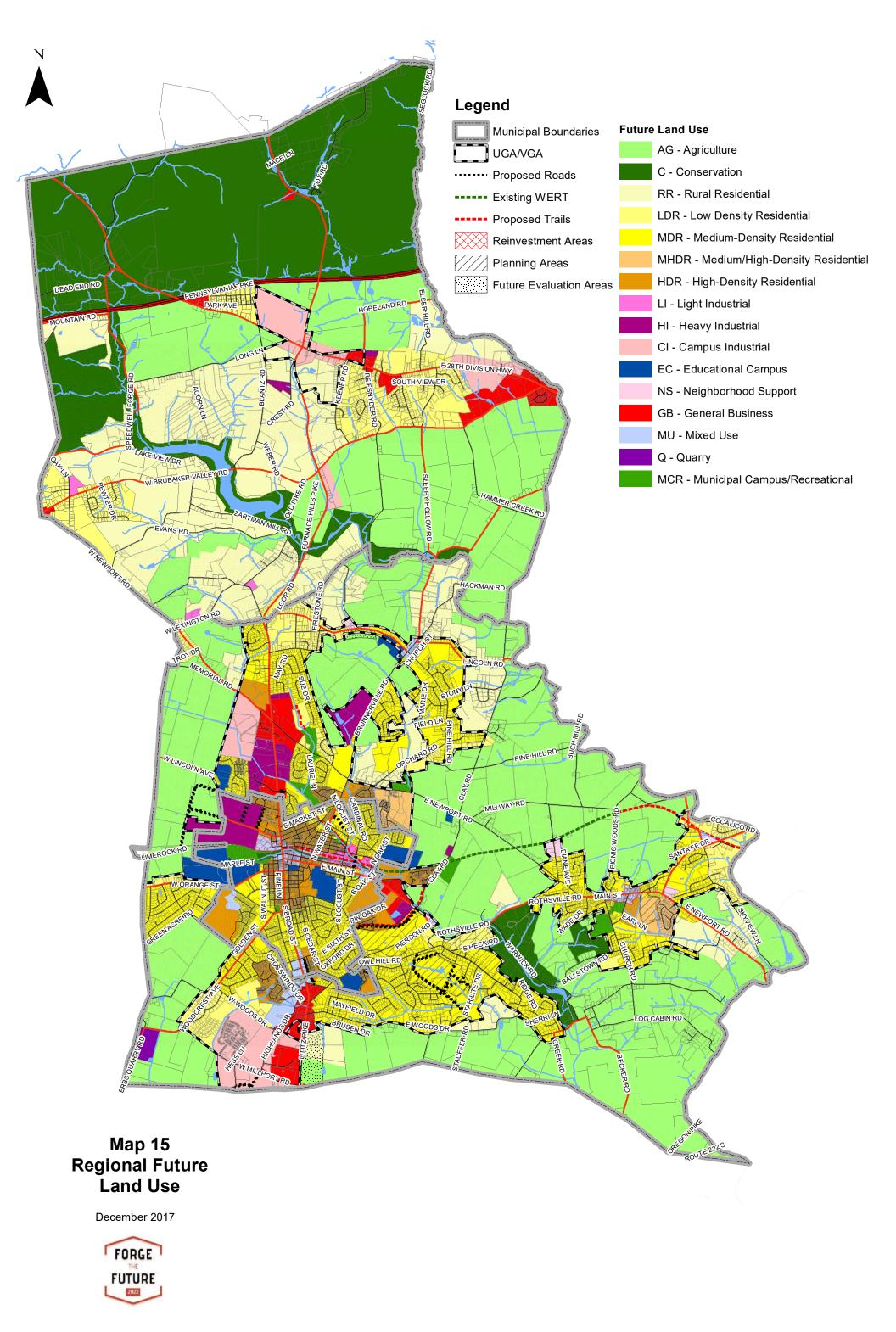












PART V: APPENDIX A
PUBLIC MEETINGS

Meeting #1: Kickoff

Feedback

## FEEDBACK GAINED FROM KICKOFF EVENT FORGE THE FUTURE 2022 March 27, 2017

On March 27, 2017, an estimated 80 persons attended the above-captioned Kickoff Event related to the "Forge the Future 2022" Update to the Warwick Region's Strategic Comprehensive Plan. (It should be noted that, of the estimated number of attendees, 40 signed-in and provided contact information. Copies of the sign-in sheets are attached.) In addition to a mapping exercise (by which attendees could propose areas for future residential, commercial, and recreational development within the Region), two questions were asked of the attendees. The attendees' responses are listed below by order of the theme(s) that they represented, including the number of persons who made these responses.

## Question #1: What is the most successful outcome of the Comp Plan from the last 5 to 10 years?

1.	Rock Lititz	11
	Rock Lititz	(6)
	Clair Global Center	(5)
2.	Downtown Lititz	11
	• Fun events (and venues) Bulls Head, Rooster Street, (soon to be) Whiskey Distillery, and Chilangos	(4)
	Expanded hospitality/restaurant options in area	(2)
	Coolest small town	(2)
	Maintaining the "small town" feel downtown	(1)
	Focus on downtown Lititz	(1)
	Responsible hospitality	(1)
3.	Lititz-to-Ephrata Rail Trail	8
	Lititz-to-Ephrata Rail Trail	(2)
	Rail Trail connections	(6)
4.	New Housing, Especially Age-Restricted	7
	Retirement housing	(2)
	Development of +55 communities	(2)
	Promote senior housing	(2)
	Lititz Reserve	(1)
5.	Protection and Preservation	6
	Wetlands protection and expansion	(3)
	Local environment protection	(1)
	Development of TDR's	(1)
	Façade improvements to 39 properties	(1)
6.	Community Development and Cooperation	6
	Positive community development	(2)
	Regional master planning north and south of Lititz	(2)
	Strong cooperation between all involved entities	(1)
	Keeping the public up-to-date on meetings and plans for future	(1)
7.	Miscellaneous	2
	• I see growth but to weigh success I'd need to know what the original plan wasthings seem to be evolving	(1)
	Dan Zimmerman and his staff	(1)

Total: 51

## Question #2: What is the most important issue facing the region in the next 5 to 10 years?

1.	Ho	using	30
	•	No more townhouses	(6)
	•	Affordable housing	(5)
	•	Single-family housing development for families (0.5 to 1.0 acres/lot)	(5)
	•	No more +55 housing	(4)
	•	Urban-style apartments for +55 in Wilbur Building (including rooftop garden and parking garage)	(3)
	•	Housing for families	(2)
	•	Housing for 22 to 35 age group	(2)
	•	Zoning to make intergenerational housing (family) easier	(1)
	•	Housing for millenials	(1)
	•	Decreased housing for young families; the cost is too high and WSD enrollment is declining	(1)
2.	Tra	ansportation and Infrastructure	28
	•	Traffic movement and parking	(6)
	•	Traffic congestion: Move those trucks off of Main Street	(6)
	•	Downtown parking and parking for retail business employees	(6)
	•	Traffic flow in Lititz	(4)
	•	Continuation of transportation, utilities, and water quality improvements that complement each other	(3)
	•	Infrastructure upgrades	(1)
	•	Route 501 traffic ("between the CVS's") is getting worse; backroads getting clogged	(1)
	•	Upkeep of downtown streets	(1)
3.	Pla	nning and Growth	14
	•	Maintaining planned growth	(2)
	•	Area-wide zoning	(2)
	•	Control development, but don't halt it	(1)
	•	Multi-municipal planning	(1)
	•	Cooperation with Lititz	(1)
	•	Northern Warwick Township development	(1)
	•	Southern Warwick Township development	(1)
	•	Balancing growth	(1)
	•	Don't become just a cute sleeper community	(1)
	•	Smart planning for housing and economic development	(1)
	•	Smart growth	(1)
	•	At Routes 501/322, need better stores and gas stations to serve better (1 good gas station vs. 2 okay ones)	(1)
4.	Do	wntowns and Business Community	10
	•	Make Main Street fresh, unique, and more desirable for 25-35 year olds and their families	
		(restaurants, food choices, DIY shops)	(3)
	•	Successful, vibrant downtowns in Lititz and Rothsville	(1)
	•	Keep downtown lively	(1)
	•	Consolidated small business support (similar to how malls promote their tenants)	(1)
	•	Strategic small business growth and opportunity	(1)
	•	Business growth	(1)
	•	Better promotion of small retail with better hours, but impacts traffic and tourism (both good and bad)	(1)
	•	Additional overnight accommodations downtown	(1)
5.	Pro	otection and Preservation	10
	•	Farmland preservation	(4)
	•	TDR's to assist rehab of historic buildings	(1)
	•	Recognizing all environmental resources and protecting them	(1)
	٠	Preserving the Moravian cultural that Lititz was built on	(1)
	•	Identify and preserve historic structures	(1)
	•	Strengthen farmlands; participate with Lancaster Farmland Trust	(1)
	•	Continue environmental gains	(1)

6.	Funding and Taxes	8
	Reduce property taxes, particularly for seniors	(5)
	Community fundraising (see "Saratoga Springs First Night Events")	(1)
	Taxes are increasing even though have increased +55 housing and expanding commercial development	(1)
	<ul> <li>Quality public services at reasonable tax rate; need to increase existing tax base</li> </ul>	(1)
7.	Community Engagement and Vision	6
	Get/keep those in the suburbs engaged in town so as to contribute to/be part of community	(3)
	Attracting variety of demographics (2) and Need a more diverse community (1)	(3)
8.	Parks and Recreation	4
	Dog park	(1)
	Veterans' Park	(1)
	Rail Trail from Borough (Lititz Springs?) Park to Oak Street in Lititz	(1)
	<ul> <li>Expanding all parks/playgrounds to be inclusive of people/kids of all abilities (like Harmony Park)</li> </ul>	(1)
9.	Agriculture	2
	Indoor year-round farmers' market	(1)
	Participate more in Lancaster County Ag Week	(1)

Total: 112

C:\Users\rick\Desktop\FEEDBACK GAINED FROM KICKOFF EVENT.docx

Meeting #2: Economic Development

**Presentation Materials** 

Feedback

## FUTURE 2022 FORGE

velopmen e 0 onomic ပ Ш

# Total Population (2010 Census)

Elizabeth Township

\_ititz Borough

Warwick Township

Total Comp Plan Area

Lancaster County

3,886

17,783

31,038 519,445



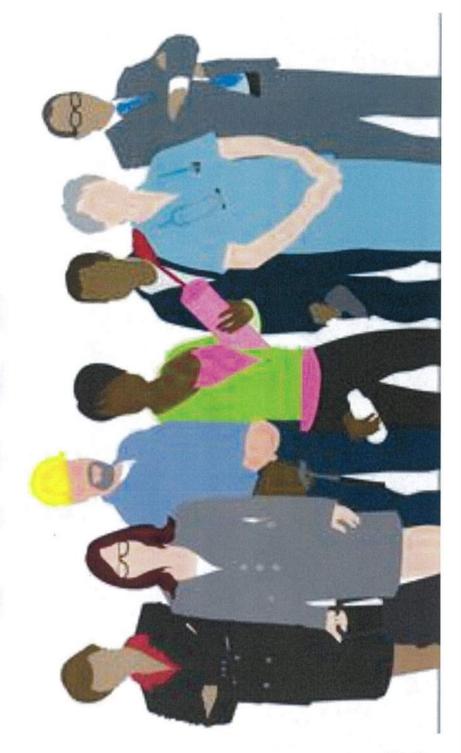
Variables	Littiz Borcugh	Warwick Township	Elizabeth Township	Lancaster County	∀ a	USA
2000-2010 Population Annual Compound Growth Rate (U.S. Census)	0.49%	1.32%	0.14%	0.99%	0.34%	0.93%
2010-2016 Population: Annual Growth Rate (Esri)	0.24%	0.53%	0.16%	0.68%	0.30%	0.75%
2016-2021 Population: Annual Growth Rate (Esri)	0.34%	%09.0	0.30%	0.68%	0.28%	0.84%

# Growth Rate





## 60 G

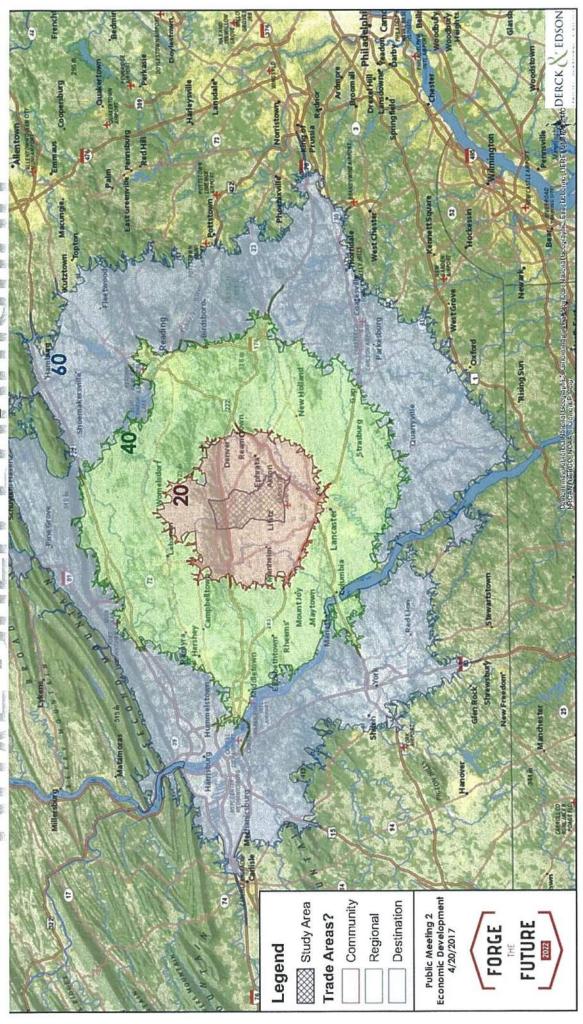


Daytime Workforc

Variables	Lititz Borough, PA	Warwick Township, PA	Elizabeth Township, PA	Comp Plan Region	Lancaster County	PA	United
2016 Per Capita Income	\$30,635	\$31,644	\$28,808	\$ 30,993	\$28,139	\$29,943	\$29,472
2016 Median Household Income	\$53,000	\$71,610	\$64,010	\$63,248	\$57,311	\$53,805	\$54,149
2016 Average Household Income	\$70,599	\$83,734	\$81,443	n/a	\$74,680	\$74,524	\$77,008



# Drive Shed Population



## Within 20 Minutes

Within 40 Minutes

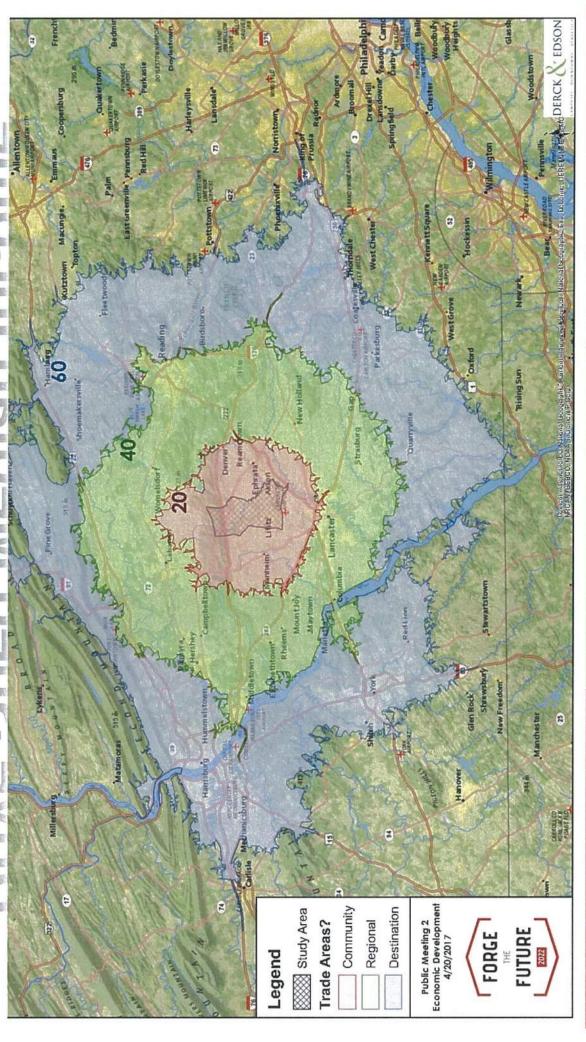
Within 60 Minutes

166,405

847,146

1,947,091

# Tive Shed Median Income



## Within 20 Minutes

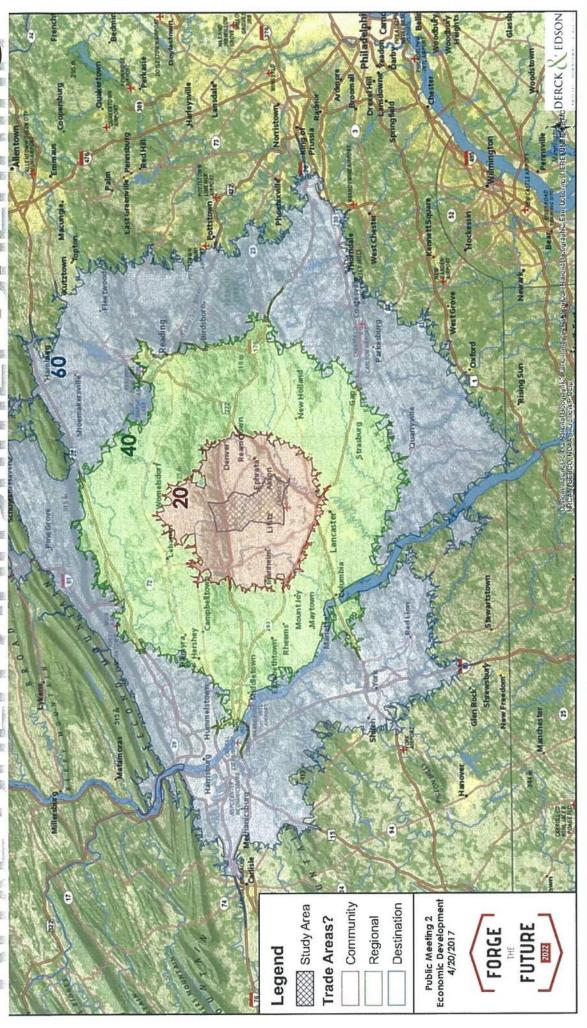
\$62,558

\$56,707

## Within 60 Minutes

\$58,875

# rive Shed Consumer Spending



Within 20 Minutes

Leaking \$110M

Within 40 Minutes

Within 60 Minutes Surplus \$1.3B

Surplus \$1B

# 20 MINUTE DRIVE-SHED SPENDING

Retail Trade-\$2.5B Food and Drink-\$250M



Based on North American Industry Classification System (NAICS) business type classification.

(Retail establishments are

(Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector.)

## 20 MINUTE DRIVE-SHED LEAKAGE

Furniture Stores - \$15M

Building Materials and Supplies - \$51M

Clothing - \$46M

Shoes - \$8M

Sporting Goods - \$16M

Florists - \$2M

Office Supplies - \$2M



Leakage represents money being spent by people living within 20 minutes of the region that leaves that same area and therefore represents potential market share that could be gained.

## S U R P L U S

Home Furnishings- \$25M

Lawn and Garden- \$1M

Specialty Food - \$76M

Jewelry, Luggage, Leather Goods - \$6M

Books, Periodicals, Music Stores- \$65K

Used Merchandise - \$4M

Restaurants - \$33M



A surplus of consumer spending is money being drawn into the region from those living beyond the 20 minute drive-shed

## FORGE

7077

NEXT MEETING - HOUSING Thursday, May 18<sup>th</sup> @ 7:30am

Brick Gables - 800 E. Newport Rd.

Area: 39.9 square miles

Comp Plan Area

Prepared by Derck & Edson

ovies/Museums 295 0 ANNUAL LIFESTYLE SPENDING 31,038 32,603 31,821 807.8 28,351 0.40 Online Games 83 Theatre/Operas Concerts \$55 \* Population/Sq 2010-2016 Annual Growth Rate (Esri) 2000 (Census) 2010 (Census) **POPULATION** Sports Events 2021 (Esri) Mile (Esri) 2016 (Esri) Estimated Projected \$58 \$1,978 2016 Median Disposable Income 3,000 51,031 HOUSEHOLD INCOME 2016 Per Capita 30,993 INCOME Income Household Income 2016 Median 63,248 100000-149999 75000-99999 15000-24999 0-14999 200000+ 150000-199999 50000-74999 35000-49999 25000-34999 WiFi Router 2016 Average Household Size 40% 6 ANNUAL HOUSEHOLD SPENDING \$5,528 Health Care E-reader/ Tablet HOME COMPUTING HOUSEHOLD INFO 33% 2016 Median Age Computers & C Hardware Desktop Computer 52% \$4,961 Groceries ACS Median Year Householder 2002 Moved In \$2,015 Apparel & Services 21% Notebook Laptop/

Source: American Community Survey (ACS), Esri, Esri and GfK MRI, U.S. Census

### Elizabeth Township

Prepared by Derck & Edson

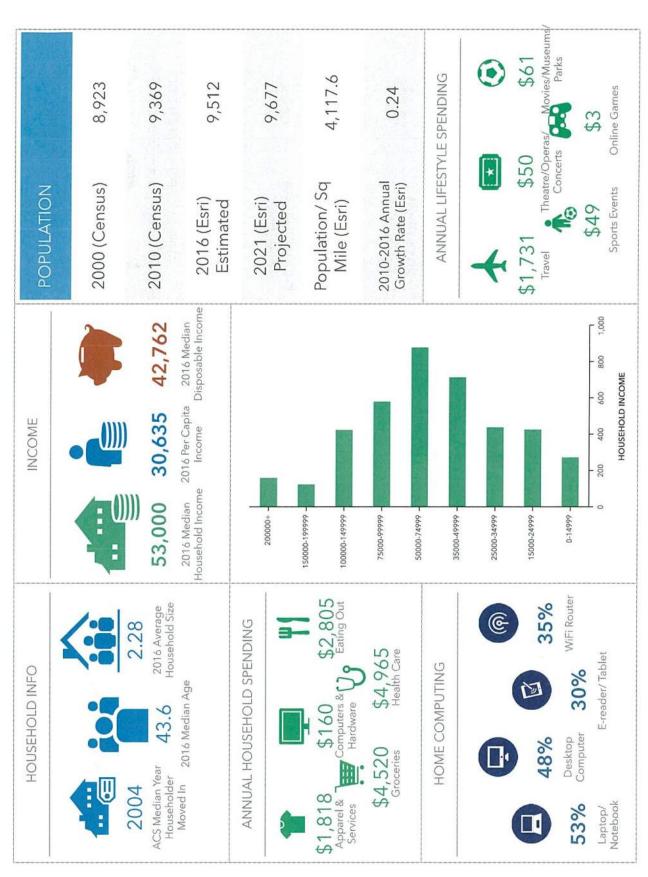
Elizabeth Township, PA Elizabeth township, PA (4207123008) Geography: County Subdivision

\$65 Parks 0 ANNUAL LIFESTYLE SPENDING 3,833 3,924 3,983 225.6 3,886 0.16 Online Games \$3 Theatre/Operas Concerts \$58 \* Population/Sq 2010-2016 Annual Growth Rate (Esri) 2000 (Census) 2010 (Census) Sports Events **POPULATION** 2021 (Esri) 2016 (Esri) Mile (Esri) Estimated Projected \$62 \$2,089 Disposable Income 400 51,516 2016 Median 300 HOUSEHOLD INCOME 2016 Per Capita 200 28,808 INCOME Income 100 Household Income 2016 Median 64,010 0-14999 15000-24999 150000-199999 00000-149999 75000-99999 50000-74999 35000-49999 25000-34999 200000+ **NiFi** Router 43% 2016 Average Household Size 6 2.83 ANNUAL HOUSEHOLD SPENDING \$5,740 Health Care E-reader/ Tablet HOME COMPUTING 33% HOUSEHOLD INFO 2016 Median Age Computers & C Hardware \$172 39.9 Desktop 55% \$5,000 Groceries ACS Median Year Householder Moved In 1995 \$2,033 Apparel & Laptop/ Notebook 26% Services

@2017 Esri

Prepared by Derck & Edson

Lititz Borough, PA Lititz Borough, PA (4243816) Geography: Place



Source: American Community Survey (ACS), Esri, Esri and GfK MRI, U.S. Census

Prepared by Derck & Edson

Warwick Township, PA Warwick township, PA (4207181168) Geography: County Subdivision



Source: American Community Survey (ACS), Esri, Esri and GfK MRI, U.S. Census

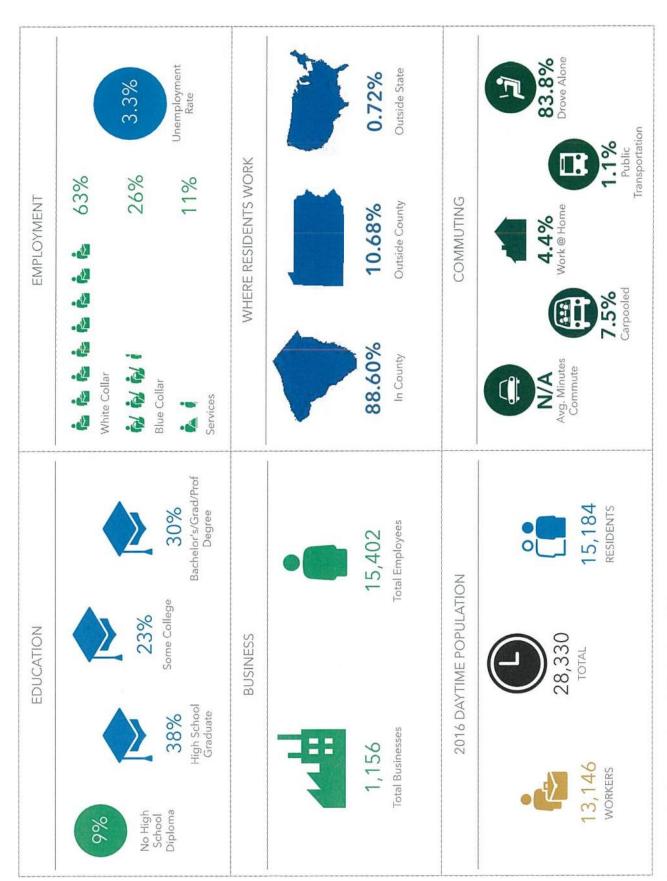
@2017 Esri

Area: 39.9 square miles

## Comprehensive Plan Area

Prepared by Derck & Edson

Dropscoot by D



April 18, 2017

Prepared by Derck & Edson

## EMPLOYMENT - Forge the Future 2022

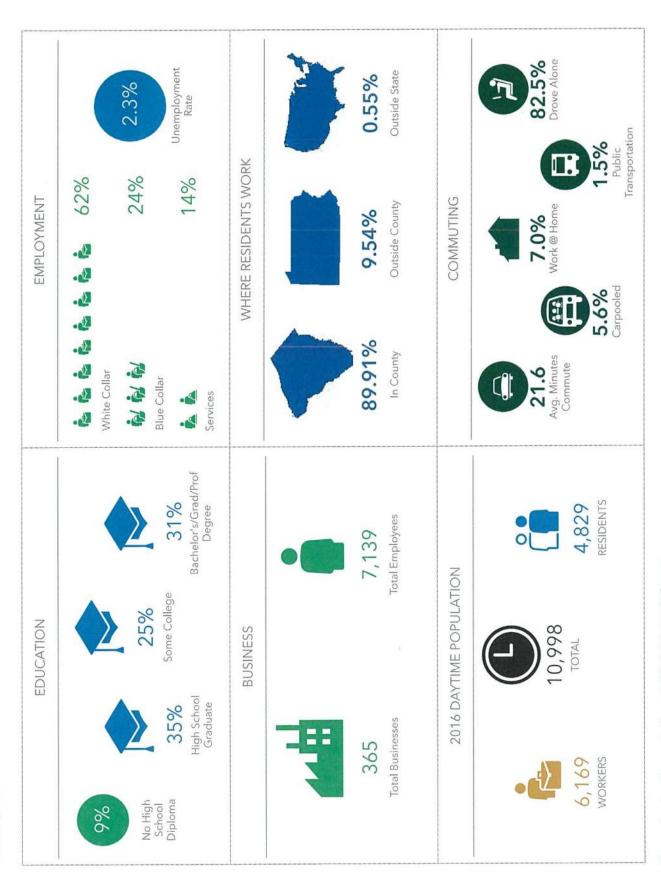
Elizabeth township, PA (4207123008) Geography: County Subdivision Elizabeth Township, PA



Prepared by Derck & Edson

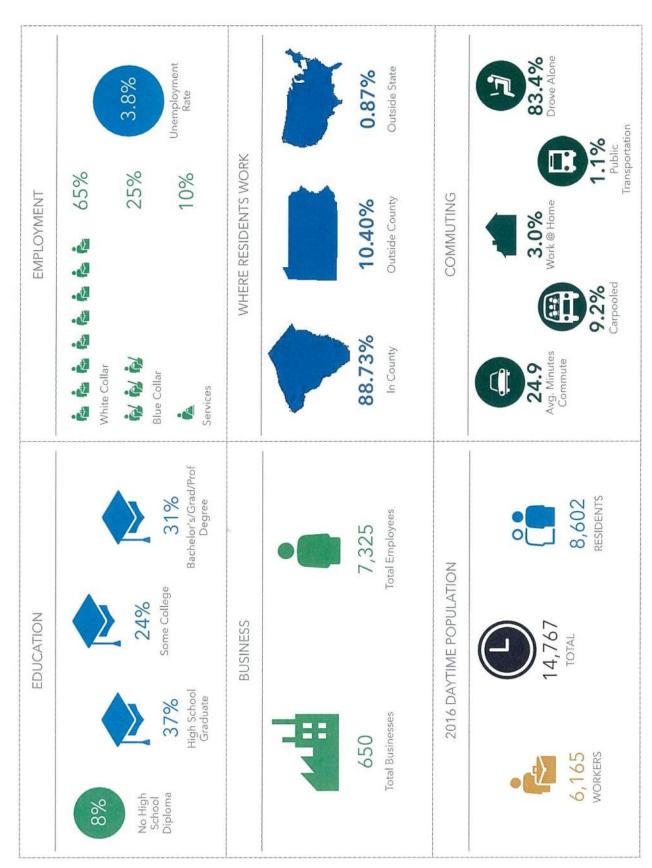
## EMPLOYMENT - Forge the Future 2022

Lititz Borough, PA Lititz Borough, PA (4243816) Geography: Place



@2017 Esri

Warwick township, PA (4207181168) Geography: County Subdivision Warwick Township, PA





Trade Areas

701 Furnace Hills Pike, Warwick Twp, Pennsylvania, 17543

Drive Time: 20 minute radius

Prepared by Esri
Latitude: 40.17577

Longitude: -76.30873

	ercent 16.6%	Demographic Summary	<b>2016</b> 166,405	<b>2021</b> 172,275
Green Acres (6A)		Population	63,824	65,985
Parks and Rec (5C)	14.4%	Households		47,027
Salt of the Earth (6B)	9.8%	Families	45,626 42.3	42.9
In Style (5B)	7.8%	Median Age		\$72,740
Middleburg (4C)	7.3%	Median Household Income	\$62,558	\$72,740
		Spending Potential	Average Amount	Total
		Index	Spent	Total
Apparel and Services		103	\$2,078.29	\$132,644,610
Men's		103	\$413.37	\$26,383,195
Women's		105	\$717.75	\$45,809,392
Children's		99	\$319.26	\$20,376,274
Footwear		103	\$440.92	\$28,141,199
Watches & Jewelry		107	\$111.14	\$7,093,335
Apparel Products and Services (1)		105	\$75.85	\$4,841,216
Computer				
Computers and Hardware for Home Use		103	\$178.28	\$11,378,847
Portable Memory		104	\$4.91	\$313,661
Computer Software		105	\$13.65	\$871,281
Computer Accessories		107	\$19.12	\$1,220,474
<b>Entertainment &amp; Recreation</b>		106	\$3,088.45	\$197,117,450
Fees and Admissions		107	\$620.11	\$39,577,851
Membership Fees for Clubs (2)		108	\$207.27	\$13,228,695
Fees for Participant Sports, excl. Trips		108	\$96.75	\$6,174,655
Tickets to Theatre/Operas/Concerts		110	\$57.93	\$3,697,623
Tickets to Movies/Museums/Parks		101	\$67.19	\$4,288,204
Admission to Sporting Events, excl. Trip	os	111	\$58.96	\$3,763,206
Fees for Recreational Lessons		107	\$131.30	\$8,380,259
Dating Services		103	\$0.71	\$45,211
TV/Video/Audio		104	\$1,253.25	\$79,987,708
Cable and Satellite Television Services		105	\$938.06	\$59,870,667
Televisions		103	\$113.76	\$7,260,808
Satellite Dishes		102	\$1.49	\$94,861
VCRs, Video Cameras, and DVD Players	5	100	\$8.13	\$519,105
Miscellaneous Video Equipment		109	\$8.40	\$536,353
Video Cassettes and DVDs		101	\$18.63	\$1,188,786
Video Game Hardware/Accessories		101	\$25.91	\$1,653,799
Video Game Software		99	\$13.60	\$868,060
Streaming/Downloaded Video		100	\$18.21	\$1,162,099
Rental of Video Cassettes and DVDs		99	\$16.16	\$1,031,595
Installation of Televisions		116	\$1.07	\$67,989
Audio (3)		105	\$86.10	\$5,495,536
Rental and Repair of TV/Radio/Sound E	quipment	95	\$3.73	\$238,049
Pets		107	\$572.72	\$36,553,109
Toys/Games/Crafts/Hobbies (4)		105	\$119.78	\$7,644,558
Recreational Vehicles and Fees (5)		112	\$120.14	\$7,668,009
Sports/Recreation/Exercise Equipment (6	)	102	\$169.55	\$10,821,308
Photo Equipment and Supplies (7)		107	\$59.13	\$3,774,137
Reading (8)		110	\$144.58	\$9,227,477
Catered Affairs (9)		113	\$29.19	\$1,863,293
Food		104	\$8,369.82	\$534,195,680
Food at Home		104	\$5,170.43	\$329,997,347
Bakery and Cereal Products		105	\$705.46	\$45,024,999
Meats, Poultry, Fish, and Eggs		103	\$1,144.28	\$73,032,616
Dairy Products		104	\$553.83	\$35,347,931
Fruits and Vegetables		104	\$991.33	\$63,270,512
Snacks and Other Food at Home (10)		104	\$1,775.53	\$113,321,290
Food Away from Home		103	\$3,199.40	\$204,198,333
Alcoholic Beverages		105	\$540.36	\$34,487,807

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding. This report is not a comprehensive list of all consumer spending variables therefore the variables in each section may not sum to totals.



