

Special Thanks to our CEDS Committee

Cameron County	Clearfield County	Elk County	Jefferson County	McKean County	Potter County
Cliff Clark - Cameron County IDA	Stan LaFuria Moshannon Valley Economic Development	Matt Quesenberry County Planning	Seth Kerr Department of Development	Erin Vassallo Kane Area Chamber of Commerce	Joe Pagano Potter County Housing and Redevelopment
Don "Stretch" Reed Emporium Borough	Rob Swales – Clearfield County EDC	Tina Gradizzi City of St Marys	Brad Lashinsky Department of Development	Robert Velleux Potter County Ed Council	Douglas Morley County Commissioner
Tina Johns Solak Chamber of Commerce	Jodi Brennen County Planning	Michelle Bogacki Ridgway Main Street	Bruce Miller Prochemtech	Sara Andrews Bradford OECD	Vacant
Valerie Shelley Lumber Heritage Region of PA	John Wright Curwensville County IDA	Jodi Foster Community Economic Development	Michael Mumau (Private Citizen)	Deborah Lunden McKean County Planning	Charlotte Dietrich County Planning
	Joe Mitchell City of DuBois Redevelopment Authority	David Greene City of St Marys		Joe DeMott McKean County Commissioner	

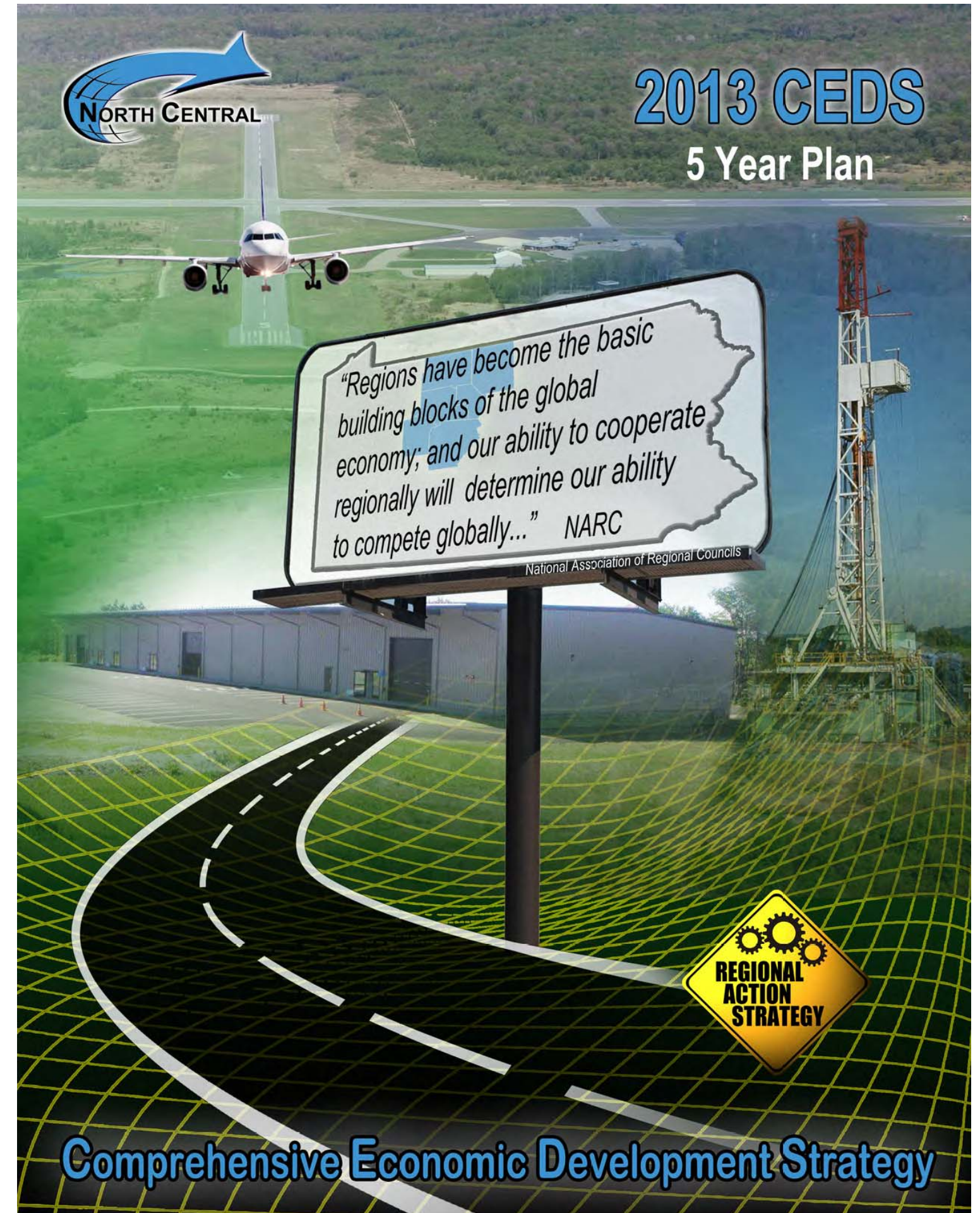
Ex-Officio Members

Deborah Pontzer Congressman Thompson's Office	Honorable Matt Gabler	Katharine "Katie" Newcombe Governor's Action Team	Mark Adams Senator Scarnati's Office
Jill Thompson Representative Kathy Rapp's Office	The Honorable Martin Causar	Tom Frungillo, Bradford Regional Airport	

North Central Executive Committee

Cameron County	Clearfield County	Elk County	Jefferson County	McKean County	Potter County
James Thomas County Commissioner	Mark McCracken County Commissioner	Dan Freeburg County Commissioner	Jeffery Pisarcik County Commissioner	Joseph DeMott County Commissioner	Douglas Morely County Commissioner
William Bogart Small Business Consultant	John Shimko Penelec	Sam MacDonald Elk Regional Health Center	Larry Conrad Brookville Equipment Corp.	Robert Esch American Refining Group	Vacant
		June Sorg County Commissioner			

More detailed information on the CEDS can be found by visiting the North Central PA Commission's website at www.ncentral.com.



Comprehensive Economic Development Strategy

Why Develop a CEDS Document?

