



NORTHWEST PENNSYLVANIA COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

The Northwest Pennsylvania Regional Planning and Development Commission

REVISED: FALL 2016



The Comprehensive Economic Development Strategy (CEDS) contributes to effective economic development in the Northwest Pennsylvania region through a locally-based, regionally-driven economic development planning process. Simply put, the CEDS is a strategy driven plan for regional economic development. Regions must update their CEDS at least every five years to qualify for EDA assistance and is a prerequisite for designation by EDA as an Economic Development District.

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I. Background

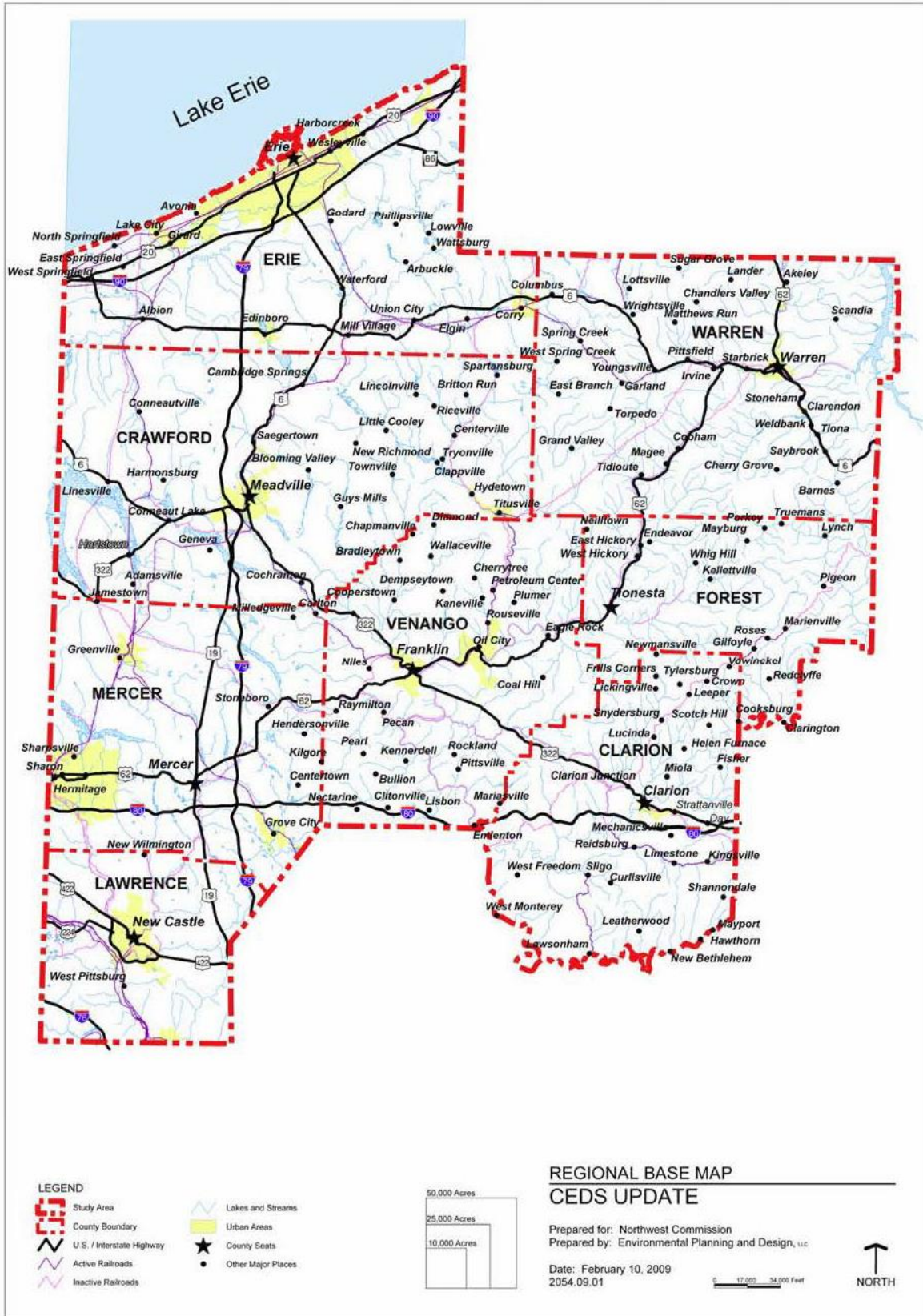
A. Regional Location and Physical Characteristics

The Northwest Region is one of ten planning regions in the Commonwealth; the region is composed of eight counties in the northwest corner of the State of Pennsylvania, bordered on the north by New York and the west by Ohio. The eight counties comprising the Northwest region include Clarion, Crawford, Erie, Forest, Lawrence, Mercer, Venango and Warren. They make up a total area of 6,263 square miles of which 5,431 square miles is land and 832 square miles is water.

The counties are linked by three major interstates: I-79, I-80 and I-90, which are tremendous assets to the region's infrastructure and transportation needs. The majority of the region is rural and agricultural. The terrain consists mostly of gently rolling topography, characteristic of the glaciated patterns from the Illinoian and Wisconsin glaciers that once covered most of the region. The region is also comprised of a random pattern of stream beds, with associated valleys and ridges. The highest ground in the region can be found in its northeast corner, part of its more intense forested lands, while its lowest ground is in its northwest corner, as the land drains toward Lake Erie.

A rich history of the region includes a significant battle in the War of 1812 and the first successful oil drilling rig. The region experienced significant industrial growth in the 1900's and has continued to prosper in spite of the collapse of the steel industry. Despite recent challenges, the region is rich in natural resources and has exceptional infrastructural assets including multiple interstate highways, a developed rail network, port access to the Great Lakes, and airport facilities that allow for sustainable economic growth; this all in turn is paramount to the region's ability to provide educational, employment, and recreational opportunities for its residents.

B. Counties



1. Clarion

Clarion County was formed on March 11, 1839, from parts of Venango and Armstrong counties and is named for the Clarion River, as is Clarion Borough, the county seat. The Clarion River at the time was the dividing line between Armstrong and Venango counties.

According to the US Census Bureau, the county has a total area of 609 square miles of which 602 square miles is land and 7 square miles (1.07%) is water.

The county is fairly rural in nature with many scenic, wooded areas and beautiful waterways. The Borough of Clarion is the largest municipality and the home of Clarion University of Pennsylvania.



2. Crawford

The County of Crawford was originally inhabited by the Iroquois Indians and other tribes and nations. In later years, the land was acquired by a group of Dutch investors under title of the Holland Land Company and resold to settlers. The Commonwealth allocated land to its Revolutionary War soldiers as a bonus settlement. The county was formed in 1800 from a portion of Allegheny County and named after Colonel William Crawford, an early military hero and close friend of George Washington.

According to the US Census Bureau, the county has a total area of 1,038 square miles of which 1,013 square miles is land and 25 square miles (2.41%) is water.

Crawford County consists of several small, nearly extinct lakes. It is also home to three major natural lakes: Conneaut, the largest natural lake in Pennsylvania, Canadohta, and Sugar. Pymatuning, the largest artificial lake in Pennsylvania, is also located here. The two principal streams are French Creek and Oil Creek, both flowing south into the Allegheny system. Conneaut Creek in the northwest drains into Lake Erie.



3. Erie

Erie County was established on March 12, 1800 from part of Allegheny County, which absorbed the lands of the disputed Erie Triangle in 1792. Prior to 1792, the region was claimed by both New York and Pennsylvania, so no county demarcations were made until the federal government intervened.

Erie County was part of the Underground Railroad giving slaves the ability to gain freedom through Lake Erie into Canada, east through New York State, or to stay in Erie with the help of abolitionists and the free black community. Today, the Journey to Freedom educational program provides an interactive program on the Underground Railroad experience.

According to the US Census Bureau, the county has a total area of 1,558 square miles of which 798.9 square miles is land and 759.1 square miles (48.7%) is water. It is the largest county in Pennsylvania. With the exception of a high ridge several miles from the lake, running nearly parallel with its shore, the terrain is generally rolling and well-watered.

The county seat of government is in the City of Erie, the county's largest municipality and the fourth largest city in the Commonwealth of Pennsylvania.



4. Forest

Forest County was created on April 11, 1848, from part of Jefferson County. The county was enlarged on October 31, 1866, when part of Venango County was incorporated into the county. Nestled between two federally designated Wild and Scenic Rivers, 99% of the county is forested. Over 50% of the county is public lands. Forest County has the most rural setting of the eight counties in the Northwest District. Within the borders of Pennsylvania's least populated county, there are no traffic lights, no four lane highways, and no daily newspapers.

Forest County prides itself as being one of "Pennsylvania's best kept secrets", and the encyclopedic website Wikipedia noted that the County is "famous as a rural retreat area". Until the 2010 Census the County consistently had the smallest population in the entire Commonwealth of Pennsylvania. This only changed because of the opening of the State Correctional Institute at Marienville, Pennsylvania, known officially as SCI Forest. This state prison was opened in 2004 and built to house 2,200 male inmates. As of the Census of 2010 there were 2,456 inmates. This single event made Forest County the fastest growing county in Pennsylvania between 2000 and 2010. County population changed in that time from 4,946 persons to 7,716 persons. Forest County remains true to its name, a county of forest lands, broken only by the occasional house, farm field, or small village.



5. Lawrence

Lawrence County was created on March 20, 1849, from parts of Beaver and Mercer counties due to the rapid growth of New Castle, which was primarily in Mercer County but was rapidly expanding into Beaver County. It lies at south-eastern tip of the district and borders on the suburban Pittsburgh region.

It was named after the USS Lawrence, Oliver Hazard Perry's original flagship at the Battle of Lake Erie during the War of 1812. The ship, in turn, was named after naval officer James Lawrence, who died during the War of 1812.

According to the US Census Bureau, the county has a total area of 363 square miles of which 358.2 square miles is land and 4.5 square miles (1.2%) is water. Major waterways are the Shenango River, Neshannock Creek and the Mahoning River which form the Beaver River. Also, the Slippery Rock Creek and Connoquenessing Creek empty into the Beaver River.



6. Mercer

Mercer County, named for Brigadier General Hugh Mercer, a Scottish surgeon and command during the Revolution, was formed March 12, 1800, from Allegheny County and organized in February 1804. The county encompasses 670 square miles, bordering the Ohio line for 32 miles. The county's largest municipality is the City of Hermitage.

According to the US Census Bureau, the county has a total area of 683 square miles of which 672 square miles is land and 11 square miles (1.58%) is water.

It is the second most populated county in the region behind Erie and has a rich industrial history, particularly in the steel industry. Even so, it still has an abundance of wooded areas and streams offering outdoor lovers a variety of activities.



7. Venango

Venango County was created on March 12, 1800 from parts of Allegheny and Lycoming Counties. The name "Venango" comes from the Native American name of the region, Onenge, meaning Otter. This was corrupted in English as the Venango River. The settlement at its mouth was likewise called Venango, and is the site of present-day Franklin, Pennsylvania.