Trade Areas 701 Furnace Hills Pike, Warwick Twp, Pennsylvania, 17543 Drive Time: 20 minute radius Prepared by Esri Latitude: 40.17577

Financial   Value of Stocks/Bonds/Mutual Funds   117   \$8,803.94   \$561,902,614   Value of Retirement Plans   117   \$30,699.11   \$1,959,340,197   Value of Other Financial Assets   114   \$1,294.23   \$82,603,022   Vehicle Loan Amount excluding Interest   108   \$619.85   \$139,863,095   Value of Credit Card Debt   108   \$619.85   \$139,863,095   Value of Credit Card Debt   108   \$619.85   \$339,561,529   Value of Credit Card Debt   108   \$619.85   \$339,561,529   Value of Credit Card Debt   108   \$454.20   \$28,988,879   Prescription Drugs   106   \$131.56   \$8,396,591   Value of Credit Card Debt   109   \$37.83   \$5,244,058   Value of Credit Card Debt   109   \$397.83   \$5,244,058   Value of Credit Card Debt   109   \$37.83   \$5,244,058   Value of Credit Card Debt   109   \$47.85   \$328,220,119   Value of Credit Card Debt   109   \$47.85   \$328,220,119   Value of Credit Card Debt   109   \$10.05   Value of Credit Card Debt   109   \$10.05   Value of Credit Card Debt   109   \$10.05   Value of Credit Card Debt   109   Value of Cr		Spending Potential Index	Average Amount Spent	Total
Value of Retirement Plans         117         \$30,699.11         \$1,959,340,197           Value of Other Financial Assets         114         \$1,294.23         \$82,603,022           Vehicle Loan Amount excluding Interest         108         \$619.85         \$159,863,092           Value of Credit Card Debt         108         \$619.85         \$39,561,529           Health         The Commendary Commendary         108         \$414.62         \$83,396,591           Prescription Drugs         108         \$454.20         \$82,898,879           Eyeglasses and Contact Lenses         109         \$97.83         \$6,244,058           Home         William Card Remodeling Services         116         \$2,027.36         \$129,394,048           Maintenance and Remodeling Services         116         \$2,027.36         \$129,394,048           Maintenance and Remodeling Materials (12)         115         \$415.81         \$26,538,919           Utilities, Fuel, and Public Services         105         \$5,142.58         \$328,220,119           Household Furnishings and Equipment         Household Textiles (13)         106         \$92.35         \$5,894,041           Household Textiles (13)         106         \$92.35         \$5,894,041           Furniture         104         \$512.28         \$2	Financial			
Value of Other Financial Assets         114         \$1,294,223         \$82,603,025           Vehicle Loan Amount excluding Interest         108         \$2,504,75         \$159,863,095           Value of Credit Card Debt         108         \$619.85         \$39,561,529           Health         ************************************	Value of Stocks/Bonds/Mutual Funds	117	\$8,803.94	\$561,902,614
Vehicle Loan Amount excluding Interest         103         \$2,504,75         \$159,863,095           Value of Credit Card Debt         108         \$619,85         \$39,561,529           Health         8         \$39,561,529           Nonprescription Drugs         106         \$131,56         \$8,396,591           Prescription Drugs         108         \$454,20         \$28,988,879           Eyeglasses and Contact Lenses         109         \$97.83         \$6,244,058           Home         Workside         \$112         \$9,627.68         \$614,476,995           Maintenance and Remodeling Services         116         \$2,027,36         \$129,394,048           Maintenance and Remodeling Services         115         \$415,61         \$26,539,919           Utilities, Fuel, and Public Services         105         \$5,142,58         \$328,220,119           Household Furnishings and Equipment         106         \$92.35         \$5,894,041           Household Textiles (13)         106         \$92.35         \$5,894,041           Furniture         104         \$512,28         \$32,695,556         Rugs           Rugs         113         \$27,49         \$1,754,816         Rugs         Rugs         \$305,98         \$19,528,978         Rugs         Rugs	Value of Retirement Plans	117	\$30,699.11	\$1,959,340,197
Value of Credit Card Debt         108         \$619.85         \$39,561,529           Health         Nonprescription Drugs         106         \$131.56         \$8,396,591           Prescription Drugs         108         \$454.20         \$28,988,879           Eyeglasses and Contact Lenses         109         \$97.83         \$6,244,058           Home         Workgage Payment and Basics (11)         112         \$9,627.68         \$614,767,995           Maintenance and Remodelling Services         116         \$2,027.36         \$129,394,048           Maintenance and Remodelling Materials (12)         115         \$415.81         \$26,538,919           Utilities, Fuel, and Public Services         105         \$5,142.58         \$328,220,119           Household Furnishings and Equipment         106         \$92.35         \$5,894,041           Household Furnishings and Equipment         104         \$512.28         \$32,695,856           Rugs         113         \$27.49         \$1,754,816           Rugs         113         \$27.49         \$1,754,816           Major Appliances (14)         108         \$305.98         \$19,528,978           Housewares (15)         106         \$88.29         \$5,635,047           Small Appliances         105         \$49	Value of Other Financial Assets	114	\$1,294.23	\$82,603,022
Nonprescription Drugs	Vehicle Loan Amount excluding Interest	103	\$2,504.75	\$159,863,095
Nonprescription Drugs	Value of Credit Card Debt	108	\$619.85	\$39,561,529
Prescription Drugs         108         \$454.20         \$28,888,879           Eyeglasses and Contact Lenses         109         \$97.83         \$6,244,058           Home         Wordgage Payment and Basics (11)         112         \$9,627.68         \$614,476,995           Maintenance and Remodeling Services         116         \$2,027.36         \$129,394,048           Maintenance and Remodeling Materials (12)         115         \$415.81         \$26,538,919           Utilities, Fuel, and Public Services         105         \$5,142.58         \$328,220,119           Household Furnishings and Equipment         106         \$92.35         \$5,894,041           Household Textiles (13)         106         \$92.35         \$32,695,856           Rugs         113         \$27.49         \$1,754,816           Major Appliances (14)         108         \$305.98         \$19,529,978           Housewares (15)         106         \$88.29         \$5,565,047           Small Appliances         105         \$49.53         \$3,161,432           Luggage         109         \$10.06         \$441,53           Felephones and Accessories         107         \$75.93         \$4,946,472           Household Operations         101         \$437.80         \$27,942,095	Health			
Eyeglasses and Contact Lenses   109	Nonprescription Drugs	106	\$131.56	\$8,396,591
Home	Prescription Drugs	108	\$454.20	\$28,988,879
Mortgage Payment and Basics (11)         112         \$9,627.68         \$614,476,995           Maintenance and Remodeling Services         116         \$2,027.36         \$129,394,048           Maintenance and Remodeling Materials (12)         115         \$415.81         \$26,538,919           Utilities, Fuel, and Public Services         105         \$5,142.58         \$328,220,119           Household Textiles (13)         106         \$92.35         \$5,894,041           Furniture         104         \$512.28         \$32,695,856           Rugs         113         \$22.749         \$1,754,816           Major Appliances (14)         108         \$305.98         \$19,528,978           Housewares (15)         106         \$88.29         \$5,635,047           Small Appliances         105         \$494,53         \$3,161,432           Luggage         109         \$10.06         \$641,813           Telephones and Accessories         107         \$75.93         \$4,466,472           Household Operations         111         \$452.92         \$28,907,094           Child Care         103         \$437.80         \$27,942,095           Law and Garden (16)         111         \$452.92         \$28,907,094           Moving/Storage/Frieight Express<	Eyeglasses and Contact Lenses	109	\$97.83	\$6,244,058
Maintenance and Remodeling Services         116         \$2,027.36         \$129,394,048           Maintenance and Remodeling Materials (12)         115         \$415.81         \$26,538,919           Utilities, Fuel, and Public Services         105         \$5,142.58         \$228,220,119           Household Furnishings and Equipment         106         \$92.35         \$5,894,041           Furniture         104         \$512.28         \$32,695,856           Rugs         113         \$27.49         \$1,754,816           Major Appliances (14)         108         \$305.98         \$19,528,978           Musewares (15)         106         \$88.29         \$5,635,047           Small Appliances         105         \$49.53         \$3,161,432           Lugagae         109         \$10.06         \$864,813           Telephones and Accessories         107         \$75.93         \$4,846,472           Household Operations         107         \$75.93         \$4,846,472           Household Supplies (17)         103         \$47.80         \$27,942,095           Lawn and Garden (16)         111         \$452.92         \$28,907,094           Moving/Storage/Freight Express         96         \$60.84         \$3,883,265           Household Supplies (	Home			
Maintenance and Remodeling Materials (12)         115         \$415.81         \$26,538,919           Utilities, Fuel, and Public Services         105         \$5,142.58         \$328,220,119           Household Furnishings and Equipment         W         ***         ***         ***         \$51,42.58         \$32,828,201,119           Household Textiles (13)         106         \$92,35         \$5,894,041         Furniture         104         \$512.28         \$32,695,856         \$80,98         \$1,754,816         Major Appliances (14)         108         \$305.98         \$19,528,978         Housewares (15)         106         \$88.29         \$5,635,047         \$5,635,047         \$5,635,047         \$3,161,432         Luggage         109         \$10.06         \$641,813         \$49.53         \$3,161,432         Luggage         109         \$10.06         \$641,813         \$49.53         \$3,161,432         Luggage         109         \$10.06         \$641,813         \$40,472         Household Operations         ***         ***         ***         ***         ***         \$4,846,472         ***         ***         ***         ***         ***         ***         ***         ***         ***         ***         ***         ***         ***         ***         ***         ***         ***	Mortgage Payment and Basics (11)	112	\$9,627.68	\$614,476,995
Utilities, Fuel, and Public Services   105   \$5,142.58   \$328,220,119     Household Furnishings and Equipment     Household Textiles (13)	Maintenance and Remodeling Services	116	\$2,027.36	\$129,394,048
Household Furnishings and Equipment   Household Textiles (13)   106   \$92.35   \$5,894,041   Furniture   104   \$512.28   \$32,695,856   Rugs   113   \$27.49   \$1,754,816   Major Appliances (14)   108   \$305.98   \$19,528,978   Housewares (15)   106   \$88.29   \$5,635,047   Small Appliances   105   \$49.53   \$3,161,432   Luggage   109   \$10.06   \$641,813   Telephones and Accessories   105   \$49.53   \$3,161,432   Luggage   109   \$10.06   \$641,813   Telephones and Accessories   107   \$75.93   \$4,846,472   \$4,846,4	Maintenance and Remodeling Materials (12)	115	\$415.81	\$26,538,919
Household Textiles (13)	Utilities, Fuel, and Public Services	105	\$5,142.58	\$328,220,119
Furniture         104         \$512.28         \$32,695,856           Rugs         113         \$27.49         \$1,754,816           Major Appliances (14)         108         \$305.98         \$19,528,978           Housewares (15)         106         \$88.29         \$5,635,047           Small Appliances         105         \$49.53         \$3,161,432           Luggage         109         \$10.06         \$641,813           Telephones and Accessories         107         \$75.93         \$4,846,472           Household Operations         107         \$75.93         \$4,846,472           Household Care         103         \$437.80         \$27,942,095           Child Care         103         \$437.80         \$27,942,095           Lawn and Garden (16)         111         \$452.92         \$28,907,094           Moving/Storage/Freight Express         96         \$60.84         \$3,883,265           Housekeeping Supplies (17)         106         \$742.38         \$47,381,739           Insurance         113         \$522.83         \$33,369,327           Vehicle Insurance         105         \$1,170.84         \$74,727,724           Life/Other Insurance         109         \$3,686.71         \$235,300,720	Household Furnishings and Equipment			
Rugs         113         \$27.49         \$1,754,816           Major Appliances (14)         108         \$305,98         \$19,528,978           Housewares (15)         106         \$88.29         \$5,635,047           Small Appliances         105         \$49.53         \$3,161,432           Luggage         109         \$10.06         \$641,813           Telephones and Accessories         107         \$75.93         \$4,846,472           Household Operations              Child Care         103         \$437.80         \$27,942,095           Lawn and Garden (16)         111         \$452.92         \$28,907,094           Moving/Storage/Freight Express         96         \$60.84         \$3,883,265           Housekeeping Supplies (17)         106         \$742.38         \$33,369,327           Vehicle Insurance         113         \$52.283         \$33,369,327           Vehicle Insurance         105         \$1,170.84         \$74,727,724           Health Insurance         109         \$3,686,71         \$235,300,720           Personal Care Products (18)         104         \$450.06         \$28,724,616           School Books and Supplies (19)         102         \$166.96 <td< td=""><td>Household Textiles (13)</td><td>106</td><td>\$92.35</td><td>\$5,894,041</td></td<>	Household Textiles (13)	106	\$92.35	\$5,894,041
Major Appliances (14)         108         \$305.98         \$19,528,978           Housewares (15)         106         \$88.29         \$5,635,047           Small Appliances         105         \$49.53         \$3,161,432           Luggage         109         \$10.06         \$641,813           Telephones and Accessories         107         \$75.93         \$4,846,472           Household Operations         ****         ****         ****           Child Care         103         \$437.80         \$27,942,095           Lawn and Garden (16)         111         \$452.92         \$28,907,094           Moving/Storage/Freight Express         96         \$60.84         \$3,883,265           Housekeeping Supplies (17)         106         \$742.38         \$47,381,739           Insurance         113         \$52.83         \$33,369,327           Vehicle Insurance         113         \$52.83         \$33,369,327           Vehicle Insurance         113         \$468.81         \$29,921,254           Health Insurance         109         \$3,686.71         \$235,300,720           Personal Care Products (18)         104         \$450.06         \$28,724,616           School Books and Supplies (19)         102         \$166.96		104	\$512.28	\$32,695,856
Major Appliances (14)         108         \$305.98         \$19,528,978           Housewares (15)         106         \$88.29         \$5,635,047           Small Appliances         105         \$49.53         \$3,161,432           Luggage         109         \$10.06         \$641,813           Telephones and Accessories         107         \$75.93         \$4,846,472           Household Operations           Child Care         103         \$437.80         \$27,942,095           Lawn and Garden (16)         111         \$452.92         \$28,907,094           Moving/Storage/Freight Express         96         \$60.84         \$3,883,265           Housekeeping Supplies (17)         106         \$742.38         \$47,381,739           Insurance         113         \$522.83         \$33,369,327           Vehicle Insurance         113         \$522.83         \$33,369,327           Vehicle Insurance         113         \$468.81         \$29,921,254           Health Insurance         109         \$3,686.71         \$235,300,720           Personal Care Products (18)         104         \$450.06         \$28,724,616           School Books and Supplies (19)         102         \$16.96         \$10,656,012 <t< td=""><td>Rugs</td><td>113</td><td>\$27.49</td><td>\$1,754,816</td></t<>	Rugs	113	\$27.49	\$1,754,816
Housewares (15)   106   \$88.29   \$5,635,047   Small Appliances   105   \$49.53   \$3,161,432   Luggage   109   \$10.06   \$641,813   Telephones and Accessories   107   \$75.93   \$4,846,472   Thusehold Operations   Third Care   103   \$437.80   \$27,942,095   Lawn and Garden (16)   111   \$452.92   \$28,907,094   Moving/Storage/Freight Express   96   \$60.84   \$3,883,265   Housekeeping Supplies (17)   106   \$742.38   \$47,381,739   Tinsurance   113   \$522.83   \$33,369,327   Vehicle Insurance   113   \$522.83   \$33,369,327   Vehicle Insurance   113   \$468.81   \$29,921,254   Health Insurance   105   \$1,170.84   \$74,727,724   Life/Other Insurance   109   \$3,686.71   \$235,300,720   Personal Care Products (18)   104   \$450.06   \$28,724,616   \$360.80   \$360.80   \$492.31   \$30,900.720   \$360.8		108	\$305.98	\$19,528,978
Small Appliances         105         \$49.53         \$3,161,432           Luggage         109         \$10.06         \$641,813           Telephones and Accessories         107         \$75.93         \$4,846,472           Household Operations           Child Care         103         \$437.80         \$27,942,095           Lawn and Garden (16)         111         \$452.92         \$28,907,094           Moving/Storage/Freight Express         96         \$60.84         \$3,883,265           Housekeeping Supplies (17)         106         \$742.38         \$47,381,739           Insurance         113         \$522.83         \$33,369,327           Vehicle Insurance         105         \$1,170.84         \$74,727,724           Life/Other Insurance         103         \$468.81         \$29,921,254           Health Insurance         109         \$3,686.71         \$235,300,720           Personal Care Products (18)         104         \$450.06         \$28,724,616           School Books and Supplies (19)         102         \$166.96         \$10,656,012           Smoking Products         102         \$168.96         \$10,656,012           Smoking Products         105         \$2,185.78         \$139,504,945		106	\$88.29	\$5,635,047
Luggage         109         \$10.06         \$641,813           Telephones and Accessories         107         \$75.93         \$4,846,472           Household Operations         ****         ****         ****         ****         \$437.80         \$27,942,095         ***         ***         ***         \$27,942,095         ***         ***         ***         \$27,942,095         ***         ***         ***         \$27,942,095         ***         ***         ***         ***         \$27,942,095         ***         ***         ***         ***         \$27,942,095         *** <t< td=""><td></td><td>105</td><td>\$49.53</td><td>\$3,161,432</td></t<>		105	\$49.53	\$3,161,432
Telephones and Accessories         107         \$75.93         \$4,846,472           Household Operations         Child Care         103         \$437.80         \$27,942,095           Lawn and Garden (16)         111         \$452.92         \$28,907,094           Moving/Storage/Freight Express         96         \$60.84         \$3,883,265           Housekeeping Supplies (17)         106         \$742.38         \$47,381,739           Insurance         113         \$522.83         \$33,369,327           Vehicle Insurance         105         \$1,170.84         \$74,727,724           Life/Other Insurance         113         \$468.81         \$29,921,254           Health Insurance         109         \$3,686.71         \$235,300,720           Personal Care Products (18)         104         \$450.06         \$28,724,616           School Books and Supplies (19)         102         \$166.96         \$10,656,012           Smoking Products         102         \$166.96         \$10,656,012           Smoking Products         102         \$165.96         \$26,739,313           Transportation         104         \$3,185.31         \$203,299,137           Vehicle Maintenance and Repairs         106         \$1,096.16         \$69,961,469		109	\$10.06	\$641,813
Child Care       103       \$437.80       \$27,942,095         Lawn and Garden (16)       111       \$452.92       \$28,907,094         Moving/Storage/Freight Express       96       \$60.84       \$3,883,265         Housekeeping Supplies (17)       106       \$742.38       \$47,381,739         Insurance       0       \$742.38       \$33,369,327         Vehicle Insurance       105       \$1,170.84       \$74,727,724         Life/Other Insurance       103       \$468.81       \$29,921,254         Health Insurance       109       \$3,686.71       \$235,300,720         Personal Care Products (18)       104       \$450.06       \$28,724,616         School Books and Supplies (19)       102       \$166.96       \$10,656,012         Smoking Products       102       \$418.95       \$26,739,313         Transportation       102       \$418.95       \$26,739,313         Tay       Vehicle Maintenance and Repairs       105       \$2,185.78       \$139,504,945         Gasoline and Motor Oil       104       \$3,185.31       \$203,299,137         Vehicle Maintenance and Repairs       106       \$1,096.16       \$69,961,469         Travel         Airline Fares       108       \$492.31<		107	\$75.93	\$4,846,472
Lawn and Garden (16)       111       \$452.92       \$28,907,094         Moving/Storage/Freight Express       96       \$60.84       \$3,883,265         Housekeeping Supplies (17)       106       \$742.38       \$47,381,739         Insurance       0wners and Renters Insurance       113       \$522.83       \$33,369,327         Vehicle Insurance       105       \$1,170.84       \$74,727,724         Life/Other Insurance       113       \$468.81       \$29,921,254         Health Insurance       109       \$3,686.71       \$235,300,720         Personal Care Products (18)       104       \$450.06       \$28,724,616         School Books and Supplies (19)       102       \$166.96       \$10,656,012         Smoking Products       102       \$418.95       \$26,739,313         Transportation       9ayments on Vehicles excluding Leases       105       \$2,185.78       \$139,504,945         Gasoline and Motor Oil       104       \$3,185.31       \$203,299,137         Vehicle Maintenance and Repairs       106       \$1,096.16       \$69,961,469         Travel         Airline Fares       108       \$492.31       \$31,421,256         Lodging on Trips       111       \$515.04       \$32,872,005 <tr< td=""><td>Household Operations</td><td></td><td></td><td></td></tr<>	Household Operations			
Moving/Storage/Freight Express         96         \$60.84         \$3,883,265           Housekeeping Supplies (17)         106         \$742.38         \$47,381,739           Insurance         0wners and Renters Insurance         113         \$522.83         \$33,369,327           Vehicle Insurance         105         \$1,170.84         \$74,727,724           Life/Other Insurance         113         \$468.81         \$29,921,254           Health Insurance         109         \$3,686.71         \$235,300,720           Personal Care Products (18)         104         \$450.06         \$28,724,616           School Books and Supplies (19)         102         \$166.96         \$10,656,012           Smoking Products         102         \$418.95         \$26,739,313           Transportation         9ayments on Vehicles excluding Leases         105         \$2,185.78         \$139,504,945           Gasoline and Motor Oil         104         \$3,185.31         \$203,299,137           Vehicle Maintenance and Repairs         106         \$1,096.16         \$69,961,469           Travel         Airline Fares         108         \$492.31         \$31,421,256           Lodging on Trips         111         \$515.04         \$32,872,005           Auto/Truck Rental on Trips	Child Care	103	\$437.80	\$27,942,095
Housekeeping Supplies (17)   106   \$742.38   \$47,381,739     Insurance	Lawn and Garden (16)	111	\$452.92	\$28,907,094
Housekeeping Supplies (17)   106   \$742.38   \$47,381,739     Insurance	Moving/Storage/Freight Express	96	\$60.84	\$3,883,265
Owners and Renters Insurance       113       \$522.83       \$33,369,327         Vehicle Insurance       105       \$1,170.84       \$74,727,724         Life/Other Insurance       113       \$468.81       \$29,921,254         Health Insurance       109       \$3,686.71       \$235,300,720         Personal Care Products (18)       104       \$450.06       \$28,724,616         School Books and Supplies (19)       102       \$166.96       \$10,656,012         Smoking Products       102       \$418.95       \$26,739,313         Transportation         Payments on Vehicles excluding Leases       105       \$2,185.78       \$139,504,945         Gasoline and Motor Oil       104       \$3,185.31       \$203,299,137         Vehicle Maintenance and Repairs       106       \$1,096.16       \$69,961,469         Travel         Airline Fares       108       \$492.31       \$31,421,256         Lodging on Trips       111       \$515.04       \$32,872,005         Auto/Truck Rental on Trips       105       \$25.28       \$1,613,300		106	\$742.38	\$47,381,739
Vehicle Insurance       105       \$1,170.84       \$74,727,724         Life/Other Insurance       113       \$468.81       \$29,921,254         Health Insurance       109       \$3,686.71       \$235,300,720         Personal Care Products (18)       104       \$450.06       \$28,724,616         School Books and Supplies (19)       102       \$166.96       \$10,656,012         Smoking Products       102       \$418.95       \$26,739,313         Transportation         Payments on Vehicles excluding Leases       105       \$2,185.78       \$139,504,945         Gasoline and Motor Oil       104       \$3,185.31       \$203,299,137         Vehicle Maintenance and Repairs       106       \$1,096.16       \$69,961,469         Travel         Airline Fares       108       \$492.31       \$31,421,256         Lodging on Trips       111       \$515.04       \$32,872,005         Auto/Truck Rental on Trips       105       \$25.28       \$1,613,300	Insurance			
Life/Other Insurance       113       \$468.81       \$29,921,254         Health Insurance       109       \$3,686.71       \$235,300,720         Personal Care Products (18)       104       \$450.06       \$28,724,616         School Books and Supplies (19)       102       \$166.96       \$10,656,012         Smoking Products       102       \$418.95       \$26,739,313         Transportation         Payments on Vehicles excluding Leases       105       \$2,185.78       \$139,504,945         Gasoline and Motor Oil       104       \$3,185.31       \$203,299,137         Vehicle Maintenance and Repairs       106       \$1,096.16       \$69,961,469         Travel         Airline Fares       108       \$492.31       \$31,421,256         Lodging on Trips       111       \$515.04       \$32,872,005         Auto/Truck Rental on Trips       105       \$25.28       \$1,613,300	Owners and Renters Insurance	113	\$522.83	\$33,369,327
Health Insurance       109       \$3,686.71       \$235,300,720         Personal Care Products (18)       104       \$450.06       \$28,724,616         School Books and Supplies (19)       102       \$166.96       \$10,656,012         Smoking Products       102       \$418.95       \$26,739,313         Transportation         Payments on Vehicles excluding Leases       105       \$2,185.78       \$139,504,945         Gasoline and Motor Oil       104       \$3,185.31       \$203,299,137         Vehicle Maintenance and Repairs       106       \$1,096.16       \$69,961,469         Travel         Airline Fares       108       \$492.31       \$31,421,256         Lodging on Trips       111       \$515.04       \$32,872,005         Auto/Truck Rental on Trips       105       \$25.28       \$1,613,300	Vehicle Insurance	105	\$1,170.84	\$74,727,724
Personal Care Products (18)       104       \$450.06       \$28,724,616         School Books and Supplies (19)       102       \$166.96       \$10,656,012         Smoking Products       102       \$418.95       \$26,739,313         Transportation         Payments on Vehicles excluding Leases       105       \$2,185.78       \$139,504,945         Gasoline and Motor Oil       104       \$3,185.31       \$203,299,137         Vehicle Maintenance and Repairs       106       \$1,096.16       \$69,961,469         Travel         Airline Fares       108       \$492.31       \$31,421,256         Lodging on Trips       111       \$515.04       \$32,872,005         Auto/Truck Rental on Trips       105       \$25.28       \$1,613,300	Life/Other Insurance	113	\$468.81	\$29,921,254
School Books and Supplies (19)       102       \$166.96       \$10,656,012         Smoking Products       102       \$418.95       \$26,739,313         Transportation         Payments on Vehicles excluding Leases       105       \$2,185.78       \$139,504,945         Gasoline and Motor Oil       104       \$3,185.31       \$203,299,137         Vehicle Maintenance and Repairs       106       \$1,096.16       \$69,961,469         Travel         Airline Fares       108       \$492.31       \$31,421,256         Lodging on Trips       111       \$515.04       \$32,872,005         Auto/Truck Rental on Trips       105       \$25.28       \$1,613,300	Health Insurance	109	\$3,686.71	\$235,300,720
Smoking Products       102       \$418.95       \$26,739,313         Transportation         Payments on Vehicles excluding Leases       105       \$2,185.78       \$139,504,945         Gasoline and Motor Oil       104       \$3,185.31       \$203,299,137         Vehicle Maintenance and Repairs       106       \$1,096.16       \$69,961,469         Travel         Airline Fares       108       \$492.31       \$31,421,256         Lodging on Trips       111       \$515.04       \$32,872,005         Auto/Truck Rental on Trips       105       \$25.28       \$1,613,300	Personal Care Products (18)	104	\$450.06	\$28,724,616
Transportation         Payments on Vehicles excluding Leases       105       \$2,185.78       \$139,504,945         Gasoline and Motor Oil       104       \$3,185.31       \$203,299,137         Vehicle Maintenance and Repairs       106       \$1,096.16       \$69,961,469         Travel         Airline Fares       108       \$492.31       \$31,421,256         Lodging on Trips       111       \$515.04       \$32,872,005         Auto/Truck Rental on Trips       105       \$25.28       \$1,613,300	School Books and Supplies (19)	102	\$166.96	\$10,656,012
Payments on Vehicles excluding Leases       105       \$2,185.78       \$139,504,945         Gasoline and Motor Oil       104       \$3,185.31       \$203,299,137         Vehicle Maintenance and Repairs       106       \$1,096.16       \$69,961,469         Travel         Airline Fares       108       \$492.31       \$31,421,256         Lodging on Trips       111       \$515.04       \$32,872,005         Auto/Truck Rental on Trips       105       \$25.28       \$1,613,300	Smoking Products	102	\$418.95	\$26,739,313
Gasoline and Motor Oil       104       \$3,185.31       \$203,299,137         Vehicle Maintenance and Repairs       106       \$1,096.16       \$69,961,469         Travel         Airline Fares       108       \$492.31       \$31,421,256         Lodging on Trips       111       \$515.04       \$32,872,005         Auto/Truck Rental on Trips       105       \$25.28       \$1,613,300				
Vehicle Maintenance and Repairs       106       \$1,096.16       \$69,961,469         Travel       108       \$492.31       \$31,421,256         Lodging on Trips       111       \$515.04       \$32,872,005         Auto/Truck Rental on Trips       105       \$25.28       \$1,613,300	Payments on Vehicles excluding Leases	105	\$2,185.78	\$139,504,945
Travel         Airline Fares       108       \$492.31       \$31,421,256         Lodging on Trips       111       \$515.04       \$32,872,005         Auto/Truck Rental on Trips       105       \$25.28       \$1,613,300	Gasoline and Motor Oil	104	\$3,185.31	\$203,299,137
Airline Fares       108       \$492.31       \$31,421,256         Lodging on Trips       111       \$515.04       \$32,872,005         Auto/Truck Rental on Trips       105       \$25.28       \$1,613,300	Vehicle Maintenance and Repairs	106	\$1,096.16	\$69,961,469
Lodging on Trips       111       \$515.04       \$32,872,005         Auto/Truck Rental on Trips       105       \$25.28       \$1,613,300	Travel			
Lodging on Trips       111       \$515.04       \$32,872,005         Auto/Truck Rental on Trips       105       \$25.28       \$1,613,300	Airline Fares	108	\$492.31	\$31,421,256
Auto/Truck Rental on Trips 105 \$25.28 \$1,613,300				
		105	\$25.28	\$1,613,300
		109		\$30,560,532

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding. This report is not a comprehensive list of all consumer spending variables therefore the variables in each section may not sum to totals.



Trade Areas 701 Furnace Hills Pike, Warwick Twp, Pennsylvania, 17543 Drive Time: 20 minute radius Prepared by Esri Latitude: 40.17577

- (1) Apparel Products and Services includes material for making clothes, sewing patterns and notions, shoe repair and other shoe services, apparel laundry and dry cleaning, alteration, repair and tailoring of apparel, clothing rental and storage, and watch and jewelry repair.
- (2) Membership Fees for Clubs includes membership fees for social, recreational, and civic clubs.
- (3) Audio includes satellite radio service, sound components and systems, digital audio players, records, CDs, audio tapes, streaming/downloaded audio, tape recorders, radios, musical instruments and accessories, and rental and repair of musical instruments.
- (4) Toys and Games includes toys, games, arts and crafts, tricycles, playground equipment, arcade games, and online entertainment and games.
- (5) Recreational Vehicles & Fees includes docking and landing fees for boats and planes, purchase and rental of RVs or boats, and camp fees.
- (6) Sports/Recreation/Exercise Equipment includes exercise equipment and gear, game tables, bicycles, camping equipment, hunting and fishing equipment, winter sports equipment, water sports equipment, other sports equipment, and rental/repair of sports/recreation/exercise equipment.
- (7) Photo Equipment and Supplies includes film, film processing, photographic equipment, rental and repair of photo equipment, and photographer fees.
- (8) Reading includes digital book readers, books, magazine and newspaper subscriptions, and single copies of magazines and newspapers...
- (9) Catered Affairs includes expenses associated with live entertainment and rental of party supplies.
- (10) Snacks and Other Food at Home includes candy, chewing gum, sugar, artificial sweeteners, jam, jelly, preserves, margarine, fat, oil, salad dressing, nondairy cream and milk, peanut butter, frozen prepared food, potato chips, nuts, salt, spices, seasonings, olives, pickles, relishes, sauces, gravy, other condiments, soup, prepared salad, prepared dessert, baby food, miscellaneous prepared food, and nonalcoholic beverages.
- (11) Mortgage Payment and Basics includes mortgage interest, mortgage principal, property taxes, homeowners insurance, and ground rent.
- (12) Maintenance and Remodeling Materials includes supplies/tools/equipment for painting and wallpapering, plumbing supplies and equipment, electrical/heating/AC supplies, materials for hard surface flooring, materials for roofing/gutters, materials for plaster/panel/siding, materials for patio/fence/brick work, landscaping materials, and insulation materials for owned homes.
- (13) Household Textiles includes bathroom linens, bedroom linens, kitchen linens, dining room linens, other linens, curtains, draperies, slipcovers, decorative pillows, and materials for slipcovers and curtains.
- (14) Major Appliances includes dishwashers, disposals, refrigerators, freezers, washers, dryers, stoves, ovens, microwaves, window air conditioners, electric floor cleaning equipment, sewing machines, and miscellaneous appliances.
- (15) Housewares includes plastic dinnerware, china, flatware, glassware, serving pieces, nonelectric cookware, and tableware.
- (16) Lawn and Garden includes lawn and garden supplies, equipment and care service, indoor plants, fresh flowers, and repair/rental of lawn and garden equipment.
- (17) Housekeeping Supplies includes soaps and laundry detergents, cleaning products, toilet tissue, paper towels, napkins, paper/plastic/foil products, stationery, giftwrap supplies, postage, and delivery services.
- (18) Personal Care Products includes hair care products, nonelectric articles for hair, wigs, hairpieces, oral hygiene products, shaving needs, perfume, cosmetics, skincare, bath products, nail products, deodorant, feminine hygiene products, adult diapers, and personal care appliances.
- (19) School Books and Supplies includes school books and supplies for College, Elementary school, High school, Vocational/Technical School, Preschool/Other Schools, and Other School Supplies.

**Data Note:** The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding. This report is not a comprehensive list of all consumer spending variables therefore the variables in each section may not sum to totals.



Trade Areas
Prepared by Esri
701 Furnace Hills Pike, Warwick Twp, Pennsylvania, 17543
Drive Time: 40 minute radius
Prepared by Esri
Latitude: 40.17577
Longitude: -76.30873

	Drive fillie. 40 fillilate	adius		Longitude: 70:5007
Top Tapestry Segments	Percent	Demographic Summary	2016	2021
Green Acres (6A)	11.8%	Population	847,146	872,475
Salt of the Earth (6B)	9.9%	Households	323,048	332,033
Parks and Rec (5C)	9.5%	Families	219,154	224,444
Middleburg (4C)	5.3%	Median Age	40.1	40.6
Front Porches (8E)	5.3%	Median Household Income	\$56,707	\$63,584
Tronc Porches (GL)	5.5 /0	Spending Potential	Average Amount	Secure discount constitution
		Index	Spent	Total
Apparel and Services		96	\$1,933.21	\$624,520,107
Men's		96	\$384.56	\$124,232,545
		96	\$661.14	
Women's				\$213,580,573
Children's		95	\$305.03	\$98,539,009
Footwear		96	\$412.08	\$133,121,644
Watches & Jewelry		97	\$100.97	\$32,619,326
Apparel Products and Service	es (1)	96	\$69.42	\$22,427,010
Computer				
Computers and Hardware for	r Home Use	96	\$165.73	\$53,538,557
Portable Memory		97	\$4.58	\$1,478,799
Computer Software		98	\$12.68	\$4,095,548
Computer Accessories		98	\$17.41	\$5,625,019
<b>Entertainment &amp; Recreation</b>	1	97	\$2,827.03	\$913,267,630
Fees and Admissions		96	\$553.95	\$178,953,892
Membership Fees for Clubs	s (2)	96	\$184.14	\$59,484,627
Fees for Participant Sports		96	\$85.78	\$27,712,332
Tickets to Theatre/Operas,		98	\$51.65	\$16,684,984
Tickets to Movies/Museum		94	\$62.23	\$20,104,620
Admission to Sporting Eve		100	\$53.23	\$17,195,782
Fees for Recreational Less		94	\$116.22	\$37,544,666
Dating Services	0113	101	\$0.70	\$226,882
TV/Video/Audio		97	\$1,169.69	\$377,866,567
Cable and Satellite Televis	ion Condess	98	\$874.60	\$282,539,093
Televisions	ion services	96	\$106.10	\$34,273,874
		92	\$1.35	\$437,570
Satellite Dishes	DVD DISCOUR	95		
VCRs, Video Cameras, and			\$7.66	\$2,473,161
Miscellaneous Video Equip		103	\$7.95	\$2,566,651
Video Cassettes and DVDs		96	\$17.65	\$5,703,017
Video Game Hardware/Acc	cessories	98	\$25.05	\$8,092,597
Video Game Software		96	\$13.27	\$4,285,350
Streaming/Downloaded Vi		95	\$17.29	\$5,586,458
Rental of Video Cassettes	and DVDs	94	\$15.37	\$4,965,669
Installation of Televisions		101	\$0.93	\$301,335
Audio (3)		96	\$78.86	\$25,477,047
Rental and Repair of TV/Ra	adio/Sound Equipment	92	\$3.61	\$1,164,744
Pets		97	\$520.18	\$168,044,533
Toys/Games/Crafts/Hobbies	(4)	98	\$111.61	\$36,054,118
Recreational Vehicles and Fe	es (5)	99	\$106.31	\$34,342,665
Sports/Recreation/Exercise E	Equipment (6)	93	\$154.53	\$49,920,236
Photo Equipment and Supplie	es (7)	98	\$53.84	\$17,394,417
Reading (8)	1 Gabbon (1 (1 € 10) 1 € 10)	100	\$131.25	\$42,399,926
Catered Affairs (9)		99	\$25.67	\$8,291,276
Food		97	\$7,808.31	\$2,522,457,830
Food at Home		97	\$4,837.23	\$1,562,658,858
Bakery and Cereal Product	ts	98	\$659.70	\$213,115,874
Meats, Poultry, Fish, and E		97	\$1,075.06	\$347,297,028
Dairy Products	33-	98	\$517.36	\$167,132,088
Fruits and Vegetables		97	\$924.73	\$298,732,087
Snacks and Other Food at	Home (10)	97	\$1,660.38	\$536,381,781
Food Away from Home	none (10)	96	\$2,971.07	\$959,798,973
Alcoholic Beverages		97	\$497.52	\$160,723,096
Alcoholic beverages		97	P497.32	\$100,723,090

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Trade Areas

701 Furnace Hills Pike, Warwick Twp, Pennsylvania, 17543

Drive Time: 40 minute radius

Prepared by Esri Latitude: 40.17577

**Spending Potential Average Amount** Total Index Spent **Financial** Value of Stocks/Bonds/Mutual Funds 101 \$7,607.28 \$2,457,515,046 101 \$26,564.03 \$8,581,456,129 Value of Retirement Plans 103 \$1,163.36 \$375,822,700 Value of Other Financial Assets Vehicle Loan Amount excluding Interest 96 \$2,331.76 \$753,269,696 99 \$564.61 \$182,395,529 Value of Credit Card Debt Health \$39,015,634 97 \$120.77 Nonprescription Drugs 99 \$413.86 \$133,696,363 Prescription Drugs \$28,722,353 Eyeglasses and Contact Lenses 99 \$88.91 Home Mortgage Payment and Basics (11) 98 \$8,435.47 \$2,725,062,157 \$571,059,402 Maintenance and Remodeling Services 101 \$1,767.72 101 \$368.47 \$119,033,873 Maintenance and Remodeling Materials (12) \$1,539,152,850 98 \$4,764.47 Utilities, Fuel, and Public Services Household Furnishings and Equipment 97 \$27,367,304 \$84.72 Household Textiles (13) \$152,756,439 96 \$472.86 Furniture 100 \$24.41 \$7,884,027 Rugs 97 \$275.37 \$88,956,654 Major Appliances (14) 97 \$80.92 \$26,140,489 Housewares (15) 97 \$45.94 \$14,839,497 Small Appliances 98 \$9.01 \$2,909,359 Luggage \$22,962,885 100 \$71.08 Telephones and Accessories **Household Operations** 95 \$130,073,069 \$402.64 Child Care \$129,200,753 98 \$399.94 Lawn and Garden (16) Moving/Storage/Freight Express 91 \$57.66 \$18,625,577 \$221,404,662 Housekeeping Supplies (17) 98 \$685.36 Insurance 101 \$465.64 \$150,423,320 Owners and Renters Insurance \$350,047,597 97 \$1,083.58 Vehicle Insurance 100 \$134,298,944 Life/Other Insurance \$415.72 \$1,081,583,233 Health Insurance 99 \$3,348.06 96 \$417.66 \$134,925,269 Personal Care Products (18) 95 \$155.93 \$50,373,380 School Books and Supplies (19) \$403.86 \$130,466,653 99 **Smoking Products** Transportation 97 \$2,016.22 \$651,334,421 Payments on Vehicles excluding Leases 97 \$2,971.15 \$959,825,107 Gasoline and Motor Oil 97 \$1,007.36 \$325,424,203 Vehicle Maintenance and Repairs Travel \$142,149,855 Airline Fares 96 \$440.03 98 \$456.27 \$147,398,473 Lodging on Trips

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding. This report is not a comprehensive list of all consumer spending variables therefore the variables in each section may not sum to totals.

94

98

Source: Esri forecasts for 2016 and 2021; Consumer Spending data are derived from the 2013 and 2014 Consumer Expenditure Surveys, Bureau of Labor Statistics.