The Public Works and Economic Development Act of 1965, as amended, requires a Comprehensive Economic Development Strategy (CEDS) in order to apply for financial assistance under the U.S. Department of Commerce’s Economic Development Administration (EDA) Public Works and Economic Adjustment Assistance Programs. The CEDS are commonly developed by Planning Organizations and District Organizations (terms defined in EDA’s regulations) that function within the boundaries of an EDA-designated Economic Development District (EDDP per - 13 CRF Part 3-3.6 (a) Federal regulations).

The CEDS Planning Process for the North Central Pennsylvania region is the responsibility of the North Central Pennsylvania Regional Planning and Development Commission or North Central. The planning process, including engaging a regional CEDS committee, is intended to bring public and private sectors together to provide a baseline of information, set forth goals and establish targeted strategies and performance measures for documenting successful economic and community development. This integration of coordinated economic development also provides for the sharing of talent and resources and provides the flexibility to adapt to regional economic conditions.

The CEDS is designed to encourage the exchange of meaningful strategies on how communities can soundly manage growth and development to efficiently and effectively link Land Use, Transportation, and Economic Development decision-making at a regional level. Pursuant to 13 C.F.R. § 303.7, a Planning Organization must include the following information in a CEDS submitted to EDA:

1. Background—A discussion of the economy, population, geography, workforce development, transportation access, resources, environment, and other pertinent information
2. Analysis of Economic Development Problems and Opportunities—An analysis of the economic development problems and opportunities that identifies strengths and weaknesses in the regional makeup
3. CEDS Goals and Objectives -- Defining Regional Expectations—A section setting forth goals and objectives necessary to solve the economic problems, or capitalize on the resources, of the region
4. Community and Private Sector Participation—A discussion on the relationship between the community in general and the private sector in the development and implementation of the CEDS
5. Strategic Projects, Programs and Activities—A section that identifies regional projects, programs and activities designed to implement the Goals and Objectives of the CEDS
6. A Plan of Action
7. Performance Measures