Venango County is located about halfway between Pittsburgh and Erie. It has one of the richest commercial/industrial histories in the state due to the oil boom in the years following discovery of petroleum in the mid-1850s and is credited with the first successful oil drilling rig on August 28, 1859.

According to the US Census Bureau, the county has a total area of 683 square miles of which 675 square miles is land and 8 square miles (1.17%) is water and includes the cities of Oil City and Franklin, the latter being the county seat.



8. Warren

Situated in the beautiful Allegheny National Forest, Warren County lies in the north-eastern portion of the region. Warren County has been listed by The Progressive Farmer Magazine as Number 2 on their "Ten Best Places to Live" list.

According to the US Census Bureau, the county has a total area of 898 square miles of which 883 square miles is land and 14 square miles (1.60%) is water. Notable physical features include the Allegheny River, the Allegheny Reservoir, the Kinzua Dam, and the Allegheny National Forest.

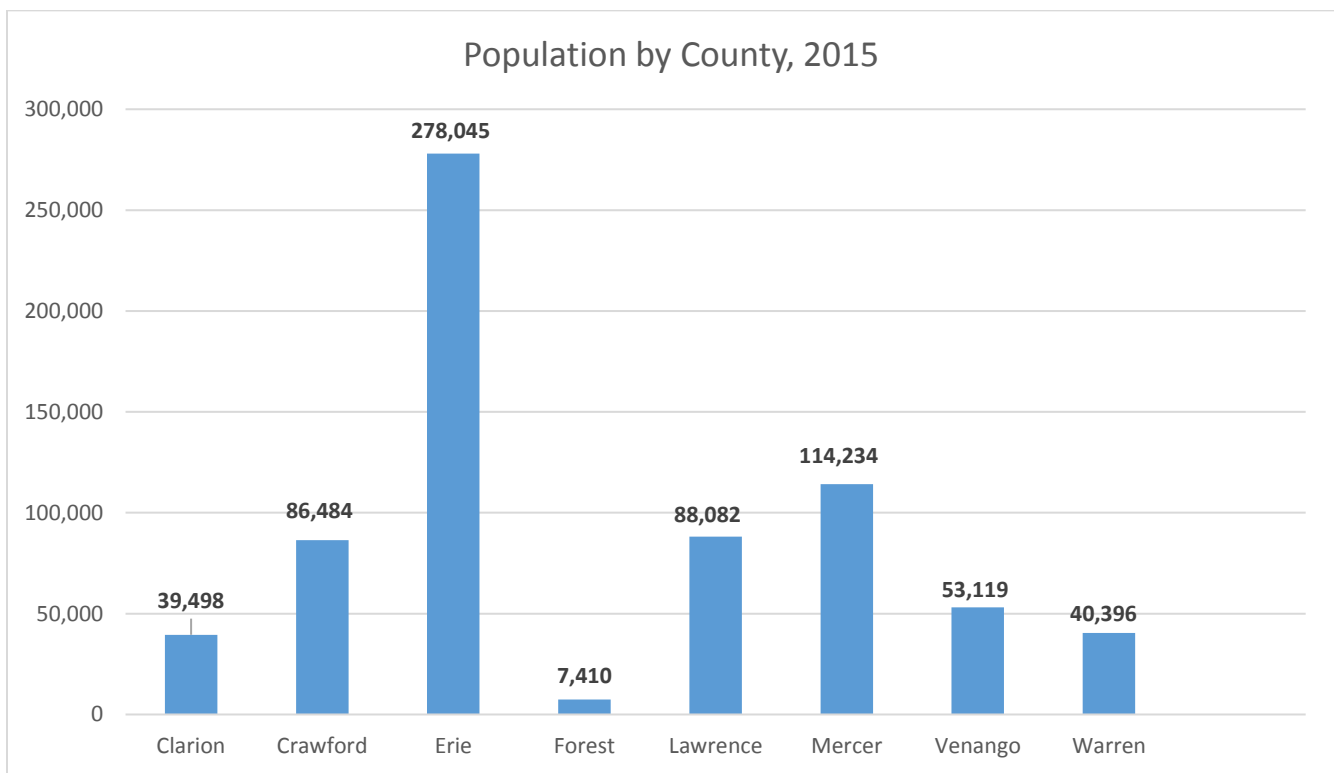
The largest municipality in Warren County is the City of Warren, which also serves as the county seat.



C. Demographic Highlights

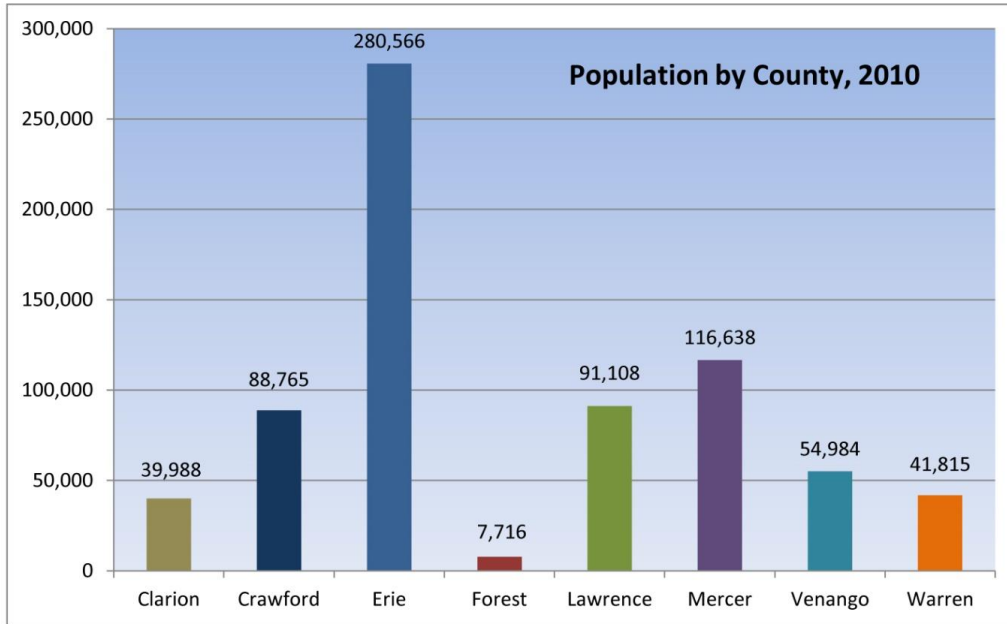
1. Current Population

According to the 2000 US Census, 734,284 people resided in the Northwest region. The 2010 Census indicated that the region had 721,580 persons; and in 2015 the Census estimated the region had 707,268 persons, a 3.7 percent decrease from 2000. Erie County remains the largest population in the region with 278,045 people, while Forest County has the lowest with a population of 7,410.¹



Source: US Census Bureau 2015 Estimates

¹ 2015 Census (Estimated Figures)



Source: US Census Bureau

Table 1: Population Trends

	1990 Census	2000 Census	2010 Census	2012 Estimate	2015 Estimate
Clarion	41,699	41,765	39,988	39,646	39,498
Crawford	86,169	90,366	88,765	87,598	86,484
Erie	275,572	280,843	280,566	280,646	278,045
Forest	4,802	4,946	7,716	7,667	7,410
Lawrence	96,246	94,643	91,108	89,871	88,082
Mercer	121,003	120,293	116,638	115,655	114,234
Venango	59,381	57,565	54,984	54,272	53,119
Warren	45,050	43,863	41,815	41,146	40,396
Total	729,922	734,284	721,580	716,501	707,268

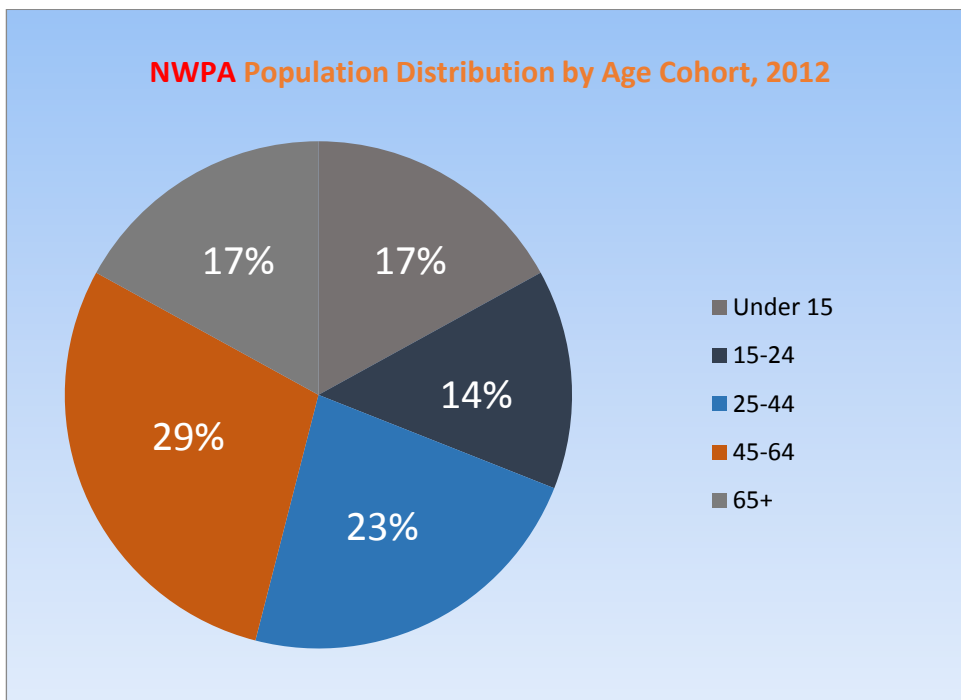
Source: US Census Bureau

The Northwest region has experienced a loss of population between 2000 and 2015. This continues to create challenges in funding infrastructure improvements, education and other government services that are generally paid for by tax dollars and has placed additional financial strain on the non-profit service provider network throughout the region..

Source: US Census Bureau

2. Age

The Northwest region's percentage in population of persons over 65 years of age is higher than the state and the nation. This emergence of an older population requires different goods and services as well as an increases demand for public sector support than a younger population. According to the 2014 US Census, 19.2 percent of the region's combined population was 65 years of age and over; this compares to the state's overall 16.7 percent and to the nation's overall 14.5 percent. This trend is projected to increase over the next 20 years. The aging population of the region is a major concern for the sustainability of the regions' employers in all sectors of the economy.



Source: US Census Bureau

3. Population Diversity

Another facet of the Northwest region's population is its racial diversity. In general, the region is not diverse. The majority of the 2014 population, 92.6 percent, is of a white, non-Hispanic origin. This compares to the nation's 77.4 percent and the state's 82.9 percent white, non-Hispanic population. Most of the region's non-white population is located in the more urbanized areas of New Castle, Sharon and Erie.