\$7,277,519

\$138,479,874

\$22.53

\$428.67

Auto/Truck Rental on Trips

Food and Drink on Trips



Trade Areas 701 Furnace Hills Pike, Warwick Twp, Pennsylvania, 17543 Drive Time: 40 minute radius Prepared by Esri Latitude: 40.17577 Longitude: -76.30873

- (1) Apparel Products and Services includes material for making clothes, sewing patterns and notions, shoe repair and other shoe services, apparel laundry and dry cleaning, alteration, repair and tailoring of apparel, clothing rental and storage, and watch and jewelry repair.
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- (5) Recreational Vehicles & Fees includes docking and landing fees for boats and planes, purchase and rental of RVs or boats, and camp fees.
- (6) Sports/Recreation/Exercise Equipment includes exercise equipment and gear, game tables, bicycles, camping equipment, hunting and fishing equipment, winter sports equipment, water sports equipment, other sports equipment, and rental/repair of sports/recreation/exercise equipment.
- (7) Photo Equipment and Supplies includes film, film processing, photographic equipment, rental and repair of photo equipment, and photographer fees.
- (8) Reading includes digital book readers, books, magazine and newspaper subscriptions, and single copies of magazines and newspapers...
- (9) Catered Affairs includes expenses associated with live entertainment and rental of party supplies.
- (10) Snacks and Other Food at Home includes candy, chewing gum, sugar, artificial sweeteners, jam, jelly, preserves, margarine, fat, oil, salad dressing, nondairy cream and milk, peanut butter, frozen prepared food, potato chips, nuts, salt, spices, seasonings, olives, pickles, relishes, sauces, gravy, other condiments, soup, prepared salad, prepared dessert, baby food, miscellaneous prepared food, and nonalcoholic beverages.
- (11) Mortgage Payment and Basics includes mortgage interest, mortgage principal, property taxes, homeowners insurance, and ground rent.
- (12) Maintenance and Remodeling Materials includes supplies/tools/equipment for painting and wallpapering, plumbing supplies and equipment, electrical/heating/AC supplies, materials for hard surface flooring, materials for roofing/gutters, materials for plaster/panel/siding, materials for patio/fence/brick work, landscaping materials, and insulation materials for owned homes.
- (13) Household Textiles includes bathroom linens, bedroom linens, kitchen linens, dining room linens, other linens, curtains, draperies, slipcovers, decorative pillows, and materials for slipcovers and curtains.
- (14) Major Appliances includes dishwashers, disposals, refrigerators, freezers, washers, dryers, stoves, ovens, microwaves, window air conditioners, electric floor cleaning equipment, sewing machines, and miscellaneous appliances.
- (15) Housewares includes plastic dinnerware, china, flatware, glassware, serving pieces, nonelectric cookware, and tableware.
- (16) Lawn and Garden includes lawn and garden supplies, equipment and care service, indoor plants, fresh flowers, and repair/rental of lawn and garden equipment.
- (17) Housekeeping Supplies includes soaps and laundry detergents, cleaning products, toilet tissue, paper towels, napkins, paper/plastic/foil products, stationery, giftwrap supplies, postage, and delivery services.
- (18) Personal Care Products includes hair care products, nonelectric articles for hair, wigs, hairpieces, oral hygiene products, shaving needs, perfume, cosmetics, skincare, bath products, nail products, deodorant, feminine hygiene products, adult diapers, and personal care appliances.
- (19) School Books and Supplies includes school books and supplies for College, Elementary school, High school, Vocational/Technical School, Preschool/Other Schools, and Other School Supplies.

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding. This report is not a comprehensive list of all consumer spending variables therefore the variables in each section may not sum to totals.



Trade Areas 701 Furnace Hills Pike, Warwick Twp, Pennsylvania, 17543 Drive Time: 60 minute radius Prepared by Esri Latitude: 40.17577

Green Acres (6A)	Top Tapestry Segments	Percent	Demographic Summary	2016	2021
Parks and Rec (5C)	(2012년 1일) 구경 전 경기 (2015년 1일 1일 전) 회원 기업 (2015년 1일 전) 전 (2015년 1일 전) 전 (2015년 1일 전) (2015년 1일 전)	10.8%		1,947,091	2,002,458
Salt of the Earth (56)   8.0%   Familles   502,620   51		8.5%	Households	743,813	763,559
Comfortable Empty Nesters (5A) 6.3% Median Age 40.0   In Style (5B) 5.9% Median Household Income \$58,875   Spent Index   Spent Index   Spent Index   Spent Index   Apparel and Services   100   \$2,016.39   Men's   100   \$40.11.2   \$228,25   Women's   100   \$687.45   \$511.33   Children's   99   \$319.45   \$227,65   Footwear   100   \$429.63   \$319.55   Rothwear   100   \$429.63   \$319.55   Rothwear   100   \$429.63   \$319.55   Rothwear   100   \$429.63   \$319.55   Rothwear   100   \$479.63   \$319.55   Rothwear   100   \$479.63   \$319.55   Rothwear   100   \$73.13   \$78.55   Roparel Products and Services (1)   101   \$13.28   \$9.67   Computer Software   103   \$11.28   \$9.67   Computer Software   103   \$13.28   \$9.67   Computer Accessories   102   \$18.14   \$13.49   Entertainment & Recreation   101   \$2,935.30   \$2,104.60   Fees and Admissions   101   \$393.63   \$2,104.60   Fees for Participant Sports, excl. Trips   101   \$93.69   \$140.60   Fees for Participant Sports, excl. Trips   101   \$90.67   \$57.44   Tickets to Movies/Museums/Parks   99   \$65.49   \$48,71   Tickets to Movies/Museums/Parks   99   \$65.49   \$4			Families	그 그리고 있는 것이 없는 것이다.	514,010
In Style (5B)					40.6
Apparel and Services			하나 # 100 (100 March 100 M		\$66,901
Apparel and Services	In Style (SB)	5.570			43-7
Apparel and Services					Total
Mens	Annaral and Sarvices				\$1,499,815,036
Women's	: 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1			1 1	\$298,356,993
Children's					\$511,336,991
Footwear					\$237,609,400
Watches & Jewelry         102         \$10.5.61         \$78.55           Apparel Products and Services (1)         101         \$73.13         \$54.39           Computer         100         \$173.57         \$129.10           Computer Software         102         \$4.79         \$3,56           Computer Software         103         \$13.28         \$9,87           Computer Accessories         101         \$2,936.30         \$2,184.06           Feer Computer Accessories         101         \$2,936.30         \$2,184.06           Feer and Admissions         101         \$584.24         \$434,56           Membership Fees for Clubs (2)         101         \$193.09         \$144,06           Fees for Participant Sports, excl. Trips         101         \$193.09         \$144,06           Fees for Participant Sports, excl. Trips         103         \$54.21         \$40,31           Tickets to Movies/Museums/Parks         99         \$55.40         \$41,55           Fees for Recreational Lessons         105         \$56.00         \$41,25           Fees for Recreational Lessons         100         \$12.34         \$91,81           Dating Services         107         \$0.74         \$55           Ty/video/Audio         101         <					\$319,564,545
Apparel Products and Services (1)   101   \$73.13   \$54,39					\$78,551,830
Computer         Computers and Hardware for Home Use         100         \$173.57         \$129,10           Portable Memory         102         \$4.79         \$3,56           Computer Software         103         \$13.28         \$9,87           Computer Accessories         102         \$18.14         \$13,49           Entertainment & Recreation         101         \$2,936.30         \$2,184,06           Fees and Admissions         101         \$193.69         \$144,06           Fees for Participant Sports, excl. Trips         101         \$90.67         \$67,44           Tickets to Theatre/Operas/Concerts         103         \$34.21         \$40,91           Tickets to Movies/Museums/Parks         99         \$65.49         \$48,71           Admission to Sporting Events, excl. Trips         105         \$55.60         \$41,65           Fees for Recreational Lessons         100         \$123.44         \$91,81           Dating Services         107         \$0.74         \$55           Foes for Recreational Lessons         100         \$12.10.72         \$900,54           Cable and Satellite Television Services         101         \$1,210.72         \$900,54           Cable and Satellite Television Services         101         \$91.10.72         \$90.54<				•	\$54,395,276
Computers and Hardware for Home Use  Portable Memory  Computer Software  Computer Software  Computer Software  Computer Software  Computer Software  In 3 \$13.28 \$9.87  Computer Software  In 10 \$2,936.30 \$1.84,06  Fees and Admissions  In 10 \$193.69 \$144,06  Fees for Participant Sports, excl. Trips  In 10 \$193.69 \$144,06  Fees for Participant Sports, excl. Trips  In 10 \$90.67 \$67,44  40,31  Tickets to Movies/Museums/Parks  99 \$65.49 \$48,71  Admission to Sporting Events, excl. Trips  In 10 \$123.44 \$91,81  Dating Services  In 7 \$0.74 \$55  TV/Video/Audio  Statellite Television Services  In 10 \$110.76 \$82,38  Satellite Dishes  96 \$1.40 \$1,04  VCRs, Video Cameras, and DVD Players  99 \$7.97 \$5,93  Miscellaneous Video Equipment  108 \$8.33 \$6,19  Video Game Hardware/Accessories  100 \$13.83 \$10,28  Streaming/Downloaded Video  99 \$18.24 \$13,56  Video Game Boftware  Streaming/Downloaded Video  99 \$18.00 \$13.83  Rental of Video Cassettes and DVDS  Rental of Video Cassettes and DVDS  Rental and Repair of TV/Radio/Sound Equipment  95 \$3.74 \$2,78  Pets  Toys/Games/Crafts/Hobbies (4)  Recreational Vehicles and Fees (5)  In 10 \$110.79 \$82,40  Sports/Recreation/Exercise Equipment (6)  Proof at Home  Bakery and Cereal Products  Food  Food at Home  Bakery and Cereal Products  Bakery and Cereal Products  Pool \$1,113.52 \$82,825  Dality Products  Food \$10.00 \$950.24 \$11,13.55  Sports/Recreation and Supplies (7)  Reading (8)  Catered Affairs (9)  Food  Food at Home  Bakery and Cereal Products  Bakery and Cereal Products  Pool \$10.00 \$950.24 \$11,11,129,129,83  First and Vegetables  In 10 \$950.24 \$11,129,83  First and Vegetables  In 10 \$11,120.64 \$11,129,83  First and Vegetables  In 10 \$11,120.64 \$11,129,83  First and Vegetables  In 10 \$11,			101	\$/3.13	\$34,393,270
Portable Memory			100	4470 57	+120 102 260
Computer Software 103 \$13.28 \$9.87 Computer Accessories 102 \$18.14 \$13.49 Entertainment & Recreation 101 \$2,936.30 \$2,184,06 Fees and Admissions 101 \$2,936.30 \$2,184,06 Fees and Admissions 101 \$193.69 \$144,06 Fees for Participant Sports, excl. Trips 101 \$193.69 \$144,06 Fees for Participant Sports, excl. Trips 101 \$90.67 \$57,44 Tickets to Theatre/Operas/Concerts 103 \$54.21 \$40,31 Tickets to Movies/Museums/Parks 99 \$65.49 \$48,71 Admission to Sporting Events, excl. Trips 105 \$56.00 \$41,65 Fees for Recreational Lessons 105 \$56.00 \$41,65 Fees for Recreational Lessons 100 \$123.44 \$91,81 Dating Services 107 \$0.74 \$55 TI/Video/Audio 101 \$1,210.72 \$900,54 Cable and Satellite Television Services 101 \$903.18 \$671,79 Televisions 101 \$10,107 \$903.18 \$671,79 Televisions 101 \$10,107 \$82,38 Satellite Dishes 96 \$1.40 \$1,04 VCRs, Video Cameras, and DVD Players 99 \$7.97 \$5,93 Miscellaneous Video Equipment 108 \$8.33 \$6,19 Video Cassettes and DVDs 99 \$18.24 \$13,56 Video Game Hardware/Accessories 102 \$26,06 \$13.38 Video Game Hardware/Accessories 102 \$26,06 \$13.38 \$10,28 Streaming/Downloaded Video 99 \$18.00 \$13.38 \$10,28 Streaming/Downloaded Video 99 \$18.00 \$13.38 \$10,28 Streaming/Downloaded Video 99 \$18.00 \$13.89 Audio (3) \$8.22 \$561,15 Rental and Repair of TV/Radio/Sound Equipment 95 \$3.74 \$2,78 Pets 100 \$536.10 \$398,75 Toys/Games/Crafts/Hobbies (4) 101 \$115.68 \$86,04 Recreational Vehicles and Fees (5) 103 \$110.79 \$82,40 Recreational Vehicles and Fees (5) 103 \$135.48 \$100,77 Catered Affairs (9) \$60.04 \$119.03 \$10.79 \$82,40 Recreational Vehicles and Fees (5) 103 \$135.48 \$100,77 Catered Affairs (9) \$60.04 \$100 \$82.22 \$56.15 Rental and Repair of TV/Radio/Sound Equipment (6) 97 \$160.04 \$119.03 \$10.79 \$82,40 \$10.79 \$82,4		Use			\$129,103,269
Computer Accessories					\$3,563,957
Entertainment & Recreation   101   \$2,936.30   \$2,184,06     Fees and Admissions   101   \$584.24   \$434,56     Membership Fees for Clubs (2)   101   \$193.69   \$144,06     Fees for Participant Sports, excl. Trips   101   \$90.67   \$67,44     Tickets to Theatre/Operas/Concerts   103   \$54.21   \$40,31     Tickets to Movies/Museums/Parks   99   \$65.49   \$48,71     Admission to Sporting Events, excl. Trips   105   \$56.00   \$41,65     Fees for Recreational Lessons   100   \$123.44   \$91,81     Dating Services   107   \$0.74   \$55     TIV/Ideo/Audio   101   \$1,210.72   \$900,54     Cable and Satellite Television Services   101   \$903.18   \$671,79     Televisions   101   \$110.76   \$82,23     Satellite Dishes   96   \$1.40   \$1.04     VCRs, Video Cameras, and DVD Players   99   \$7.97   \$5,93     Miscellaneous Video Equipment   108   \$8.33   \$6,19     Video Cassettes and DVDs   99   \$18.24   \$13,56     Video Game Hardware/Accesories   102   \$26.06   \$19,38     Video Game Bostware   100   \$13.83   \$10,28     Streaming/Downloaded Video   99   \$18.00   \$13,38     Rental of Video Cassettes and DVDs   98   \$15.98   \$11,88     Installation of Televisions   108   \$0.99   \$73     Audio (3)   \$80,000   \$10   \$82,22   \$61,15     Rental and Repair of TV/Radio/Sound Equipment   95   \$3.74   \$2,78     Pets   100   \$56.10   \$398,75     Toys/Games/Crafts/Hobbies (4)   101   \$115.68   \$86,04     Recreational Vehicles and Fees (5)   103   \$110.79   \$82,40     Recreational Vehicles and Fees (5)   103   \$110.79   \$82,40     Recreational Vehicles and Fees (5)   103   \$135.48   \$100,79     Reading (8)   \$70.94   \$100   \$11.35   \$80,000     Food   100   \$8,106.85   \$6,029,80     Food at Home   101   \$56.27   \$828,25     Bakery and Cereal Products   101   \$55.437   \$397,47     Fruits and Vegetables   100   \$1,113.55   \$828,25     Dairy Products   101   \$1,720.64   \$1279,83     Furths and Vegetables   100   \$1,113.55   \$828,25     Snacks and Other Food at Home (10)   \$1,120.64   \$1279,83     Food   \$100   \$1,113.55   \$828,25     Snacks and Other F					\$9,879,464
Fees and Admissions         101         \$584.24         \$434,56           Membership Fees for Clubs (2)         101         \$193.69         \$144,06           Fees for Participant Sports, excl. Trips         101         \$90.67         \$6744           Tickets to Theatre/Operas/Concerts         103         \$54.21         \$40,31           Tickets to Thories/Museums/Parks         99         \$65.49         \$48,71           Admission to Sporting Events, excl. Trips         105         \$56.00         \$41,65           Fees for Recreational Lessons         100         \$123.44         \$91,81           Dating Services         107         \$0.74         \$55           TV/Video/Audio         101         \$120.72         \$900,54           Cable and Satellite Television Services         101         \$110.76         \$82,38           Satellite Dishes         96         \$1.40         \$1,04           VCRs, Video Cameras, and DVD Players         99         \$7.97         \$5,93           Miscellaneous Video Equipment         108         \$8.33         \$6,19           Video Cameras and DVDs         99         \$18.24         \$13,65           Video Game Hardware/Accessories         102         \$26.06         \$19,38           Video Game Sof					\$13,495,488
Membership Fees for Clubs (2)         101         \$133.69         \$144,06           Fees for Participant Sports, excl. Trips         101         \$90.67         \$67,44           Tickets to Theatre/Operas/Concerts         103         \$55.42         \$440,31           Tickets to Movies/Museums/Parks         99         \$55.49         \$48,71           Admission to Sporting Events, excl. Trips         105         \$55.00         \$41,65           Fees for Recreational Lessons         100         \$123.44         \$91,81           Dating Services         107         \$0.74         \$55           TV/Video/Audio         101         \$1,210.72         \$900,54           Cable and Satellite Television Services         101         \$903.18         \$671,79           Televisions         101         \$110.76         \$82,38           Satellite Dishes         96         \$1.40         \$1,04           VCRs, Video Cameras, and DVD Players         99         \$7.97         \$5,93           Miscellaneous Video Equipment         108         \$8.33         \$6,11           Video Game Hardware/Accessories         102         \$26.06         \$19,38           Video Game Hardware/Accessories         102         \$26.06         \$19,38           Video Gam					\$2,184,061,455
Fees for Participant Sports, excl. Trips Tickets to Theatre/Operas/Concerts Tickets to Movies/Museums/Parks 99 \$55.49 \$48,71 Admission to Sporting Events, excl. Trips 100 \$123.44 \$91,81 Dating Services 107 \$0.74 \$15.  TV/Video/Audio 101 \$1,210.72 \$900,54 Cable and Satellite Television Services 101 \$903.18 \$671,79 Televisions Satellite Dishes Video Cameras, and DVD Players 99 \$7.97 \$5,93 Miscellaneous Video Equipment 108 \$8.33 \$6,19 Video Game Hardware/Accessories 102 \$26.06 \$13.40 Video Game Hardware/Accessories 103 \$13.83 \$6,19 Video Game Software 104 \$13.83 \$10,28 Streaming/Downloaded Video 99 \$18.00 \$13.83 Rental of Video Cassettes and DVDs 108 \$13.83 Rental of Video Cassettes and DVDs 109 \$18.00 \$13.83 Rental of Video Cassettes and DVDs 109 \$18.00 \$13.83 Rental of Video Cassettes and DVDs 100 \$2.22 \$61,15 Rental and Repair of TV/Radio/Sound Equipment 95 \$3.74 \$2,78 Pets 100 \$536.10 \$999,57 Toys/Games/Crafts/Hobbies (4) Recreational Vehicles and Fees (5) 103 \$110.79 \$82,40 Recreational Vehicles and Fees (5) 103 \$110.79 \$82,40 Recreational Vehicles and Fees (5) 104 \$66.32 \$41,89 Reading (8) Food Food Food at Home 101 \$50.11.54 \$37,27,64 Bakery and Cereal Products Meats, Poultry, Fish, and Eggs Dairy Products Fruits and Vegetables Snacks and Other Food at Home (10) 51,720.64 \$17,29,85 Snacks and Other Food at Home (10) 51,720.64 \$17,29,85 Snacks and Other Food at Home (10) 51,720.64 \$17,29,85 Snacks and Other Food at Home (10) 51,720.64 \$17,29,85 Snacks and Other Food at Home (10)					\$434,567,404
Tickets to Theatre/Operas/Concerts         103         \$54,21         \$40,31           Tickets to Movies/Museums/Parks         99         \$65.49         \$48,71           Admission to Sporting Events, excl. Trips         105         \$56.00         \$41,65           Fees for Recreational Lessons         100         \$123.44         \$91,81           Dating Services         107         \$0.74         \$55           TV/Ivideo/Audio         101         \$1,210.72         \$900,54           Cable and Satellite Television Services         101         \$903.18         \$671,79           Televisions         96         \$1.40         \$1,04           VCRs, Video Cameras, and DVD Players         96         \$1.40         \$1,04           VCRs, Video Cameras, and DVD Players         99         \$7.97         \$5,93           Miscellaneous Video Equipment         108         \$8.33         \$6,19           Video Cassettes and DVDs         99         \$18.24         \$13,56           Video Game Software         100         \$13.83         \$10,28           Streaming/Downloaded Video         99         \$18.00         \$13,38           Rental of Video Cassettes and DVDs         98         \$15.98         \$11,88           Installation of Television	) '(이라마 101 P.				\$144,068,776
Tickets to Movies/Museums/Parks         99         \$65.49         \$48,71           Admission to Sporting Events, excl. Trips         105         \$55.00         \$41,65           Fees for Recreational Lessons         100         \$123.44         \$91,81           Dating Services         107         \$0.74         \$55           TV/Video/Audio         101         \$1210.72         \$900,54           Cable and Satellite Television Services         101         \$903.18         \$671,79           Televisions         96         \$1.40         \$1,04           VCRs, Video Cameras, and DVD Players         99         \$7.77         \$5,93           Miscellaneous Video Equipment         108         \$8.33         \$6,19           Video Game Hardware/Accessories         102         \$26.06         \$19,38           Video Game Hardware/Accessories         102         \$26.06         \$19,38           Video Game Hardware/Accessories         100         \$13.83         \$10,28           Streaming/Downloaded Video         99         \$18.00         \$13,38           Rental of Video Cassettes and DVDs         98         \$15.98         \$11,88           Installation of Televisions         108         \$0.99         \$73           Audio (3)					\$67,444,790
Admission to Sporting Events, excl. Trips Fees for Recreational Lessons Fees for Recreational Lessons 100 \$123.44 \$91,81 Dating Services 107 \$0.74 \$555 TV/Video/Audio 101 \$1,210.72 \$900,54 Cable and Satellite Television Services 101 \$903.18 \$671,79 Televisions 101 \$110.76 \$82,338 Satellite Dishes 96 \$1.140 \$1,04 VCRs, Video Cameras, and DVD Players 99 \$7.97 \$5,93 Miscellaneous Video Equipment 108 \$8.33 \$6,19 Video Game Hardware/Accessories 102 \$26.06 \$19,38 Video Game Hardware/Accessories 102 \$26.06 \$19,38 Video Game Software 100 \$13.83 \$10,28 Streaming/Downloaded Video 99 \$18.00 \$13,38 Rental of Video Cassettes and DVDs 98 \$15.98 \$11,88 Installation of Televisions 108 \$0.99 \$73 Audio (3) Rental and Repair of TV/Radio/Sound Equipment 95 \$3.74 \$2,78 Pets Pets 100 \$536.10 \$398,75 Toys/Games/Crafts/Hobbies (4) Recreational Vehicles and Fees (5) 103 \$110.79 \$82,40 Sports/Recreation/Exercise Equipment (6) 97 \$160.04 \$119,03 Photo Equipment and Supplies (7) 102 \$56.32 \$41,89 Reading (8) Catered Affairs (9) Food Food at Home 101 \$534.37 \$397,75 Food At Home 102 \$56.32 \$41,89 Readry and Cereal Products Meats, Poultry, Fish, and Eggs Dalry Products Food Spocks and Other Food at Home (10) 101 \$1,720.64 \$1,729,88 Snacks and Other Food at Home (10) 101 \$1,720.64 \$1,279,88 Snacks and Other Food at Home (10)					\$40,318,702
Fees for Recreational Lessons         100         \$123.44         \$91,81           Dating Services         107         \$0.74         \$55           TV/ideo/Audio         101         \$1,210.72         \$900,54           Cable and Satellite Television Services         101         \$903.18         \$671,79           Televisions         101         \$110.76         \$82,38           Satellite Dishes         96         \$1.40         \$1,04           VCRs, Video Cameras, and DVD Players         99         \$7.97         \$5,93           Miscellaneous Video Equipment         108         \$8.33         \$6,19           Video Games and DVDs         99         \$18.24         \$13,56           Video Game Hardware/Accessories         102         \$26.06         \$19,38           Video Game Software         100         \$13.83         \$10,28           Streaming/Downloaded Video         99         \$18.00         \$13,38           Rental of Video Cassettes and DVDs         98         \$15.98         \$11,88           Installation of Televisions         108         \$0.99         \$73           Audio (3)         \$0.99         \$13.43         \$10,28           Rental and Repair of TV/Radio/Sound Equipment         95         \$3.74	Tickets to Movies/Museums/Parks		99	\$65.49	\$48,714,711
Dating Services         107         \$0.74         \$55           TV/Video/Audio         101         \$1,210.72         \$900,54           Cable and Satellite Television Services         101         \$903.18         \$671,79           Televisions         101         \$110.76         \$82,38           Satellite Dishes         96         \$1.40         \$1,04           VCRs, Video Cameras, and DVD Players         99         \$7.97         \$5,93           Miscellaneous Video Equipment         108         \$8.33         \$6,19           Video Gasesttes and DVDs         99         \$18.24         \$13,56           Video Game Hardware/Accessories         102         \$26.06         \$19,38           Video Game Software         100         \$13.83         \$10,28           Streaming/Downloaded Video         99         \$18.00         \$13,38           Rental of Video Cassettes and DVDs         98         \$15.98         \$11,88           Installation of Televisions         108         \$0.99         \$73           Audio (3)         \$0.99         \$3.74         \$2,78           Pets         100         \$82.22         \$61,15           Rental and Repair of TV/Radio/Sound Equipment         95         \$3.74         \$2,78	Admission to Sporting Events, exc	l. Trips			\$41,655,676
TV/Video/Audio Cable and Satellite Television Services Cable and Satellite Television Services 101 Sp03.18 Sc71,79 Televisions Satellite Dishes 96 \$1.40 \$1,04 VCRs, Video Cameras, and DVD Players 99 \$7.97 Miscellaneous Video Equipment 108 \$8.33 \$6,19 Video Cassettes and DVDs 99 \$18.24 \$13,56 Video Game Hardware/Accessories 102 \$26.06 \$19,38 Video Game Hardware/Accessories 100 \$13.33 \$10,28 Streaming/Downloaded Video 99 \$18.00 \$13.83 \$10,28 Streaming/Downloaded Video 99 \$18.00 \$13,38 \$10,28 Streaming/Downloaded Video 99 \$18.00 \$19,38 Streaming/Downloaded Video 99 \$18.00 \$13,38 \$10,28 Streaming/Downloaded Video 99 \$18.00 \$13,38 \$10,28 Streaming/Downloaded Video 99 \$18.00 \$13,38 \$10,28 Streaming/Downloaded Video \$100 \$1,113.52 \$13,48 Streaming/Downloaded Video Streaming/Download	Fees for Recreational Lessons		100		\$91,813,835
Cable and Satellite Television Services         101         \$903.18         \$671,79           Televisions         101         \$110.76         \$82,38           Satellite Dishes         96         \$1.40         \$1,04           VCRs, Video Cameras, and DVD Players         99         \$7.97         \$5,93           Miscellaneous Video Equipment         108         \$8.33         \$6,19           Video Game Hardware/Accessories         102         \$26.06         \$19,38           Video Game Hardware/Accessories         100         \$13.83         \$10,28           Video Game Software         100         \$13.83         \$10,28           Streaming/Downloaded Video         99         \$18.00         \$13,38           Rental of Video Cassettes and DVDs         98         \$15.98         \$11,88           Installation of Televisions         108         \$0.99         \$73           Audio (3)         100         \$82.22         \$61,15           Rental and Repair of TV/Radio/Sound Equipment         95         \$3,74         \$2,78           Pets         100         \$536.10         \$398,75           Toys/Games/Crafts/Hobbies (4)         101         \$115.68         \$66,04           Recreational Vehicles and Fees (5)         103 <td>Dating Services</td> <td></td> <td></td> <td></td> <td>\$550,914</td>	Dating Services				\$550,914
Televisions         101         \$11.0.76         \$82,38           Satellite Dishes         96         \$1.40         \$1,04           VCRs, Video Cameras, and DVD Players         99         \$7.97         \$5,93           Miscellaneous Video Equipment         108         \$8.33         \$6,19           Video Cassettes and DVDs         99         \$18.24         \$13,56           Video Game Hardware/Accessories         102         \$26.06         \$19,38           Video Game Software         100         \$13.83         \$10,28           Streaming/Downloaded Video         99         \$18.00         \$13,38           Rental of Video Cassettes and DVDs         98         \$15.98         \$11,88           Installation of Televisions         108         \$0.99         \$73           Audio (3)         100         \$82.22         \$61,15           Rental and Repair of TV/Radio/Sound Equipment         95         \$3.74         \$2,78           Pets         100         \$536.10         \$398,75           Toys/Games/Crafts/Hobbies (4)         101         \$115.68         \$86,04           Recreational Vehicles and Fees (5)         103         \$110.79         \$82,40           Sports/Recreation/Exercise Equipment (6)         97	TV/Video/Audio		101	\$1,210.72	\$900,548,154
Satellite Dishes       96       \$1.40       \$1,04         VCRs, Video Cameras, and DVD Players       99       \$7.97       \$5,93         Miscellaneous Video Equipment       108       \$8.33       \$6,19         Video Cassettes and DVDs       99       \$18.24       \$13,56         Video Game Hardware/Accessories       102       \$26.06       \$19,38         Video Game Software       100       \$13.83       \$10,28         Streaming/Downloaded Video       99       \$18.00       \$13,38         Rental of Video Cassettes and DVDs       98       \$15.98       \$11,88         Installation of Televisions       108       \$0.99       \$73         Audio (3)       100       \$82.22       \$61,15         Rental and Repair of TV/Radio/Sound Equipment       95       \$3.74       \$2,78         Pets       100       \$536.10       \$398,75         Toys/Games/Crafts/Hobbies (4)       101       \$115.68       \$86,04         Recreational Vehicles and Fees (5)       103       \$110.79       \$82,40         Sports/Recreation/Exercise Equipment (6)       97       \$160.04       \$119,03         Photo Equipment and Supplies (7)       102       \$56.32       \$41,89         Reading (8) <t< td=""><td>Cable and Satellite Television Serv</td><td>rices</td><td>101</td><td>\$903.18</td><td>\$671,798,899</td></t<>	Cable and Satellite Television Serv	rices	101	\$903.18	\$671,798,899
VCRs, Video Cameras, and DVD Players         99         \$7.97         \$5,93           Miscellaneous Video Equipment         108         \$8.33         \$6,19           Video Cassettes and DVDs         99         \$18.24         \$13,56           Video Game Hardware/Accessories         102         \$26.06         \$19,38           Video Game Software         100         \$13.83         \$10,28           Streaming/Downloaded Video         99         \$18.00         \$13,38           Rental of Video Cassettes and DVDs         98         \$15.98         \$11,88           Installation of Televisions         108         \$0.99         \$73           Audio (3)         100         \$82.22         \$61,15           Rental and Repair of TV/Radio/Sound Equipment         95         \$3.74         \$2,78           Pets         100         \$536.10         \$398,75           Toys/Games/Crafts/Hobbies (4)         101         \$115.68         \$86,04           Recreational Vehicles and Fees (5)         103         \$110.79         \$82,40           Sports/Recreation/Exercise Equipment (6)         97         \$160.04         \$119,03           Photo Equipment and Supplies (7)         102         \$56.32         \$41,89           Reading (8)	Televisions		101	\$110.76	\$82,384,625
Miscellaneous Video Equipment       108       \$8.33       \$6,19         Video Cassettes and DVDs       99       \$18.24       \$13,56         Video Game Hardware/Accessories       102       \$26.06       \$19,38         Video Game Software       100       \$13.83       \$10,28         Streaming/Downloaded Video       99       \$18.00       \$13,38         Rental of Video Cassettes and DVDs       98       \$15.98       \$11,88         Installation of Televisions       108       \$0.99       \$73         Audio (3)       100       \$82.22       \$61,15         Rental and Repair of TV/Radio/Sound Equipment       95       \$3.74       \$2,78         Pets       100       \$536.10       \$398,75         Toys/Games/Crafts/Hobbies (4)       101       \$115.68       \$86,04         Recreational Vehicles and Fees (5)       103       \$110.79       \$82,40         Sports/Recreation/Exercise Equipment (6)       97       \$160.04       \$119,03         Photo Equipment and Supplies (7)       102       \$56.32       \$41,89         Reading (8)       103       \$135.48       \$100,77         Catered Affairs (9)       104       \$26.94       \$20,03         Food       100	Satellite Dishes		96	\$1.40	\$1,041,320
Video Cassettes and DVDs       99       \$18.24       \$13,56         Video Game Hardware/Accessories       102       \$26.06       \$19,38         Video Game Software       100       \$13.83       \$10,28         Streaming/Downloaded Video       99       \$18.00       \$13,383         Rental of Video Cassettes and DVDs       98       \$15.98       \$11,88         Installation of Televisions       108       \$0.99       \$73         Audio (3)       100       \$82.22       \$61,15         Rental and Repair of TV/Radio/Sound Equipment       95       \$3.74       \$2,78         Pets       100       \$536.10       \$398,75         Toys/Games/Crafts/Hobbies (4)       101       \$115.68       \$86,04         Recreational Vehicles and Fees (5)       103       \$110.79       \$82,40         Sports/Recreation/Exercise Equipment (6)       97       \$160.04       \$119,03         Photo Equipment and Supplies (7)       102       \$55.32       \$41,89         Reading (8)       103       \$135.48       \$100,77         Catered Affairs (9)       104       \$26.94       \$20,03         Food       100       \$8,106.85       \$6,029,98         Food at Home       101       \$50.81.3	VCRs, Video Cameras, and DVD PI	layers	99	\$7.97	\$5,931,715
Video Game Hardware/Accessories         102         \$26.06         \$19,38           Video Game Software         100         \$13.83         \$10,28           Streaming/Downloaded Video         99         \$18.00         \$13,38           Rental of Video Cassettes and DVDs         98         \$15.98         \$11,88           Installation of Televisions         108         \$0.99         \$73           Audio (3)         100         \$82.22         \$61,15           Rental and Repair of TV/Radio/Sound Equipment         95         \$3.74         \$2,78           Pets         100         \$536.10         \$398,75           Toys/Games/Crafts/Hobbies (4)         101         \$115.68         \$86,04           Recreational Vehicles and Fees (5)         103         \$110.79         \$82,40           Sports/Recreation/Exercise Equipment (6)         97         \$160.04         \$119,03           Photo Equipment and Supplies (7)         102         \$56.32         \$41,89           Reading (8)         103         \$135.48         \$100,77           Catered Affairs (9)         104         \$26.94         \$20,03           Food         100         \$8,106.85         \$6,029,98           Food at Home         101         \$50,11.54	Miscellaneous Video Equipment		108	\$8.33	\$6,195,598
Video Game Software       100       \$13.83       \$10,28         Streaming/Downloaded Video       99       \$18.00       \$13,38         Rental of Video Cassettes and DVDs       98       \$15.98       \$11,88         Installation of Televisions       108       \$0.99       \$73         Audio (3)       100       \$82.22       \$61,15         Rental and Repair of TV/Radio/Sound Equipment       95       \$3.74       \$2,78         Pets       100       \$536.10       \$398,75         Toys/Games/Crafts/Hobbies (4)       101       \$115.68       \$86,04         Recreational Vehicles and Fees (5)       103       \$110.79       \$82,40         Sports/Recreation/Exercise Equipment (6)       97       \$160.04       \$119,03         Photo Equipment and Supplies (7)       102       \$56.32       \$41,89         Reading (8)       103       \$135.48       \$100,77         Catered Affairs (9)       104       \$26.94       \$20,03         Food       100       \$8,106.85       \$6,029,98         Food at Home       101       \$5,011.54       \$3,727,64         Bakery and Cereal Products       101       \$682.76       \$507,84         Meats, Poultry, Fish, and Eggs       100 <td< td=""><td>Video Cassettes and DVDs</td><td></td><td>99</td><td>\$18.24</td><td>\$13,569,759</td></td<>	Video Cassettes and DVDs		99	\$18.24	\$13,569,759
Streaming/Downloaded Video       99       \$18.00       \$13,38         Rental of Video Cassettes and DVDs       98       \$15.98       \$11,88         Installation of Televisions       108       \$0.99       \$73         Audio (3)       100       \$82.22       \$61,15         Rental and Repair of TV/Radio/Sound Equipment       95       \$3.74       \$2,78         Pets       100       \$536.10       \$398,75         Toys/Games/Crafts/Hobbies (4)       101       \$115.68       \$86,04         Recreational Vehicles and Fees (5)       103       \$110.79       \$82,40         Sports/Recreation/Exercise Equipment (6)       97       \$160.04       \$119,03         Photo Equipment and Supplies (7)       102       \$56.32       \$41,89         Reading (8)       103       \$135.48       \$100,77         Catered Affairs (9)       104       \$26.94       \$20,03         Food       100       \$8,106.85       \$6,029,98         Food at Home       101       \$50,11.54       \$3,727,64         Bakery and Cereal Products       101       \$682.76       \$507,84         Meats, Poultry, Fish, and Eggs       100       \$1,113.52       \$828,25         Dairy Products       101	Video Game Hardware/Accessories	S	102	\$26.06	\$19,384,285
Rental of Video Cassettes and DVDs       98       \$15.98       \$11,88         Installation of Televisions       108       \$0.99       \$73         Audio (3)       100       \$82.22       \$61,15         Rental and Repair of TV/Radio/Sound Equipment       95       \$3.74       \$2,78         Pets       100       \$536.10       \$398,75         Toys/Games/Crafts/Hobbies (4)       101       \$115.68       \$86,04         Recreational Vehicles and Fees (5)       103       \$110.79       \$82,40         Sports/Recreation/Exercise Equipment (6)       97       \$160.04       \$119,03         Photo Equipment and Supplies (7)       102       \$56.32       \$41,89         Reading (8)       103       \$135.48       \$100,77         Catered Affairs (9)       104       \$26.94       \$20,03         Food       104       \$26.94       \$20,03         Food at Home       101       \$5,011.54       \$3,727,64         Bakery and Cereal Products       101       \$682.76       \$507,84         Meats, Poultry, Fish, and Eggs       100       \$1,113.52       \$828,25         Dairy Products       101       \$534.37       \$397,47         Fruits and Vegetables       100       \$960.24<	Video Game Software		100	\$13.83	\$10,283,594
Installation of Televisions       108       \$0.99       \$73         Audio (3)       100       \$82.22       \$61,15         Rental and Repair of TV/Radio/Sound Equipment       95       \$3.74       \$2,78         Pets       100       \$536.10       \$398,75         Toys/Games/Crafts/Hobbies (4)       101       \$115.68       \$86,04         Recreational Vehicles and Fees (5)       103       \$110.79       \$82,40         Sports/Recreation/Exercise Equipment (6)       97       \$160.04       \$119,03         Photo Equipment and Supplies (7)       102       \$56.32       \$41,89         Reading (8)       103       \$135.48       \$100,77         Catered Affairs (9)       104       \$26.94       \$20,03         Food       104       \$26.94       \$20,03         Food at Home       101       \$5,011.54       \$3,727,64         Bakery and Cereal Products       101       \$682.76       \$507,84         Meats, Poultry, Fish, and Eggs       100       \$1,113.52       \$828,25         Dairy Products       101       \$534.37       \$397,47         Fruits and Vegetables       100       \$960.24       \$714,24         Snacks and Other Food at Home (10)       101       \$1,72	Streaming/Downloaded Video		99	\$18.00	\$13,389,004
Audio (3) Rental and Repair of TV/Radio/Sound Equipment Pets 100 \$536.10 \$398,75 Toys/Games/Crafts/Hobbies (4) Recreational Vehicles and Fees (5) Sports/Recreation/Exercise Equipment (6) Photo Equipment and Supplies (7) Reading (8) Reading (8) Catered Affairs (9) Food Food at Home Bakery and Cereal Products Meats, Poultry, Fish, and Eggs Dairy Products Fruits and Vegetables Snacks and Other Food at Home (10)  100 \$82.22 \$561,15 \$3.74 \$2,78 \$100 \$536.10 \$398,75 \$398,75 \$398,75 \$398,75 \$398,75 \$398,75 \$398,75 \$398,75 \$398,75 \$398,75 \$398,75 \$398,75 \$398,75 \$398,75 \$398,75 \$399,	Rental of Video Cassettes and DVI	Os	98	\$15.98	\$11,888,038
Rental and Repair of TV/Radio/Sound Equipment       95       \$3.74       \$2,78         Pets       100       \$536.10       \$398,75         Toys/Games/Crafts/Hobbies (4)       101       \$115.68       \$86,04         Recreational Vehicles and Fees (5)       103       \$110.79       \$82,40         Sports/Recreation/Exercise Equipment (6)       97       \$160.04       \$119,03         Photo Equipment and Supplies (7)       102       \$56.32       \$41,89         Reading (8)       103       \$135.48       \$100,77         Catered Affairs (9)       104       \$26.94       \$20,03         Food       100       \$8,106.85       \$6,029,98         Food at Home       101       \$5,011.54       \$3,727,64         Bakery and Cereal Products       101       \$682.76       \$507,84         Meats, Poultry, Fish, and Eggs       100       \$1,113.52       \$828,25         Dairy Products       101       \$534.37       \$397,47         Fruits and Vegetables       100       \$960.24       \$714,24         Snacks and Other Food at Home (10)       101       \$1,720.64       \$1,279,83	Installation of Televisions		108	\$0.99	\$739,342
Pets       100       \$536.10       \$398,75         Toys/Games/Crafts/Hobbies (4)       101       \$115.68       \$86,04         Recreational Vehicles and Fees (5)       103       \$110.79       \$82,40         Sports/Recreation/Exercise Equipment (6)       97       \$160.04       \$119,03         Photo Equipment and Supplies (7)       102       \$56.32       \$41,89         Reading (8)       103       \$135.48       \$100,77         Catered Affairs (9)       104       \$26.94       \$20,03         Food       100       \$8,106.85       \$6,029,98         Food at Home       101       \$5,011.54       \$3,727,64         Bakery and Cereal Products       101       \$682.76       \$507,84         Meats, Poultry, Fish, and Eggs       100       \$1,113.52       \$828,25         Dairy Products       101       \$534.37       \$397,47         Fruits and Vegetables       100       \$960.24       \$714,24         Snacks and Other Food at Home (10)       101       \$1,720.64       \$1,279,83	Audio (3)		100	\$82.22	\$61,159,460
Toys/Games/Crafts/Hobbies (4)       101       \$115.68       \$86,04         Recreational Vehicles and Fees (5)       103       \$110.79       \$82,40         Sports/Recreation/Exercise Equipment (6)       97       \$160.04       \$119,03         Photo Equipment and Supplies (7)       102       \$56.32       \$41,89         Reading (8)       103       \$135.48       \$100,77         Catered Affairs (9)       104       \$26.94       \$20,03         Food       100       \$8,106.85       \$6,029,98         Food at Home       101       \$5,011.54       \$3,727,64         Bakery and Cereal Products       101       \$682.76       \$507,84         Meats, Poultry, Fish, and Eggs       100       \$1,113.52       \$828,25         Dairy Products       101       \$534.37       \$397,47         Fruits and Vegetables       100       \$960.24       \$714,24         Snacks and Other Food at Home (10)       101       \$1,720.64       \$1,279,83	Rental and Repair of TV/Radio/Sou	and Equipment	95	\$3.74	\$2,782,516
Recreational Vehicles and Fees (5)       103       \$110.79       \$82,40         Sports/Recreation/Exercise Equipment (6)       97       \$160.04       \$119,03         Photo Equipment and Supplies (7)       102       \$56.32       \$41,89         Reading (8)       103       \$135.48       \$100,77         Catered Affairs (9)       104       \$26.94       \$20,03         Food       100       \$8,106.85       \$6,029,98         Food at Home       101       \$5,011.54       \$3,727,64         Bakery and Cereal Products       101       \$682.76       \$507,84         Meats, Poultry, Fish, and Eggs       100       \$1,113.52       \$828,25         Dairy Products       101       \$534.37       \$397,47         Fruits and Vegetables       100       \$960.24       \$714,24         Snacks and Other Food at Home (10)       101       \$1,720.64       \$1,279,83	Pets		100	\$536.10	\$398,758,860
Recreational Vehicles and Fees (5)       103       \$110.79       \$82,40         Sports/Recreation/Exercise Equipment (6)       97       \$160.04       \$119,03         Photo Equipment and Supplies (7)       102       \$56.32       \$41,89         Reading (8)       103       \$135.48       \$100,77         Catered Affairs (9)       104       \$26.94       \$20,03         Food       100       \$8,106.85       \$6,029,98         Food at Home       101       \$5,011.54       \$3,727,64         Bakery and Cereal Products       101       \$682.76       \$507,84         Meats, Poultry, Fish, and Eggs       100       \$1,113.52       \$828,25         Dairy Products       101       \$534.37       \$397,47         Fruits and Vegetables       100       \$960.24       \$714,24         Snacks and Other Food at Home (10)       101       \$1,720.64       \$1,279,83	Toys/Games/Crafts/Hobbies (4)		101	\$115.68	\$86,044,534
Sports/Recreation/Exercise Equipment (6)       97       \$160.04       \$119,03         Photo Equipment and Supplies (7)       102       \$56.32       \$41,89         Reading (8)       103       \$135.48       \$100,77         Catered Affairs (9)       104       \$26.94       \$20,03         Food       100       \$8,106.85       \$6,029,98         Food at Home       101       \$5,011.54       \$3,727,64         Bakery and Cereal Products       101       \$682.76       \$507,84         Meats, Poultry, Fish, and Eggs       100       \$1,113.52       \$828,25         Dairy Products       101       \$534.37       \$397,47         Fruits and Vegetables       100       \$960.24       \$714,24         Snacks and Other Food at Home (10)       101       \$1,720.64       \$1,279,83					\$82,403,829
Photo Equipment and Supplies (7)       102       \$56.32       \$41,89         Reading (8)       103       \$135.48       \$100,77         Catered Affairs (9)       104       \$26.94       \$20,03         Food       100       \$8,106.85       \$6,029,98         Food at Home       101       \$5,011.54       \$3,727,64         Bakery and Cereal Products       101       \$682.76       \$507,84         Meats, Poultry, Fish, and Eggs       100       \$1,113.52       \$828,25         Dairy Products       101       \$534.37       \$397,47         Fruits and Vegetables       100       \$960.24       \$714,24         Snacks and Other Food at Home (10)       101       \$1,720.64       \$1,279,83	를 함께 있다면 가장 이번 마음이 되었다. 그런 사람들은 사람들은 사람들은 사람들이 되었다면 하다면 하다면 하다	nt (6)	97	\$160.04	\$119,036,639
Reading (8)       103       \$135.48       \$100,77         Catered Affairs (9)       104       \$26.94       \$20,03         Food       100       \$8,106.85       \$6,029,98         Food at Home       101       \$5,011.54       \$3,727,64         Bakery and Cereal Products       101       \$682.76       \$507,84         Meats, Poultry, Fish, and Eggs       100       \$1,113.52       \$828,25         Dairy Products       101       \$534.37       \$397,47         Fruits and Vegetables       100       \$960.24       \$714,24         Snacks and Other Food at Home (10)       101       \$1,720.64       \$1,279,83			102	\$56.32	\$41,892,416
Catered Affairs (9)       104       \$26.94       \$20,03         Food       100       \$8,106.85       \$6,029,98         Food at Home       101       \$5,011.54       \$3,727,64         Bakery and Cereal Products       101       \$682.76       \$507,84         Meats, Poultry, Fish, and Eggs       100       \$1,113.52       \$828,25         Dairy Products       101       \$534.37       \$397,47         Fruits and Vegetables       100       \$960.24       \$714,24         Snacks and Other Food at Home (10)       101       \$1,720.64       \$1,279,83	[15] [10] [16] [17] [17] [17] [17] [17] [17] [17] [17			\$135.48	\$100,773,798
Food         100         \$8,106.85         \$6,029,98           Food at Home         101         \$5,011.54         \$3,727,64           Bakery and Cereal Products         101         \$682.76         \$507,84           Meats, Poultry, Fish, and Eggs         100         \$1,113.52         \$828,25           Dairy Products         101         \$534.37         \$397,47           Fruits and Vegetables         100         \$960.24         \$714,24           Snacks and Other Food at Home (10)         101         \$1,720.64         \$1,279,83	A STANDARD CONTRACTOR OF THE STANDARD CONTRACTOR				\$20,035,821
Food at Home       101       \$5,011.54       \$3,727,64         Bakery and Cereal Products       101       \$682.76       \$507,84         Meats, Poultry, Fish, and Eggs       100       \$1,113.52       \$828,25         Dairy Products       101       \$534.37       \$397,47         Fruits and Vegetables       100       \$960.24       \$714,24         Snacks and Other Food at Home (10)       101       \$1,720.64       \$1,279,83	Consideration of the Constitution of the Const				\$6,029,981,236
Bakery and Cereal Products       101       \$682.76       \$507,84         Meats, Poultry, Fish, and Eggs       100       \$1,113.52       \$828,25         Dairy Products       101       \$534.37       \$397,47         Fruits and Vegetables       100       \$960.24       \$714,24         Snacks and Other Food at Home (10)       101       \$1,720.64       \$1,279,83					\$3,727,649,238
Meats, Poultry, Fish, and Eggs       100       \$1,113.52       \$828,25         Dairy Products       101       \$534.37       \$397,47         Fruits and Vegetables       100       \$960.24       \$714,24         Snacks and Other Food at Home (10)       101       \$1,720.64       \$1,279,83					\$507,845,739
Dairy Products       101       \$534.37       \$397,47         Fruits and Vegetables       100       \$960.24       \$714,24         Snacks and Other Food at Home (10)       101       \$1,720.64       \$1,279,83				All and a second	\$828,254,258
Fruits and Vegetables 100 \$960.24 \$714,24 Snacks and Other Food at Home (10) 101 \$1,720.64 \$1,279,83					\$397,473,176
Snacks and Other Food at Home (10) 101 \$1,720.64 \$1,279,83					\$714,242,702
		10)			\$1,279,833,364
FOOD AWAY ITOM HOME 100 \$2.3U2.33	Food Away from Home	/	100	\$3,095.31	\$2,302,331,997
					\$385,689,606