Recent & Projected Investments

Completed Projects	Key Sponsor	Public/Private	Total Est. Cost
Benezette Township Sewer Project	Benezette Township	Public	\$2,715,000
Bradford Regional Airport Multi-Tenant Center	Bradford Airport	Public/Private	\$3,250,000
Elk Regional Health System 3 rd Floor	Elk Regional Health	Public	\$9,549,989
Future Projects	Key Sponsor	Public/Private	Total Est. Cost
Port Allegany Flood Management	Port Allegany Borough	Public	\$500,000
Charles Cole Memorial Hospital Alt Fuel	Charles Cole Memorial Hospital	Private	\$2,700,000
Curwensville Municipal Authority Sewer	Curwensville Municipal Authority	Public	\$752,000
Borough of Sykesville Waterline Relocation	Jefferson County	Public	\$250,000
Lewis Run Industrial Park Access Road	Lewis Run Borough	Public	\$300,000
Jefferson County Business Park	Jefferson County	Public	\$1,072,530
Kane Magnetic Multi-Tenant Building	McKean County	Public/Private	\$2,000,000

* Additional Projects will be added as they surface

Measuring Progress | Performance Measures

Measure	Baseline (2012)	2015	Change (2012-2020)
Total Population	224,780		
Total Private Sector Investment	\$5,000,000		
Per Capita Income	\$20,751		
Annual Regional Unemployment Rate	8.3%		
Median Age	42.8 years		
\$ Infrastructure Investment	\$45 million		
Jobs Created	4,074		
Jobs Retained	111,214		
Median Home Value	\$79,717		
Job Growth by Sector	3.7%		
4-Year Cohort High School Graduation Rate	88.85%		
% of Housing Units that are Owner Occupied	59.1%		
Average Age of the Region’s Workforce	44.8		
Real property tax (Property Value)	\$3,148,719,289		
Civilian Labor Force	116,100		
International Export Sales (Annual)	\$52,800,307		

Source: US Census and EMSI data

A Plan of Action

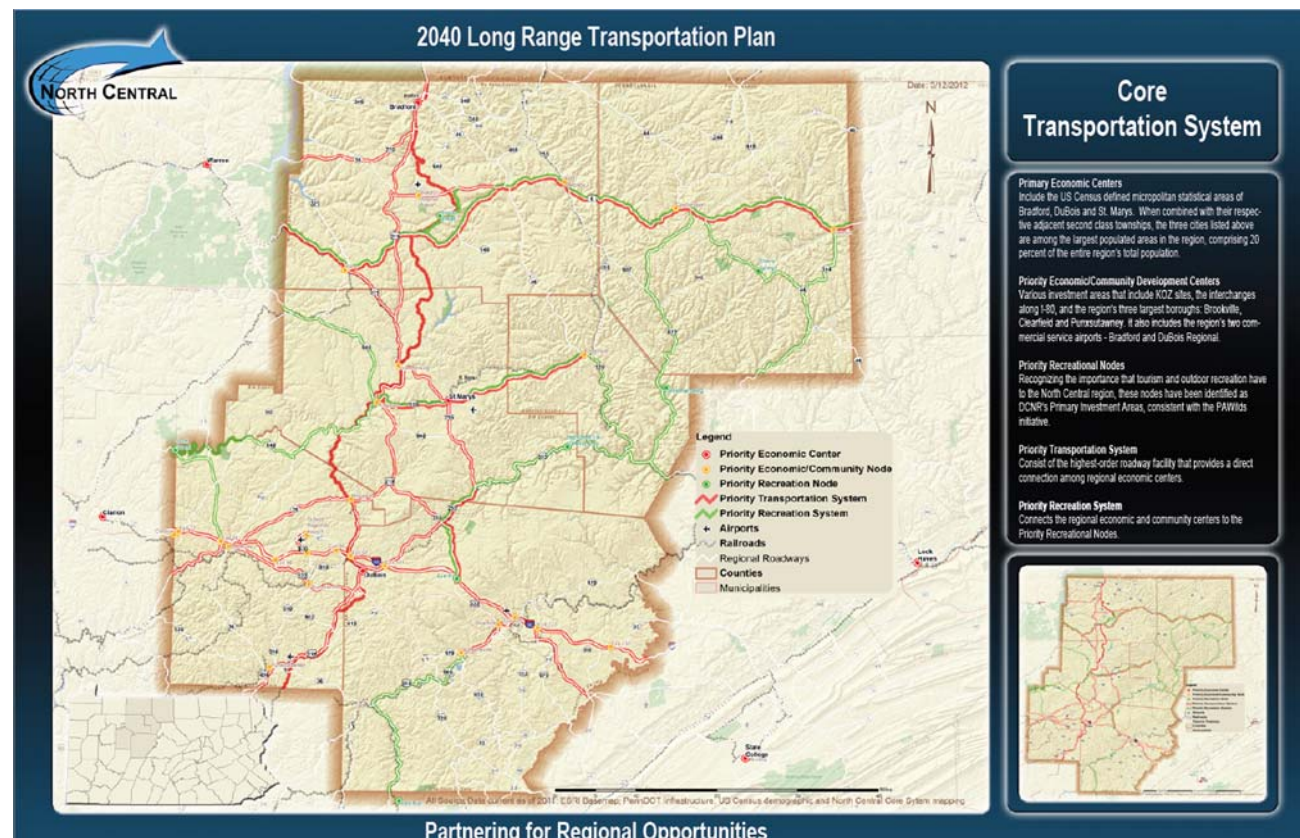
The Comprehensive Economic Development Strategy is concerned with targeting investments of regional significance. It is necessary to coordinate planning among counties, stakeholders, or programs to achieve regional benefit regardless of the location.