Table 2: 2010 Population Diversity

	NWPA Total
White	92.1%
Black	4.7%
American Indian and Alaska Native	0.1%
Asian	0.7%
Hispanic or Latino	1.5%
Persons Reporting Two or More Races	1.4%

Source: US Census Bureau

Table 2: 2014 Population Diversity

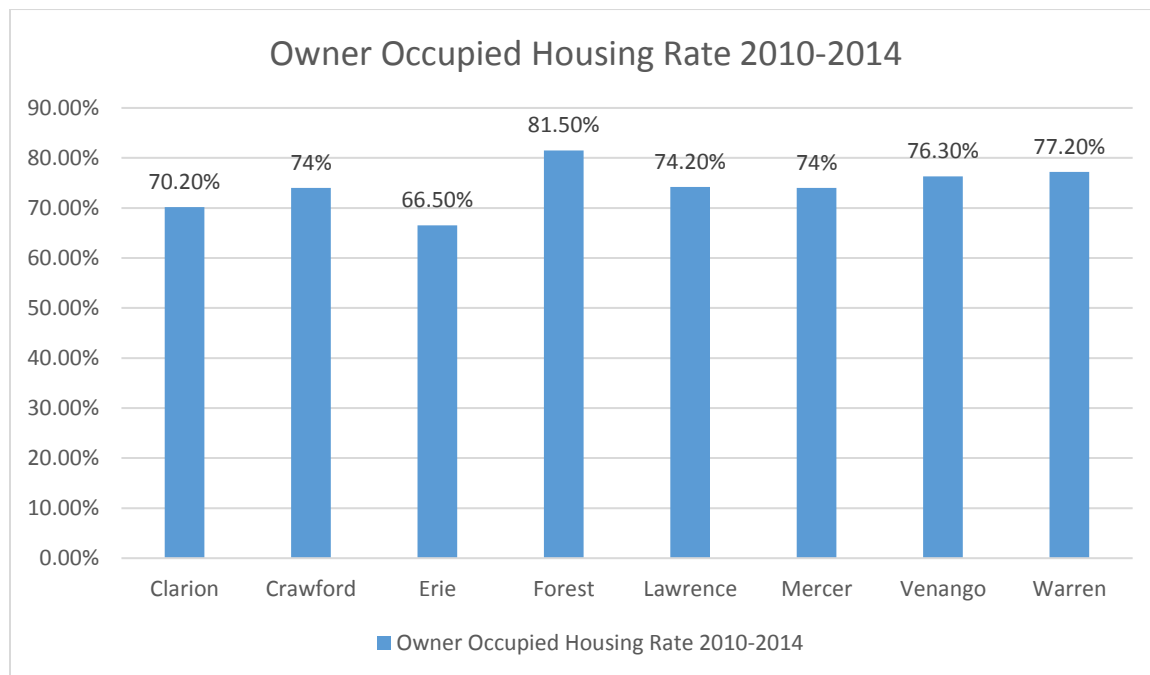
	NWPA Total
White	92.6%
Black	5.2%
American Indian and Alaska Native	0.25%
Asian	0.6%
Hispanic or Latino	2.0%
Persons Reporting Two or More Races	1.3%

4. Educational Attainment

Education attainment is an important factor in determining the economic potential of a region. According to the US Census Bureau, 88.2 percent of the region's residents over 25 years of age are high school graduates or higher. Approximately 19.9 percent of all residents have college degrees. The Northwest Pennsylvania region has a high school graduation rate and college graduation rate slightly lower than national and statewide averages.

5. Housing

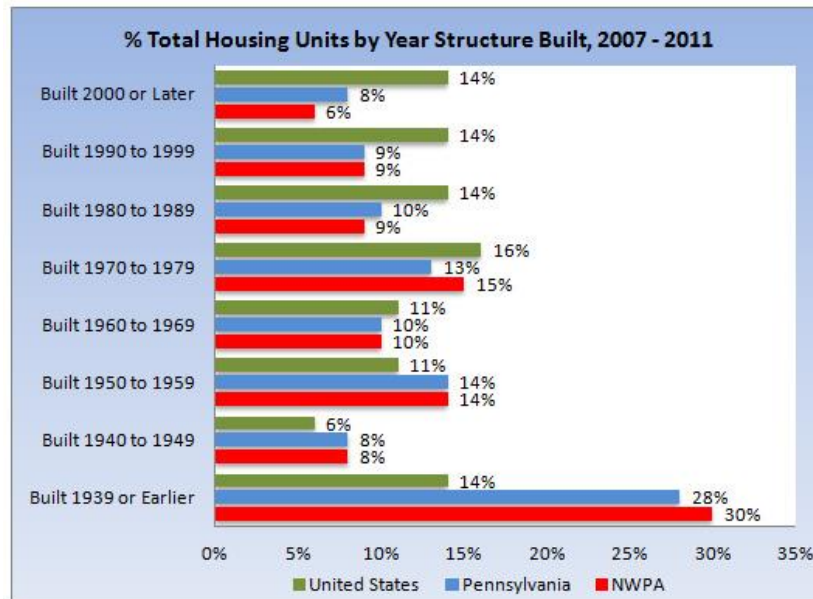
The home ownership rate is calculated by dividing the number of owner-occupied housing units by the number of occupied housing units or households. Home ownership rates can be an important indicator of a region's economic strength. According to the Federal Reserve Board, on average a homeowner's net worth is 46 times that of a renter's. Data from the US Census indicates that homeowners are less likely to move than renters, are more likely to be involved in the community and are more likely to partake in political decisions to protect their investment. Factors such as these indicate a stable work force. Forest County has the highest home ownership rate in the Northwest region. This could be attributed to several factors, such as the rural nature of Forest County or the higher percentage of elderly. All of the counties, except for Erie (66.5 percent), within the region are above the state's home ownership rate (69.5 percent) and none are below the nation's average (64.4 percent).



Source: US Census Bureau

6. Age of Housing

New housing starts in the region have been on the decline since the 1970's, with only 6 percent of the current housing inventory having been built since 2000. This is far behind both the national rate (14 percent) and slightly behind the state's rate (8 percent). A significant portion (30 percent) of the region's homes were built prior to 1940, which is over twice that of the national rate (14 percent), but only a small amount more than the state's rate (28 percent).



Source: US Census Bureau

Table 3: 2012 Construction/Building Data

County	Buildings			Units		
	2000	2012	Change	2000	2012	Change
Clarion	102	31	-69.6%	106	41	-61.3%
Crawford	165	52	-68.5%	175	52	-70.3%
Erie	581	225	-61.3%	688	483	-29.8%
Forest	18	4	-77.8%	18	4	-77.8%
Lawrence	198	40	-79.8%	266	41	-84.6%
Mercer	295	79	-73.2%	420	79	-81.2%
Venango	91	25	-72.5%	117	25	-78.6%
Warren	84	30	-64.3%	84	30	-64.3%
NW Pa.	1534	486	-68.3%	1874	755	-59.7%

Source: US Census Bureau

D. Regional Economy

1. Income

According to the 2014 US Census, the region had an overall median household income of \$42,954. The region's median household income is approximately 19 percent less than the Commonwealth of Pennsylvania which is \$53,115. The region's per capita income is 23 percent lower than the state's per capita income.

Table 4: 2011 Income

County	Median Household Income	Per Capita Income	Persons Below Poverty
	2011	2011	2011
Clarion	\$41,423	\$32,931	15.0
Crawford	\$40,775	\$31,485	15.3
Erie	\$41,951	\$34,721	16.5
Forest	\$32,852	\$24,014	22.0
Lawrence	\$41,447	\$33,475	16.1
Mercer	\$41,535	\$33,136	14.3
Venango	\$39,608	\$33,628	16.6
Warren	\$40,940	\$33,268	14.5
NWPA	\$40,066	\$32,082	16.3
PA	\$50,221	\$42,291	13.7
US	\$50,502	\$41,560	15.9

Source: US Census Bureau

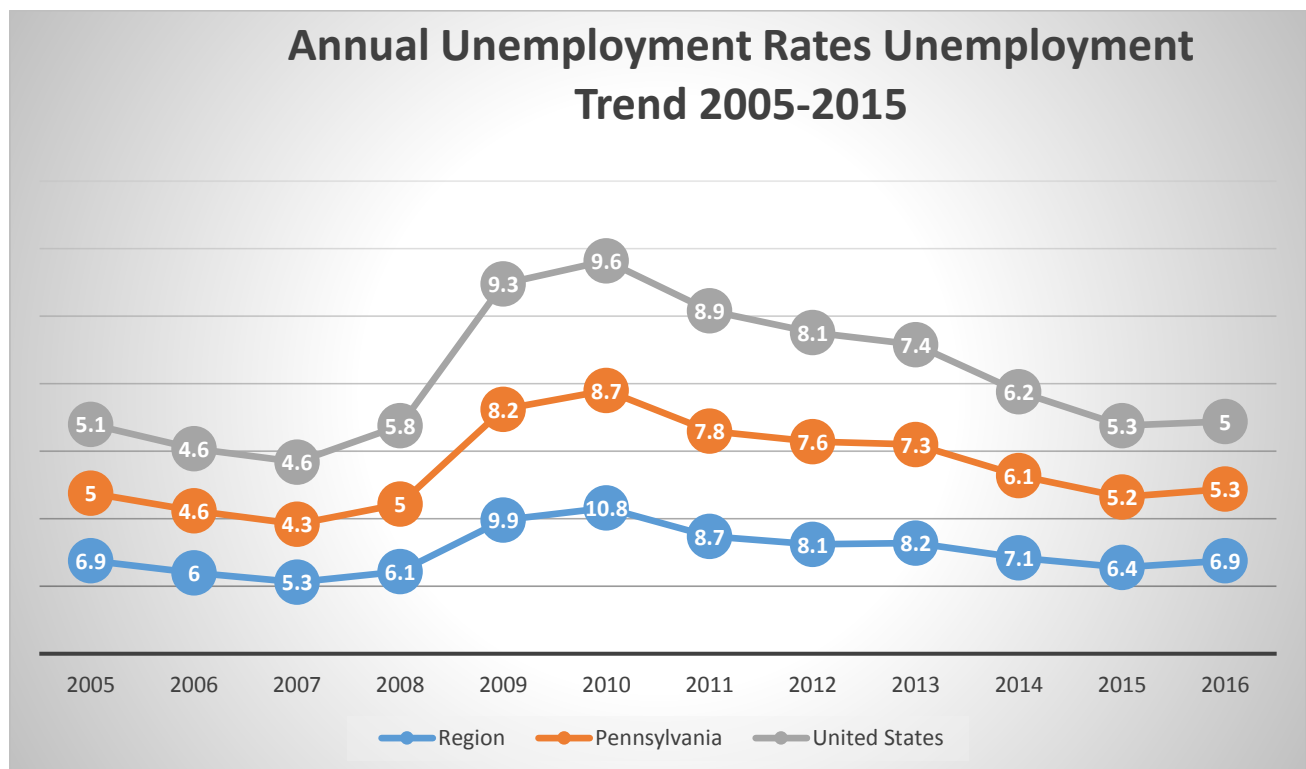
Table 4: 2014 Income

County	Median Household Income	Per Capita Income (past 12 months)	Persons Below Poverty
	2014	2014	2014
Clarion	\$42,880	\$22,341	15.0
Crawford	\$43,622	\$22,421	15.3
Erie	\$45,703	\$24,505	16.5
Forest	\$36,037	\$13,680	22.0
Lawrence	\$43,991	\$33,475	16.1
Mercer	\$43,715	\$33,136	14.3
Venango	\$43,291	\$33,628	16.6
Warren	\$44,391	\$33,268	14.5
NWPA	\$42,954	\$32,082	16.3
PA	\$53,115	\$42,291	13.7
US	\$53,482	\$41,560	15.9