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding. This report is not a comprehensive list of all consumer spending variables therefore the variables in each section may not sum to totals.



Trade Areas 701 Furnace Hills Pike, Warwick Twp, Pennsylvania, 17543 Drive Time: 60 minute radius Prepared by Esri Latitude: 40.17577 Longitude: -76.30873

	Spending Potential Index	Average Amount Spent	Total
Financial			
Value of Stocks/Bonds/Mutual Funds	106	\$7,968.56	\$5,927,119,938
Value of Retirement Plans	105	\$27,607.01	\$20,534,450,903
Value of Other Financial Assets	106	\$1,200.37	\$892,852,910
Vehicle Loan Amount excluding Interest	99	\$2,419.33	\$1,799,527,064
Value of Credit Card Debt	103	\$586.47	\$436,221,545
Health			
Nonprescription Drugs	100	\$124.51	\$92,614,116
Prescription Drugs	101	\$424.09	\$315,441,521
Eyeglasses and Contact Lenses	103	\$91.79	\$68,274,878
Home			
Mortgage Payment and Basics (11)	103	\$8,829.33	\$6,567,367,822
Maintenance and Remodeling Services	105	\$1,836.29	\$1,365,855,174
Maintenance and Remodeling Materials (12)	105	\$379.98	\$282,633,999
Utilities, Fuel, and Public Services	101	\$4,925.91	\$3,663,957,365
Household Furnishings and Equipment			
Household Textiles (13)	101	\$88.24	\$65,631,538
Furniture	101	\$494.63	\$367,912,201
Rugs	105	\$25.55	\$19,007,719
Major Appliances (14)	101	\$284.81	\$211,844,723
Housewares (15)	101	\$84.13	\$62,575,748
Small Appliances	101	\$47.65	\$35,439,667
Luggage	103	\$9.49	\$7,057,505
Telephones and Accessories	104	\$74.15	\$55,155,634
Household Operations			
Child Care	101	\$426.20	\$317,010,731
Lawn and Garden (16)	101	\$411.67	\$306,205,807
Moving/Storage/Freight Express	94	\$59.91	\$44,559,503
Housekeeping Supplies (17)	101	\$710.04	\$528,136,851
Insurance			
Owners and Renters Insurance	104	\$479.51	\$356,666,631
Vehicle Insurance	100	\$1,122.98	\$835,290,068
Life/Other Insurance	104	\$430.46	\$320,183,837
Health Insurance	102	\$3,456.91	\$2,571,292,340
Personal Care Products (18)	100	\$434.05	\$322,853,381
School Books and Supplies (19)	99	\$162.77	\$121,069,247
Smoking Products	100	\$411.43	\$306,023,710
Transportation			
Payments on Vehicles excluding Leases	100	\$2,084.35	\$1,550,363,869
Gasoline and Motor Oil	100	\$3,069.64	\$2,283,240,789
Vehicle Maintenance and Repairs	101	\$1,043.18	\$775,930,269
Travel			2004-1970-1970-1970-1970-1970-1970-1970-1970
Airline Fares	101	\$461.85	\$343,531,820
Lodging on Trips	103	\$476.41	\$354,363,632
Auto/Truck Rental on Trips	98	\$23.58	\$17,536,133
Food and Drink on Trips	102	\$446.82	\$332,350,746

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding. This report is not a comprehensive list of all consumer spending variables therefore the variables in each section may not sum to totals.



Trade Areas 701 Furnace Hills Pike, Warwick Twp, Pennsylvania, 17543 Drive Time: 60 minute radius Prepared by Esri Latitude: 40,17577

- (1) Apparel Products and Services includes material for making clothes, sewing patterns and notions, shoe repair and other shoe services, apparel laundry and dry cleaning, alteration, repair and tailoring of apparel, clothing rental and storage, and watch and jewelry repair.
- (2) Membership Fees for Clubs includes membership fees for social, recreational, and civic clubs.
- (3) Audio includes satellite radio service, sound components and systems, digital audio players, records, CDs, audio tapes, streaming/downloaded audio, tape recorders, radios, musical instruments and accessories, and rental and repair of musical instruments.
- (4) Toys and Games includes toys, games, arts and crafts, tricycles, playground equipment, arcade games, and online entertainment and games.
- (5) Recreational Vehicles & Fees includes docking and landing fees for boats and planes, purchase and rental of RVs or boats, and camp fees.
- (6) Sports/Recreation/Exercise Equipment includes exercise equipment and gear, game tables, bicycles, camping equipment, hunting and fishing equipment, winter sports equipment, other sports equipment, and rental/repair of sports/recreation/exercise equipment.
- (7) Photo Equipment and Supplies includes film, film processing, photographic equipment, rental and repair of photo equipment, and photographer fees.
- (8) Reading includes digital book readers, books, magazine and newspaper subscriptions, and single copies of magazines and newspapers...
- (9) Catered Affairs includes expenses associated with live entertainment and rental of party supplies.
- (10) Snacks and Other Food at Home includes candy, chewing gum, sugar, artificial sweeteners, jam, jelly, preserves, margarine, fat, oil, salad dressing, nondairy cream and milk, peanut butter, frozen prepared food, potato chips, nuts, salt, spices, seasonings, olives, pickles, relishes, sauces, gravy, other condiments, soup, prepared salad, prepared dessert, baby food, miscellaneous prepared food, and nonalcoholic beverages.
- (11) Mortgage Payment and Basics includes mortgage interest, mortgage principal, property taxes, homeowners insurance, and ground rent.
- (12) Maintenance and Remodeling Materials includes supplies/tools/equipment for painting and wallpapering, plumbing supplies and equipment, electrical/heating/AC supplies, materials for hard surface flooring, materials for roofing/gutters, materials for plaster/panel/siding, materials for patio/fence/brick work, landscaping materials, and insulation materials for owned homes.
- (13) Household Textiles includes bathroom linens, bedroom linens, kitchen linens, dining room linens, other linens, curtains, draperies, slipcovers, decorative pillows, and materials for slipcovers and curtains.
- (14) Major Appliances includes dishwashers, disposals, refrigerators, freezers, washers, dryers, stoves, ovens, microwaves, window air conditioners, electric floor cleaning equipment, sewing machines, and miscellaneous appliances.
- (15) Housewares includes plastic dinnerware, china, flatware, glassware, serving pieces, nonelectric cookware, and tableware.
- (16) Lawn and Garden includes lawn and garden supplies, equipment and care service, indoor plants, fresh flowers, and repair/rental of lawn and garden equipment.
- (17) Housekeeping Supplies includes soaps and laundry detergents, cleaning products, toilet tissue, paper towels, napkins, paper/plastic/foil products, stationery, giftwrap supplies, postage, and delivery services.
- (18) Personal Care Products includes hair care products, nonelectric articles for hair, wigs, hairpieces, oral hygiene products, shaving needs, perfume, cosmetics, skincare, bath products, nail products, deodorant, feminine hygiene products, adult diapers, and personal care appliances.
- (19) School Books and Supplies includes school books and supplies for College, Elementary school, High school, Vocational/Technical School, Preschool/Other Schools, and Other School Supplies.

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding. This report is not a comprehensive list of all consumer spending variables therefore the variables in each section may not sum to totals.



Trade Areas 701 Furnace Hills Pike, Warwick Twp, Pennsylvania, 17543 Drive Time: 20 minute radius

Latitude: 40.17577 Longitude: -76.30873

Prepared by Esri

Summary Demographics						
2016 Population						166,405
2016 Households						63,824
2016 Median Disposable Income						\$50,712
2016 Per Capita Income						\$31,606
	NAICS	Demand	Supply	Retail Gap	Leakage/Surplus	Number of
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2016 Median Disposable Income						\$50,712
2016 Per Capita Income						\$31,606
	NAICS	Demand	Supply	Retail Gap	Leakage/Surplus	Number of
Industry Summary		(Retail Potential)	(Retail Sales)		Factor	Businesses
Total Retail Trade and Food & Drink	44-45,722	\$2,760,456,704	\$2,649,596,761	\$110,859,943	2.0	1,436
Total Retail Trade	44-45	\$2,510,190,021	\$2,426,524,997	\$83,665,024	1.7	1,106
Total Food & Drink	722	\$250,266,683	\$223,071,764	\$27,194,919	5.7	330
	NAICS	Demand	Supply	Retail Gap	Leakage/Surplus	Number of
Industry Group		(Retail Potential)	(Retail Sales)		Factor	Businesses
Motor Vehicle & Parts Dealers	441	\$580,727,264	\$683,439,287	-\$102,712,023	-8.1	225
Automobile Dealers	4411	\$483,341,863	\$602,679,961	-\$119,338,098	-11.0	159
Other Motor Vehicle Dealers	4412	\$62,068,395	\$60,468,332	\$1,600,063	1.3	27
Auto Parts, Accessories & Tire Stores	4413	\$35,317,007	\$20,290,994	\$15,026,013	27.0	40
Furniture & Home Furnishings Stores	442	\$81,387,510	\$91,806,883	-\$10,419,373	-6.0	76
Furniture Stores	4421	\$46,863,609	\$31,869,648	\$14,993,961	19.0	42
Home Furnishings Stores	4422	\$34,523,900	\$59,937,235	-\$25,413,335	-26.9	35
Electronics & Appliance Stores	443	\$128,387,384	\$77,247,086	\$51,140,298	24.9	- 39
Bldg Materials, Garden Equip. & Supply Stores	444	\$152,146,551	\$125,915,110	\$26,231,441	9.4	90
Bldg Material & Supplies Dealers	4441	\$138,275,975	\$111,142,858	\$27,133,117	10.9	68
Lawn & Garden Equip & Supply Stores	4442	\$13,870,576	\$14,772,252	-\$901,676	-3.1	22
Food & Beverage Stores	445	\$480,044,916	\$648,029,624	-\$167,984,708	-14.9	138
Grocery Stores	4451	\$431,959,544	\$527,115,015	-\$95,155,471	-9.9	74
Specialty Food Stores	4452	\$29,690,704	\$106,471,552	-\$76,780,848	-56.4	54
Beer, Wine & Liquor Stores	4453	\$18,394,668	\$14,443,057	\$3,951,611	12.0	10
Health & Personal Care Stores	446,4461	\$145,417,417	\$117,168,480	\$28,248,937	10.8	80
Gasoline Stations	447,4471	\$154,044,983	\$57,971,968	\$96,073,015	45.3	30
Clothing & Clothing Accessories Stores	448	\$124,623,715	\$75,962,767	\$48,660,948	24.3	95
Clothing Stores	4481	\$85,588,273	\$39,185,544	\$46,402,729	37.2	50
Shoe Stores	4482	\$17,477,404	\$9,279,807	\$8,197,597	30.6	13
Jewelry, Luggage & Leather Goods Stores	4483	\$21,558,038	\$27,497,416	-\$5,939,378	-12.1	32
Sporting Goods, Hobby, Book & Music Stores	451	\$66,879,110	\$50,716,192	\$16,162,918	13.7	94
Sporting Goods/Hobby/Musical Instr Stores	4511	\$57,358,509	\$41,131,208	\$16,227,301	16.5	76
Book, Periodical & Music Stores	4512	\$9,520,601	\$9,584,984	-\$64,383	-0.3	18
General Merchandise Stores	452	\$402,801,280	\$278,382,110	\$124,419,170	18.3	33
Department Stores Excluding Leased Depts.	4521	\$307,772,801	\$250,716,308	\$57,056,493	10.2	13
Other General Merchandise Stores	4529	\$95,028,479	\$27,665,802	\$67,362,677	54.9	20
Miscellaneous Store Retailers	4529	\$130,300,178	\$101,342,600	\$28,957,578	12.5	187
Florists	4531		\$3,169,074	\$2,307,823	26.7	12
	4531	\$5,476,897	\$21,344,809	\$2,088,619	4.7	47
Office Supplies, Stationery & Gift Stores		\$23,433,428			-17.8	56
Used Merchandise Stores	4533	\$8,824,653	\$12,653,689	-\$3,829,036	18.1	73
Other Miscellaneous Store Retailers	4539	\$92,565,201	\$64,175,027	\$28,390,174		18
Nonstore Retailers	454	\$63,429,714	\$118,542,891	-\$55,113,177	-30.3	77.70
Electronic Shopping & Mail-Order Houses	4541	\$43,393,803	\$81,824,822	-\$38,431,019	-30.7	4
Vending Machine Operators	4542	\$2,904,079	\$1,178,516	\$1,725,563	42.3	1
Direct Selling Establishments	4543	\$17,131,831	\$35,539,553	-\$18,407,722	-34.9	12
Food Services & Drinking Places	722	\$250,266,683	\$223,071,764	\$27,194,919	5.7	330
Special Food Services	7223	\$6,330,512	\$6,314,707	\$15,805	0.1	19
Drinking Places - Alcoholic Beverages	7224	\$13,424,374	\$19,200,213	-\$5,775,839	-17.7	15
Restaurants/Other Eating Places	7225	\$230,511,798	\$197,556,844	\$32,954,954	8	296

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement. http://www.esri.com/data/esri\_data/methodology-statements

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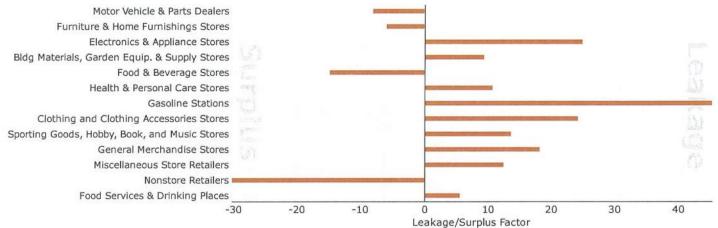
April 12, 2017



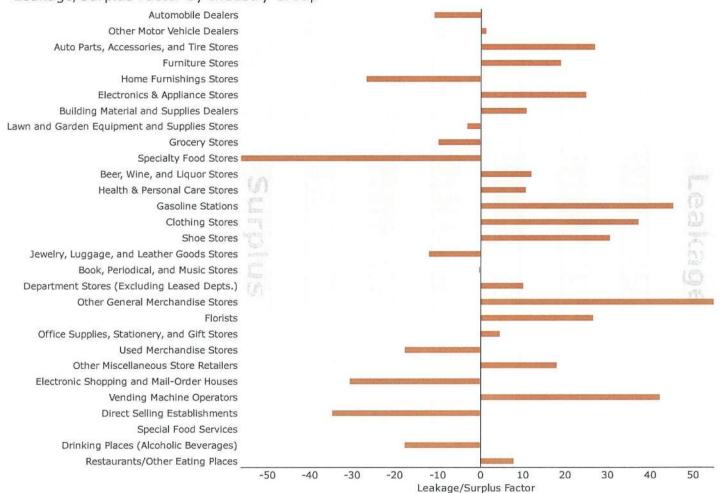
Trade Areas 701 Furnace Hills Pike, Warwick Twp, Pennsylvania, 17543 Drive Time: 20 minute radius Prepared by Esri

Latitude: 40.17577 Longitude: -76.30873

### Leakage/Surplus Factor by Industry Subsector



### Leakage/Surplus Factor by Industry Group





Trade Areas 701 Furnace Hills Pike, Warwick Twp, Pennsylvania, 17543 Drive Time: 40 minute radius Prepared by Esri

Latitude: 40.17577 Longitude: -76.30873

Summary Demographics 2016 Population						847,1
2016 Households						323,0
2016 Median Disposable Income						\$45,9
2016 Per Capita Income						\$29,0
	NAICS	Demand	Supply	Retail Gap	Leakage/Surplus	Number o
Industry Summary		(Retail Potential)	(Retail Sales)		Factor	Businesse
Total Retail Trade and Food & Drink	44-45,722	\$12,917,448,101	\$13,897,934,485	-\$980,486,384	-3.7	7,1
Total Retail Trade	44-45	\$11,750,868,797	\$12,703,831,546	-\$952,962,749	-3.9	5,3
Total Food & Drink	722	\$1,166,579,305	\$1,194,102,939	-\$27,523,634	-1.2	1,8
	NAICS	Demand	Supply	Retail Gap	Leakage/Surplus	Number
industry Group		(Retail Potential)	(Retail Sales)		Factor	Business
Motor Vehicle & Parts Dealers	441	\$2,720,581,080	\$3,009,181,659	-\$288,600,579	-5.0	7
Automobile Dealers	4411	\$2,266,558,269	\$2,697,109,137	-\$430,550,868	-8.7	4
Other Motor Vehicle Dealers	4412	\$289,316,647	\$183,114,053	\$106,202,594	22.5	
Auto Parts, Accessories & Tire Stores	4413	\$164,706,164	\$128,958,469	\$35,747,695	12.2	1
Furniture & Home Furnishings Stores	442	\$377,297,344	\$490,747,142	-\$113,449,798	-13.1	3
Furniture Stores	4421	\$218,293,070	\$180,570,528	\$37,722,542	9.5	1
Home Furnishings Stores	4422	\$159,004,275	\$310,176,614	-\$151,172,339	-32.2	1
Electronics & Appliance Stores	443	\$597,461,736	\$356,881,370	\$240,580,366	25.2	2
Bldg Materials, Garden Equip. & Supply Stores	444	\$698,965,288	\$771,119,129	-\$72,153,841	-4.9	2
Bldg Material & Supplies Dealers	4441	\$634,765,494	\$699,044,609	-\$64,279,115	-4.8	
Lawn & Garden Equip & Supply Stores	4442	\$64,199,794	\$72,074,520	-\$7,874,726	-5.8	
	445	\$2,260,355,320	\$2,762,597,698	-\$502,242,378	-10.0	
Food & Beverage Stores			The state of the s	-\$358,586,874	-8.1	
Grocery Stores	4451 4452	\$2,035,076,313	\$2,393,663,187		-37.7	
Specialty Food Stores		\$139,954,019	\$309,031,949	-\$169,077,930	17.5	
Beer, Wine & Liquor Stores	4453	\$85,324,987	\$59,902,561	\$25,422,426	6.7	
Health & Personal Care Stores	446,4461	\$679,387,054	\$594,638,068	\$84,748,986	24.4	
Gasoline Stations	447,4471	\$727,676,772	\$441,778,840	\$285,897,932		
Clothing & Clothing Accessories Stores	448	\$581,455,726	\$519,044,826	\$62,410,900	5.7	
Clothing Stores	4481	\$400,186,098	\$330,777,829	\$69,408,269	9.5	
Shoe Stores	4482	\$81,992,325	\$89,273,211	-\$7,280,886	-4.3	
Jewelry, Luggage & Leather Goods Stores	4483	\$99,277,303	\$98,993,786	\$283,517	0.1	
Sporting Goods, Hobby, Book & Music Stores	451	\$312,922,235	\$312,435,008	\$487,227	0.1	
Sporting Goods/Hobby/Musical Instr Stores	4511	\$268,312,175	\$261,619,352	\$6,692,823	1.3	
Book, Periodical & Music Stores	4512	\$44,610,060	\$50,815,657	-\$6,205,597	-6.5	
General Merchandise Stores	452	\$1,886,327,558	\$1,605,096,259	\$281,231,299	8.1	
Department Stores Excluding Leased Depts.	4521	\$1,439,655,377	\$1,193,790,029	\$245,865,348	9.3	
Other General Merchandise Stores	4529	\$446,672,181	\$411,306,229	\$35,365,952	4.1	
Miscellaneous Store Retailers	453	\$613,282,093	\$786,857,221	-\$173,575,128	-12.4	
Florists	4531	\$25,092,638	\$22,414,745	\$2,677,893	5.6	
Office Supplies, Stationery & Gift Stores	4532	\$108,857,886	\$138,716,016	-\$29,858,130	-12.1	and T
Used Merchandise Stores	4533	\$41,138,024	\$62,583,168	-\$21,445,144	-20.7	
Other Miscellaneous Store Retailers	4539	\$438,193,546	\$563,143,292	-\$124,949,746	-12.5	
Nonstore Retailers	454	\$295,156,590	\$1,053,454,326	-\$758,297,736	-56.2	
Electronic Shopping & Mail-Order Houses	4541	\$202,623,889	\$941,713,761	-\$739,089,872	-64.6	
Vending Machine Operators	4542	\$13,666,905	\$37,722,538	-\$24,055,633	-46.8	
Direct Selling Establishments	4543	\$78,865,796	\$74,018,027	\$4,847,769	3.2	
Food Services & Drinking Places	722	\$1,166,579,305	\$1,194,102,939	-\$27,523,634	-1.2	1,
Special Food Services	7223	\$29,237,395	\$27,084,374	\$2,153,021	3.8	
Drinking Places - Alcoholic Beverages	7224	\$61,659,620	\$45,313,390	\$16,346,230	15.3	
Restaurants/Other Eating Places	7225	\$1,075,682,289	\$1,121,705,175	-\$46,022,886	-2	1,7

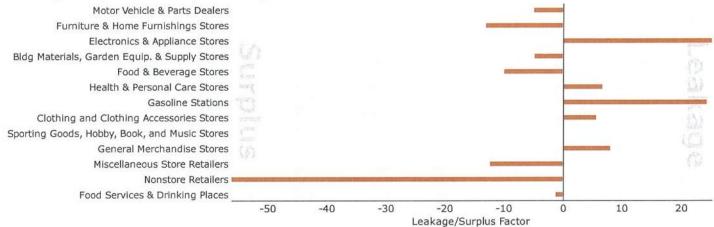
Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement. http://www.esri.com/data/esri\_data/methodology-statements



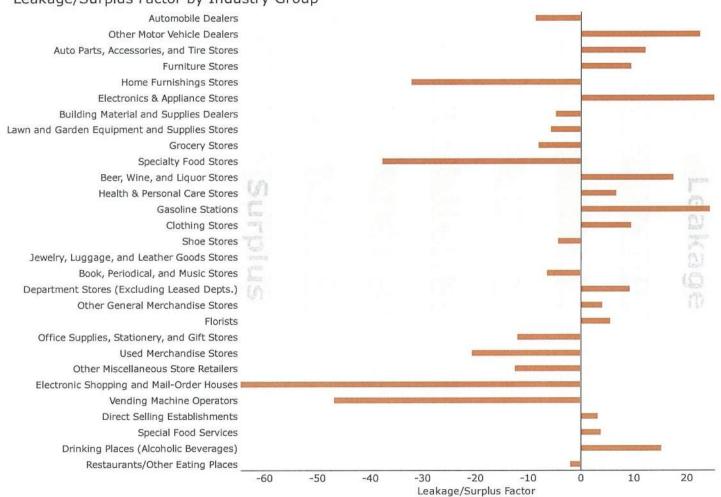
Trade Areas 701 Furnace Hills Pike, Warwick Twp, Pennsylvania, 17543 Drive Time: 40 minute radius Prepared by Esri

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### Leakage/Surplus Factor by Industry Subsector



### Leakage/Surplus Factor by Industry Group





Trade Areas 701 Furnace Hills Pike, Warwick Twp, Pennsylvania, 17543 Drive Time: 60 minute radius Prepared by Esri Latitude: 40.17577 Longitude: -76.30873

Summary Demographics						
2016 Population						1,947,091
2016 Households						743,813
2016 Median Disposable Income						\$47,952
2016 Per Capita Income						\$30,239
	NAICS	Demand	Supply	Retail Gap	Leakage/Surplus	Number of

2016 Per Capita Income						\$30,239
2016 Per Capita Income	NAICS	Demand	Supply	Retail Gap	Leakage/Surplus	Number of
Industry Summary	NAICS	(Retail Potential)	(Retail Sales)	Ketan dap	Factor	Businesses
Total Retail Trade and Food & Drink	44-45,722	\$30,745,560,864	\$32,120,099,681	-\$1 374 538 817	-2.2	15,146
Total Retail Trade	44-45	\$27,947,471,999		-\$1,531,572,418	-2.7	10,913
Total Food & Drink	722	\$2,798,088,864	\$2,641,055,264	\$157,033,600	2.9	4,233
Total Food & Dillik	NAICS	Demand	Supply	Retail Gap	Leakage/Surplus	Number of
Industry Group	HAICS	(Retail Potential)	(Retail Sales)	Retail dap	Factor	Businesses
Motor Vehicle & Parts Dealers	441	\$6,464,095,840	\$7,428,601,892	-\$964,506,052	-6.9	1,567
Automobile Dealers	4411	\$5,385,065,560		-\$1,159,865,502	-9.7	971
Other Motor Vehicle Dealers	4412	\$687,503,935	\$522,008,784	\$165,495,151	13.7	187
Auto Parts, Accessories & Tire Stores	4413	\$391,526,345	\$361,662,046	\$29,864,299	4.0	409
Furniture & Home Furnishings Stores	442	\$905,612,437	\$1,148,330,949	-\$242,718,512	-11.8	668
Furniture Stores	4421	\$524,477,604	\$642,948,181	-\$118,470,577	-10.1	330
Home Furnishings Stores	4422	\$381,134,832	\$505,382,768	-\$124,247,936	-14.0	338
Electronics & Appliance Stores	443	\$1,432,510,444	\$1,066,116,187	\$366,394,257	14.7	635
Bldg Materials, Garden Equip. & Supply Stores	444	\$1,661,013,351	\$1,641,512,787	\$19,500,564	0.6	906
Bldg Material & Supplies Dealers	4441	\$1,510,929,099	\$1,421,775,354	\$89,153,745	3.0	660
Lawn & Garden Equip & Supply Stores	4442	\$150,084,252	\$219,737,433	-\$69,653,181	-18.8	246
Food & Beverage Stores	445	\$5,367,495,841	\$5,988,884,326	-\$621,388,485	-5.5	1,420
Grocery Stores	4451	\$4,831,064,881	\$5,282,682,367	-\$451,617,486	-4.5	918
Specialty Food Stores	4452	\$332,445,430	\$526,213,910	-\$193,768,480	-22.6	377
Beer, Wine & Liquor Stores	4453	\$203,985,530	\$179,988,048	\$23,997,482	6.2	124
Health & Personal Care Stores	446,4461	\$1,605,255,196	\$1,415,957,484	\$189,297,712	6.3	855
Gasoline Stations	447,4471	\$1,721,755,276	\$1,243,296,315	\$478,458,961	16.1	392
Clothing & Clothing Accessories Stores	448	\$1,395,448,938	\$1,162,327,301	\$233,121,637	9.1	1,132
Clothing Stores	4481	\$959,456,963	\$814,930,900	\$144,526,063	8.1	720
Shoe Stores	4482	\$196,639,635	\$174,285,432	\$22,354,203	6.0	191
Jewelry, Luggage & Leather Goods Stores	4483	\$239,352,341	\$173,110,968	\$66,241,373	16.1	221
Sporting Goods, Hobby, Book & Music Stores	451	\$748,330,564	\$846,368,083	-\$98,037,519	-6.1	825
Sporting Goods/Hobby/Musical Instr Stores	4511	\$641,719,242	\$743,615,046	-\$101,895,804	-7.4	709
Book, Periodical & Music Stores	4512	\$106,611,322	\$102,753,036	\$3,858,286	1.8	117
General Merchandise Stores	452	\$4,501,656,276	\$4,776,470,548	-\$274,814,272	-3.0	499
Department Stores Excluding Leased Depts.	4521	\$3,439,710,090	\$3,219,829,893	\$219,880,197	3.3	163
Other General Merchandise Stores	4529	\$1,061,946,186	\$1,556,640,655	-\$494,694,469	-18.9	335
Miscellaneous Store Retailers	453	\$1,447,478,482	\$1,555,951,056	-\$108,472,574	-3.6	1,841
Florists	4531	\$59,646,007	\$49,686,144	\$9,959,863	9.1	175
Office Supplies, Stationery & Gift Stores	4532	\$260,310,181	\$359,565,764	-\$99,255,583	-16.0	408
Used Merchandise Stores	4533	\$98,603,199	\$122,028,386	-\$23,425,187	-10.6	438
Other Miscellaneous Store Retailers	4539	\$1,028,919,095	\$1,024,670,763	\$4,248,332	0.2	820
Nonstore Retailers	454	\$696,819,355	\$1,205,227,491	-\$508,408,136	-26.7	172
Electronic Shopping & Mail-Order Houses	4541	\$482,539,548	\$1,008,301,833	-\$525,762,285	-35.3	51
Vending Machine Operators	4542	\$32,538,627	\$56,842,979	-\$24,304,352	-27.2	31
Direct Selling Establishments	4543	\$181,741,180	\$140,082,679	\$41,658,501	12.9	90
Food Services & Drinking Places	722	\$2,798,088,864	\$2,641,055,264	\$157,033,600	2.9	4,233
Special Food Services	7223	\$70,263,639	\$68,893,312	\$1,370,327	1.0	160
Drinking Places - Alcoholic Beverages	7224	\$148,970,104	\$86,227,499	\$62,742,605	26.7	214
Restaurants/Other Eating Places	7225	\$2,578,855,121	\$2,485,934,453	\$92,920,668	2	3,860