The fundamental approach that forms the basis for implementing the plan should begin by identifying the following:

- What are the project types desired (by the stakeholders)?
- Where should they be located, and
- Why should they be completed (the purpose and need)?

Investment criteria will be used to evaluate and select projects of major significance. The criteria reflect the goals, values, and direction of stakeholders. The minimum criteria identified by stakeholders to be used in rating, scoring, and prioritizing projects include:

- Project promotes or strengthens targeted industry clusters
- Project creates or retains high-skilled jobs
- Project location is consistent with regional development strategies
- Project is consistent with local land use regulations
- Project improves workforce training, development, and education
- Project will attract private investment
- Project will maximize return on taxpayer investment
- Project promotes the use and diffusion of technology
- Project establishes a destination and attracts visitors to the region
- Project increases international transactions and supports global competitiveness



A Regional Background

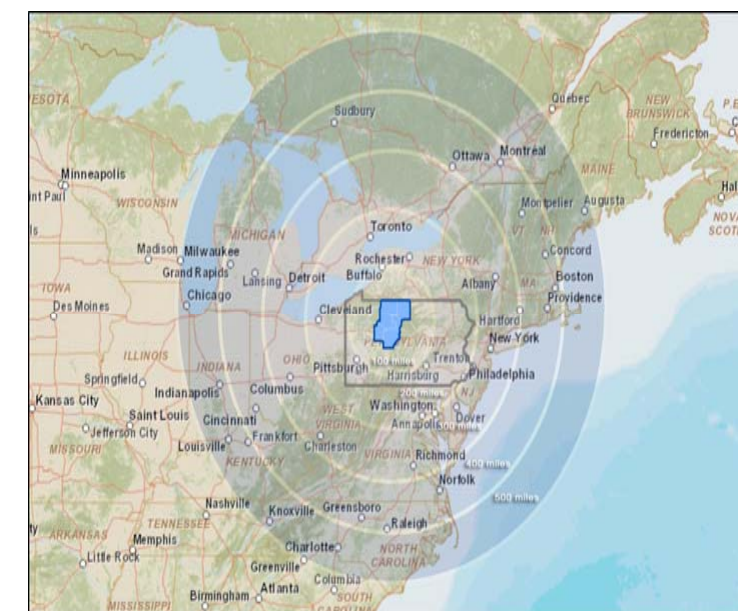
The North Central PA Regional Planning and Development Commission headquartered in Ridgway, Pennsylvania takes great efforts to promote the area in order to foster community and economic development within the Commonwealth.

The six-county region includes the counties of: Cameron, Clearfield, Elk, Jefferson, McKean, and Potter. These counties are rich in industrial sites, are well known for the quality of their workforce, and provide excellent opportunities for businesses to relocate or expand their current operations here.

North Central works cooperatively with each community to streamline state, federal and regional services, including community and economic development, workforce and transportation planning. Funding support is available for community infrastructure projects, business start-up and expansion financing, exporting, government procurement, redevelopment, customized job training, business expansion, exporting, government procurement and redevelopment. Our vast network of partners work together to take maximum advantage of the numerous opportunities that exist, in order to benefit everyone.