2. Employment and Unemployment

Unemployment Rates

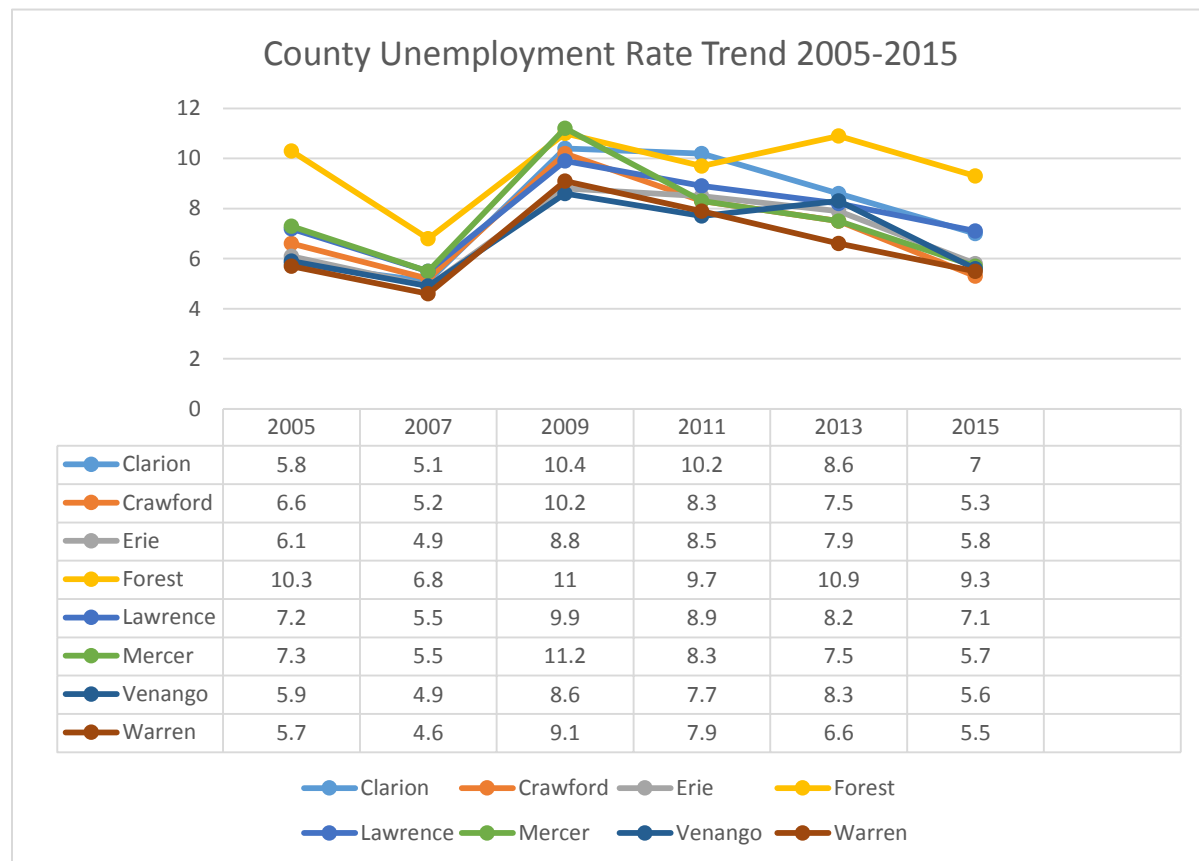
Until 2007, employment in the region as a whole had been fairly steady since the year 2000. Between 2007 and 2010, unemployment rose from 5 percent to 9.3 percent as the result of a national recession. Between 2010 and 2015 there was a slight decrease in unemployment rates throughout the region. As of March 2016, the 24-month average unemployment rate for the region was 5.63 percent, .13 percent higher than the national average. According to the Bureau of Labor Statistics the current up-to-date unemployment rate for the region is 6.9 percent.



Source: US Bureau of Labor Statistics, US Census Bureau

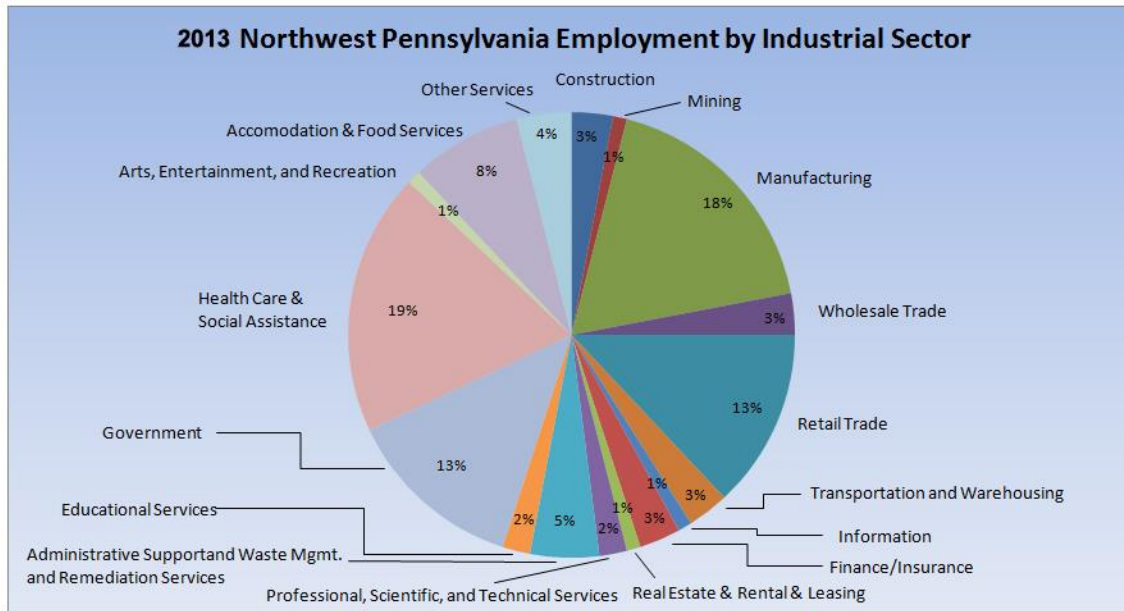
According to the Bureau of Labor Statistics in April 2016; Crawford, Erie and Venango counties had the largest increase in unemployment over 12 months. Crawford increased .7 percent (6.0 percent), Erie County 1.1 percent (6.9 percent) and Venango County 1.8 percent (7.4 percent). The sudden increases show the amount of job losses and plant closures in the region due to the downturn in the coal and transportation industries.

Each county is represented in the graph below. The graph details the unemployment rate trends for each county over the past 10 years.



Source: US Bureau of Labor Statistics

Employment by Industrial Sector



Source:

U.S. Department of Labor and Industry

Small businesses predominate in the region with 84 percent having less than 10 employees and 94 percent having less than 100. The various components of the services sector have the most business establishments and employ the most persons in Northwest Pennsylvania, health care and social assistance being the largest service employer group. Manufacturing, retail, and government are also significant employers in the region. Although manufacturing has been decreasing in the region, it is still a significant source of employment. Approximately 18 percent of the region's employment is in the manufacturing sector.

Top Employers by County

This section, arranged alphabetically by county name, outlines the top employers in 2015, according to the most up-to-date research done by each county economic development agency.

Table 6: Major Employers in Clarion County

Employer	Industry
State System of Higher Education/Clarion University	Educational Services
Clarion Hospital	Health Care and Social Assistance
Clarion Industries	Advanced Manufacturing
Wal-Mart Associates	Retail Trade
Riverview Intermediate Unit	Educational Services

Table 7: Major Employers in Crawford County

Employer	Industry
Meadville Medical Center	Health Care and Social Assistance
Crawford Central School District	Education Services
Penncrest School District	Education Services
Wal-Mart Associates	Retail Trade
Allegheny College	Education Services

Table 8: Major Employers in Erie County

Employer	Industry
General Electric Co	Manufacturing
Erie Indemnity Co	Finance and Insurance
UPMC Hamot	Health Care and Social Assistance
Saint Vincent Health Center	Health Care and Social Assistance
Wal-Mart Associates	Retail Trade

Table 9: Major Employers in Forest County

Employer	Industry
State Government	SCI Forest (Prison)
Cornell Abraxas Group Inc.	Health Care and Social Assistance
Industrial Timber and Land Co.	Manufacturing
Windsor Inc.	Health Care and Social Assistance
Forest Area School District	Educational Services

Table 10: Major Employers in Lawrence County

Employer	Industry
Jameson Memorial Hospital	Health Care and Social Assistance
New Castle Area School District	Educational Services
Westminster College	Educational Services
Ellwood City Hospital	Health Care and Social Assistance
County of Lawrence	Public Administration

Table 11: Major Employers in Mercer County

Employer	Industry
Sharon Regional Health Center	Health Care and Social Assistance
General Electric Company	Manufacturing
UPMC Horizon	Health Care and Social Assistance
Wal-Mart Associates	Retail Trade
State Government	Government/Public Administration

Table 12: Major Employers in Venango County

Employer	Industry
State Government	Government/Public Administration
Joy Global	Manufacturing
UPMC Northwest	Health and Social Assistance
Venango County	Public Administration
Wal-Mart Associates	Retail Trade

Table 13: Major Employers in Warren County

Employer	Industry
Blair Corporation LLC	Transportation and Warehousing
Warren County School District	Educational Services
Northwest Bancshares Inc.	Finance and Insurance
Warren General Hospital	Health Care and Social Assistance
United Refining Company	Natural Resource processing, refining
Whirley Industries	Plastics

Location quotient is a method for assessing the relative specialization of a geographic region relative to a selection of industries or economic clusters. The quotient represents a ratio of a particular industrial concentration in the geographic area compared to the same industry's concentration at the national level. A location quotient value of 1 (or close to 1) indicates that the region produces enough goods or services in a particular industry or economic cluster to satisfy local demand. A quotient of less than 1 indicates that the region does not produce enough goods or services locally and therefore must import goods or services to satisfy local demand. A quotient whose value is greater than 1 indicates that the industry is an export industry and the region likely has some competitive advantage relative to that industry or industry cluster. These particular industries are referred to as “current strongholds”.

The industries or economic clusters that rank as **Current Strongholds** in the Northwest region as a whole include:

- 1) Primary Metal Manufacturing
- 2) Plastics and Rubber Products Manufacturing

- 3) Fabricated Metal Product Manufacturing
- 4) Wood Product Manufacturing
- 5) Machinery Manufacturing
- 6) Transportation Equipment Manufacturing
- 7) Non-metallic Mineral Product Manufacturing

According to the Department of Labor and Industry, the Northwest Workforce Region's top industries for the 3rd quarter in 2015 include:

- 1) Food Services and Drinking Places
- 2) Educational Services
- 3) Ambulatory and Health Care Services
- 4) Hospitals
- 5) Plastics and Rubber Products Manufacturing

Individual county concentrations show a different picture of economic clusters and location quotients; however, economies do not align with arbitrary government boundaries. In fact, they reflect the fluid movement of goods, people, and ideas.