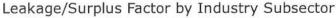
Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement. http://www.esri.com/data/esri\_data/methodology-statements

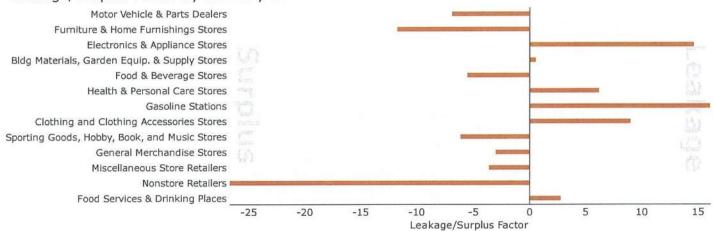


Trade Areas 701 Furnace Hills Pike, Warwick Twp, Pennsylvania, 17543 Drive Time: 60 minute radius

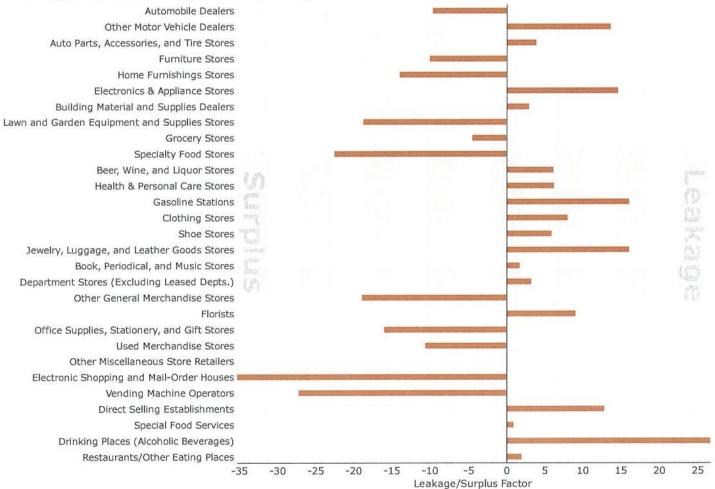
Latitude: 40.17577

Prepared by Esri





### Leakage/Surplus Factor by Industry Group



### Discussion Question: How Far Will Tourists Travel? 3 Hours Reynoldsville 2 Hours Hour Legend Study Area Visit Type? Day Trip Day/Weekend Trip Day/Weekend Trip Blg Events Public Meeting 2 **Economic Development** 4/20/2017 **FORGE FUTURE** Content may not reflect National Geographic's current map policy. Sources: National Geographic, Esri, DeLorme, HERE, UNEP-WOME DERCK

### Discussion Question: How Far Will Consumers Travel? Bethlehem Allentown ALLENTOWN QUEEN CIT Hamburg Emmaus 60 Coopersburg Macungie. Kutztown Topton Shoemakersville Quakertown Fleetwood Palm QUAKERTOWN AIRPORT PENNRIDGE AIRPORT East Greenville Pennsburg 309 RedHill Perkasie DOYLESTOWNAIRPORT Reading Doylestown, Harleysville Hershey Birdsboro. Campbellto Harrisburg Pottstown LIMERICK Lansdale\* Denver' Reamcown Carlisle Manheim Legend Norristown, Phoenixville Rheems' MountJoy New Holland Study Area King of .May town Radnor **Trade Areas?** Lancaster\* Ardmore Columbia Community Broomall CHESTER CO Coatesville Philadelphi Drexel Hill Regional West Chester Parkesburg Lansdowne Yeadon Came Springfield Destination RedLion Quarryville PHILADELPHIA Belli **Public Meeting 2** Kennett Square Chester Woodbury NEW +GARDEN AIRPORT **Economic Development** Woodbury 4/20/2017 West Grove Hanover Hockessin Oxford Glen Rock Shrewsbury Stewartstown Wilmington New Freedom' 'Rising Sun Newark THEW CASTLE AIRPORT Woodstown Manchester Pennsville CARROLL CO RGNL JACK B POAGE FLD 25

### FEEDBACK GAINED FROM ECONOMIC DEVELOPMENT DATA REVIEW FORGE THE FUTURE 2022 April 20, 2017

On April 20, 2017, an estimated 45 to 50 persons attended the above-captioned Data Review session (held at Pod #2 of Rock Lititz) related to the "Forge the Future 2022" Update to the Warwick Region's Strategic Comprehensive Plan. In addition to a review of community demographic and economic development data, peer discussion of the data ensued. The following reactions and opinions, relating to the Economic Development Data, were shared and recorded (noting that the following list is in no particular order). These insights, which may or may not be factual, will be further considered throughout the "Forge the Future" planning process.

- Despite strong economic data, enrollment in the Warwick School District is declining; is this indicative of a housing gap?
- The CBD of Lititz is well-known, but needs to leverage county-wide and regional tourism/promotions and branding efforts, recognizing that the funding of these efforts is shrinking
- The potential for growth in the Borough of Lititz is constrained by limited land area and lack of vacant land; this impediment can/could be solved by creative infill/redevelopment
- The lack of millennial housing is a concern and may be an indicator of why the commute-time to jobs in the region stands at a 23-minute average
- While average disposable income figures are high, it is important to remember that many are at the bottom-end of the income spectrum (ranging from millennials carrying college debt to low/moderateincome families); does our community measure and acknowledge these conditions, and should equitable economic development be a goal?
- Due to constrained household budgets, it's not surprising that second-hand shops and fashion accessories (as opposed to clothing) are strong sellers
- The housing real estate market (across the board) is "hot" and driving housing prices up
- Renewable energy programs (zero-down solar array installations for homes and businesses) should be promoted, including through community-wide education efforts
- It is eye-opening to see the income disparity between Lititz Borough and the Townships
- Transportation is viewed as an impediment to realizing more robust economic development, especially in terms of downtown Lititz businesses; every decision for our future should consider the impact caused by constrained mobility (light/signal cycles in getting to Lititz from Brownstown and leftturns/cross-traffic on 501 south)
- What is the region's capacity for increased industrial and commercial development?
- Does the region have a directory of all of its businesses and employers?

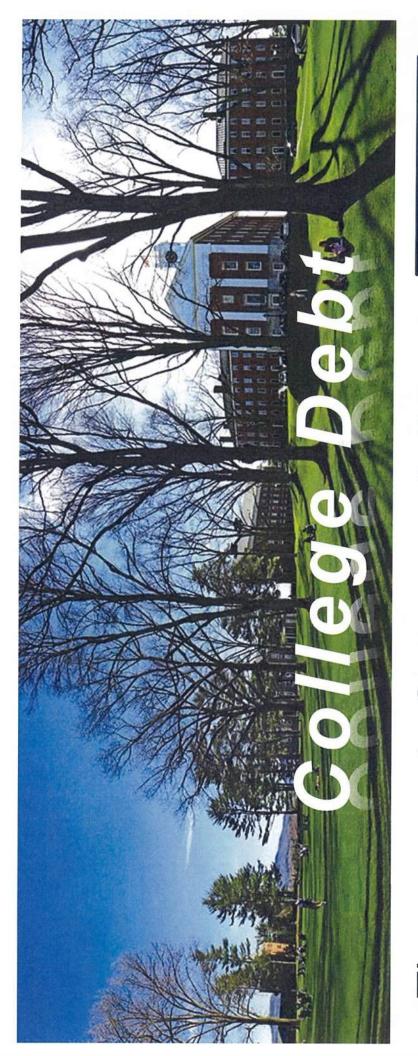
Meeting #3: Housing
Presentation Materials

Feedback

## FORGE

2022

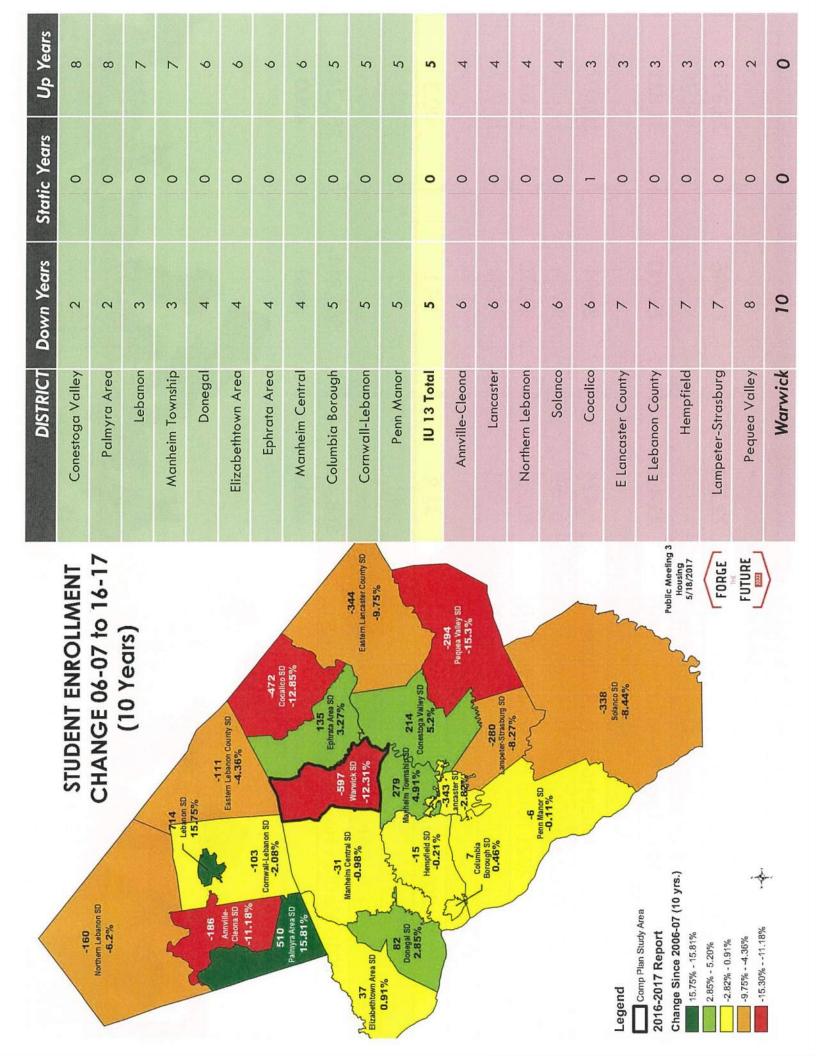
Housing



The **percent of our population** holding student loan debt is slightly higher than the national average

The value of that debt is slightly lower than the national average

### COLLEGE

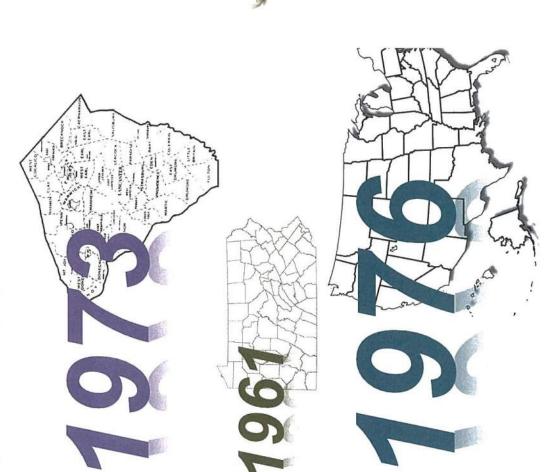


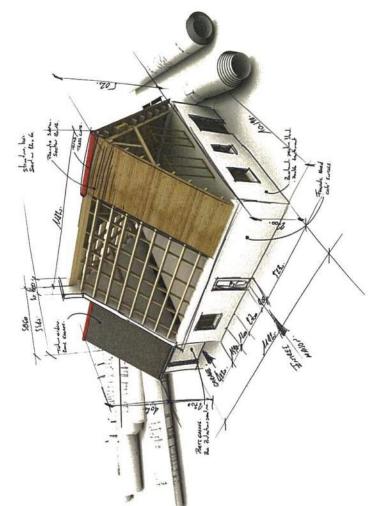
SCHOOL DISTRICT	LOWER DAUPHIN	DERRY TOWNSHIP	WARWICK
POPULATION			
2000 Total Population (U.S. Census)	22,271	21,496	28,351
2010 Total Population (U.S. Census)	24,588	24,827	31,038
2016 Total Population (Esri)	25,456	25,400	31,821
ноизеногря			
2000 Total Households (U.S. Census)	8,424	8,984	10,607
2010 Total Households (U.S. Census)	9,559	9,736	12,055
2021 Total Households (Esri)	10,233	10,170	12,617
2016 Total Households (Esri)	9,963	686'6	12,327
MEDIAN AGE			
2010 Median Age (U.S. Census)	41.8	38.1	40.9
2016 Median Age (Esri)	43	39.1	42
MEDIAN HOUSEHOLD INCOME			
2016 Median Household Income (Esri)	\$68,410	\$65,814	\$63,248
	4000	3400	4200



# Median Year Structure Built

Elizabeth Township 1978 Warwick Township 1989 Lititz Borough 1963





# Median Year Householder Moved In

Lititz Borough

Warwick Township

Elizabeth Township

2004

2001

1995





## Median Housing Value

Elizabeth Township Warwick Township \$223,497 \$187,654 Lititz Borough

\$224,805





## Median Contract Rent

Lititz Borough

Warwick Township

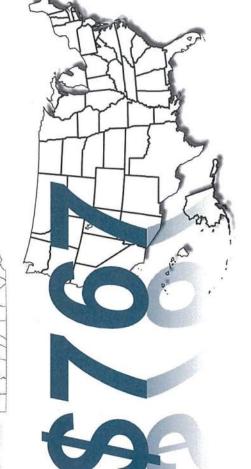
Elizabeth Township

\$708

\$962

\$637



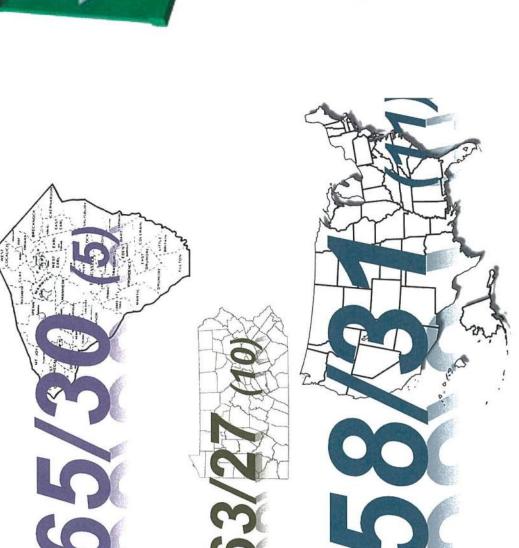




# Owner/Renter Occupied

Elizabeth Township 83/14 (3) Warwick Township 74/23 (3) 59/37 (4) Lititz Borough







### FORGE FUNEE

2022

NEXT MEETING – Community Services and Quality of Life Thursday, June 15th @ 7:30am

Brickerville Fire Company – 10 Hopeland Rd.

### Elizabeth Township, PA Elizabeth township, PA (4207123008) Geography: County Subdivision

HAVE STUDENT LOANS			(2016) 2016 INDEX (Compared to USA)	STUDENT LOAN DEBT THIS YEAR	CSSS	5 86	ed on 2016 INDEX (Compared to USA)
HAV		***************************************	HAVE STUDENT LOAN (2016)	STUDE	CSE	\$1,578,305	2016 Total Value Owed on Student Loans - Current Year
2016 DEGREE ATTAINMENT	<b>№</b> %5	Graduate //Professional Degree	Bachelor's Degree	N DEBT PRIOR YEAR		88	2016 INDEX (Compered to USA)
2016 DEGR	<b>%</b> %	7% Associate's Degree	Some College (No Degree)	STUDENT LOAN DEBT		\$1,471,140	2016 Value Owed on Student Loans - Prior Year

©2017 Esri

HAVE STUDENT LOANS		113	5) 2016 INDEX (Compared to USA)	STUDENT LOAN DEBT THIS YEAR	CSS	88	2016 INDEX (Compared to USA)
HAVE ST		%8	HAVE STUDENT LOAN (2016)	STUDENT	Cath	\$4,686,847	2016 Total Value Owed on Student Loans - Current Year
AINMENT	12%	19% Graduate /Professional Degree	Bachelor's Degree	PRIOR YEAR		88	2016 INDEX (Compered to USA)
2016 DEGREE ATTAINMENT	<b>%</b> 8	17% Associate's Degree	Some College (No Degree)	STUDENT LOAN DEBT		\$4,306,901	2016 Value Owed on Student Loans - Prior Year

Warwick Township

Warwick Township, PA Warwick township, PA (4207181168) Geography: County Subdivision

HAVE STUDENT LOANS	8% 114	HAVE STUDENT LOAN (2016) 2016 INDEX (Compared to USA)	STUDENT LOAN DEBT THIS YEAR	Casa	\$8,644,374	2016 Total Value Owed on 2016 INDEX (Compared to Student Loans - Current Year USA)
ATTAINMENT	10%  Graduate /Professional Degree	Bachelor's Degree	EBT PRIOR YEAR		96	2016 INDEX (Compered to USA)
2016 DEGREE ATTAINMENT	7% 7% 17% Associate's Degree	Some College (No Degree)	STUDENT LOAN DEBT		\$8,046,221	2016 Value Owed on Student Loans - Prior Year

@2017 Esri

		•••••								
	<b>E</b>	\$828	Median Contract Rent		(2)	30%	2021 ESRI			3.21% 2021 PROJECTED
HOUSING STATS		\$9,527	Average Spent on Mongage & Basics	RENTER-OCCUPIED HOUSING UNITS	<b>a</b>	29%	2016 ESRI	VACANT HOUSING UNITS		3.28% 2016 ACS
HOUSI	48	6\$	Averag	RENTER-OCCUP	<b>a</b>	26%	2010 Census	VACANTH		3.50
		\$211,066	Median Home Value			22%	2000 Census			3.37% 2010 CENSUS
	4	0.47	2016-2021 (ESRI)		91	%02	2021 ESRI	UNITS	4	34% NO MORTGAGE 2016
ER OF HOUSEHOLDS	4	91	S (ESRI)	HOUSING UNITS	<b>%</b>	71%	2016 ESRI	OCCUPIED HOUSING		OO% MORTGAGE 2016
GROWTH RATE: NUMBER OF HOUSEHOLDS		0.36	2010-2016 (ESRI)	OWNER -OCCUPIED HOUSING UNITS	<b>%</b>	20%	2010 Census	MORTGAGE STATUS: OWNER-OCCUPIED HOUSING UNITS	4	31% NO MORTGAGE
	4	1.29	2000-2010 (Census)		<b>9</b>	78%	2000 Census	MORTG		/U%o MORTGAGE 2010

HOUSING Elzabeth Township, PA Elzabeth township, PA (4207123008) Geography, County Subdivision

	<b>#</b>	\$637	Median Contract Rent		<b>9</b>	16%	2021 ESRI		2.76% 2021 PROJECTED
HOUSING STATS	4	172	Average Spent on Mortgage & Basics	RENTER-OCCUPIED HOUSING UNITS	<b>9</b>	16%	2016 ESRI	VACANT HOUSING UNITS	2.80% 2016 ACS
NISNOH	***	\$10,172	Average Mortgag	RENTER-OCCUPIE	<b>2</b>	14%	2010 Census	VACANT HO	2.8
		\$224,085	Median Home Value			13%	2000 Census		2.55% 2010 CENSUS
	4	0.27	2016-2021 (ESRI)		<b>9</b>	84%	2021 ESRI	NITS	34% NO MORTGAGE 2016
GROWTH RATE: NUMBER OF HOUSEHOLDS	4	0.13	2010-2016 (ESRI)	OWNER -OCCUPIED HOUSING UNITS	9	84%	2016 ESRI	R-OCCUPIED HOUSING L	66% MORTGAGE 2016
GROWTH RATE: NUM		0.	2010-20	OWNER-OCCUPIE	9	83%	2010 Census	MORTGAGE STATUS: OWNER-OCCUPIED HOUSING UNITS	33% NO MORTGAGE 2010
4	4	0.55	2005-2010 (Census)		9		2000 Census	MOM	67% MORTGAGE 2010

	<b>#</b>	\$708	Madian Contract Rent		<b>a</b>	41%	2021 ESRI		1	4.16%	2021 PROJECTED
HOUSING STATS		28	Average Spent on Mongage & Basics	RENTER-OCCUPIED HOUSING UNITS	<b>2</b>	40%	2016 ESRI	VACANT HOUSING UNITS	4	4.11%	ACS
NISNOH		\$8,128	Average ' Mongage	RENTER-OCCUPIE		37%	2010 Census	VACANT HO	4	4.1	2016 ACS
		\$187,654	Median Home Value			37%	2000 Census			3.76%	2010 CENSUS
	4	0.31	2016-2021 (ESRI)		<b>9</b>	26%	2021 ESRI	UNITS	4	33%	NO MORTGAGE 2016
GROWTH RATE: NUMBER OF HOUSEHOLDS		0.17	2010-2016 (ESRI)	OWNER -OCCUPIED HOUSING UNITS	9	%09	2016 ESRI	MORTGAGE STATUS: OWNER-OCCUPIED HOUSING UNITS		67% MORTGAGE 2016	
GROWTH RATE: NUM		o	2010-20	OWNER-OCCUPIE	<b>9</b>	26%	2010 Census	TGAGE STATUS: OWNE	4	32%	NO MORTGAGE 2010
	4	0.72	2000-2010 (Census)		9	63%	2000 Census	MOK		68% MORTGAGE 2010	

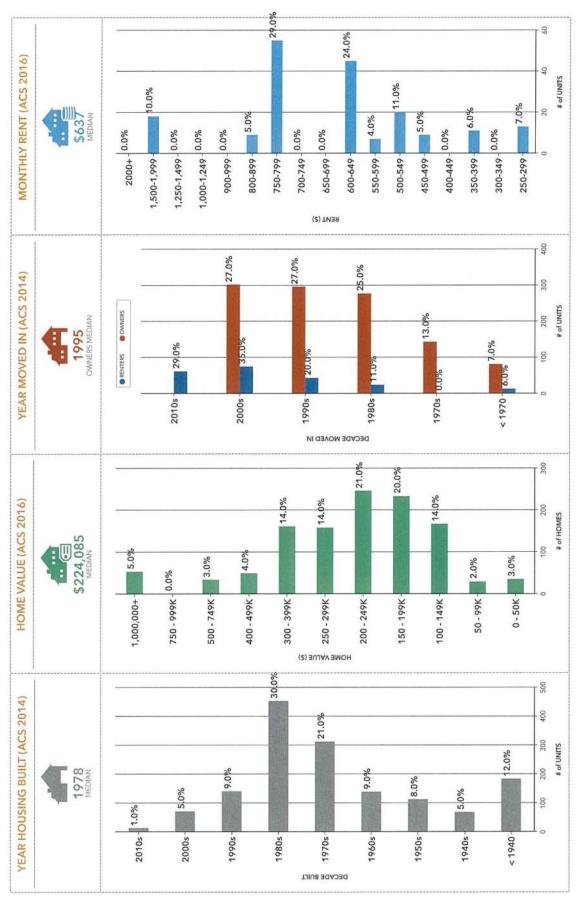
May 11, 2017

HOUSING
Warwick Township, PA
Warwick cownship, PA (4207181168)
Geography, County Subdivision

	<b>#</b>	\$962 Median Contract Rent		<b>9</b>	26%	2021 ESRI			2.75% 2021 PROJECTED
HOUSING STATS		\$10,245	RENTER-OCCUPIED HOUSING UNITS	<b>a</b>	25%	2016 ESRI	VACANT HOUSING UNITS		2.89% 2016 ACS
HOUSI	***	\$10	RENTER-OCCUPI	<b>a</b>	23%	2010 Census	VACANTHO		2.60
		\$223,497 Median Home Value			15%	2000 Census			3.30% 2010 CENSUS
	4	0.59		9	74%	2021 ESRI	INITS	4	34% NO MORTGAGE 2016
ER OF HOUSEHOLDS		52	HOUSING UNITS	9	75%	2016 ESRI	OCCUPIED HOUSING U	<b>4</b> %	MORTGAGE 2016
GROWTH RATE: NUMBER OF HOUSEHOLDS		2010-2016 (ESRI)	OWNER -OCCUPIED HOUSING UNITS	<b>9</b> 1	74%	2010 Census	MORTGAGE STATUS: OWNER-OCCUPIED HOUSING UNITS	4	29% NO MORTGAGE
	4	1.80		9	85%	2000 Census	MORT	71%	MORTGAGE 2010

HOUSING INFO

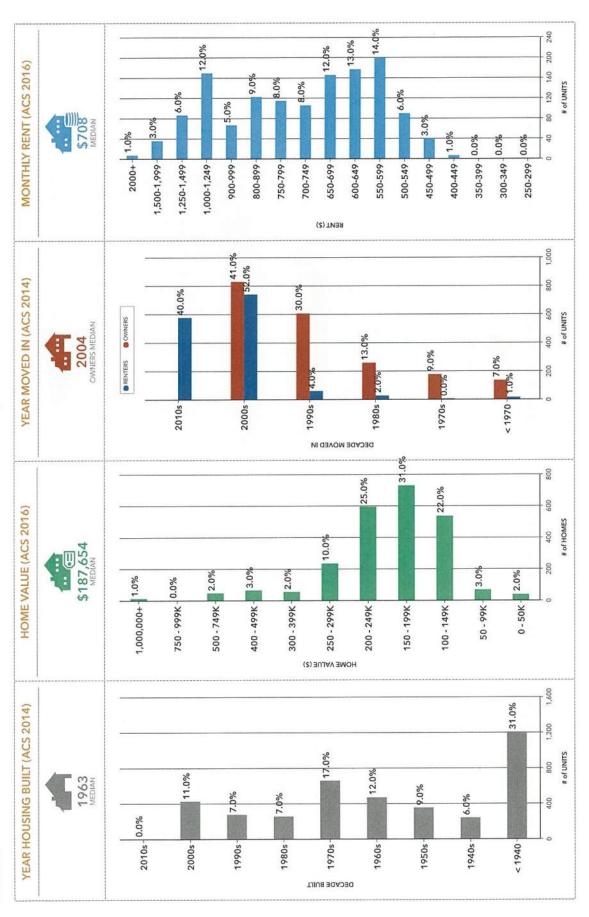
Elizabeth Township, PA Elizabeth township, PA (4207123008) Geography: County Subdivision



May 9, 2017

HOUSING INFO

Litiz Borough, PA Litiz Borough, PA (4243816) Geography: Place

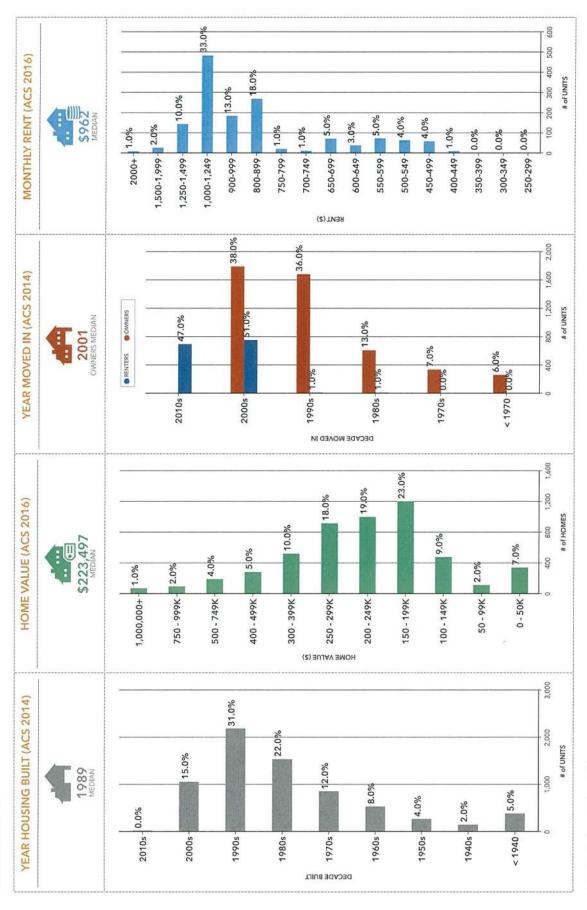


Page 1 of 1

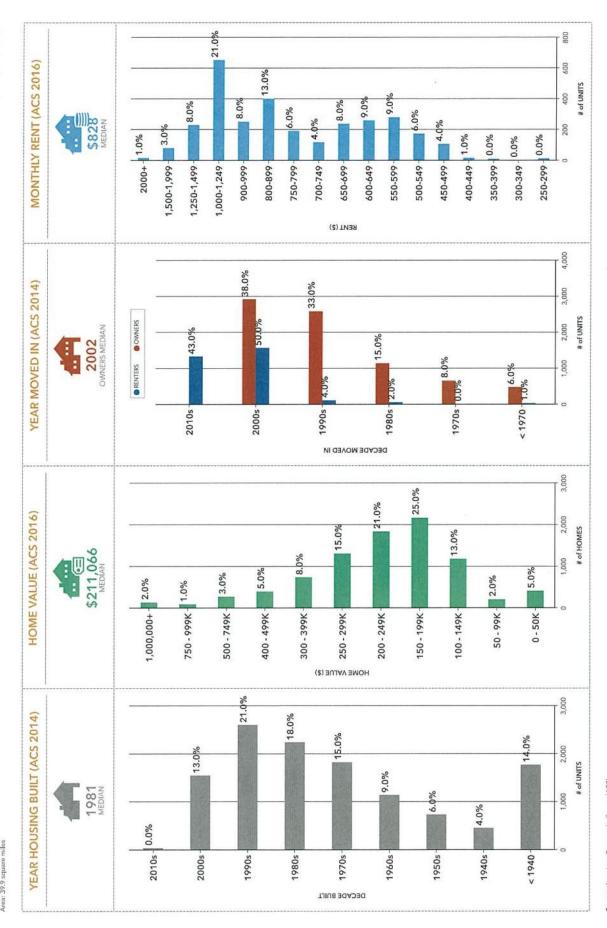
May 9, 2017

HOUSING INFO

Warwick Township, PA Warwick township, PA (4207181168) Geography: County Subdivision



HOUSING INFO Comp Plan Area Area: 39.9 square miles



Page 1 of 1

DERCK

HOUSING MEETING

HOUSING MEETING

DERCK

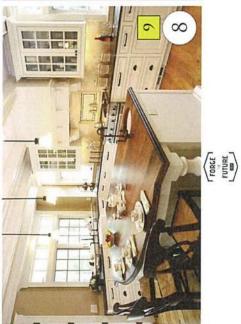
INTERIORS 1





DERCK KEDSON













HOUSING MEETING

HOUSING MEETING

FORGE

DERCK KEDSON

MULTI-FAMILY



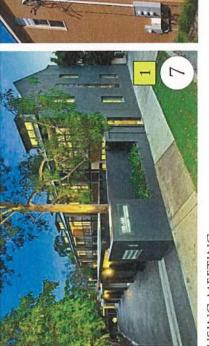
HOUSING MEETING

DERCK CEDSON
CAMPUSES DOWNTOWNS ATHEFFES









HOUSING MEETING

DERCK CEDSON
CAMPUSIS DOWNTOWS ATHEFFES



FUTURE

DERCK EDSON

HOUSING MEETING





FORCE

HOUSING MEETING









UPPER FLOOR RESIDENTIAL









HOUSING MEETING

### FEEDBACK GAINED FROM HOUSING DATA REVIEW FORGE THE FUTURE 2022 May 18, 2017

On May 18, 2017, an estimated 40 to 45 persons attended the above-captioned Data Review session (held at Zig's/Brick Gables) related to the "Forge the Future 2022" Update to the Warwick Region's Strategic Comprehensive Plan. In addition to a review of community demographic and housing data, peer discussion of the data ensued along with a visual preference exercise. The following reactions and opinions, relating to the Housing Data, were shared and recorded (noting that the following list is in no particular order). These insights, which may or may not be factual, will be further considered throughout the "Forge the Future" planning process.

- People want to live here and have their children attend school here, but cannot find places to live;
   there's not enough housing at affordable prices/rents. The School District has more than a dozen students who live outside of the District, but pay tuition to attend school here
- This Plan Update must strive to comport and be consistent with the County's on-going Comp Plan
  Update with regard to density targets, efficient use of Designated Growth Areas, and preservation of
  valued resources
- During this planning process, community conversations need to occur that allow for feedback and discussion on planning concepts and strategies; the public's input needs to be valued
- We need leaders to emerge
- It would be valuable to share imagery and case studies, especially of local projects
- The data is compelling, especially the size of the class graduating from Warwick High School versus the size of the incoming class of kindergarteners
- The School District's declining enrollment is alarming; we must understand the factors that have contributed to ten straight years of decline. These factors might include, but not be limited to, housing that is too expensive, a real estate market that is too tight, affordability that is very difficult to find, and an abundance of +55 housing (because we're an attractive destination for this kind of development). Are there more/other factors than these that are causing the decline in enrollment?
- We need to embrace the "tiny house" movement; they exude good design elements while meeting the minimalist needs of many millennials
- While providing for housing, we need to value greenspace and open space, wildlife and natural habitats, stormwater and green infrastructure, farming and the Amish; it's a balancing act
- Higher cost of development may have a direct bearing on the cost of renting and owning
- It's unfortunate that Habitat for Humanity's proposed handful of houses may not be able to be built because of development costs related to infrastructure

- At first, it appears that the cost to rent seems low; however, when considering that the shared data is for median rental cost, maybe it's not so low after all, compared to household incomes
- What examples of other development patterns can we consider for rural (IE: less "urban") settings in the Region? Are there cluster options that should be considered/promoted?
- The diversity of housing is "upside down;" if school enrollment is down and business growth is up, why is so much +55 housing being built?
- · From some developer's perspectives, form-based codes can be difficult to work with
- Promote higher density housing
- Discuss housing needs with the region's key employers. You're fortunate to have Rock Lititz, Listrak, etc.; the Region's housing stock should be designed around the needs of the employees of these businesses

C:\Users\rick\Desktop\FEEDBACK GAINED FROM HSNG DATA REVIEW.docx

### Meeting #4: Community Services and Quality of Life

**Presentation Materials** 

### FORGE FUTURE

2022

Community Services & Quality of Life
Thursday, June 15<sup>th</sup> @ 7:30am
Brickerville Fire Company

# HOUSING PREFERENCES SURVEY

Link:

www.surveymonkey.com/r/forge2022housing

\*Survey available through the end of June

## COMMUNITY SERVICES & QUALITY OF LIFE - GOALS

- 1. Continue to hold biannual meetings with governing bodies and staff of the Warwick School District and municipalities.
- between the public works departments and to meet 2. Continue to explore opportunities for cooperation increasing service demands.
- response through Warwick Emergency Services (WESC). 3. Continue to improve emergency services and
- 4. Plan for the future need of improved police protection.

## COMMUNITY SERVICES & QUALITY OF LIFE - GOALS CONT.

- 5. Continue to support and celebrate activities and events, activities of the Recreation Center, Regional Recreation Commission, Venture Lititz, Lititz Public Library and the which express the region's character and maintain an orientation to family including, but not limited to, the Manheim Consortium.
- 6. Maintain a high level of administrative services to keep pace with the demand of the growing region.
- 7. Acknowledge the special needs of residents, including: older adults, with a focus on those who are living in retirement communities; people with disabilities; children neighborhoods and are not having their needs met by and youth; and unemployed.