Geography & Land Use

Located in the heart of the "Pennsylvania Wilds" in North Central Pennsylvania, the six county region is comprised of



5,091 square miles and encompasses some of Pennsylvania's most preserved and scenic terrain.

The region, which is situated in between Allegany and Cattaraugus Counties of New York in the north and



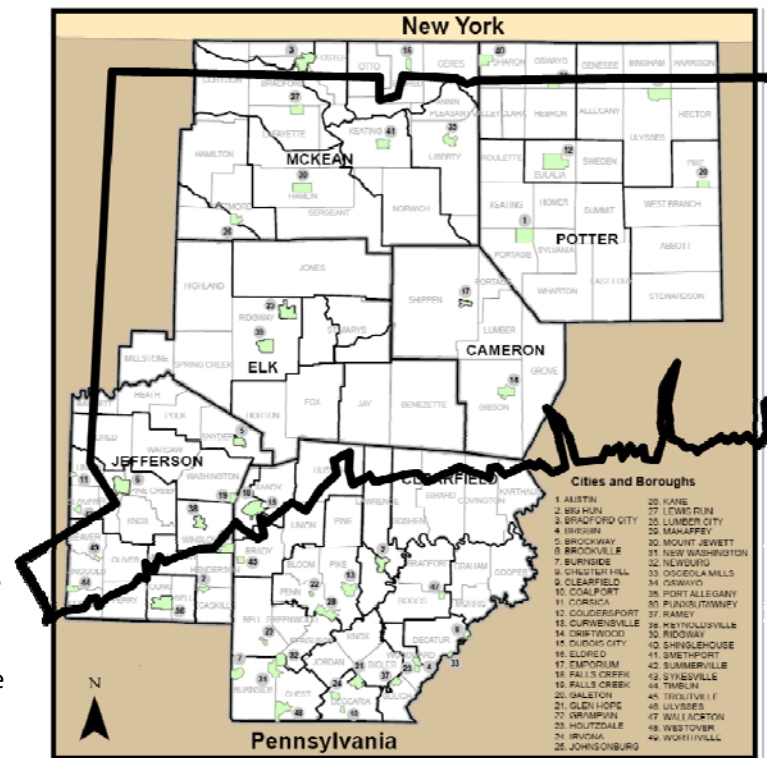
Interstate 80 in the south and is within 250 miles of Harrisburg, Philadelphia, Harrisburg, Buffalo, New York City, Baltimore, Washington and Cleveland.

The primary transportation arteries that link our region to these cities are Interstate 80 running east to west along the southern part of the region and U.S. Route 219, which runs north to south through the middle of the region. U.S. Route 6 in Pennsylvania, which was named by National Geographic as one of America's most scenic drives, links communities near the region's northern border.

The region is home to more than 1.3 million acres of public forestland, including almost half of the 513,000 acre Allegheny National Forest, the Commonwealth's only national park. The region also claims 29 state parks on more than 27,600 acres and 8 state forest districts. These resources provide local residents direct access to some of the best outdoor recreation in the world, as well as opportunities to capitalize on recreational tourism.