Competitive advantage is created and sustained through highly localized processes. Differences in national and regional economic structures, values, cultures, institutions, and histories contribute to competitive success. However, the globalization of the economy makes a region and its attributes and strategies even more important. With fewer impediments to trade sheltering uncompetitive domestic firms and industries, the home region takes on greater importance because it is the source of the skills, knowledge, technology, resources, and assets that are the cornerstone of its competitive advantage.

Clarion County Strongholds:

1. Wood Product Manufacturing
2. Manufactured Housing
3. Oil and Gas Extraction
4. Tourism

Crawford County Strongholds:

1. Plastics and Rubber Products Manufacturing
2. Machinery Manufacturing
3. Wood Product Manufacturing

4. Non-metallic Mineral Product Manufacturing
5. Fabricated Metal Product Manufacturing
6. Forestry and Logging
7. Fabricated Metal Product Manufacturing
8. Animal Production and Aquaculture

Erie County Strongholds:

1. Plastics and Rubber Products Manufacturing
2. Transportation Equipment Manufacturing
3. Fabricated Metal Product Manufacturing
4. Primary Metal Manufacturing
5. Machinery Manufacturing
6. Healthcare
7. Higher Education
8. Recreation/Tourism

Forest County Strongholds:

1. Oil and Gas Extraction
2. Lumber/Forest Products
3. Recreation/Tourism

Lawrence County Strongholds:

1. Primary Metal Manufacturing
2. Non-metallic Mineral Product Manufacturing
3. Fabricated Metal Product Manufacturing
4. Plastics and Rubber Products Manufacturing
5. Electrical Equipment, Appliance, and Component Manufacturing
6. Food Manufacturing

Mercer County Strongholds:

1. Primary Metal Manufacturing
2. Fabricated Metal Product Manufacturing
3. Wood Product Manufacturing
4. Clothing and Clothing Accessory Stores

5. Machinery Manufacturing
6. Electrical Equipment, Appliance, and Component Manufacturing
7. Food Manufacturing

Venango County Strongholds:

1. Primary Metal Manufacturing
2. Machinery Manufacturing
3. Fabricated Metal Product Manufacturing
4. Wood Product Manufacturing
5. Oil & Gas Extraction
6. Agriculture production
7. Recreation & Tourism Opportunities

Warren County Strongholds:

1. Warehousing and Distribution
2. Steel Production, forging and machining
3. Plastics
4. Natural Resource extraction, processing and refining
5. Timber Harvesting
6. Health Services

E. Infrastructure Systems

1. Highway

There are six interstate highways in Northwest Pennsylvania: I-79 (north-south), I-80 (east-west), I-86 (east-west), I-90 (east-west), I-76 (east-west), and I-376 (east-west, although a significant portion runs north-south). The region's highway network provides businesses, residents, and travelers with the ability to directly access six of the region's eight counties. Most significantly, these limited access interstates link the Northwest region to larger markets including:

- Boston through Albany, Syracuse, Rochester, Buffalo, Cleveland, and the Queen Elizabeth Highway (Toronto and Quebec) via I-90
- New York, NY via I-80 East
- Chicago, IL via I-80 West
- Pittsburgh and Charleston, WV via I-79 South

Scenic Byways throughout the Northwest Region connect tourists and travelers to the natural beauty of the region. Examples of such byways include: Route 6 in Warren County traveling through the Kinzua Area; Routes 6, 18, 618 and 285 in Crawford County all go through the Lakelands, Route 5 in Erie County is also known as the Seaway Trail; Lake Wilhelm Scenic Byway in Mercer County; and many more.

2. Rail Transportation

In addition to highway travel, freight rail service links the Northwest Region's businesses to other regional markets. The region is served by three Class 1 railroads: Canadian National Railway (through its subsidiary, the Bessemer and Lake Erie Railroad), CSX Transportation, and Norfolk Southern; and several class two railroads. Passenger rail service is provided from Erie via Amtrak's *Lake Shore Limited Service* eastbound to New York City and westbound to Chicago using the New York Central's historic "Water Level Route".

The Norfolk Southern operates on three lines, one passing through Erie to points west, via Cleveland and points north and east via Buffalo; a second line passes through Mercer and Venango Counties to Youngstown, Ohio via Cleveland and to the east via Binghamton (NY); and the third line passes through New Castle and Lawrence County on its way from Cleveland and Youngstown to Pittsburgh and points beyond. The CN's Bessemer line provides freight services between Erie and Pittsburgh. Connection between most of the region's larger communities and the railroads' rights-of-way are prevalent. Three shorter line railroads in the region include the Oil City and Titusville (OC&T), the Buffalo and Pittsburgh (BPRR), and the Western New York and Pennsylvania (WNY&P).

As Pennsylvania's only port on Lake Erie, the Port of Erie accommodates both commercial shipping and recreational boating. Products travel along the Great Lakes, and to various US coastal and European markets with stops to load and unload cargo in Erie. Manufacturers can also use the Port of Erie to move bulk goods in the Great Lakes network and through the St. Lawrence Seaway to and from European markets. The port is served by railroads operating in the area. The port's draught berth (27 feet deep) provides approximately 100,000 square feet of covered storage.

3. *Air Transportation*

Air cargo shipments can be made by transporting products to major international airports in Pittsburgh and Cleveland. For some portions of the region, Pittsburgh International Airport is a short distance away, being anywhere from 42 miles (New Castle in Lawrence County) to 142 miles from the outer limits of the region (Warren in Warren County). Cleveland's Hopkins International Airport is also relatively close by, being 113 miles from the City of Erie and 160 miles from the farthest reaches of the region (New Bethlehem in Clarion County). Commercial, passenger, and airfreight service is available at Erie International Airport in Erie and the Venango Regional Airport in Franklin. Smaller, general aviation airports are located in, Clarion, Corry, Meadville, Titusville, and Greenville.

4. *Transit*

In addition to the existing transportation network, the region is working on other planning strategies in order to further strengthen and optimize transportation efforts for businesses and residents of the Northwest region. A pertinent goal in the Northwest Commission Strategic Plan includes "creating high quality transportation infrastructure to support economic development, quality of life, and job creation/retention in Northwest Pennsylvania."

Furthermore, as part of the region's Long-Range Transportation Plan, eight goals aim at improving the effectiveness and efficiency of its transportation network.

These goals include:

1. Support the region's economic vitality.
2. Increase transportation system safety.
3. Increase transportation system security.
4. Increase accessibility and mobility options.
5. Protect and enhance the environment, promote energy conservation, and improve quality of life and stewardship.
6. Enhance the regional transportation system integration and connectivity.
7. Promote efficient transportation management and operation.
8. Give priority to transportation system preservation.

To advance these goals, the Commission has outlined performance measures, specific work activities, scheduling, annual budgeting/funding goals, and performance reporting measures. The planning efforts which emerge as part of this Comprehensive Economic Development Strategy should consider each of these above concepts and further promote ways in which the businesses and residents of the region can achieve their goals.

5. Shale Gas Industry Considerations

An important consideration for the region's infrastructure is the ongoing development of the Marcellus, Utica, and Barnett shale gas industry. As this industry grows, it will place additional load on the regions' road and rail infrastructure. Planning for this increase in infrastructure usage demands and the resultant increases in maintenance demands is critical for the region.

II. SWOT Analysis Summary

A SWOT analysis is a structured planning method used to evaluate a project by considering four factors:

Strengths: characteristics of the project that give it an advantage over others.

Weaknesses: characteristics that place the project at a disadvantage relative to others.

Opportunities: elements that the project could exploit to its advantage.

Threats: elements in the environment that could cause trouble for the project.

The results of the analysis can then be used as the basis for the development of regional planning and strategic initiatives. The following SWOT Analysis was conducted regarding the region as it pertains to Economic Development:

A. Strengths

- ***Geographic location is well-suited to service growing shale gas industry statewide***

The proximity of Northwest Pennsylvania to the most significant shale gas activity in the state (as well as neighboring states) will allow it to efficiently and effectively lend needed support to this industry as it continues to grow. The region itself is also a candidate for a significant increase in drilling activity.

- ***Ideally positioned from a logistics standpoint to quickly reach most of the United States population***

The region is within a day's drive of reaching the majority of the US population; a significant logistical benefit for shipping companies, cargo hubs, and the like. Additionally, several major metropolitan areas are located within 100 miles of the region, including Pittsburgh, Cleveland, and Buffalo. Also within a day's drive are Chicago, New York, Philadelphia, and Washington.

- ***High concentration of natural water resources***

With numerous waterways and lakes as well as ground water supplies/springs, the region is rich in water resources necessary for business and population growth.

- ***Large number of secondary and higher education institutions***

Northwest PA has over 35 institutions that could be leveraged to help drive regional economic development efforts.

- ***Significant highway and railway infrastructure assets***

Six main Interstate Highways (I-79, I-80, I-86, I-90, I-76 and I-376) provide access to six of the region's eight counties. The remaining two counties are served through a combination of state Routes 6 and 62. Additionally, the region is served

by a multitude of secondary railroads and three major railroads with the potential to expand service.

- ***Development of Erie Ports***

The development of ports in Erie will provide the region with enhanced trade links and the opportunity to connecting service to dozens of cities and ports.

- ***Low cost of living***

With a cost of living index below the national average, the region offers an economic advantage to both businesses and households that would look to locate themselves in Northwest PA.

- ***Natural beauty and tourism***

The region has numerous tourism opportunities in the form of parks, forests, rivers and waterways, lakes, and other natural and scenic resources.

- ***Established workforce***

As part of the region's commercial and industrial base there exists a long-established and specialized workforce. The most prevalent specialization comes in the form of manufacturing and health-care related jobs.

- ***Low crime rate***

Northwest Pennsylvania enjoys a lower crime rate than the national average, making it an attractive place to live and do business. Additionally, the crime rate has been trending downwards since 2010 and is predicted to continue to do so in 2014.

- ***Year-around outdoor recreation activities***

The region's location and natural weather pattern serves to offer recreational activities throughout all four seasons.

- ***Healthcare***

The region has an abundance of easily accessible healthcare facilities, including: hospitals, primary care physicians, long-term care providers, assisted living facilities, specialists, etc.

- ***Manufacturing Stronghold***

Manufacturing is a stronghold in all eight counties that make up the Northwest region. Manufacturing is the foundation to the region's economy and has been throughout history. Manufacturing sectors include: wood product, plastics and rubber, machinery, fabricated metal, transportation equipment, primary metal, mineral product, electrical and food.