### WARWICK EMERGENCY SERVICES COMMISSION

2018-2022 OUT! OOK



### IMPACT 2017 GOALS



- Monitor the work of WESA, to match needs of community with the services provided for next 5 years and beyond
- volunteer staffing for region's fire and ambulance services volunteer recruitment and retention by actively recruiting Continue to reach out to the community with regard to
- director and the establishment of a Regional Emergency Move forward with hiring of a regional coordinator / Services Council





- WESC Organized in 2013
- First full-time Director was hired in 2013; I have been WESC Administrator since October 2014
- Recruitment and Retention fire and ambulance volunteers
- Creation of Standards of Response
- Coordination of training, responses and equipment purchases
- Strategic Apparatus Replacement Plan

## 2018 - 2022 GOALS OF EMERGENCY SERVICES

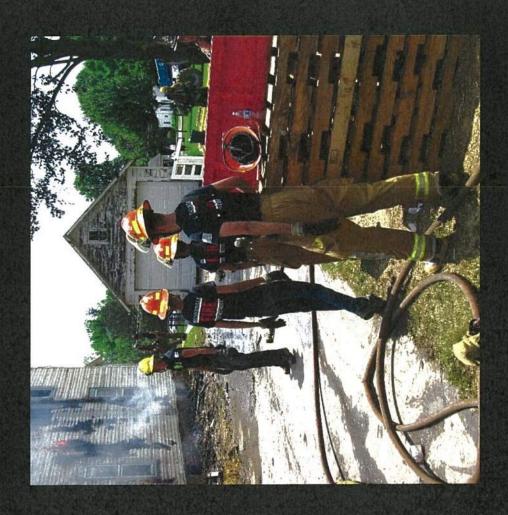


- Continue recruitment of new members Juniors, young adults
- Retention of existing members experienced, trained
- Eventually will need to consider paid staffing -Regional model
- Sustain or improve funding model
- Need better support of fund drives and subscription programs
- Tax, fee or alternative ways to finance fire companies and ambulances
- Can't expect volunteers to host fund raisers in addition to training and emergency responses

### **ECRUITMENT AND RETENTION** FUTURE CHALLENGES:

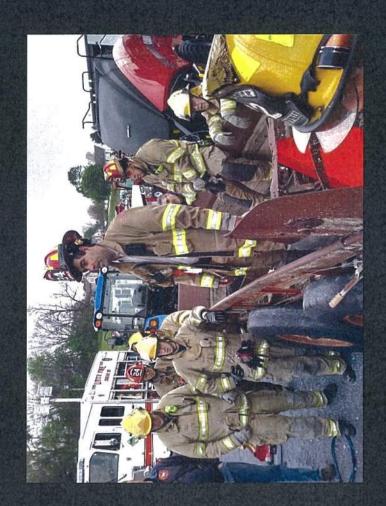


- The need to continuously recruit more volunteers
- Increased time commitments are turning people away, both current volunteers and potential applicants
- Different style of motivating today's generation to volunteer
- Using experience of veteran members to train new members
- Physically-demanding and high risk job with no set hours



### RECRUITMENT AND RETENTION FUTURE CHALLENGES:



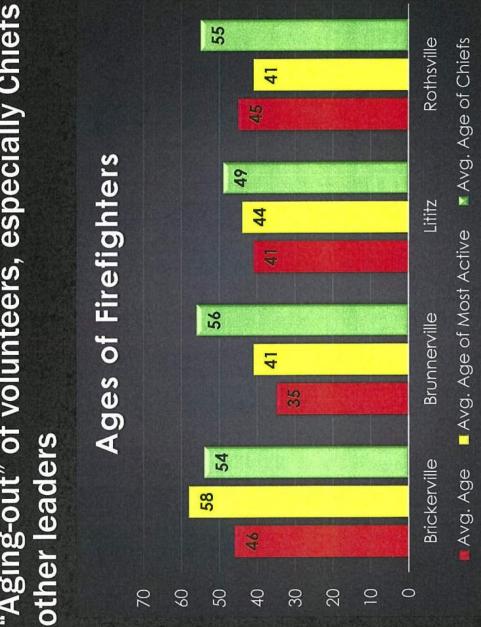


- Younger members looking for their own living space
- Needs to be affordable
- New housing developments
- Too far from fire stations
- Not normal candidates to recruit
- Many out of area transplants – never heard of volunteer firefighters & don't donate

#### FUTURE CHALLENGES: STAFFING



"Aging-out" of volunteers, especially Chiefs and



### WHAT IF NO ONE RESPONDED? FUTURE CHALLENGES:



- Not now, but when?
- Need to plan
- What if local businesses did not support daytime response aid?
- Need to be prepared
- · Combination fire companies
- Fully-paid fire companies
- End results would be less than 4 fire companies in the region

Put out the fire

GNITE

the passion

to protect
LancasterCounty

Become A Firefighter.org

VOLUNTEER TODAY!

### WHAT IF NO ONE RESPONDED? FUTURE CHALLENGES:

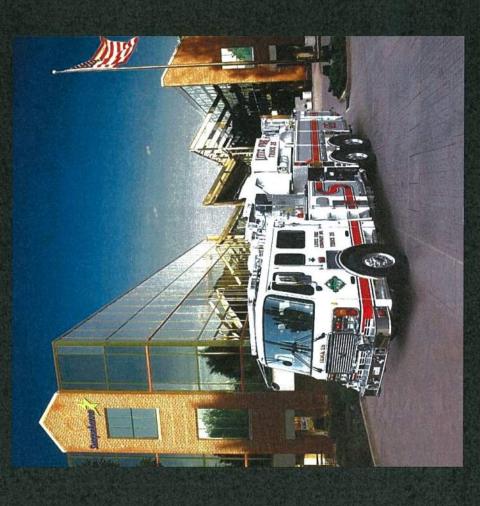


- Heading towards a combination (volunteer PT paid) fire company?
- 12 FT firefighters and 4 FT fire officers with benefits = \$1.4 million in first year, using existing equipment and apparatus
- Only supplements volunteer staffing
- If fully-paid need arises (no more volunteers), annual costs would be 2-3 times higher

## FUTURE CHALLENGES:

## **ADDITIONAL FUNDING**

- Fire apparatus replacement plan
- 20-25 year replacement cycle on main fire trucks
- Command vehicles and Squads - \$50,000 -\$100,000
- Engines, Rescues and Tankers approx. \$400,000 \$700,000
- · Ladder Truck \$1.4 million
- Very likely to reduce local resources in future, not add



## **FUTURE CHALLENGES: FUNDING**



#### FOR EMS

- Stagnant reimbursement rates
- Federal Medicaid reimbursement rates haven't changes since 2004
- Patients not paying balance owed after insurance
- Results in writing off debt
- No compensation when patient isn't transported
- Risk of going out of business

### REVIEW - PREPARING FOR NEXT 5 YEARS



#### FIRE COMPANIES

- Decrease in volunteers It's not just a local problem happening nationwide
- When is it time to start paying for staffing? Combination / Full-time?
- As costs of apparatus rise and need to pay FF's, is it safe to reduce resources?
- What will funding model look like? By whom? Tax?
- Regionalization of services

#### AMBULANCES

- Very few volunteers remain
- Will need to staff ambulances with fully paid staff
- Need income to keep up with costs to run ambulances
- Mergers / Consolidations of services to best serve community
- More direct funding from municipalities

## Planning for Success

**NLCRPD Strategic Reporting** 

June 2017



Author: Chief D.E. Steffen



### REGIONAL POLI NORTHERN LANCAS

#### About Us

The Northern Lancaster County Regional Police Department (NLCRPD) is a progressive police department consisting of twenty six sworn staff members, and additional unsworn staff that is responsible for delivery of the support services functions.

One of the most unique characteristics of the operational aspects of the NLCRPD is the agency is a self-contained unit, responsible for the operations, administrative, budget, human resource, fiscal, physical plant and review functions of the police organization.

This structure assures all costs for delivery of police services are realized in the budget and fiscal process and eliminates "hidden costs" of the police services



## Charter Municipalities

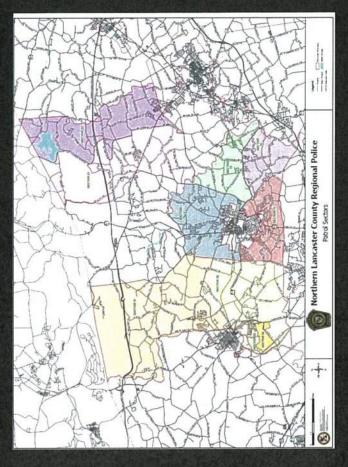
PEDD

LANCASTER COUNTY, PA











### Strategic Plan for the NLCRPD Added Values of an Agency



### Strategic Plan Flow Chart

Organizational Expectations

Expectations

Community

Strategic Goal 2

Enhance internal communication

Improve external communication

Enhance community partnerships

Focus on availability and visibility of resources

 Provides a pathway to saccess  Allows for measurable outcomes

provides clarity for decision making Benchmarking

 Increases agency performance

## NLCRPD External Influences



Controlled Influences External

Event Driven -Situational

Fiscal Impacts Unanticipated

Containment

Cost

Environmental Weather

Allocation Resource



## Agency Objectives 2017-2020

- Maintain and expand agency standards of service and quality control
- Maintain and expand agency risk management and control strategy
- Mitigation of the opioid related negative community impacts

- Maintain and expand fiscal control and efficiencies
- Expanded use of technology for agency efficiency



### Monitor Agency Plan and Key Performance Metrics



consistent measures we can performing within expected determine if the agency is By use of historic data and

Standards.



"Planning is bringing the future into the present so that you can do something about it now."

Alan Lakein

# NLCRPD Trend line 2012-2016

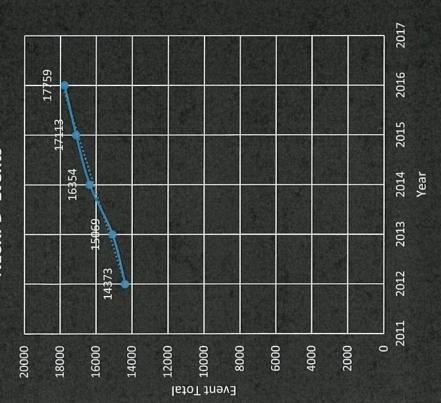




## Workload & Staffing Analysis



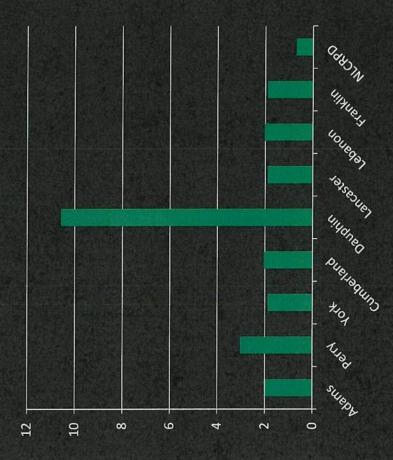
#### NLCRPD Events



...... Linear (LCWC Events)

LCWC Events

### Staffing of Sworn Officers In South Central CHSR - per 1000 residents



### Dispatches 1975 to 2015 Lancaster County Police



## LANCASTER COUNTY POLICE DISPATCHES

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## NLCRPD Event Distribution by





### Member Municipal Workload Distribution by Percentages

Percentage of NLCRPD Reporting

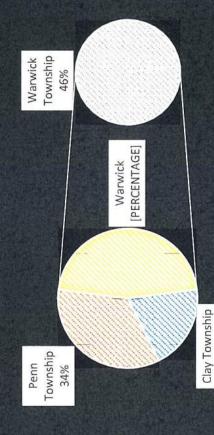
#### **NLCRPD INCIDENTS**

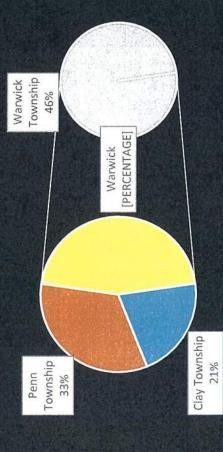
☐ Clay Township ☐ Penn Township ☐ Warwick Township

Percentage of LCWC Reporting

#### **LCWC EVENTS**

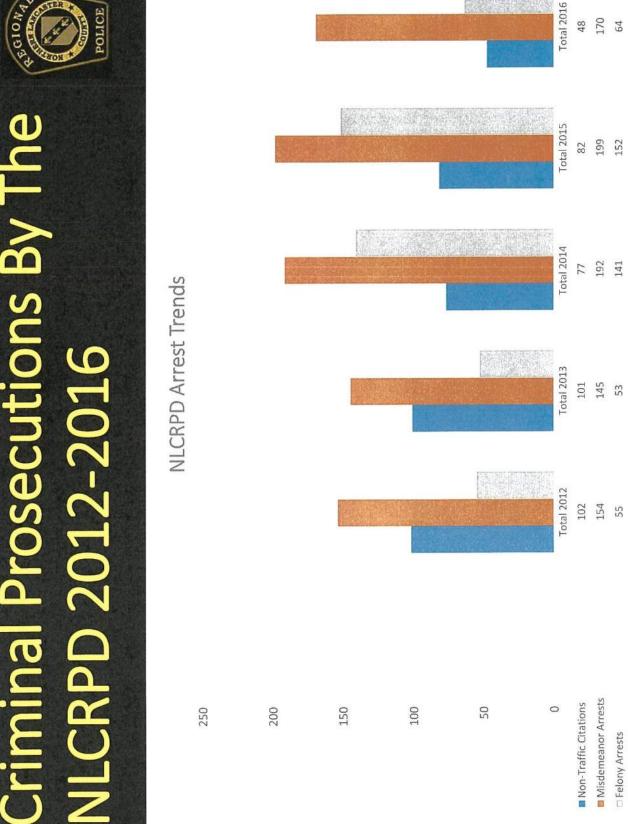
□ Clay Township □ Penn Township □ Warwick Township





## Criminal Prosecutions By The





Municipality	Population (2010)	Expenditures (2014)	Cost Per Person
AKRON BORO	3,876	\$561,619.00	\$144.90
CHRISTIANA BORO	1,168	\$216,347.00	\$185.23
COLUMBIA BORO	10,400	\$2,567,258.00	\$246.85
EAST COCALICO TWP	10,310	\$3,257,815.00	\$315.99
EAST EARL TWP	6,507	\$823,081.00	\$126.49
EAST HEMPFIELD TWP	23,522	\$4,395,942.00	\$186.89
EAST LAMPETER TWP	16,424	\$5,527,475.00	\$336.55
<b>ELIZABETHTOWN BORD</b>	11,545	\$1,864,627.00	\$161.51
EPHRATA BORO	13,394	\$5,050,704.00	\$377.09
LANCASTER CITY	59,322	\$19,697,271.00	\$332.04
LITITZ BORO	698'6	\$1,826,840.00	\$194.99
MANHEIM BORO	4,858	\$1,966,924.00	\$404.88
MANHEIM TWP	38,133	\$10,602,182.00	\$278.03
MANOR TWP	19,612	\$1,928,572.00	\$98.34
MILLERSVILLE BORO	8,168	\$1,356,436.00	\$166.07
MOUNT JOY BORO	7,410	\$1,219,458.00	\$164.57
NEW HOLLAND BORO	5,378	\$1,764,534.00	\$328.10
QUARRYVILLE BORO	2,576	\$292,534.00	\$113.56
STRASBURG BORO	2,809	\$497,988.00	\$177.28
WEST EARL TWP	7,868	\$668,910.00	\$85.02
WEST HEMPFIELD TWP	16,153	\$2,037,758.00	\$126.15
WEST LAMPETER TWP	15,209	\$1,481,821.00	\$97.43



## 2014 Cost of Police Services

# NLCRPD Fiscal Situation 6/2017



Pension Funded Ratio	OPEBS
95.7 % * 2017	Fully Funded at
valuation using most	current funding rate
current mortality rate	until 2049
charts – GASB 75	

	Reserve Funds
unded at	\$ 247,000.00
t funding rate	<b>Certificates and liquic</b>
049	assets.

Year	Population	Officers	Officer Per 1000	Expenditures	Cost Per Officer	Per Capita Cost
2017	35,723 27	27.00	0.80	\$3,791,718.00 \$140,434.00	\$140,434.00	\$106.00



#### HERN LANCASTER REGIONAL POLICE



Professional Law Enforcement Service Delivery





Quality Always Matters



Service Driven







## Hospital Overview of Services

From preventative care to rehabilitation after surgery and everything in between - we've got you covered. Deborah Willwerth, CEO



Campus: 43.5 acres

Hospital: Approximately 176,000 sq. ft.

Licensed beds: 148

Hospital employees: 390 (includes employed practice staff)

Volunteers: 123

Physicians on medical staff: 340

**Employed practices Lancaster Medical Group:** 

10 family medicine

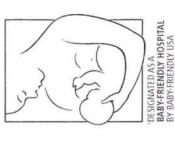
17 specialists

= 56 employed physicians

Mission: Compassionate, personalized care...every patient, every time.

Quality Achievements:







Primary Stroke Center

## Hospital Services Most Applicable ...



# Preventative Care – It Begins With Your Family Physician

We have over 30 family physicians at ten family practice locations in Lancaster County. (See handout of all.) Two of them are right here in Lititz:

1. Heartland Family Medicine: 1535 Highlands Drive, Suite 100

Physicians: Peter Hurtubise, MD; Louise Butler, DO

2. Highlands Family Medicine: 1871 Santa Barbara Drive, Suite 1

Physicians: Louis Gray, MD; Lindsi DeArment, DO

### Why do you need a family physician?

- "Welcome to Medicare Part B" preventative office visits within the first 12 months of enrollment. Take advantage of that!
- Help when you are not feeling well.
- Referrals to specialists.(If your insurance requires it.)



## Specialized Care - Some Highlights

#### Arthritis & Rheumatology

Lancaster Arthritis & Rheumatology Care

1725 Oregon Pike, Suite 107B, Lancaster

Physician: Ami Milton, MD; Amal Kebede, DO

**Board Certified Rheumatologist** 

Treats osteoarthritis, rheumatoid arthritis, lupus, vasculitis, gout and other autoimmune diseases.

#### Cardiology

Red Rose Cardiology

2135 Noll Drive, Suite D, Lancaster

Physicians: Nehal Patel, MD; Gregory Cox, DO

**Board Certified Cardiologists** 

#### Cardiac Consultants

1697 Crown Avenue

Lancaster, PA 17601

Physicians: Mathew Evans, DO; Gordon Hutt, MD, FACC; Nicholas Mandalakas, MD, FACC; Sunil Patel, MD, FACC;

Surender Singh, MD, FRCP(C), FACC, FACP FAHA

**Board Certified Cardiologists** 

Specialize in the prevention, diagnosis and treatment of diseases and disorders of the heart. Experier noninvasive and invasive tests and procedures



# Specialized Care - Some Highlights (con't)

Oncology - right here in Lititz

Infusion Center of Heart of Lancaster

1575 Highlands Drive, Suite 205

Medical Director: Naeem Latif, MD

**Board Certified Oncologist** 

Brings 19 years of experience to the fight against cancer and blood disease with an infusion center on-

#### Orthopaedics

2150 Noll Drive, Suite 200 (also at 1575 Highlands Dr., Suite 200 on Wednesdays) Physicians: William Parrish, MD; Seth Baublitz, DO; Thomas Ring, MD Orthopaedic Specialists of Central Pennsylvania Board Certified and Fellowship Trained Orthopaedic surgeons treat injuries and illnesses that affect bones, muscles, tendons, joints and ligaments. Dr. Parrish also specializes in ortho oncology.



# Specialized Care – Some Highlights (con't)

## Outpatient Physical Therapy – right here in Lititz CPRS Physical Therapy

1535 Highlands Dr., Suite 200

Heart of Lancaster Regional Medical Center partners with CPRS Physical Therapy to offer outpatient therapy services in a convenient location across the street from the hospital on Highlands Drive.

#### Pulmonary Care

Lancaster Pulmonary and Sleep Associates

233 College Ave, Suite 201 (also at 1575 Highlands Dr., Suite 200 on Tuesdays)

Physicians: Chineya Emuwa, MD; Masood Ahmad, MD

**Board Certified Pulmonologists** 

Treating patients with asthma, pneumonia, COPD, lung masses, lung diseases, chronic bronchitis. Our doctors are also trained in critical care medicine and sleep medicine.



# Specialized Care - Some Highlights (con't)

#### Gynecology - right here in Lititz

**OBGYN** of Lancaster

1575 Highlands Dr., Suite 101 (one of three locations in the County)

practitioners stands ready to help you proactively manage your gynecologic health. Proud to offer the latest and most effective advancements in minimally invasive surgical options to treat pelvic floor The team of Board Certified physicians, certified nurse midwives, and certified registered nurse disorders, endometriosis, perform hysterectomies, etc.

#### Wound Healing

1555 Highlands Drive, Suite 100 (one of two locations in the County) Wound Healing Center of Heart of Lancaster Regional Medical Physicians: James Cavorsi, MD, Medical Director Offers state-of-the-art treatments including debridement, diabetic wound care, hyperbaric oxygen therapy, wound dressing selection, special shoes, patient education and has exceptional healing results and clinical outcomes.



# Specialized Care – Some Highlights (con't)

### Plastic Surgery – right here in Lititz

Plastic & Aesthetic Surgical Associates

1535 Highlands Dr., Suite 300

Physician: Bryan Cicuto, DO

body, including reconstructive surgery after cancer. Aesthetician services also available at this location Dr. Cicuto has extensive background in advanced plastic surgery techniques for breast, face, hand and including spa, injectables, and laser treatments.

## Bariatrics; Medical and Surgical Weight Loss – right here in Lititz

**BMI** of Lancaster

1575 Highlands Dr., Suite 201

Physician: Justin Rosenberger, MD – Medical Director

BMI of Lancaster offers some of the most experienced bariatric specialists in the area, on-site dietitians and a fitness center with an exercise physiologist.



# Specialized Care - Some Highlights (con't)

## Outpatient Nutrition Counseling - offered at both hospitals

Licensed registered dietitians provide expert nutrition counseling to help you create a personalized meal plan and meets with you as needed to help you maintain your diet and lifestyle changes.

## Behavioral Health - Lancaster Regional Medical Center

adults, age 18 and older. We are the only facility in Lancaster County to have a separate, 10 bed wing specifically for older adults. The Behavioral Health Services Team includes psychiatrists, psychiatric Provides compassionate, short term, inpatient behavior and medication stabilization for up to 39 nurses, social workers, Master's level therapists, counselors and a recreation therapist.



## Senior Wellness Program

offers fellowship, activities, benefits at Lancaster Regional & Heart of Lancaster Regional The senior wellness program is a dynamic organization dedicated to supporting healthy lifestyles and building strong relationships with those ages 50 and better. The program Medical Centers and health education.

- Health/wellness physician talks
- Educational / social activities
- Newsletters

717-625-5628 or Alondra.Thomas@HeartofLancaster.com. Interested? Contact Lonnie Thomas at



### **Lititz Warwick Community Chest** Overview

Started over 100 years ago as a community nursing service.

Became food bank in mid – 1980's.

Provide food assistance for neighbors residing within the boundaries of the Warwick School District.

All volunteer organization.

Independent, community group — no governmental, regional food bank or religious denomination affiliations.

Families do not have to a require self declaration of income to receive assistance. Home delivery model is utilized - no food is distributed directly from pantry.

Apply for grants from Anne Brossman Sweigart Charitable Foundation and Rotary Club of Lititz. Also participate in Extraordinary Give. Any additional funding and all food donations come from donations and food drives from within our

LWCC coordinates the WSD Christmas Basket Program.

Support local community and holiday meal programs.

THURSDAY July 26, 2001

#### emains true to its mission of service A century later, Community Chest



# LWCC Assistance Program

## HOTLINE 717-627-0770

Must be a resident of WSD

Must call and request assistance

No second party requests on behalf of a family.

Will refer family to other area social service organizations if needs are shared that fall outside of our program.





# LWCC Assistance Program: STORE AND PANTRY

Each family is eligible for 5 Store and Pantry Deliveries within a 12 month period, with no delivery occurring closer than 30 days apart.

- Includes nonperishable food from pantry and fresh items purchased at grocery store at time of delivery.
- S&P Delivery is adjusted for family size.
- Includes paper products and personal hygiene items.
- Current average store bill \$74.16.
- Christmas Basket does not count toward their 5 S&P total.





# LWCC Assistance Program: PANTRY

If a family use up their 5 Store and Pantry deliveries, then they are put on Pantry Only status until 12 month anniversary when they would be eligible for up to 5 more Store and Pantry deliveries in the coming 12 months.

- Limited number of nonperishable food items.
- Not adjusted for family size.
- No paper or personal hygiene products included.
- No store purchases.







## WSD Poverty Rate and Homeless Student Census Data

(source: Susan Shinn-Thomas, WSD Social Worker, personal communication, 6/9/17)

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2016 - 2017	24.45 % (starte d year at 27.66 %)	44
2015 - 2016	27.02 %	36
2014 -	26.3%	32
2013 - 2014	24.5%	30
2012 - 2013	24.6%	25
2011 -	22.2%	37
2010 - 2011	20.7%	23
2009 - 2010	19.6%	29
Acade mic Year	% QSM	Homele ss Student s

### LWCC Pantry Statistics

	Families served in a year	Total deliveries in year	Average number of deliveries per month	Average pounds of pantry food in each delivery	Average pounds of food distributed each month	Total pounds of pantry food distributed in year
2009	229	411	34	117.3	4,036	48,434
2010	224	384	31	117.0	3,718	44,621
2011	233	460	39	118.8	4,585	55,015
2012	262	574	46	105.0	4,871	58,450
2013	270	590	49	113.7	5,590	67,079
2014	315	683	57	111.0	6,324	75,890
2015	270	592	49	114.6	5,655	67,867
2016	317	564	47	110.2	5,179	62,143

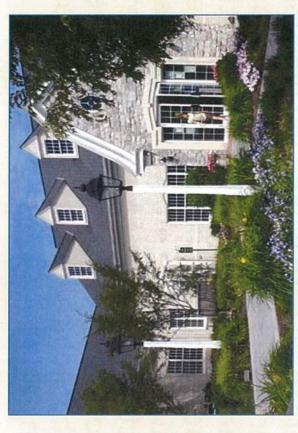


# LWCC and the next 5 years: My questions relating to

- Depending on federal and state budgetary decisions, will LWCC see an increase in demand for assistance if other social service's budgets are cut?
- How long can we continue in light of difficulties recruiting volunteers to fill core leadership positions? (A plight most volunteer organizations are experiencing.)
- civic groups, mainline protestant congregations), how will product based program to a gift card based program? Or acquisition? Will our program focus need to shift from a With changes in societal priorities and the state of flux many traditional institutions are experiencing (scouts, this affect our means of food and monetary donation something else?



# Lititz Public Library







## Lititz Public Library

- Over the Past 5 Years:
- Focus on the library as a place where people learn and connect.
- Provide programs that bring people together.
- Maintain personal connections with people who use the library.
- Focus on literacy skills.
- Help young people learn to read and get ready for success in school.
- Provide help with digital literacy.
- ☐ Focus on annual giving fundraising campaigns.
- Struggle with challenges brought by slash in state aid in 2009, cutting \$163,350 per year for our library.
- Increase annual appeal donations to mitigate loss of state aid. Gifts increased by 60% since 2009. (Increase represents only 33% of state loss).

## Lititz Public Library



vithin a communit









Signature Senior Living

# 2017 LASS



# Services to our Residents and Community

- Serving over 16,200 (County-Wide)
- Residential Living
- Personal Care
- Skilled Nursing Care (Long-Term and Short-Term/Rehabilitation)
- Alzheimer's and Dementia
- Adult Day Care & Child Day Care
- Hospice Services
- Home Health and/or Home Care Services

## Workforce

- 8275 Employees
- Payrolls total over \$253,202,000
- Who
- ✓ Nursing Staff
- ✓ Therapy Staff
- ✓ Maintenance, Housekeeping, Laundry
- ✓ Administrative

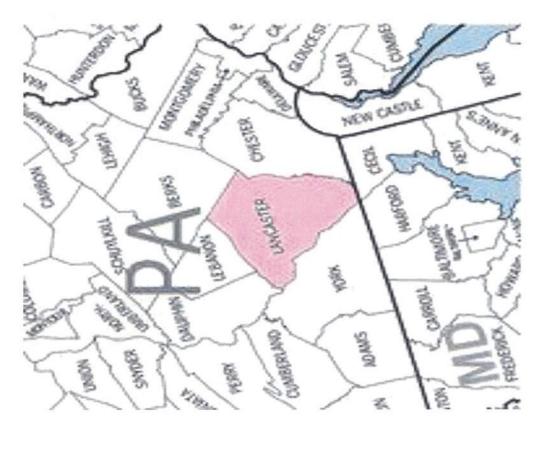
# Charitable Care

- \$59.8 million a year in benevolent assistance
- \$42.9 million is shortfall from Medicaid Payments
- \$16.9 is Direct Benevolent

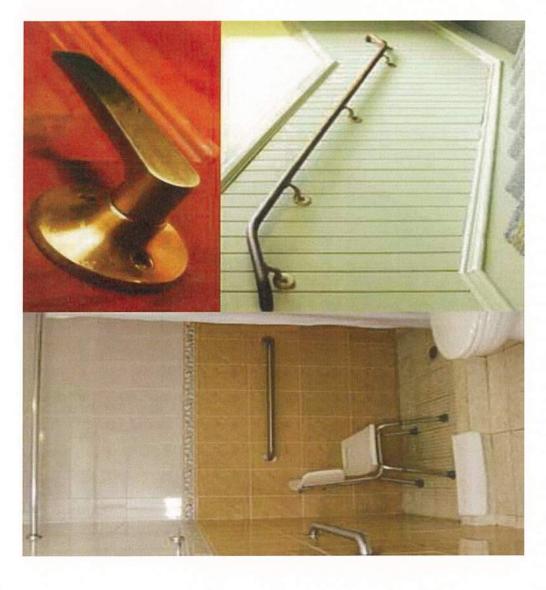
# Property Taxes and PILOT

- \$11.2 million in taxes
- \$2.3 million from PILOTs

Retirees are attracted to

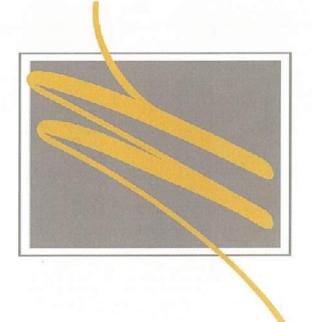


Aging in Place ....



# Employee Retention/Attraction





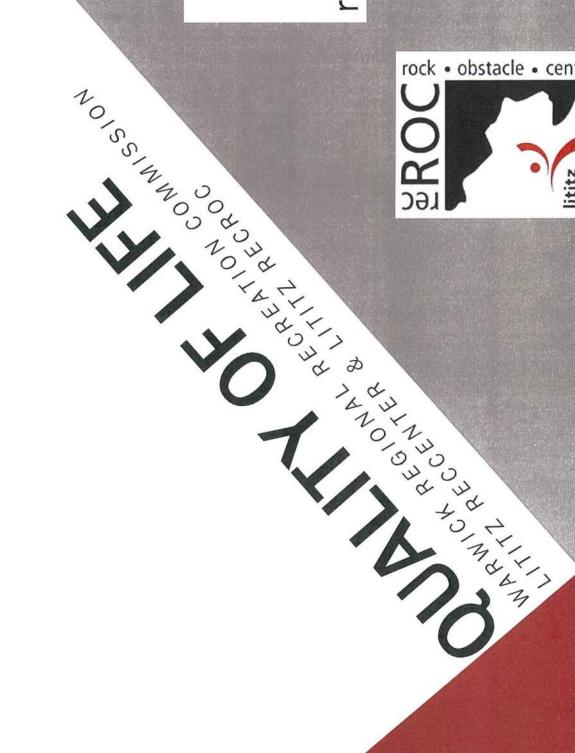
a community within a community™



Warwick Regional Recreation Commission







# RECREATION OFFERINGS

# Walking, running, biking trails

- ❖Various trails in parks
- ❖Warwick To Ephrata Rail (WERT)
- Access to sidewalk systems and Accessibility of trail to down town etc.



- Playground Program
- Youth Sports/Sport fields
- Pavilion rentals





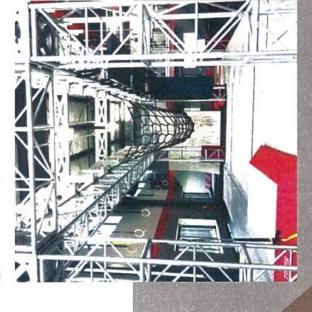
## LRC OFFERINGS

## Lititz recCenter

- Increase need for activities of all ages (i.e. Pickleball
- ❖Summer Camps (Sports, Arts & Crafts etc.)
- ❖Outdoor/Indoor Pools & Swim lessons for all ages
- \*Fitness Classes & Programs for all ages and levels
- \*Family offerings (i.e. Family Karate)

### Lititz recR0C

- Bouldering for beginners & advance
- Obstacle course training for kids, adults etc.







# CHALLENGES WITH RECREATION

- Lack of parking with other events, games or pavilion rentals
- Field space for youth sports
- Loss of fields/Change in locations
- Overlapping fields
- Changing participation numbers
- Field space for public
- Pavilion rentals
- Only one pavilion with a kitchen
- When two renters inquire about the same day
- Field Maintenance/Park updates
- Lack of attention to elementary fields
- Field updates to maintain
- Funds for updates i.e. Skate Park/Outdoor Pool







## LRC CHALLENGES

- Offerings for all ages and abilities
- Times for beginners, intermediate and advance
- Separate times youth, adults, active older adult
- Limited Open Gym Space
- Ample Parking for participants/members
- Parking of HS students
- Full Classes Class times
- Continually growing participation, classes etc.
- Finding new trend and new offerings







# FORGE

NEXT MEETING: Built, Natural, & Historic Resources Thursday, July 20th @ 7:30am

Millport Conservancy - 737 E. Millport Rd.

### Meeting #5: Built, Natural, and Historic Resources

**Presentation Materials** 

### FORGE FUTURE

2022

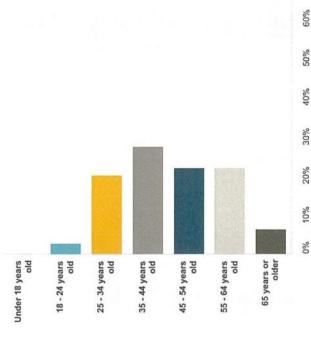
Histori O esour Natural Resou

B

# ONLINE

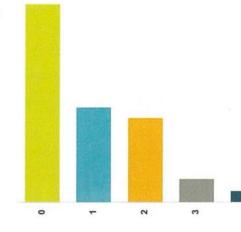
### Q12 What is your age?

Answered: 110 Skipped: 0



# Q15 How many children currently live in your household?





prefer single family detached living

%08

92% prefer owner occupied living

10% 20% 30% 40%

4 or more

80%

%04

%09

20%





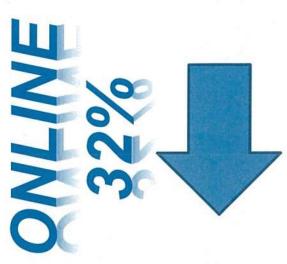


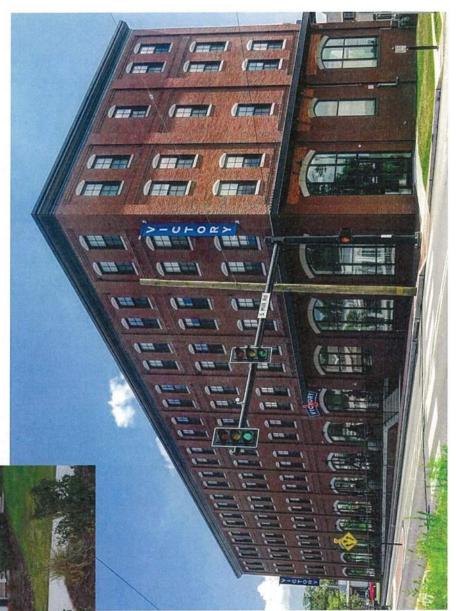


















# BUILT, NATURAL, & HISTORIC RESOURCES - GOALS

- urban growth area, to assess its long-term impact on 1. Re-examine the location and size of the region's determine the need to reconfigure the location the region's resources and infrastructure and to and/or modify the size of the boundary.
- 2. To coordinate land use and transportation planning for the safe, efficient, and convenient movement of people and goods.
- 3. Continue to develop and promote alternative and multi-modal transportation choices.
- 4. Develop a sub-regional transit system.

# BUILT, NATURAL, & HISTORIC RESOURCES-GOALS CONT.

- 5. Reduce traffic congestion in the region's borough fransport of goods and services to and from the and villages without negatively impacting the
- 6. Continue to maintain existing built infrastructure, coordinating infrastructure with land use.
- development and use of clean energy within the 7. Continue to promote the conservation of infrastructure needs, while promoting the
- 8. Continue to lead the way in green infrastructure and environmental planning.

# BUILT, NATURAL, & HISTORIC RESOURCES-GOALS CONT.

- parking management and the development of new parking facilities to support activities related to live, 9. Within urbanized areas of the region, promote WOIK, and DIAY.
- 10. Plan for the unintended consequences of an
- 1. Continue to implement various community planning and infrastructure initiatives.
- 12. Promote and strengthen the Litiz Borough Historic District as well as other historic properties of the
- the local level to strive to effectively protect historic 13. Establish formal mechanisms and assistance at and archeological resources.



# LITITZ WASTEWATER TREATMENT PLANT

- Wastewater Treatment Plant that serves Lititz Borough and portions of In 2010, the Lititz Sewer Authority completed an upgrade to the Warwick Township. A
- The project converted the existing two-stage activated sludge process into a five stage Biological Nutrient Removal (BNR) process to comply with the Chesapeake Bay Initiatives. A
- Treatment equipment upgrades included:
- fine influent barscreen and compactor
- cloth media disc filters
- ultraviolet disinfection
- centrifuge for sludge thickening
- biosolids drying system.

#### CAPACITY

- ➤ Remained at 3.85 mgd average daily flow
- ▶ 4.8 mgd max monthly average flow
- ▼ 7.9 mgd maximum daily flow
- ▶ 9.4 mgd peak hourly flow

### WWTP UPGRADES

- A fine bar screen replaced an existing coarse bar screen
- Two Anaerobic Tanks were created from the existing primary clarifiers
- By installing geomembrane baffles, first and second stage aeration tanks were separated into treatment zones to facilitate biological nutrient removal without adding existing tankage.
- First stage aeration tanks were converted to Pre-anoxic and Aeration Zones
- The intermediate clarifiers were converted to Aeration Tanks. These tanks also receive off-gas from the biosolids dryer to control odor, eliminating the need for construction of additional odor control equipment.