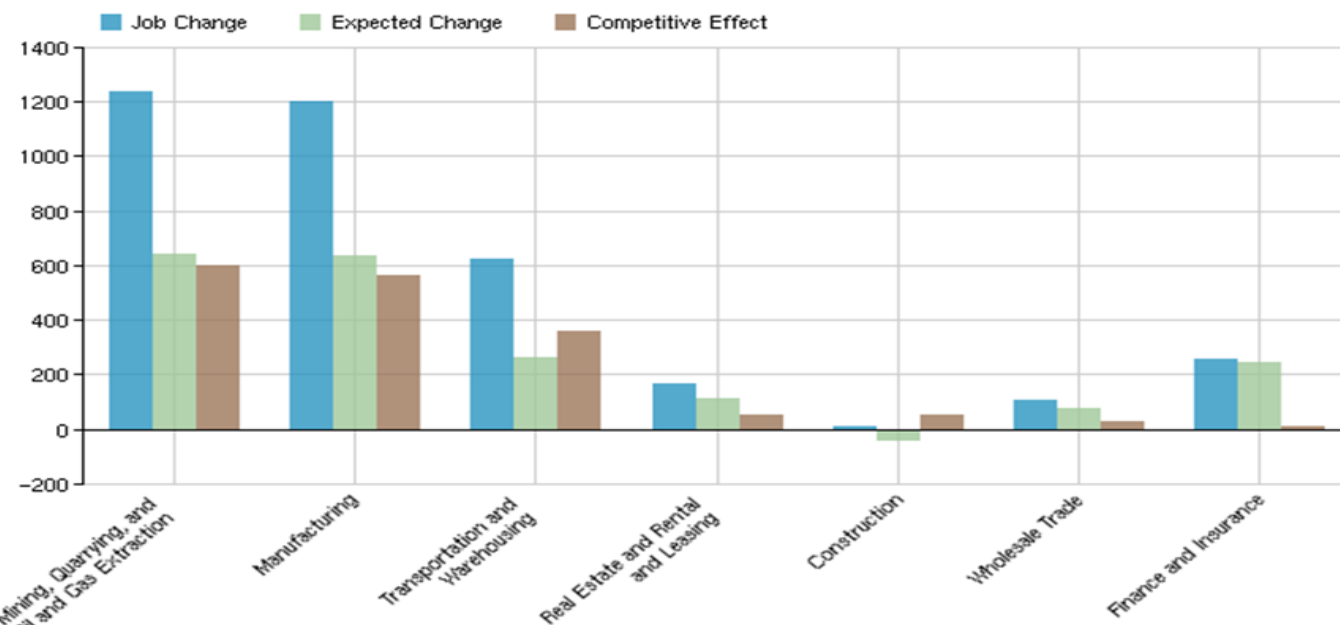
Transportation | Regional Network at a Glance

- The region has an expansive network of 6,500 miles of roadway to be operated and maintained. Over half of this total (55 percent) is locally owned.
- There has been a rebound of interest in public transportation, as route restructuring and other service improvements have contributed to ridership increases at both ATA and DuFAST.
- Our region's airports have been successful in attracting businesses after making investments in supporting Infrastructure.
- The region's rail freight operators continue to carry low-value, high-bulk items for regional shippers and receivers such as coal, lumber, and paraffin. New transload facilities have been constructed in support of the Marcellus Shale Gas extraction industry.
- Despite the economic challenges, residents have a positive or neutral outlook toward the future. Three out of four residents responded that in five years they believe the region's economy will either grow or remain unchanged.
- The region's two commercial service airports (DuBois and Bradford) had a combined total employment of 400 with a total economic output of \$43.78 million into the economy.



- The planning region is over 5,100 square miles or roughly the size of the state of Connecticut as shown above

Our Most Competitive Industries

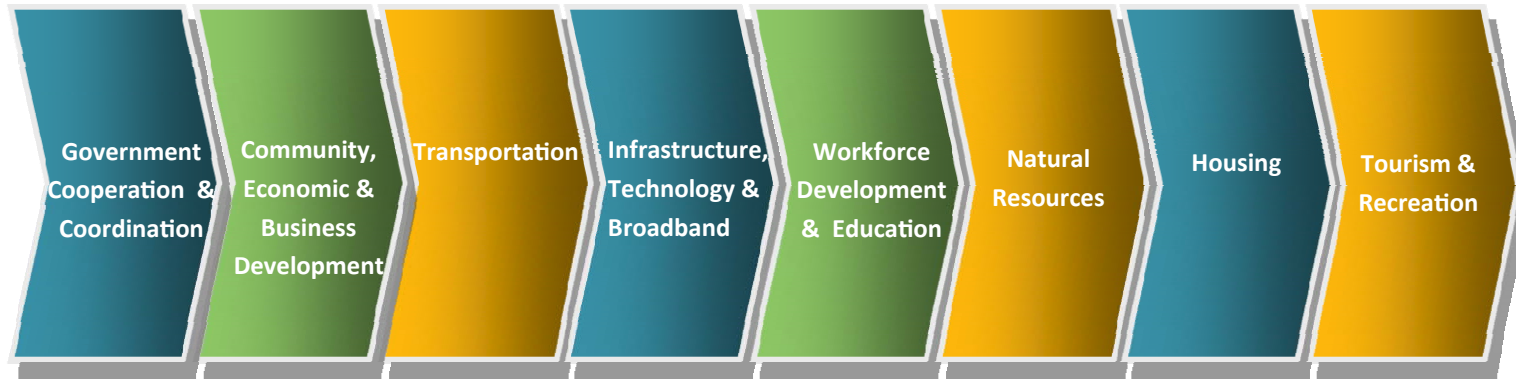


Our Region's Blueprint

The blueprint for addressing our region's economy begins with a vision statement which includes supporting goals and objectives. Performance measures will be used to track our progress.