B. Weaknesses

- ***Population Decline***
Regional census counts and estimates have noted a population decline due to multiple factors that appear hard to reverse.
- ***Decline in Workforce due to aging and lack of opportunity***
A significant percentage of the area's workforce is 55-years-old or older leading to a decrease in workforce from a result of retirement and disability. Due to a lack of regional opportunity, young educated workers are leaving the area in order to establish their careers.
- ***Underdeveloped telecommunication and broadband infrastructure***
The gaps in rural areas for high speed internet availability, combined with sub-standard wireless telecommunication coverage is a challenge for businesses and individuals who may look to locate in the area.
- ***Imbalance between brownfield sites and developed Greenfield Sites***
Strict regulations governing brownfield sites are a deterrent to their development, in addition to obvious concerns over environmental contaminants. Conversely, developed Greenfield sites are in short supply where they would make the most sense from a logistical standpoint.
- ***Utility infrastructure capacities are in need of upgrade or expansion.***
Many locales are lacking the necessary infrastructure to support both commercial and residential growth.
- ***Lack of ordinances and land-use control.***
Many communities throughout the region do not control land-use at the local level, instead relying on county-level management or regulations and ordinances. This effectively limits both the agility and flexibility needed to drive regional economic development consistently.
- ***Limited rail access***
Although there is still a strong rail presence in certain areas, capacities are not in line with regional need. There are limitations to the rail system throughout the region.
- ***Lack of Multi-Tenant Modern Facilities***
Throughout the region there is a lack of multi-tenant modern facilities. The limitation to such facilities serves to decrease business attraction and ability to steadily progress with technologies and modern-day advancements.

C. Opportunities

- **Educational assets**
Institute programs at all education levels that will serve to promote and enhance all economic-based sectors.
- **Natural gas support industries**
A significant support network is essential to promote the growing natural gas industry in the region. Regional businesses are positioned to capitalize on both the extraction and transportation needs through the development of a variety of products and services.
- **Higher education programs and labor force specialization**
Addressing these needs through formal educational programs will be helpful to new and ongoing regional economic development and workforce efforts. Develop systematic programs to capture and train regional youth/workforce on the necessary skill sets that will enable one to assimilate into regional business and industry employment opportunities.
- **Natural water resources**
The region has an abundance of water resources that can be developed and leveraged for economic development.
- **Erie Port Development**
When developing regional businesses, the development of ports will allow for the region to reach a broader global market thereby increasing regional export opportunities.
- **Tourism**
Promote natural beauty and tourism as a development strategy to improve the social and economic well-being of the region.
- **Small to medium size business adaption**
Develop formalized programs that will allow existing businesses to adapt to and capitalize on emerging markets and opportunities by becoming supply chain partners.
- **Outside expertise and experiences**
Investigate what efforts have and have not worked in other areas and use this research as a benchmark to inform regional efforts and measure their progress and growth.
- **Foreign investment and “re-shoring” of jobs**
Promote the region’s positive attributes to foreign business interests to encourage the financial investment necessary to bring lost jobs back to the area.
- **Government Contracting**
Promote the opportunities for regional businesses and industries to contract with the Federal, State and Local levels of government.

- ***Employment and Recruitment of Veterans***
Promote the region’s contract with RecruitMilitary to take advantage of the opportunity to connect the Veteran workforce with the skill sets desired by regional employers.
- ***Industry involvement in education***
Solicit the participation of regional industries to drive the development of educational programs that will look to place future workers in local opportunities.
- ***POWER Initiative***
Capitalize on the available funding through the POWER Initiative to help regional “coal-impacted” communities. Structure regional partnerships and projects to enhance the social and economic well-being of the region.
- ***Entrepreneurial Development***
Entrepreneurship has the potential to boost the regional economy by tapping regional talent and resources. Encouraging entrepreneurial activity will help keep rural populations from declining even further.
- ***Utilizing the Aging Workforce as Mentors***
Benefit from the increase of retired professionals by implementing mentorship programs. Utilize the abundance of experience by training the younger/less-experienced workforce.

D. Threats

- ***Loss of agricultural production***
The region’s agricultural industrial base continues to shrink and is effecting the regions revenue.
- ***Lack of diversity in economic base.***
The region’s strong reliance on manufacturing could create economic hardship.
- ***Limited financial capital access***
For the past several years there has been a limited amount of grant monies and funding available for economic development efforts. Additionally, venture capital has become incredibly scarce, and prohibitively expensive when available.
- ***Competition against other regions***
Northwest Pennsylvania has competition trying to leverage the same economic development opportunities. Larger communities in the tri-state area such as Pittsburgh, Cleveland, and Buffalo are all positioned to attract industries and workers through their own unique attributes.
- ***Increasing costs of healthcare***
Health care costs have risen dramatically over the past five years and appear to be positioned to continue to do so. Some businesses may find themselves unable to absorb these costs which could create issues with the workforce.

- ***Costs of fully developing infrastructure systems***
The costs associated with repairing and maintaining Northwest Pennsylvania's aging infrastructure combined with the associated costs of needed upgrades and enhancements could potentially hinder economic development opportunities.
- ***Aging population's effects on industry longevity***
A lack of business succession planning combined with a deficit of qualified workers to replace the current aging workforce could change business ownership and commitment to the region.

III. Goals and Objectives

A. Vision Statement

Building upon the evaluation of the region's existing strengths, weaknesses, opportunities, and threats, as well as its potential economic growth areas, the Northwest region's CEDS Committee developed a vision statement reflecting on the CEDS project. The vision statement, as follows, serves as the underlying guide for implementation of the region's future economic development strategies.

“Facilitate the preservation and growth of a strong, sustainable economy through a concerted effort to improve and enhance the region's infrastructure assets, educational capabilities, investment capital availability, and work force resources, to the benefit of Northwest Pennsylvania's residents, businesses, and industries.”

B. Strategic Goals

The above vision statement is subsequently realized through the implementation or achievement of a series of goals. Goals represent the general desired outcomes in order to fulfill the vision statement. They provide direction and focus on the “ends” rather than the means. The CEDS goals include:

1. Update infrastructure to facilitate the attraction and retention of both businesses and residents to the region.
2. Continue to develop broadband infrastructure in an effort to blanket the region with high-speed coverage. Develop public/private partnerships to accomplish this goal (development agencies, electric companies, etc.).
3. Develop a supply-chain assessment tool for businesses throughout the region focused upon both supply to and potential outflow product usage from the Shell Cracker plant to be developed in Beaver County, Pa. and also to assist businesses impacted by the loss of coal-related markets.
4. Develop regional uses for natural gas to mitigate its export to other states and regions.
5. Enhance regional industry and manufacturing by assisting businesses in developing and exporting finished products in addition to raw materials.
6. Promote and expand rail usage throughout the region and develop networks to other key rail hubs, with a focus on leveraging existing infrastructure.
7. Continue to promote the region's tourism and recreational opportunities.
8. Develop education programs and partnerships that offer specialized training needed for regional opportunities

9. Foster a culture of entrepreneurship in order to serve regional needs moving forward.
10. Increase and enhance the use of existing programs and capabilities of PREP partners to further promote regional economic development.
11. Develop incentives, promote and support entrepreneurs in their efforts to start businesses in the region.

C. Regional Objectives

From the defined Strategic Goals to strengthen economic development opportunities in the Northwest region, a series of Regional Objectives also emerge. These Objectives have in part been defined by other related land use, transportation, and strategic planning efforts in the region. Identified objectives include:

1. Technology

- Define what the region needs regarding broadband/high speed internet and fiber optics capabilities
- Promote all fiber optics project in the region and support expansion, marketing and utilization.
- Create a dedicated group to accomplish determined needs
- Continue to develop cell phone coverage throughout the region
- Offer the necessary technical assistance needed by local businesses and organizations
- Determine the technical assistance that will be needed by emerging businesses and industries moving forward

2. Education

- Establish an accessible community college in the region
- Create programs to address regional workforce needs in lieu of general and outdated standardized programs
- Facilitate cooperative efforts and programs across educational institutes to take on regional issues and concerns
- Develop dedicated courses to promote and encourage entrepreneurial activities throughout the region at high school, post-secondary and college levels
- Create more internship and apprenticeship opportunities among regional industries.

3. Business Attraction, Growth and Retention

- Develop partnerships between educational institutes and businesses
- Create programs to promote effective workforce development based on assessed needs and opportunities

- Leverage existing assistance programs by creating increased awareness through dedicated marketing and promotional efforts (Government Contracting, Women/Minority programs, etc.)
- Develop more high-tech industry serving incubators (such as the Barnes Center in Clarion County)
- Construct shell-buildings to attract businesses and promote fast, customizable purpose adaption
- Repurpose and rehabilitate vacant facilities and buildings
- Create a comprehensive database of available commercial buildings and properties for economic developers and realtors
- Identification of the competitive advantages that the region has as a result of the soon-to-be developed Ethane Cracker plant.

4. *Business Financing*

- Deliver low interest loans to businesses to retain and create jobs
- Provide business loan packaging assistance to businesses
- Develop a venture capital pool
- Conduct training programs and workshops regarding availability of alternative sources of capital
- Further promote existing loan programs

5. *Natural Resources*

- Develop new and expand existing regional natural gas usage as fuel source as well as production stock
- Develop businesses to create finished products from regional natural resources and materials
- Support Compressed Natural Gas (CNG) investment and conversion

6. *Manufacturing*

- Develop infrastructure for manufacturing growth and expansion
- Create shovel-ready industrial parks
- Encourage the development of fast growth and high tech industries that are related to the process of manufacturing
- Identify and develop the concept of core industry clusters such as plastics, metal fabrication, machining, wood products, biotechnology, etc.
- Develop new and creative uses for brownfield sites
- Promote and encourage brownfield development

7. *Tourism*

- Continue to promote regional tourism
- Support and encourage region-wide marketing strategies for promotion

- Aggregate opportunities through the development of regional events, tours, and activities
- Preserve and enhance the region's character and quality of life through regional Greenways planning efforts, Conservation Landscape and Heritage programs.

8. *International Marketing*

- Provide technical assistance to businesses in the region
- Provide educational programs in cooperation with PREP partners
- Provide trained staff to conduct on-site consultations
- Develop a regional strategy that is consistent with state and federal programs
- Enhance marketing and promotional efforts

9. *Intelligence and Data Gathering*

- Conduct data gathering studies and surveys that address the region's primary issues
- Create a central repository for the gathered data that can be leveraged by PREP partners and others to inform programs and strategic efforts
- Seek out studies from other states and regions that may be applicable to Northwest Pennsylvania
- Continue a process of ongoing data collection and dissemination

10. *Community Development*

- Identify and obtain sources of funding to assist in restoring deteriorated and underutilized downtown areas
- Assist rural areas in obtaining grants for community projects
- Encourage the consolidation of government services and municipalities
- Support and promote modern and more uniform land use and development regulations
- Support proactive community, county, and regional planning programs
- Encourage and facilitate collaboration on regional projects
- Offer leadership and governance training for elected officials
- Support expansion of the Local Government Academy
- Create programs that promote economic development training within the region
- Provide Technical Assistance to communities as required to support development initiatives
- Offer grant research and grant writing services
- Establish regional priority projects and provide legislative support for those projects
- Encourage inter-governmental cooperation

11. Transportation

- Support Metropolitan Planning Organization(s) and Regional Planning Organization(s) transportation activities.