### **WWTP UPGRADES**

- Aeration Zones. Submersible internal nitrate return pumps were also installed Second stage aeration tanks were converted to Aeration, Anoxic and Postin second stage to facilitate de-nitrification. A biological process in which nitrate is converted to nitrogen gas.
- Three cloth media disc filters were added downstream of the final clarifiers
- One ton chlorine gas cylinders were replaced with a UV disinfection system by modifying one existing chlorine contact tank. A
- The belt filter press was replaced with a centrifuge and sludge drying system that produces a Class A biosolid with far less restrictions than the Class B Biosolid that was produced and land applied prior to the upgrade
- provide better control and increased efficiency with lower power demand. Variable Frequency Drives or VFDs were added to key plant equipment to A
- accumulation and increased process monitoring of the treatment facilities. system were included in this project allowing better process control, data Online water quality instrumentation along with a state of the art control A

# **ENVIRONMENTAL IMPROVEMENTS**

#### June 2008

17.75 mg/l 12,068 lbs/month

Z

1.75 mg/l 1,162 lbs/month

175 gallons per day ferrous chloride or \$140/ day or \$51,460 /year

#### June 2017

5.6 mg/l 3,530 lbs/month

Z

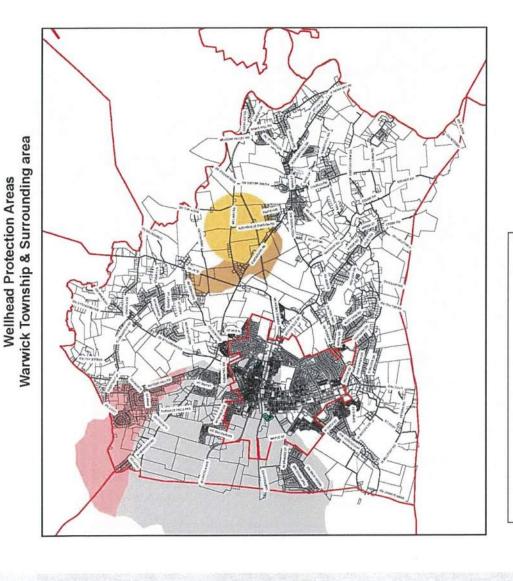
1.2 mg/l 728 lbs/month

Elimination of chlorine in the effluent

No longer need to chemically dechlorinate

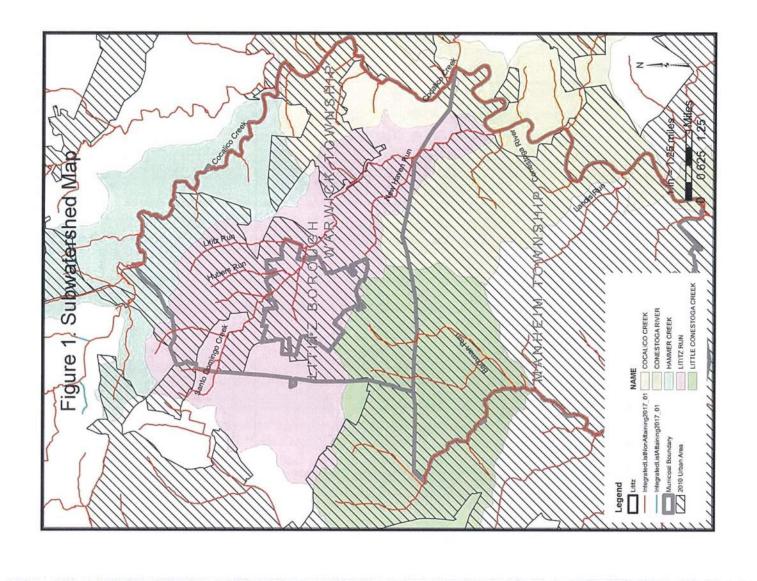
# **ENVIRONMENTAL IMPROVEMENTS**

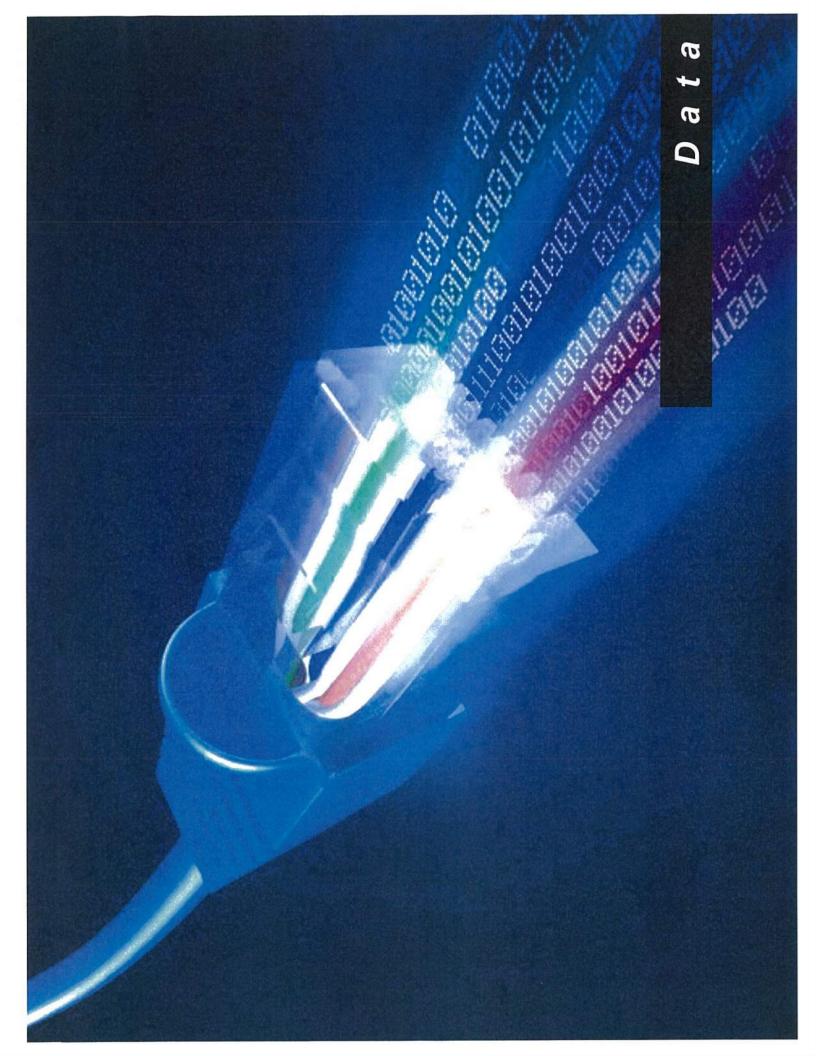
- Public Safety- Removal of One Ton Chlorine Cylinders and bulk Ferrous Chloride Storage A
- Biosolids A vs. B- Less regulatory restrictions, decreased hauling impacts, less pathogens, reduced vector attraction A
- VFDs- Increased efficiency and decreased electric demand A
- increased plant performance, troubleshooting of equipment or process Increased Control, Data Acquisition and Process Supervision- Enables issues and notification of alarm or emergency conditions A





- Municipal Bounds
  Warwick Parcels
  - Lititz Parcels
    - Lititz Wells
- Warwick Wells
   Wellhead Protection
- Wellhead Protection Area-Zone 1 (Rothsville system)
  Wellhead Protection Area-Zone 2 (Rothsville system)
  Wellhead Protection Area-Zone 3 (Rothsville system)
  Wellhead Protection Area-Zone 2 (Litiz system)
  - Wellhead Protection Area-Zone 3 (Lititz system)
    Wellhead Protection Area-Zone 3 (Lititz System)
    - Roadways





#### FORGE THE FUTURE TRANSPORTATION 2022

Lancaster County Planning Commission Transportation Planning Division

Bob Bini, Director

July 20, 2017

- ▶ 21st Century transportation system what does this suggest?
- Ever increasing reliance on technology,
- Vehicles (safety, connected, autonomous)
- Ways to get information to travelers/shippers
- and efficiency (free up capacity for bus lanes?). Potential of technology to improve both safety
- Millennials driving less,
- Evolving patterns of development that meet community's desires.

#### OVERVIEW OF COUNTY **ACTIVITIES**

- Balance growth with protection/preservation of rural and agricultural areas;
- Framework of transportation alternatives supports both the pattern of development and the economy;
- System that maximizes mobility and accessibility;
- Balance of roadway networks, transit, passenger and freight rail, pedestrian and bicycle modes —a truly multimodal system that pays more than lip service to all modes,
- Equity among users,
- Enhance economic development by effectively enabling workers to get to their jobs and products to get to market, and
- Promote health and well-being pedestrians and bicyclists finally get their due.

#### NOISIN

- Connections 2040, 2016 Update
- development in designated growth areas, and enhance livability by enabling more trips via alternatives to driving. "Smart transportation" = projects support economic
- Context sensitive
- Leverage private dollars
- Safety is goal one!
- Maintenance/preservation of existing system is high priority.
- Strategic expansion supports economic development and system connectivity.

### RANGE TRANSPORTATION PLAN LANCASTER COUNTY'S LONG

- ► Connections 2040, 2016 Update (cont.)
- Reduce congestion.
- Focus on operations and technology
- Intersection function is key
- Push the focus on reducing SOVs
- Protect sensitive resources as we go.

### RANGE TRANSPORTATION PLAN LANCASTER COUNTY'S LONG

- Active Transportation Plan
- South Central Transit Authority Transit Development Plan Update
- Routh 283/230 Corridor Study
- Smart Growth Transportation Program
- Complete Streets

# OTHER PLANNING EFFORTS

- Highway approx. \$225 million over 4 years (\$56.2 m/yr.)
- Transit approx. \$78.5 million over 4 years (\$19.6 m/yr.)
- Rough breakdown on how this money is used:
- Bridges restoration/rehabilitation/replacement 57% of projects (63)
- Roadway reconstruction/resurfacing 11% of projects (12)
- Traffic signals/intersection improvements 7% (8)
- Smart Growth Transp./TAP 6% (7)
- Safety 4% (4)
- Traffic system management 3% (3)
- Widening 2% (2)
- Other and reserves 10% (11)

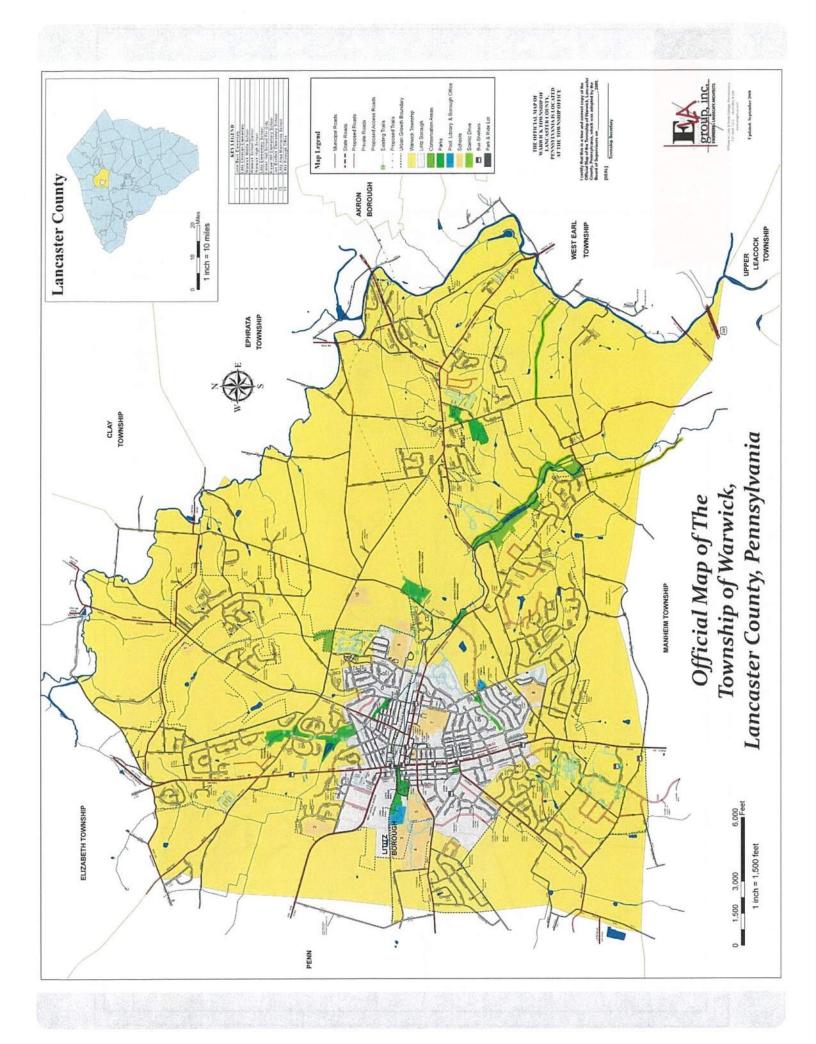
### 2017 – 2020 transportation IMPROVEMENT PROGRAM

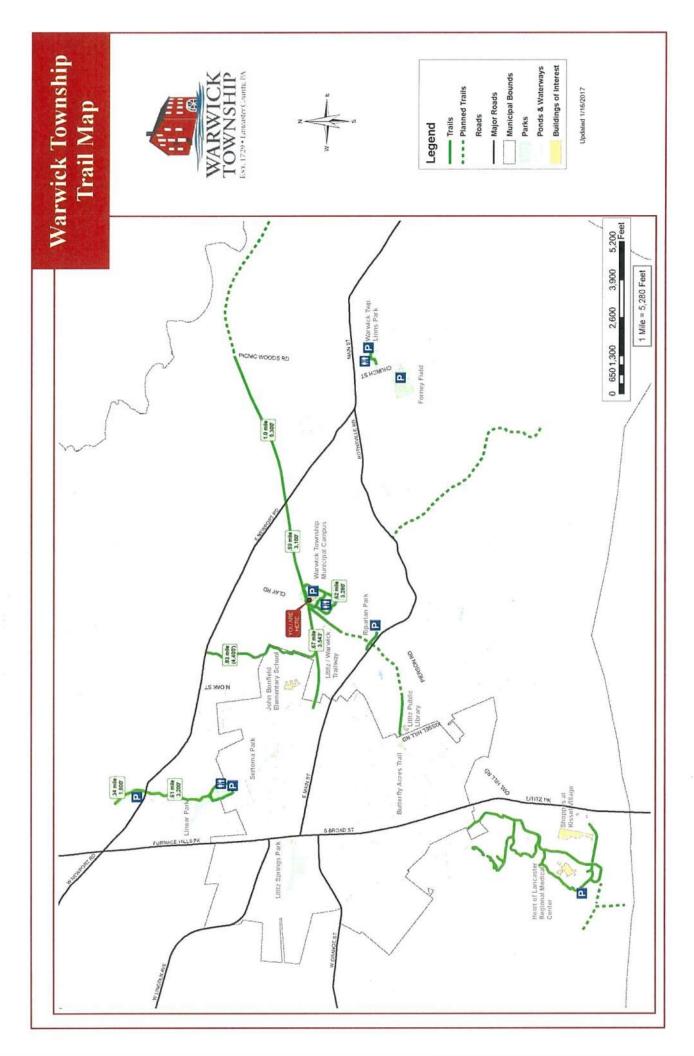
- ► Furnace Hills Pike resurfacing (501- Lititz Borough line to Brubaker Valley Road) - \$2,576,000
- Oregon Pike resurfacing (US 30 to Zooks Mill Road) - \$2,660,000
- Creek Road bridge rehab/replacement -\$525,000
- ▶ items total \$5,761,000 (2.5% of county total)

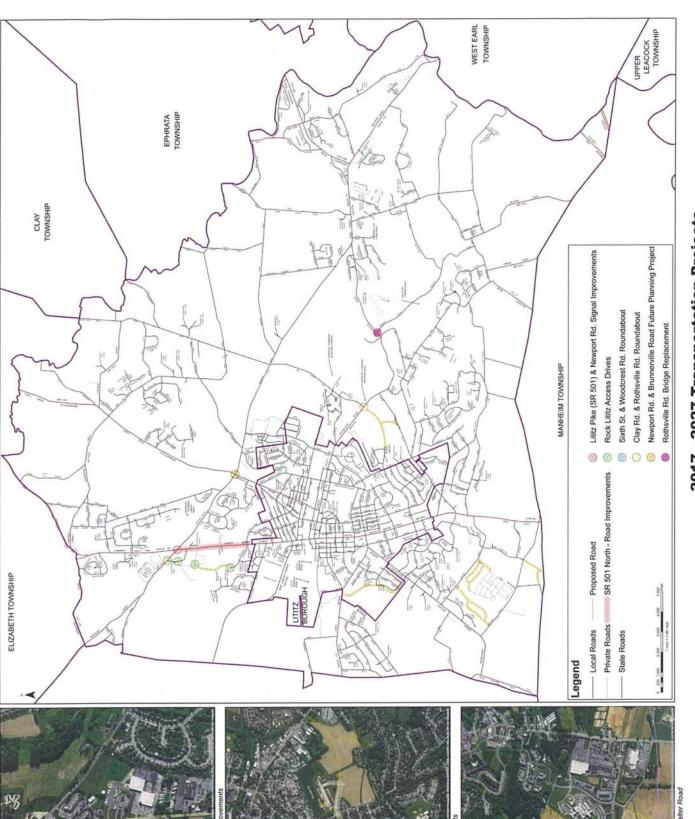
#### PROJECTS THAT MAY BE OF INTEREST

- Three bridge rehab/replacement projects along 222 - \$3,886,000
- 222/322 interchange improvements (diverging diamond design) - \$1,381,364
- 222 restoration \$3,500,000 (design only)
- Countywide Intelligent Transportation Systems applications - \$9,250,000)
- vanpooling, transit coordination) \$1,353,150 Commuter Services of PA (ridesharing,
- Total for items on this and the previous slide = about \$25,131,500 (11% of county total)

### PROJECTS THAT MAY BE OF INTEREST







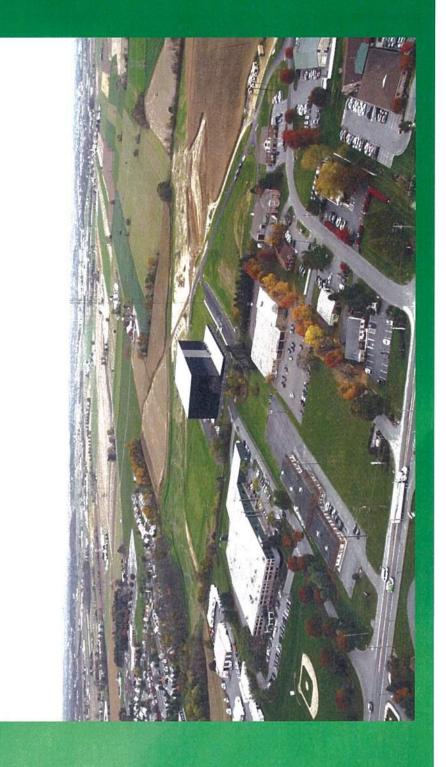


2017 - 2027 Transportation Projects Warwick Township Lancaster County, Pennsylvania



#### Warwick Township TDRs -Multi-Benefit Program

Presenter: Dan Zimmerman Warwick Township Manager July 20, 2017



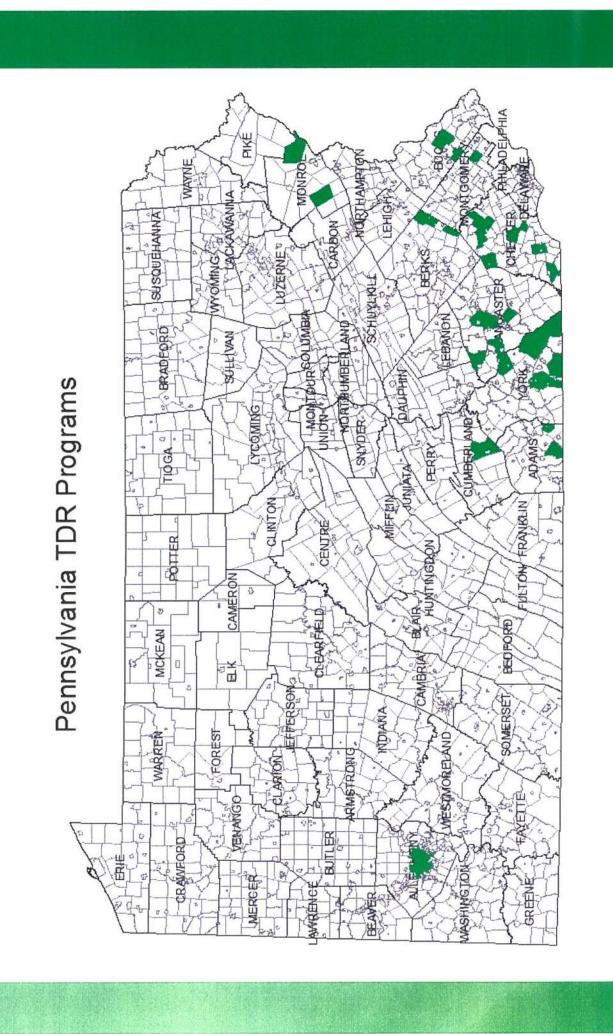
## TDR Program Overview

# Sending area = Agricultural zone

- 2 gross acres = 1 TDR (100-acre farm = 50 TDRs)
- Purchase price is based on the appraised value of the farmland at the time the TDRs are sold
- TDR Program is done on a voluntary basis
- Zoning Officer calculates the number of TDRs assigned to each farm.

### Receiving area = Campus Industrial & R-3 zones

- Ordinance. Purchase of one TDR entitles an increased permitted lot coverage Campus Industrial Zone permits a 10% baseline lot coverage under Zoning of 4,000 sq. ft., up to a maximum of 70% lot coverage
- DUs/ac for multi-family dwellings. Purchase of one TDR allows for an increase R-3 (high-density residential) Zone permits a baseline maximum density of 8 of one DU/ac up to a maximum of 14 DUs/ac



# Expanding Campus Industrial

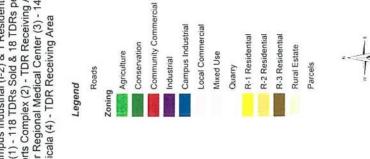
**April 2017** 

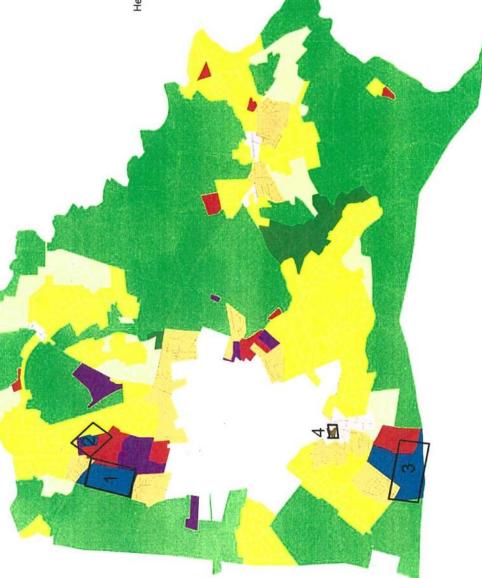
Campus Industrial (I-2) Map Warwick Township (Lancaster County)

program with the Lancaster County Ag, Preserve 414 TDRs have been sold through a cooperative > A total of 766 TDRs have been purchased and > Warwick Township has purchased 601 TDRs and has sold 272 TDRs.

Board and Farmland Trust.

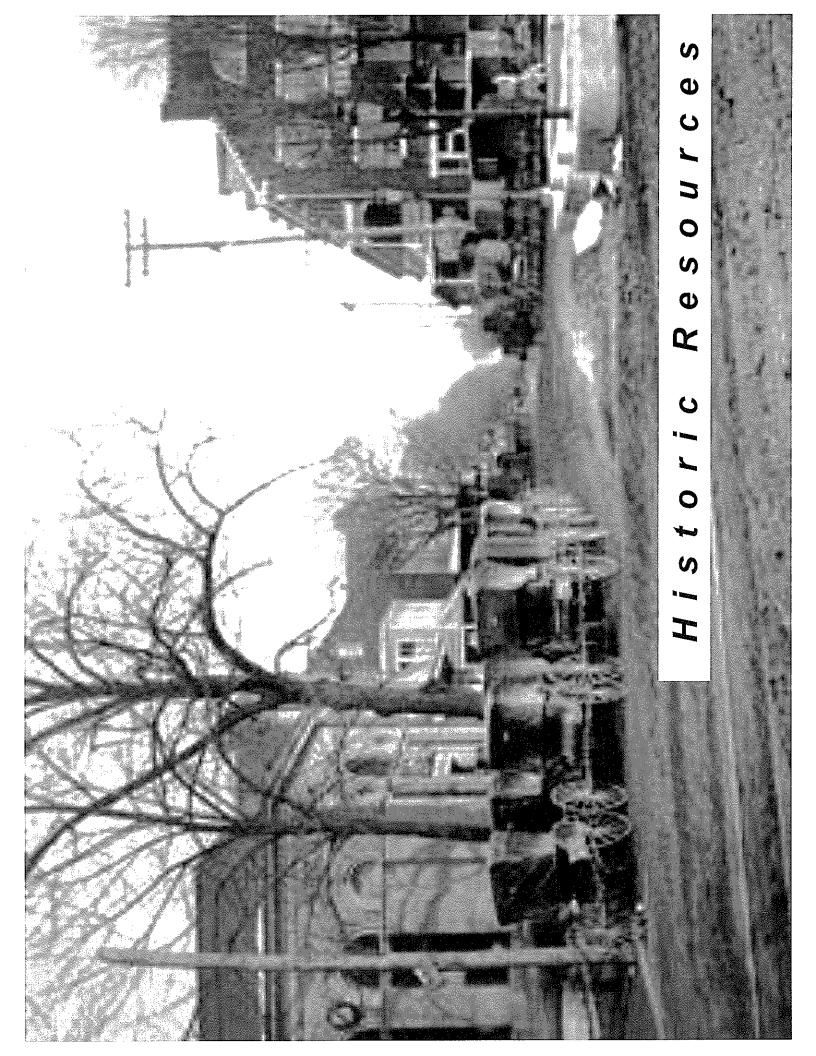
Rock Lititz (1) - 118 TDRs Sold & 18 TDRs pending High Sports Complex (2) - TDR Receiving Area Heart of Lancaster Regional Medical Center (3) - 141 TDRs Sold Cicala (4) - TDR Receiving Area 4 Sites - 3 Campus Industrial (I-2) & 1 Residential (R-3)





#### program with the Lancaster County Ag. Preserve 414 TDRs have been sold through a cooperative Agricultural Security Area / Preserved Farms > A total of 766 TDRs have been purchased and > Warwick Township has purchased 601 TDRs Campus Industrial (receiving area) Agricultural Security Area (ASA) - 4,371.576 acres Warwick Township's Agricultural Zone TDR Conservation Easement is comprised of 6914.88 total acres. "(this figure is comprised of farms within the ASA) > 1,469.637 acres have been preserved Agricultural (sending area) Agricultural Security Area Preserved Farms - 2,913.511 acres \* WARWICK TOWNSHIP TDR Preserved Farms Pending Preservation (Lancaster County) Municipal Bounds Preserved Farms through the TDR Program. Board and Farmland Trust. Warwick Twp. and has sold 272 TDRs. Zoning Districts: Roadways **Legend** PENDING PRESERVATION - 285 78 acres Manheim Twp. Lititz Boro.

Warwick Township TDR Farm Preservation	wnship	
Organization	# of Farms Acreage	Acreage
Agricultural Preserve Board	16	963.134
Lancaster Farmland Trust Conservation Fasement	∞ ←	487.698



### FORGE FOR FINANCE IN THE PROPERTY OF THE PROPE

2022

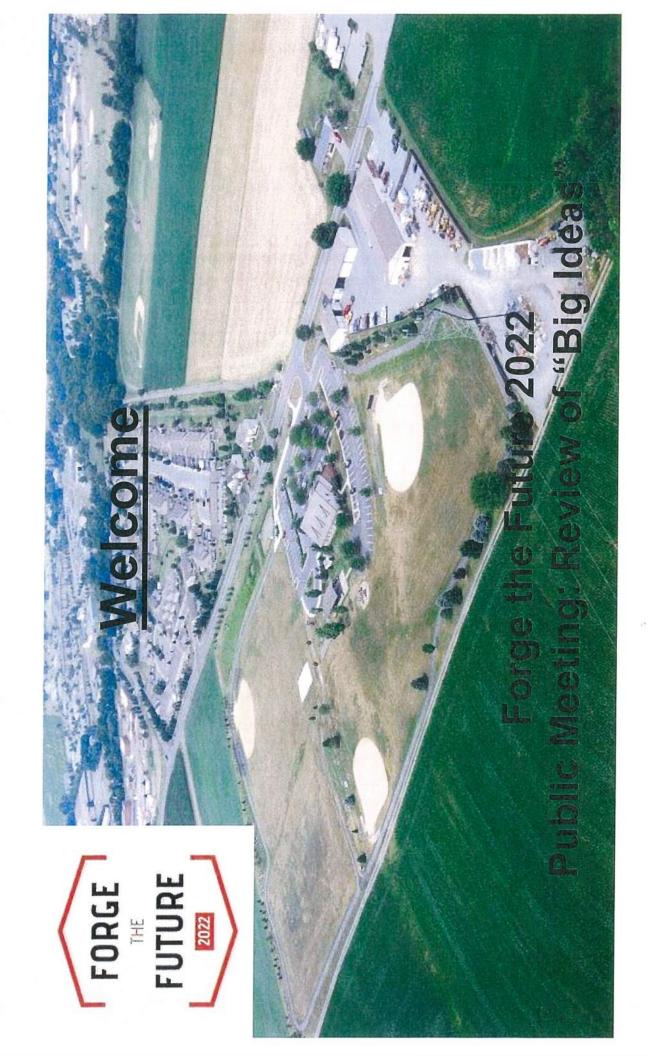
NEXT MEETING - Draft 5-Year Objectives Thursday, September 21st @ 6:30PM Warwick Middle School Auditorium Meeting #6: "Big Ideas"

**Presentation Materials** 

Feedback

#### FORGE THE FUTURE

Big Ideas

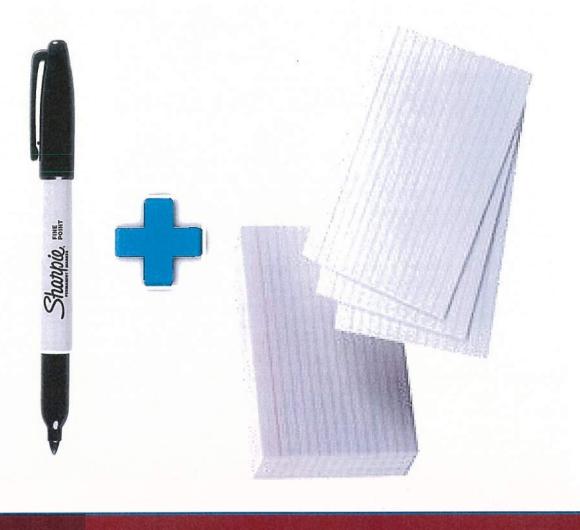


## Overview of Tonight's Meeting

- 1. Successes of the Past Five Years
  - Past Five Years 2.Key Issues for the
- 3. "Big Ideas"

Next 5-10 Years

- 4. Next Steps
- 5. Questions and
- Comments



#### Successes

As expressed during the March 2017 Kickoff Meeting, our community considers the following as successes within the past five years:

(22% of Responses)	(22%) Il Trail		ation (12%)	int & Cooperation (12%)	(2%)
1. Rock Lititz	<ol> <li>Downtown Lititz</li> <li>Warwick to Ephrata Rail Trail</li> </ol>	4. New Housing, Especially Age-Restricted	5. Protection and Preservation	6. Community Development & Cooperation	7. Miscellaneous



### Important Issues

Conversely, our community views the following as the important issues facing our community over the next five to ten years:

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1. Housing	2. Transportation and Infrastructure	2 Diaming ond Crossits		4. Downtown and Business Community	5 Protection and Preservation	

### Important Issues (cont'd)

Additional issues raised:

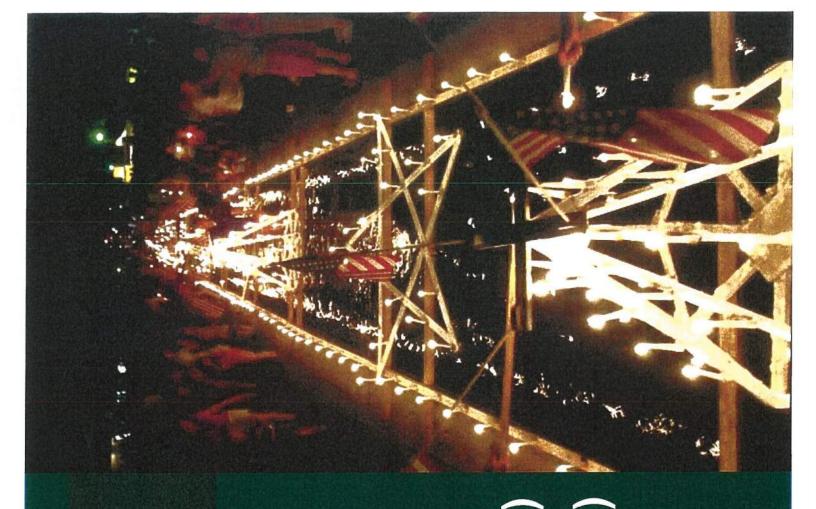
6. Funding/Taxes (7%)

7.Community

Engagement/Vision (5%)

8. Parks/Recreation (4%)

9. Agriculture (2%)



## "Big Ideas:" An Overview

The Big Ideas emerged from the four Public Meetings that were held subsequent to the Kickoff Meeting:

April: Economic Development

Housing

May:

dune:

Community Services and Quality of Life

Built, Natural, and Historic Resources

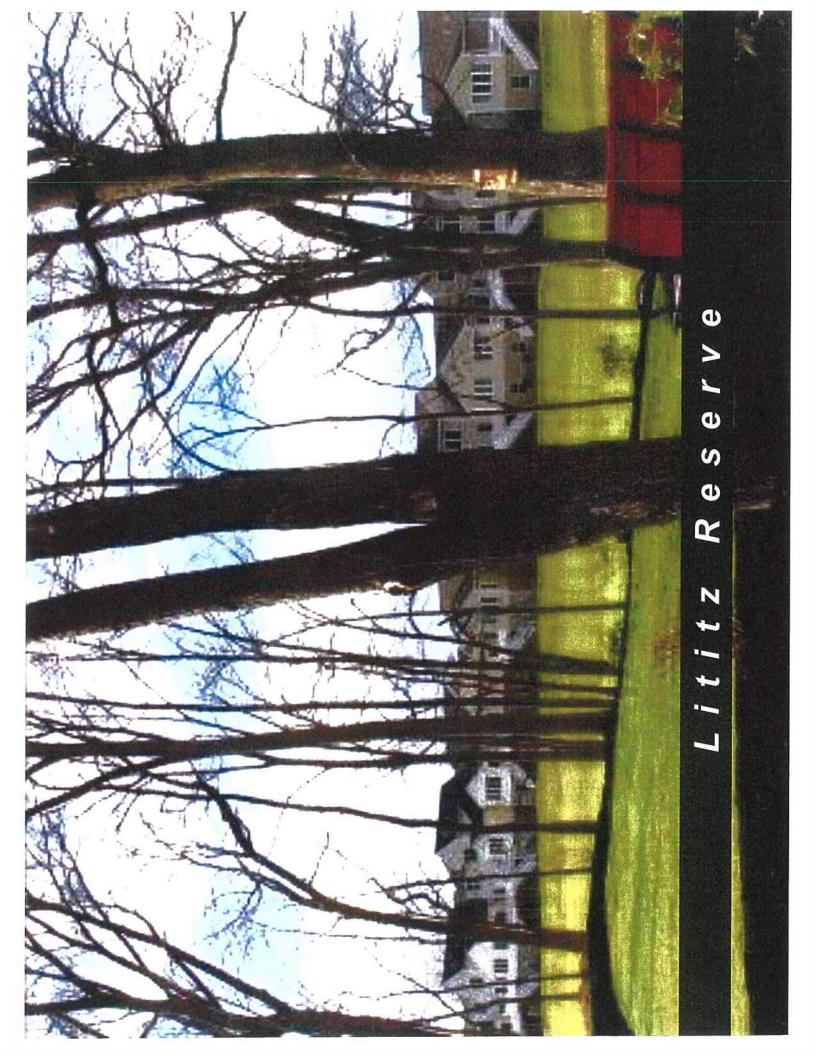
## Plans/Updates remain the same; therefore, the Big Goals from prior Joint Strategic Comprehensive Ideas primarily focus on new strategies.