D. Performance Measurements

Performance measures are indicators by which the region's stakeholders will judge the effectiveness of a particular goal and/or objective. Performance measures are linked to key success factors.

The EDA has identified several performance measures that must, at a minimum, be used to evaluate the implementation of the CEDS. Noted performance measures include:

- Number of jobs created after implementation of CEDS
- Number and type of investments undertaken in the region
- Number of jobs retained in the region
- Amount of private sector investment in the region after implementation of the CEDS
- Changes in the economic conditions of the region

The Northwest Pennsylvania Planning and Development Commission is responsible for collecting, tracking, and reporting the performance measures to the public and appropriate federal and state agencies.

As the Economic Development District organization for Northwestern Pennsylvania, the Northwest Commission will monitor the following performance measures:

- Number of U.S. Department of Commerce, Economic Development Administration(EDA) investments
- Number of new jobs established after the implementation of the CEDS
- Number of jobs retained
- Amount of private sector investment
- Types of investments to attract key business clusters
- Lower unemployment rates
- Higher regional income averages

As a Local Development District for the Pennsylvania Department of Community and Economic Development and the Appalachian Regional Commission, the Northwest Commission employs the regional goals and objectives of the Comprehensive Economic Development Strategy (CEDS) during the project review and ranking process for Appalachian Regional Commission funding. The goals, objectives and strategies contained in the CEDS document influences the types of projects chosen for funding consideration.

E. Economic Resilience

Regional economic prosperity is linked to a region's ability to prevent, withstand, and quickly recover from major disruptions to its economic base. Economic resilience becomes inclusive of three primary attributes: the ability to recover quickly from a shock, the ability to withstand a shock and the ability to avoid the shock. Establishing economic resilience in a regional economy requires the ability to anticipate risk, evaluate how that risk can impact key economic assets, and build a responsive capacity.

The shocks to the economic base of a region are manifested in three ways:

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

At the regional level, economic development practitioners are instrumental in building the capacity for economic resilience.

Northwest Pennsylvania regional economic resilience initiatives include:

- Engaging in comprehensive planning efforts that involve extensive involvement from regional partners
- Undertaking efforts to broaden the industrial base with diversification initiatives
- Adapting business retention and expansion programs
- Building a resilient workforce that can better shift between jobs or industries
- Promoting business continuity and preparedness
- Establishing a process for regular communication, monitoring, and updating of business community needs and issues
- Establishing leadership succession plans for short, intermediate and long-term recovery needs

IV. Regional Projects

An important component of the Northwest Region's CEDS is the identification of projects and initiatives with a regional scope. Regional partners have proposed numerous initiatives for the Region to undertake in the future. In order to determine the scope of regional projects, meetings were held with regional partners to discuss and prioritize initiatives. Through these meetings, it was determined that several over-arching initiatives were the main focus of the group as a whole. These initiatives include: Regional Real Estate Development, Regional Training and Workforce Development, Regional Natural Gas Production, Regional Recreation and Tourism Development, Regional Communication Development, Regional Transportation Improvement and Development, and Regional Business Attraction, Expansion and Retention. These noted initiatives were approved by the CEDS board and encompass specific projects and projects related to the POWER initiative. The CEDS board strongly identifies these initiatives as being impactful to regional economic development efforts.

Regional Real Estate Development

Since the end of the recession there has been a rapid expansion of established businesses in the region. Nearly all of the inventory of vacant industrial space has been reoccupied leaving only blighted industrial facilities and brownfields. This has essentially put us in a position of having limited facilities to sell or lease to existing or new manufacturers that want to grow or locate in our region. To remedy this we propose to develop a program to construct speculative shell buildings within the region. Having these structures in place and ready for interior finish build-out significantly reduces the time for business start-up through elimination of permitting and construction lead timing. The region also intends to pursue the acquisition of blighted industrial facilities and brownfield sites by Act II standards. The region plans on the reclamation and renovation of the structurally sound parts of the facility; and the expansion of the regional industrial park system and infrastructure serving it to accommodate new business growth.

- **Brownfield Redevelopment**
 - Potential for redevelopment, serving to upgrade the image of the region/area. Providing additional facilities to sell or lease to existing or new manufacturers. Redevelopment would improve the image of the region.
- **Multi-Tenant Facilities, Shell Buildings and Shovel-Ready Industrial Parks**
 - Provide an adequate supply of quality industrial sites and buildings. The region needs the development of more speculative building space, and this should be a strategy to make the Region more competitive.
- **Utilities/Infrastructure**
 - Provide infrastructure to make the region more competitive for economic development. Infrastructure is the system of roads, sewer and water systems, power and telecommunications that are essential to support development. Having sufficient infrastructure in place is a prerequisite for economic development if existing firms are to be retained and new firms are to be attracted to the region.

- **Revitalization Projects**

- Improve the appearance, livability and economic viability of downtown and hospitality/tourism based areas throughout the regions

Current Projects/Initiatives:

Tirelogix LLC Manufacturing Center

In an effort to provide the physical capacity to efficiently accommodate the construction of large scale industrial buildings and facilities in Crawford County, and to support new and existing manufacturing and industrial employment in the region, the Economic Progress Alliance of Crawford County acquired various assets associated with the former Keystone Ordinance Works (brownfield site) and has aggressively engaged in the planning, design and rehabilitation of infrastructure for this purpose. To date, this effort has involved the subdivision and purchase of more than 1,300 acres of land; the acquisition, reconstruction, expansion and operation of a wastewater treatment plant; and, the acquisition and reconstruction of a portion of the water system serving the area. This development, now referred to as the Keystone Regional Industrial Park, has benefited by the commitment and support of Greenwood Township, Crawford County, the Commonwealth of PA and the U.S. Economic Development Administration. To date the Alliance has invested more than \$10,000,000 in the acquisition of property and the rehabilitation of associated infrastructure at the Park, which is a Keystone Opportunity Zone designated site.

The Keystone Regional Industrial Park had previously been selected as the site of the proposed Crawford Renewable Energy (CRE) facility to construct and operate a power facility on an 80-acre site acquired by CRE for this purpose. The feedstock for generating electricity at this facility was to be tire-derived fuel or TDF. Due to changes in market demand for power generated by such a facility, CRE is no longer moving forward with the power station project. However, the aforementioned market changes have provided new opportunities for the used tires that were to feed the plant.

During the seven-plus years the power station project was being planned, CRE developed the logistical capacity to identify, collect and process tires in quantities sufficient to supply the power station and to sell processed tires to other related markets. For this purpose, CRE established a subsidiary operation known as TireLogix LLC. They have now developed that subsidiary into a full-scale operation to collect and process tires for sale to a wide-ranging network of markets on a profitable basis. Site preparation work that had been completed to support the proposed power station, including stormwater management facilities, wetlands mitigation, site utilities and the construction of major rail service to the site will now be utilized to support the tire processing operation. CRE is currently pursuing public and private funding options to assist with construction of the proposed tire processing facility itself.

In addition, as the proposed Tirelogix facility will be the first constructed at the Keystone Regional Industrial Park, it is expected to serve as a demonstration to others that the Park is an efficient alternative to accommodate additional industrial growth and to generate revenues that can be reinvested back into the Park.

Conneaut Lake Park Revitalization

The project has been separated into three key elements: Reorganize, Re-Vision, and Revitalize. The descriptions of these elements are as follows:

Reorganize: The Economic Progress Alliance of Crawford County (EPACC) will serve as catalyst to transition governance from a volunteer dependent operational board to a board of trustees focused on setting, guiding and reviewing policies intended to preserve and strengthen the assets of Conneaut Lake Park for the benefit of the public. Meetings of the Board of Trustees will be announced in advance and open to the public. All minutes of meetings and regular financial statements will be made available to the public and will be posted on the CLP web site. All actions adopted by the Board of Trustees will be recorded and made available for review by the public. To that end, the board has been reconstituted to focus on the policies as outlined and has transitioned management from part-time volunteers to full time EPACC professional management. All board activities and financial records are readily available to the public and all operations are now managed by EPACC staff. EPACC management is developing and implementing a long range plan to achieve self-sufficiency and organizational stability.

Re-Vision: Historically Conneaut Lake Park has been viewed primarily as an amusement park, even though it has had a far more diverse roster of amenities and services available to its users. The re-visioning of the park will seek to leverage this diversity as it relates to strategic initiatives and marketing strategy. This new vision would see CLP as a “public events and amusement park” based upon the following facilities and improvements:

- Lakeside Performing Arts Center
- Outdoor Amphitheater
- New Beach Club
- New Dreamland Expo Center
- New Midway
- New Outdoor Show Plaza
- Improved/Expanded Camperland
- Hotel Conneaut Renovations
- Classic Amusement Park
- Public Beach Access

Revitalize: The complete redevelopment of Conneaut Lake Park is expected to take ten years to achieve. A plan has been adopted that identifies properties of critical importance to attaining the stated objectives, court approval has been sought and given for the sale or long term lease of surplus properties as a means of generating funds sufficient to pay all taxes and to begin investing in the new vision. A revitalized Conneaut Lake Park will serve to create numerous full and part time jobs in the region while facilitating enhanced tourism opportunities and revenues

Regional Training and Workforce Development

Recently the region has seen an increase in unemployment numbers, stemming from the negative impact by changes in the coal economy. The region is progressing in economic diversity and a skilled-workforce is a need. The recent job losses leaves the region with the chance to increase the skilled labor-force through regional training and educational programs. Workforce development aims to build, attract and retain a skilled workforce to meet the economic needs of Northwestern Pennsylvania, to minimize skill shortages and maximize the region's ability to respond to new opportunities. The region will work with industry, the community, government, and education to build a workforce which is productive, inclusive and efficient. The region aims to enable businesses and workers to compete in the worldwide, knowledge-based economy by becoming a trained and skilled labor force.

- **Entrepreneurial Training/Education Programs**
- **Improvement of regional educational opportunities to assure a valuable and technically skilled labor force.**
 - Provide both youth and mature workers with updated skill sets that are in demand by employers today. Educate the public on training possibilities.
- **Regionally market the need for job skills**
 - Introduce job skills training and trends to the area school systems and job placement centers. Leverage the CareerLink system and identify job training needs.
- **Develop/enhance area technical schools**
 - Extensions of are colleges, additional courses at community colleges, or newly built/renovated schools for career training. To support the development of Rural Regional Community College initiative.

Purposed Projects/Initiatives:

Regional Center for Technical Education and Workforce Development

Project Title: Regional Center for Technical Education and Workforce Development --- Oil Region Alliance of Business, Industry and Tourism

Purpose: To purchase the former "Verizon" maintenance building a designated Brownfield site in Venango County and develop it as a Regional Center for Technical Education and Workforce Development.

The Oil Region Alliance will be partnering with the Community College of Allegheny County (CCAC) and Keystone Community Education Council to deliver four (4) certificate programs that will help unemployed and underemployed persons in the northwest region gain the skills they need to find well-paying, family-sustaining jobs. These certificate programs include Cybersecurity, Heating & Air Conditioning Technology, Mechatronics, and Business Management.

This Center will provide workforce-relevant technical training to traditional and non-traditional students without the time and cost of extensive daily travel. The multi-use facility is ideal in location and layout as it provides open bay space for technical training programs that meet the needs of regional employers and that strengthen the regional workforce. The structure also provides opportunities for great classroom and lab space to

support the Business Management and Cybersecurity programs. There will also be a large meeting space incorporated into the design which will greatly serve the region.

Total Project Cost: \$5MM

Current Projects/Initiatives:

Knowledge Park Expansion

Knowledge Park, originally funded in part through EDA and ARC grant money, is designed for organizations looking to develop knowledge-driven partnerships with other like-minded companies, Penn State Behrend, or other institutions of higher education, in order to accelerate their competitive advantage. The park brings together forward-thinking organizations with faculty, staff, and students providing access to interns, full and part time employees, fundamental and applied research opportunities, and education and technology transfer services. A typical park prospect is characterized by one or more of the following:

- Serves as corporate headquarters for a knowledge-based company
- Conducts applied or fundamental research and development
- Includes part or product prototyping as well as pilot plants
- Is involved in development and delivery of information technologies
- Is a knowledge-based business start-up

The goals of the project are to 1) Develop a state-of-the-art facility, the Advanced Manufacturing and Innovation Center (AMIC), that co-locates industry, research and academia under one roof 2) Create lab space for industry to collaborate with Penn State on applied research projects in the open lab environment, and 3) Provide area students with hands-on project applications and possible job placement, serving as a recruitment tool for the engineering departments. As a result, it is estimated that this project will create 17 additional faculty and staff positions at Behrend as well as 210 new private sector jobs.

The need for this expansion project is based on a current 100% park occupancy rate coupled with a high demand for space within the park.

Regional Natural Gas Production Projects

Once again Pennsylvania is on the forefront of the Oil and Gas Industry. Initially with the discovery of Oil in Titusville in the 1800's and more recently with the discovery with the Marcellus and Utica Shale Pennsylvania is now one of the top energy producers in the world. Recently, Shell announced it has green lighted the construction of an ethane cracker plant in Beaver County. We need to act quickly to establish strategies that capitalize on the investments the oil and gas industry is making in Pennsylvania. Rather than just letting our gas be exported as a raw material we must support business that provide secondary processing of our resource. These may include the attraction of plastic resin manufacturing companies, promotion of CNG vehicles and fueling station infrastructure, along with a host of production of the petrochemical industry.

Proposed Projects/Initiatives:

Beaver County Cracker Plant

In June 2016, Shell Chemical Appalachia announced it plans to build a massive, multi-billion dollar petrochemical plant (known as an ethane cracker) in Potter Township, Beaver County, about 30 miles northwest of Pittsburgh. An ethane cracker takes ethane, a component of natural gas found in abundance in the Marcellus shale, and processes it – or ‘cracks’ it – into ethylene. Crackers often feed other nearby plants that create more refined products further “downstream.” Crackers are generally very large industrial plants. The location was chosen because of its proximity to gas supplies, creating shorter and more reliable supply chains than those for comparable facilities on the U.S. Gulf Coast, and because it will be within 700 miles of North American polyethylene customers, the company said.

Construction is expected to begin in 2017, creating some 10,000 jobs at the height of construction. Commercial operation is due to begin “early in the next decade” and will employ about 600 people permanently.

Ethylene is the most commonly produced petrochemical. It is the root chemical for a kingdom of plastics, resins, adhesives and synthetic products used in virtually every aspect of modern life. It's used as the base for plastics like beverage containers, food wrap, polyvinyl chloride (PVC), polyester, and chemicals like those found in antifreeze, solvents, urethanes and pharmaceuticals.

Current Projects/Initiatives:

Regional Compressed Natural Gas (CNG) Stations

This project would include a private/public partnership that would endeavor to launch 10 regional CNG stations within Northwest Pennsylvania. Stations would ideally be located on land owned by economic development (ED) entities within the region, thereby creating revenue for further ED initiatives and ongoing efforts.

This project also encompasses the support and collaboration with Penn Dot and the department's count-based CNG Station initiative.

The strategy would be for these stations to serve the growing CNG market while supporting the regional approach to ED by utilizing a natural resource from within the region. Programs, contracts, etc could then be developed to effectively serve a broad customer base including colleges, school districts, businesses, municipalities, local/state/federal agencies, etc.

Currently there is an ongoing study to identify the need (or lack thereof) for these regional stations that we will be able access. The results of this study should be available soon and will serve to inform how the project will ultimately be described within the CEDS document.

Regional Recreation and Tourism Development

Northwest Pennsylvania offers a broad range of natural and man-made assets which offer a wide spectrum of tourism opportunities. These opportunities provide two primary sources of growth for the region. First, the potential for expanded service and hospitality sector growth through increased utilization of these assets. Second, the enhanced ability for recruitment of new residents, employees and entrepreneurs to the region stimulated by the life-style and personal growth opportunities highlighted by tourism-based presence in the region.

- **Erie To Pittsburgh Trail**

- The trail runs through a majority of the counties in the Northwest Region. The development of this trail system is being encouraged and coordinated by the Erie to Pittsburgh Trail Alliance (EPTA). It is an active coalition of trail organizations, municipalities and individuals dedicated to the promotion, acquisition, development, and maintenance of a safe non-motorized trails network. The alliance seeks to improve the quality of life for communities along the trail network while stimulating economic development and recreational tourism activities.

- **Expansion of Marketing for Tourism**

- Marketing for tourism has grown steadily in recent years, as it is a necessity in an increasingly competitive tourism environment in the state. As the regions tourist sites are continual developed and interconnected by trails and designated routes, there will be a need for improved marketing.

Current Projects:

The Trails at Jakes Rocks Project

The Trails at Jakes Rocks (TAJR) project involves the construction of 46 miles of professionally designed and constructed purpose built, stacked-loop mountain biking trails with the Allegheny National Forest.

Planning for this project began in 2009 by a volunteer committee formed from the Leadership Warren County initiative. This committee remains active in the project as Pennsylvania Kinzua Pathways (PKP). Through the dedication and initiative of this group, the required design work for the system was completed by Trail Solutions, a division of the International Mountain Biking Association (IMBA). Additionally, the mandated National Environmental Protection Act (NEPA) Environmental Assessment (EA) of the entire project site was completed and approved through direct collaboration with the U.S. Forest Service. The EA was formally approved in December 2015. Phase 1 of the trail construction efforts, including roughly 10 miles of trail construction, was awarded in January 2016 with construction activities commencing in May and scheduled completion by September 1, 2016. The cost of Phase 1 is \$310,000.

Phase 2 of the construction effort will include 20.2 miles of trail at a budgeted cost of \$1.4 million. Funds are being actively pursued for this portion of the project with anticipation of construction release first quarter 2017 and construction completion summer 2018.

The final phase of the project totaling 16 miles of shoreline trail adjacent to the Allegheny Reservoir is being developed in collaboration with the US Forest Service reconstruction of Longhouse Scenic Drive with several significant water crossings to be addressed with bridging designs accommodating both vehicle and bike usage. Phase 3 is anticipated to be completed in 2019. Costs for this phase of the project have not yet been developed. Completion of the trail system is expected to serve as a catalyst for significant expansion of the tourism sector economy of Northwest Pennsylvania. Similar trail systems in South-Central PA attract in excess of 30,000 visitors per year and have stimulated significant business growth in the surrounding communities. TAJR will be a unique opportunity for bikers and hikers due to the natural topography and geologic offerings of the Allegheny National Forest as well as the methodologies being employed in the construction of the trails themselves.

Regional Communications Projects

Telecommunications is the suite of technologies, devices, equipment, facilities, networks, and applications that support communication at a distance. It is a key enabler of productivity across the U.S. economy and society. The ability to progress with the technology of communication is critical to business retention and growth in Northwest Pennsylvania. Telecommunications has become the new infrastructure and is vital to the success of businesses.

- **High Speed Fiber Optics Internet Creation and Expansion**
- **Upgrade and Expand Telecommunications in the Region**
 - There are numerous locations within the region that have no broadband internet service or cell phone service.

Current Projects:

Venango Fiber Optics Project

The fiber optics project is underway in Franklin (Venango County) with a soon-to-be network being supplied throughout the business area of the city. The project involves running new fiber optic lines to critical locations throughout the business district.

This project will provide a valuable communications and data infrastructure asset to the community and hopefully, in the near future, the region. The network is capable of delivering high-speed Internet and other services to residences and businesses throughout the region.

Once the Franklin section of the project is complete, the plan is to grow the accessibility of broadband regionally. The project would continue into other cities/areas of Venango County and then onto other counties within Northwest Pennsylvania.

The progression and expansion of broadband in the NWPA region is a vital component to economic diversification and success.

Regional Transportation Improvement and Development

The transportation sector is an important component of the economy and a common tool used for development. When transport systems are efficient, they provide economic and social opportunities and benefits that result in positive multipliers effects such as better accessibility to markets, employment and additional investments. In the Northwest, Pa region rural-natured counties do not have direct access to interstate systems resulting in the importance of secondary roads. To make the region competitive the improvement of access throughout the region and to the interstate is vital.

- **Improve the transportation network**
 - To improve access throughout the region and to the interstate system, via improved highways and local roads.
- **Creation and Improvements of Access Roads**

Regional Business Attraction, Expansion and Retention

A vibrant business community depends on the attraction of new companies and the retention and expansion of existing companies. Throughout the Northwest, Pa region there are Economic Development organizations that assist with site selection, due diligence, tax incentives, permit assistance, financing and other programs that help large and small businesses. These assistance programs are imperative to the economic development and diversification of the region.

The use of the existing workforce and skill-sets can be utilized to attract new businesses and help with expansion and/or retention of businesses. The region has a large pool of qualified and skilled workers that are/would be attractive to companies. The development of training programs will also increase the number of skilled workers, leading to a more developed labor force for businesses.

Current Projects/Initiatives:

Partners for Regional Economic Performance

Partnerships for Regional Economic Performance (PREP) is PA's network of business assistance partners designed to help companies start, grow and prosper. Our local and regional PREP partners have the experience and know-how to assist individuals who have an idea and need help with the basics of starting a new venture. PREP also meets the demands of existing companies that seek assistance in all aspects of successful business development and growth. The PREP network consists of hundreds of trained and experienced experts who can offer assistance and resources. PREP's one-on-one counseling, specialized workshops, online training and financial incentives make it one of the most coordinated and respected networks in the nation designed specifically to meet the needs of our job creators — the men and women who start and grow our businesses. The economic development partners in the Northwest PREP region, which include eight county economic development corporations, an incubator association, two industrial resource centers, three small business development centers, a local development district, a PennTAP office, one Benjamin Franklin Technology Partners (BFTP) office and two Workforce Investment Boards, have a long history of collaboration and allow easy access to services for the small businesses that dominate and drive the region's economy. Eighty four percent of businesses in the area have fewer than 10 employees, and 94 percent have fewer than 100 employees. The partners are working more closely than ever through an effective information- and referral-sharing process, as well as other collaborative initiatives for relocating businesses.