- We will be able to achieve a high level of sustainability because transportation/infrastructure, planning/growth, economic the Big Ideas overlap the themes of housing, development, and protection/preservation,
- These Big Ideas supplement on-going Strategies that have been mainstays of prior Plans/Updates
- These Big Ideas require clear communication, extensive outreach, and resources to achieve success

# Our purpose tonight is to gain feedback

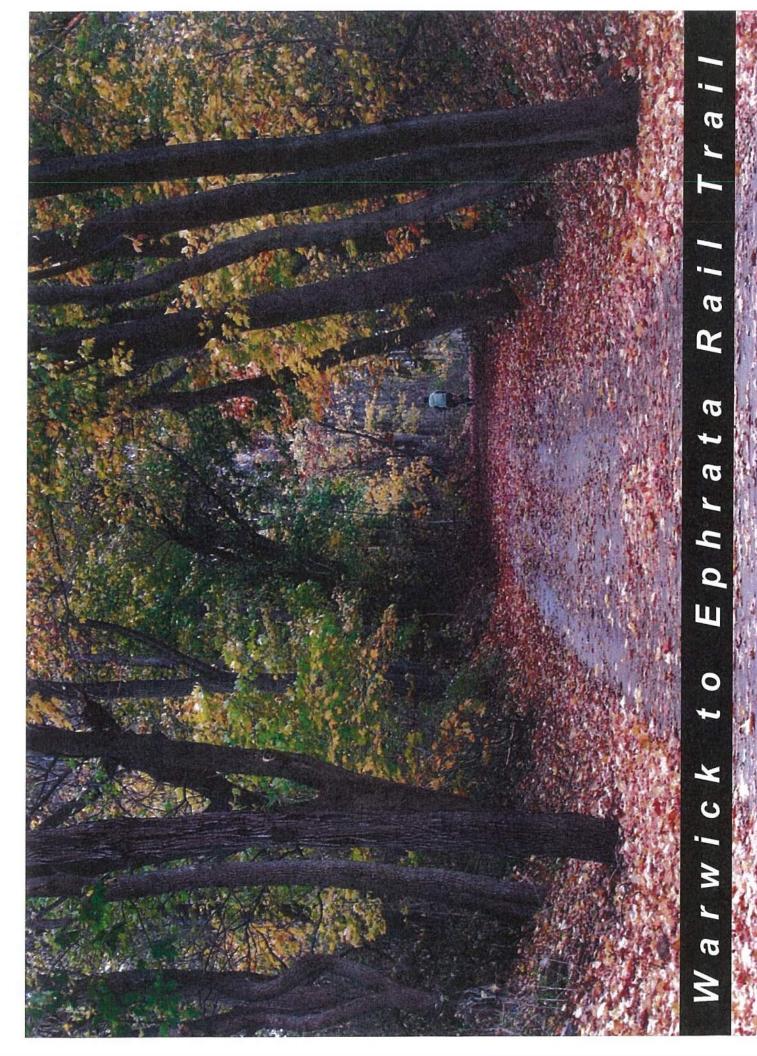
## Big Ideas: Housing

- Promote mixed-residential communities that provide a range of housing types, tenures, and price points, while meeting market demands
- Explore flexibility in zoning to expand housing choices while preserving valued resources
- Consider incentives by which to retain existing and recruit new employees and community volunteers
- Understand the role of housing in supporting our community, from employers' needs to the vision of the School District



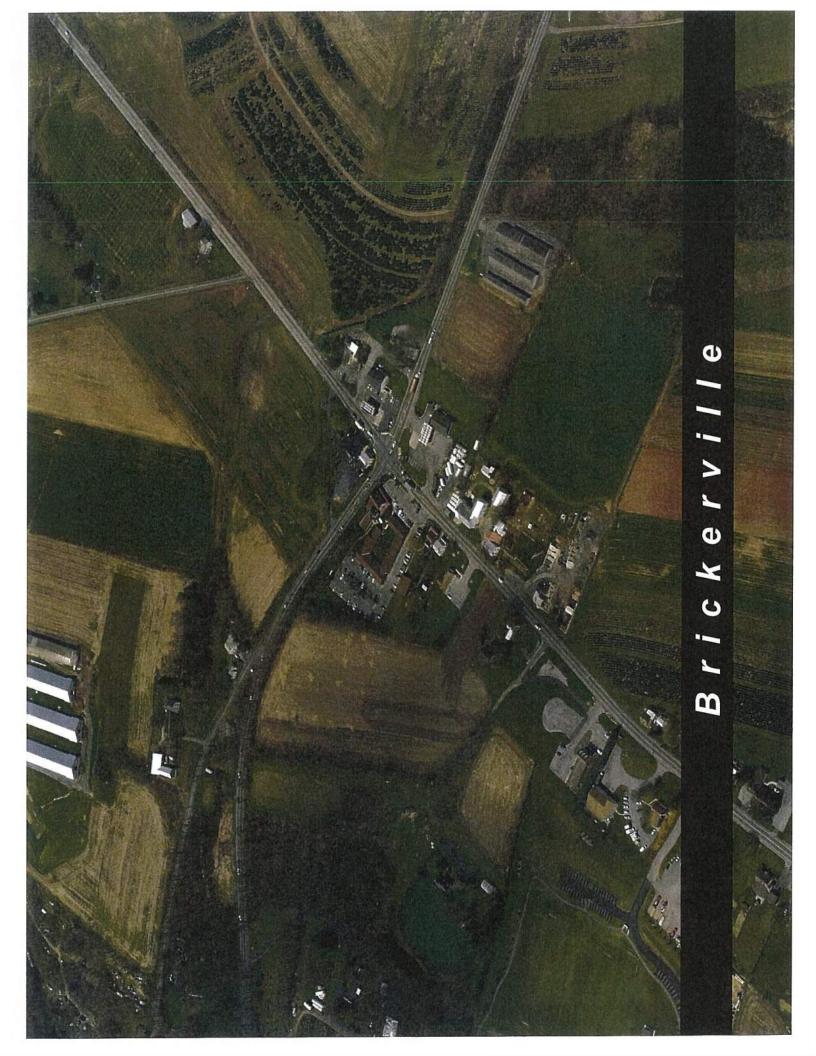
# Big Ideas: Transportation and Infrastructure

- Consider implementing "Complete Streets" so as to foster walkable communities and provide choices in multi-modal transportation
  - Plan for various transportation improvements, especially for:
- Route 501/Route 322 where new growth pressures are being felt
- Route 772, East Main Street, and Route 501
- Expand inter-modal transportation options, by working with local and regional providers and by completing the Warwick-to-Ephrata Rail Trail
  - Be "wired" for business, anticipating the technology needs of tomorrow
- Plan for the sustainability of community services, in terms of needed financial resources and succession to the "next generation" of leaders



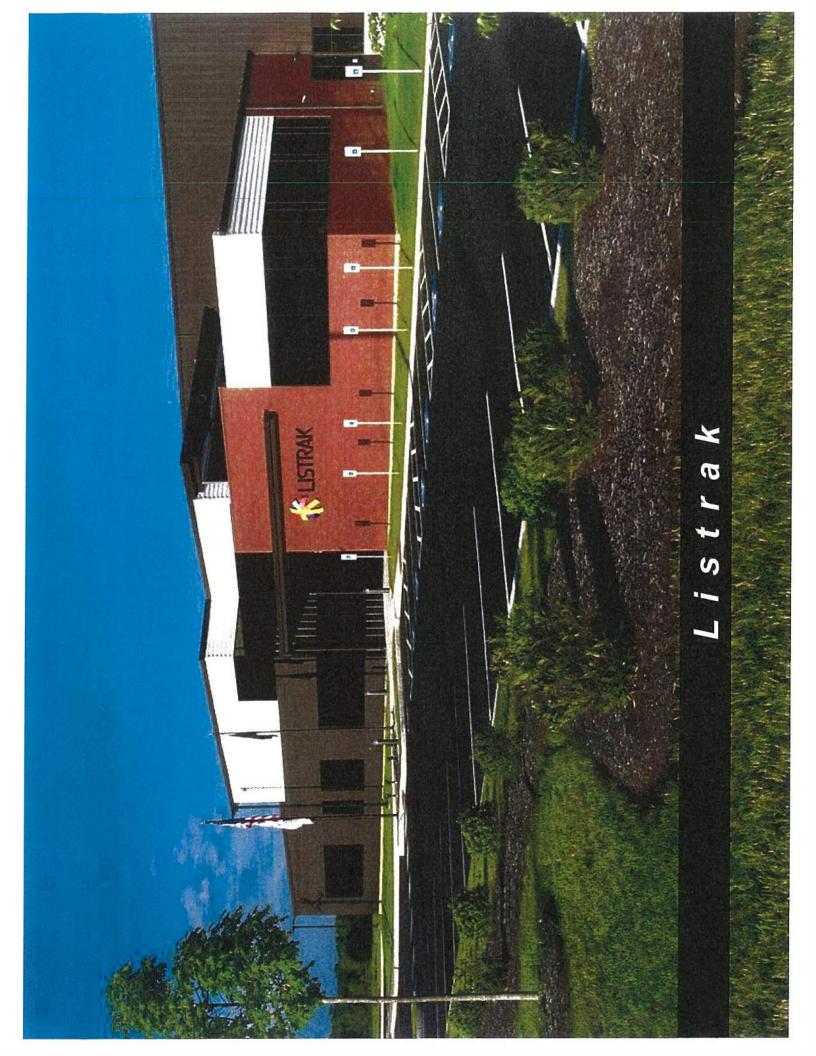
## Big Ideas: Planning and Growth

- and transportation needs, while also exploring employer-assisted housing Engage the communities' employers to determine housing program
- Analyze the region's future growth potential versus available and planned infrastructure; determine if and when future growth will become unsustainable
- Revitalize our existing neighborhoods, while assaying "challenged" **sites**; consider removing the barriers to the latter's re/development
- Begin considering the future of Brickerville, especially in response to new growth pressures
- Begin recruiting the next generation of visionary leaders, from municipal staff to elected and appointed leaders



## Big Ideas: Economic Development

- Evaluate the region's capacity for commercial and industrial development in support of existing and emerging industry clusters
- Update and/or implement the Downtown Lititz Master Plan and Lititz Run Revitalization Plan
- Continue planning for parking solutions in downtown Lititz
- Corporation (LRCDC) as one of the region's funding sources for business Support the efforts of the Lititz Regional Community Development retention and growth
- Continually engage the agricultural community to determine their needs by which to remain integral to the region's economy



## Big Ideas: Protection and Preservation

- Continue to lead the way in green infrastructure planning as a means to achieve sustainable development
- Pioneer regional "banking" for stormwater management facilities, while endeavoring to reduce the cost of development and, consequently, the cost of
- Consider rental inspections in the Townships, matching those already undertaken in the Borough
- Create a regional extreme-weather resiliency plan
- Continue to balance growth/development with protection/preservation of high-priority historic sites, the business of agriculture, and highly-valued

## THE CAMPUS

### POD # 2 AT ROCK LITITZ

Multi-tenant facility of live event service providers. Creating a collaborative environment to promote technology development and improve service to our customers in the live event industry.

### ROCK LITITZ STUDIO The cornerstone of campus, the Studio offers 52,000 square feet of state-of-the-art production rehearsal space.

Rock Lititz



### **Next Steps**

Your feedback will be incorporated into a compiled set of Goals and Strategies

The Draft "Forge the Future 2022" Update will be completed and circulated for municipal and County review

The Final "Forge the Future 2022" Update could be adopted by Spring 2018



## FORGE | FUTURE | 2022

Questions and comments...

### FEEDBACK GAINED FROM PUBLIC MEETING TO REVIEW THE "BIG IDEAS" FORGE THE FUTURE 2022 September 21, 2017

Held at the Warwick Middle School on September 21, 2017 and attended by about 50 residents, a public presentation was made of the "Big Ideas" that have emerged during the planning process that, to-date, is in its sixth month. The Big Ideas relate to the following topics that have been identified by the community as the key issues facing our region in the next five to ten years:

- 1. Housing
- 2. Transportation and Infrastructure
- 3. Planning and Growth
- 4. Economic Development
- 5. Protection and Preservation

It was also noted that the following additional issues also garner the community's attention: Financial Sustainability, Community Engagement, Parks and Recreation, and Supporting Agriculture.

### **Comments Received**

The following comments were recorded during the public comment period or on submitted note cards.

### 1. Housing

### Via Public Comment

How do we send a clear message to slum lords (that they're not desired in our community)? How
do we "buy them out" and convert to owner-occupied housing?

### Via Note Card

- Slum lords and revitalizing already-existing properties
- · Require mix of housing types in each development
- Need to make housing affordable for families and young adults
- Affordable rental housing is key; a 27 year old employee of a local nursing home is one of ten trying to rent an apartment within the school district and is not getting "picked" to rent. To purchase a home, she must either look in Ephrata, Manheim, Mount Joy. She can't afford here.
- Explore TDR's for affordable housing

### 2. Transportation and Infrastructure

### Via Public Comment

- What can we specifically do to address traffic on Route 501?
- From a "big picture" perspective, how should we address our community's mental and social health (in light of a shortage of healthcare providers)?
- What more can we do to promote alternative sources of energy? Incentives? Official Map?
- What can our community do to provide for more-reliable and competitive internet service?

### Via Note Card

- How do we collaborate on transportation/roadway change with PennDOT and local municipalities? Our issues are not just addressed in Traffic Impact Studies.
- Building on the concern for a lack of mental health professionals, there is a national shortage of psychiatrists; when populations grow, these services and providers must grow, too
- Could we include social workers/interns to assist in community planning, needs assessment, community engagement, grant writing, and volunteer coordination?
- Reach-out to Millersville University, whose students annually conduct needs assessments and report-back to the community
- Solar roads (see YouTube)
- Bike lanes: Downtown, Main Street, and Route 501/Broad Street
- Sidewalks: Kissel Hill to downtown Lititz and along Route 501 outside of the Borough
- Electric-automobile charging station downtown
- Bike rental along the Rail/Trail is awesome; how about downtown, too?
- Are there any plans for sites or ordinances to establish large-scale alternative energy sources?
   Incentives for existing and new construction for providing such alternative energy sources?

### 3. Planning and Growth

### Via Public Comment

- How do we better engage the next generation in decision-making?
- How do we avoid unintended consequences, especially the loss of affordable housing and gentrification of existing neighborhoods?
- How much land area, within the Warwick Region, is zoned for development versus agriculture? What is the balance that we should seek?
- Are we using prime agricultural soils for farming or development?
- Is it necessary to convert farms into housing/development?

### Via Note Card

- What assessment has been done on the outcomes of our planning? Is the plan delivering on its intentions? Are there unintended consequences?
- The Parkview Hotel is an eyesore in the center of town; can it be transformed to a better use?
- Percentage of agriculture to development; the County has best soils in the US, we can't allow it to be "malled;" building just to build is detrimental
- Stop growth before we're "maxed-out"
- As Brickerville grows, so does stress on Route 501
- Implement native plantings, no runoff, and pesticide-free properties
- Instead of building new neighborhoods as a first priority, can we revitalize existing ones with updated infrastructure (including utilities) first? Then build new second?
- Brickerville: what is its community character and how do you maintain it?
- Good rules in one community need to be adopted in all three municipalities

### 4. Economic Development

No feedback was provided with regard to this issue.

### 5. Protection and Preservation

### Via Public Comment

- Is there a way to use TDR's as a means of improving housing affordability?
- Is there one resource that we're more concerned-about than any others?
- What do we do to promote native plants? Are Warwick Township's ordinance provisions enough; should they be replicated throughout the Region?
- How do we protect our groundwater from contaminants?
- What is the role of Pennsylvania's PADEP and DCNR in resource protection, especially with regard to wetlands and floodplains?
- Preserve greenspaces, carefully examine the impact of development on our environment, resources, and air/water; without this, we increase health impacts

### Via Note Card

- Encourage the School District to be more environmentally friendly; create outdoor, natural classrooms
- Use TDR funds to acquire and create more natural, undeveloped areas
- Make all development more ecologically friendly: less grass, more native plants; connected natural areas
- Ecological services occur that are often overlooked
- Adopt policies similar to MD, that when trees are removed for development, they must be replaced at a rate of 2:1
- Native plants, less insecticides
- Rock Lititz doesn't go far enough in preserving natural and agricultural use. There should be
  more incentives and push for maintaining food sources and natural resources in cohesive
  strategy with new artificial development.
- Need to push for preservation/protection so that TOA can't say "no" until forced to save historic home

### 6. Other

### A. Financial Sustainability

No feedback was provided with regard to this issue.

### **B.** Community Engagement

### Via Public Comment

- How do we better engage the community via social media?
- Is there a role for oral histories and "storytelling"?
- Where can the public find results of prior meetings and view prior Plans?

- While it's good to discuss "engaging the next generation," how do we create a more racially diverse community that doesn't currently exist here?
- How do we overcome skepticism related to the political process and the perception that decision-making is in the hands of a few? How do we engage the community? What structure could be established to continue these "small group" interactions?
- We need to celebrate the "voices in our community" and the actions that a "little person" has taken to impact their community. Decisions matter, not only of elected officials but of common, ordinary people.

### Via Note Card

- Farm fields which may have been zoned for development years ago and are only now being developed, then people are upset looking at these zoning issues
- How do you engage the community when turnout tonight was a small fraction of 17,783 who live here? Of those attending, most are over 40 years old
- Free snacks at meetings
- All prior meetings were in the morning, when residents work; make meetings and workshops more accessible
- How will social media be used to sustain education of this Plan?

### C. Parks and Recreation

### Via Note Card

• What is the next phase of the Rail/Trail's development beyond Warwick-to-Ephrata? What planning needs to be done to figure this out? Is it downtown Lititz?

### D. Supporting Agriculture

### Via Public Comment

- What successes can we celebrate and strategies can we develop to support agriculture?
- How do we achieve sustainable farming, balancing farming practices with stewardship?

### Via Note Card

- Provide examples of how you incorporate support for agriculture and natural resources in your planning
- Promote more redevelopment versus new building. Be better stewards.

### PART V: APPENDIX B SOCIAL MEDIA

**Website Performance/Activity Report** 

**Housing Survey** 

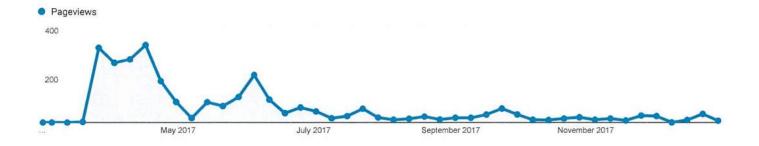
**Facebook Page Input** 

### **Pages**



Mar 1, 2017 - Jan 2, 2018

Explorer

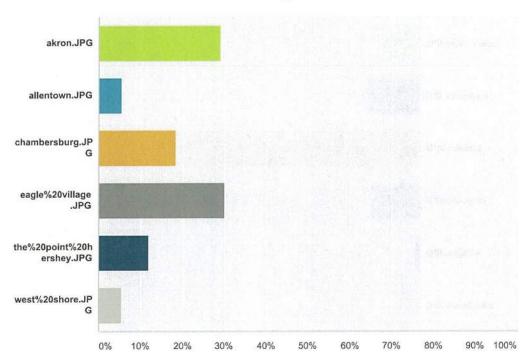


Page	Pageviews	Unique Pageviews	Avg. Time on Page	Entrances	Bounce Rate	% Exit	Page Value
	2,665 % of Total: 100.00% (2,665)	1,612 % of Total: 100.00% (1,612)	00:01:26 Avg for View: 00:01:26 (0.00%)	838 % of Total: 100.00% (838)	44.15% Avg for View: 44.15% (0.00%)	31.44% Avg for View: 31.44% (0.00%)	\$0.00 % of Total 0.00 (\$0.00
1. /	1,202 (45.10%)	690 (42,80%)	00:01:15	677 (80.79%)	37.08%	29.45%	\$0.0
2. /meetings/	479 (17.97%)	336 (20.84%)	00:01:45	57 (6.80%)	73.68%	46.76%	\$0.0
3. /planning/	380 (14.26%)	274 (17.00%)	00:02:50	51 (6.09%)	78.43%	45.00%	\$0.0
4. /about/	248 (9.31%)	159 (9.86%)	00:00:28	19 (2.27%)	68.42%	16.13%	\$0.0
5. /be-heard/	190 (7.13%)	106 (6.58%)	00:01:11	16 (1.91%)	56.25%	12.11%	\$0.0
6. /thank-you.php	110 (4.13%)	12 (0.74%)	00:01:32	(0.95%)	62.50%	8.18%	\$0.00
7. /meetings/index.php	37 (1.39%)	24 (1.49%)	00:02:02	(0.24%)	100.00%	24.32%	\$0.00%
8. /be-heard/thank-you.php	(0.30%)	(0.12%)	00:03:40	(0.00%)	0.00%	0.00%	\$0.00%
9. /home	6 (0.23%)	6 (0.37%)	00:00:00	6 (0.72%)	100.00%	100.00%	\$0.00
0. /privacy.php	(0.11%)	(0.06%)	00:01:11	(0.00%)	0.00%	0.00%	\$0.00

Rows 1 - 10 of 12

### Q1 Which development pattern do you prefer?

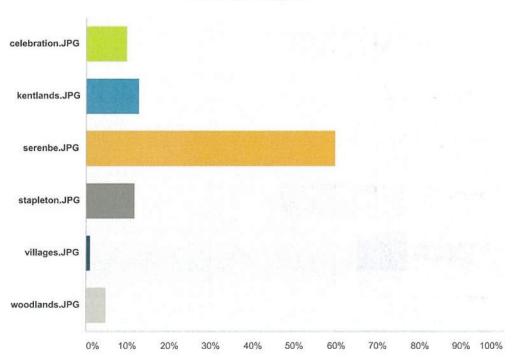




Answer Choices	Responses	The was of metric
	29.03%	27
	5.38%	5
	18.28%	17
	30.11%	28
	11.83%	11
	5.38%	5
Total		93

### Q2 Which development pattern do you prefer?

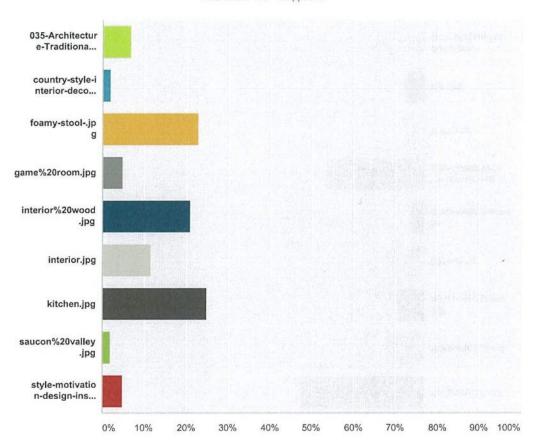




Answer Choices	Responses	
	9.80%	10
(h)	12.75%	13
	59.80%	61
	11.76%	12
	0.98%	1
	4.90%	5
Total		102

### Q3 Which housing interior do you prefer?

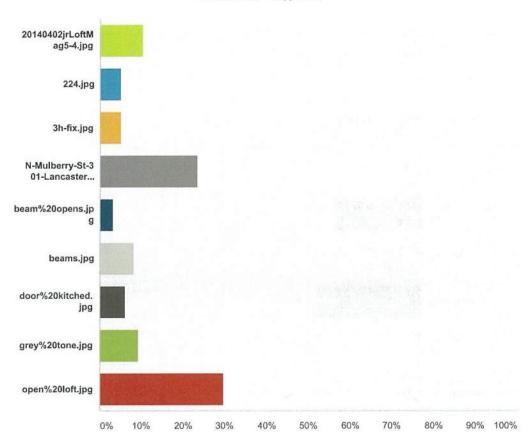
Answered: 105 Skipped: 5



Answer Choices	Responses	Control of the Labourer
	,6.67%	7
	1.90%	2
	22.86%	24
	4.76%	5
	20.95%	22
	11.43%	12
	24.76%	26
De leve	1.90%	2
	4.76%	5
Total		105

### Q4 Which housing interior do you prefer?

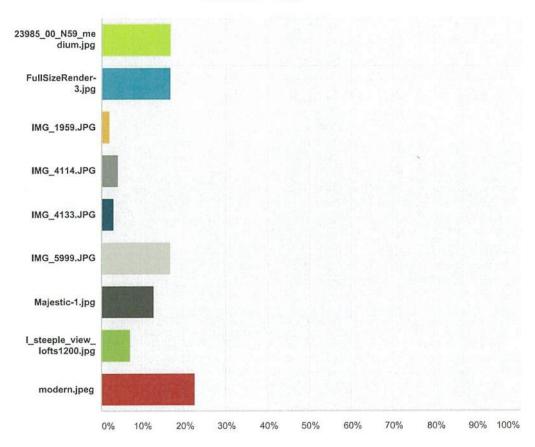




nswer Choices	Responses	A Secretarion
A CANADA	10.20%	10
	5.10%	5
	5.10%	5
	23.47%	23
	3.06%	3
	8.16%	8
H. Janes	6.12%	6
	9.18%	9
	29.59%	29
otal		98

### Q5 Which multi-family housing do you prefer?

Answered: 103 Skipped: 7

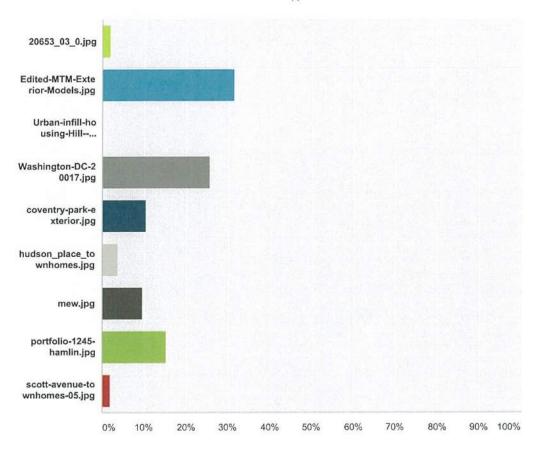


Answer Choices	Responses	
	16.50%	17
	16.50%	17
don't	1.94%	2
	3.88%	4
	2.91%	3
	16.50%	17
Jill Have	12.62%	13
	6.80%	7

	22.33%	23
Total		103

### Q6 Which multi-family housing do you prefer?

Answered: 105 Skipped: 5

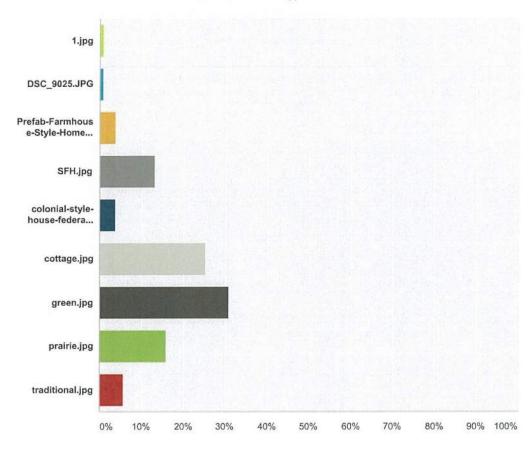


Answer Choices	Responses	
	1.90%	2
	31.43%	33
	0.00%	0
	25.71%	27
	10.48%	11
	3.81%	4
	9.52%	10
A SINGLE	15.24%	16

	1.90%	2
The second control of		
Total	1	105
i Otai		100
	:	

### Q7 Which single family housing do you prefer?

Answered: 107 Skipped: 3



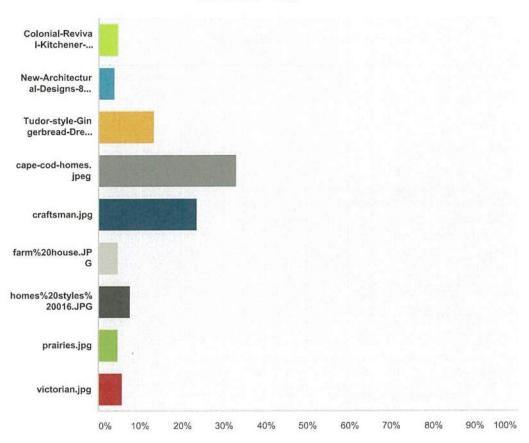
Answer Choices	Responses	
	0.93%	1
	0.93%	1
Water Dr.	3.74%	4
	13.08%	14
म्बर्गासम् मुक्तासम्	3.74%	4
	25.23%	27
Signal Property of the Control of th	30.84%	33
	15.89%	17

The Control of the Co	5.61%	6
Total		107

3

### Q8 Which single family housing do you prefer?

Answered: 107 Skipped: 3

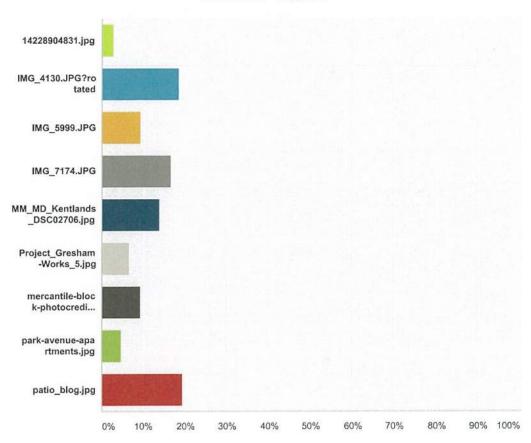


Answer Choices	Responses
	4.67%
	3.74%
	13.08%
	32.71%
	23.36%
HISTOR.	4.67%
	7.48%
	4.67%

Van S		
	5.61%	6
The state of the contract of t	(*) ***********************************	and a facility of the factor to the factor of the first terminal and the first terminal for the first terminal and
Total		107

### Q9 Which upper floor housing do you prefer?

Answered: 109 Skipped: 1

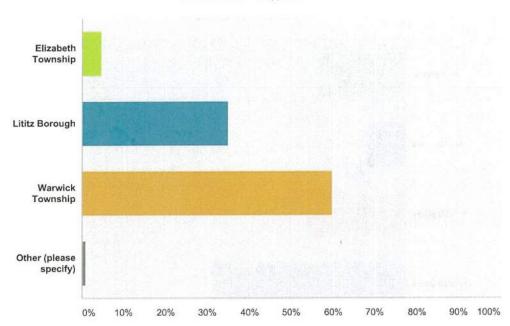


Answer Choices	Responses	
	2.75%	3
	18.35%	20
	9.17%	10
	16.51%	18
	13.76%	15
	6.42%	7
	9.17%	10
· II A	4.59%	5

	19.27%	21
Total	A TANDAN (A. 17, 17, 17, 17, 17, 17, 17, 17, 17, 17,	109

### Q10 Which municipality do you live in?

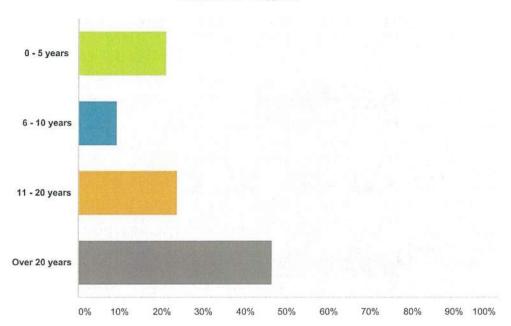




nswer Choices	Responses	
Elizabeth Township	4.59%	5
Lititz Borough	34.86%	38
Warwick Township	59.63%	65
Other (please specify)	0.92%	1
otal		109

### Q11 How long have you lived in the Elizabeth/Lititz/Warwick region?

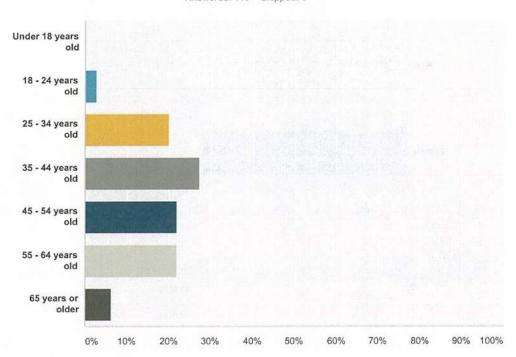




swer Choices	Responses	
0 - 5 years	20.91%	23
6 - 10 years	9.09%	10
11 - 20 years	23.64%	26
Over 20 years	46.36%	51
tal		110

### Q12 What is your age?

Answered: 110 Skipped: 0

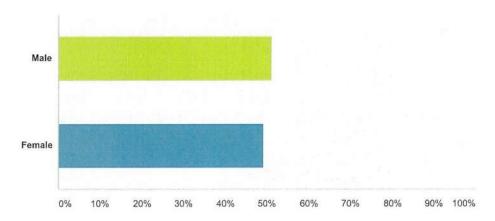


nswer Choices	Responses	
Under 18 years old	0.00%	0
18 - 24 years old	2.73%	3
25 - 34 years old	20.00%	22
35 - 44 years old	27.27%	30
45 - 54 years old	21.82%	24
55 - 64 years old	21.82%	24
65 years or older	6.36%	7
otal		110

SurveyMonkey

### Q13 What is your gender?

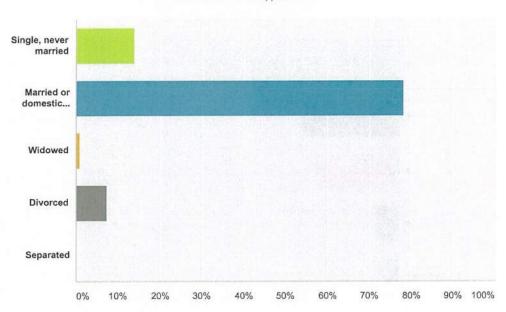
Answered: 108 Skipped: 2



Answer Choices	Responses	
Male	50.93%	55
Female	49.07%	53
Total	By THE THE PERSON OF STREET	108

### Q14 What is your marital status?

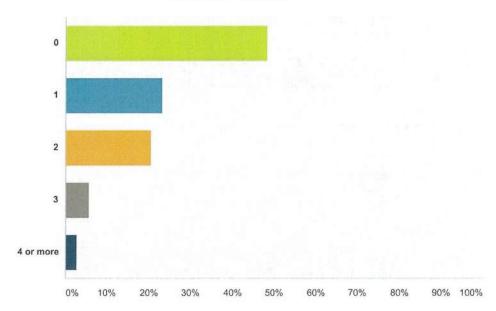




nswer Choices	Responses	
Single, never married	13.76%	15
Married or domestic partnership	77.98%	85
Widowed	0.92%	1
Divorced	7.34%	8
Separated	0.00%	0
otal		109

### Q15 How many children currently live in your household?

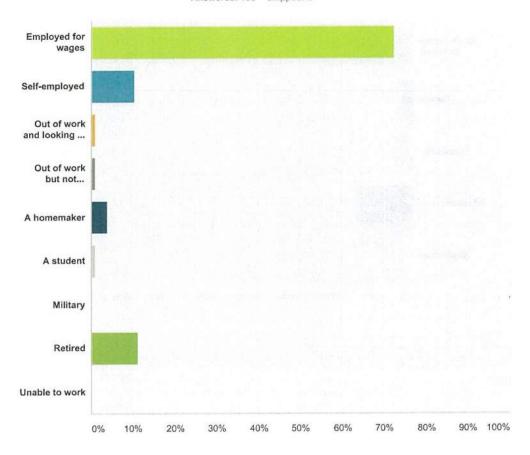




nswer Choices	Responses	
0	48.15%	52
1	23.15%	25
2	20.37%	22
3	5.56%	6
4 or more	2.78%	3
otal		108

### Q16 Employment status: Are you currently?

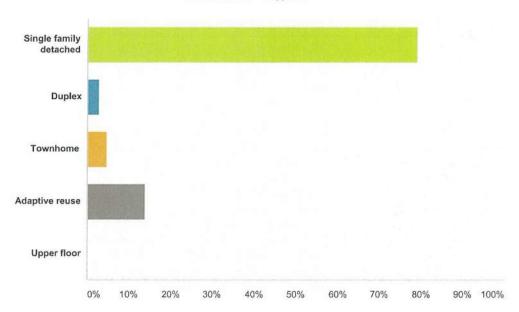
Answered: 108 Skipped: 2



nswer Choices	Responses	
Employed for wages	72.22%	78
Self-employed	10.19%	11
Out of work and looking for work	0.93%	1
Out of work but not currently looking for work	0.93%	1
A homemaker	3.70%	4
A student	0.93%	1
Military	0.00%	0
Retired	11.11%	12
Unable to work	0.00%	0
otal		108

### Q17 What housing type do you prefer?

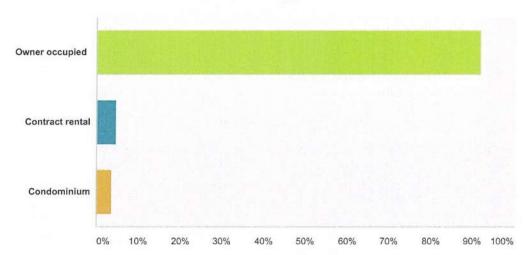




nswer Choices	Responses	
Single family detached	78.90%	86
Duplex	2.75%	3
Townhome	4.59%	5
Adaptive reuse	13.76%	15
Upper floor	0.00%	0
tal		109

### Q18 What ownership structure do you prefer?





nswer Choices	Responses	
Owner occupied	91.82%	101
Contract rental	4.55%	5
Condominium	3.64%	4
otal		110

### Forge the Future 2022 Facebook Page Input

### Our Facebook post stating "What is the most important issue facing the region in the next 5 to 10 years?"

- 1. Jason Burkholder Enabling smarter growth by prioritizing zoning changes to allow higher density housing development. We won't be able to successfully preserve farmland by only allowing detached homes on large lots and there is a great demand new duplex and townhome construction across Central PA.
  - A. (Response to Jason Burkholder's comment from) Chrissie Raffensperger I agree it's important to preserve our farmland and green spaces while at the same time exploring creative and innovative solutions to housing.
  - B. (Response to Jason Burkholder's comment from) Catherine Rivera And keeping the housing affordable for all who wish to live in the area, not just wealthier citizens.
- 2. Chrissie Raffensperger I also think rather than simply focusing on the most important issue we should be focusing on what interventions can we implement which will have the biggest impact on the issues looking at our community as a system rather than each issue as separate. For example working with school boards to educate young people on the opportunities outside of a four year track to meet future economic demands will help keep young people out of student loan debt for jobs they may not even want not can get increasing their spending power for local business and meet the need of these business for skilled employees. I know several people in my age group who never would have gone to college but instead pursued tech school had they realized those were viable options. While not a pressing issue it has a large impact.
- 3. Seth William Attracting young professionals to the area in order to maintain economic growth when we are overbuilding geriatric communities at an alarming rate. The concern is that such projects create a depressing age ratio in the community that keeps young families out by inflating home prices and making it harder for a vibrant culture to exist downtown.

### Facebook Inbox Messages

- 1. Cynthia Smith Jennings This is GREAT! I would really like to see the area become more welcoming....especially for people who have disabilities. Efforts already exist: Penn Cinema offers 'sensory sensitive' movie showings (for people affected by autism, etc.). I know the Lititz Springs pool is up for an overhaul would be great to have a zero-entry pool and a family bathroom there! It would benefit so many people: people who have disabilities, the elderly, veterans, parents with young children, and families. It's a wonderful area we live in would love to make it welcoming to all so it can be shared.
- 2. Andrea Becker Thanks for the work on this project and for continuing to share information. I attended the last meeting and have some questions, especially with regards to the healthcare needs of

the community. While I appreciated the presentations, I am left wondering what challenges this engaged group sees, and how can we pull together the right people to look for solutions. I'd love to know more about this aspect, if this is the intent of this project. Thank you!