Goal	Sample Objectives	Performance Measures
Government Cooperation & Coordination	<ul style="list-style-type: none"> Promote Regional Planning Reduce Cost of Government and Conserve Fiscal Resources Promote Educational and Awareness of Regional Planning Strategies among both Elected and appointed officials, private sector and the public 	<ul style="list-style-type: none"> # of Inter-municipal Plans Developed # of training sessions # of attendees # of Municipal Consolidations
Community, Economic & Business Development	<ul style="list-style-type: none"> Enhance and promote Community Development Expand employment and diversity of the region's economic base Improve coordination between the region's economic development, workforce development and business community Improve Global Trade and International competitiveness of target industry clusters, emerging industries & entrepreneurs Promote use of Natural Gas as an energy source for industry Market access to capital improvements financing through the EDA/RLF Provide business start-up and expansion planning services to coordinate industrial development Promote use of existing industrial park locations 	<ul style="list-style-type: none"> # of new business started # of Business Plans completed % change in Employment # of coordinated project applications # of Fleets converted to Natural Gas # of International/Export Sales (Annual) # of regional companies participating at international events # of business finance loans provided # of loans closed # of businesses exporting to foreign markets # of jobs created/retained
Transportation	<ul style="list-style-type: none"> Improve Mobility of the Residents, employees & visitors into and throughout the region Improve existing "asset conditions" throughout the region 	<ul style="list-style-type: none"> # of projects aligned with LRTP Decline in the # of "poor" IRI Miles Decline in the # of SD Bridges
Infrastructure, Technology and Broadband	<ul style="list-style-type: none"> Improve Existing Water, Sewer, Public Utilities & Technology/Broadband Promote the use and diffusion of technology in the region 	<ul style="list-style-type: none"> # of assets collected # of projects applications with demonstrated linkage to economic development
Workforce Development & Education	<ul style="list-style-type: none"> Recognize the North Central WIB and Title 1 Workforce Providers as the Clearinghouse for Labor Market information Build Strategic alliance with the educational system Increase the number of entrepreneurs in the Region Coordination of workforce development training programs with new employment opportunities 	<ul style="list-style-type: none"> # of Labor Market Information requests made and reports provided # of Business and Education Collaborative programs implemented # of Entrepreneur training programs held (i.e. Junior Achievement, Business and Education Connect, Career Connect)
Natural Resources	<ul style="list-style-type: none"> Balance the region's scenic vistas through the designation of scenic byways/overlooks as part of design and construction Balance the region's watersheds and natural resources with smart development Pursue opportunities for alternative energy sources/fuels 	<ul style="list-style-type: none"> # of project applications # of projects with context sensitive designs
Housing	<ul style="list-style-type: none"> Promote and pursue housing rehabilitation programs, elderly housing and affordable housing programs Expand the current housing supply of affordable housing within the context of stable, maintained and accessible neighborhoods 	<ul style="list-style-type: none"> Median sale price of a single family home # of housing units # of community-based rehab policies
Tourism & Recreation	<ul style="list-style-type: none"> Establish programs, events & destinations to attract visitors and enhance recreational opportunities Preserve the region's exceptional heritage 	<ul style="list-style-type: none"> # of Activities in PA Wilds Impact Report # of Increased Visitors Total # of visitors annually by attraction

A Planning Framework | Setting the Stage



The North Central Pennsylvania Regional Planning and Development Commission's (North Central) Comprehensive Economic Development Strategy has been developed to link Land Use, Transportation, and Economic Development decisions which will include:

- Criteria that will yield significant economic development impact.
- Projects that are strategically the most important to the region.
- A process and/or criteria in which regionally significant projects and investments can be determined on a regular basis.
- Identification of partners and implementing agencies related to each recommendation.
- Mechanisms, tools, or systems used to promote coordination within programs of land use, transportation, resource conservation, and economic development decisions and investments.
- Continuing engagement and a process for sustained coordinated planning within the region to maintain and help implement the plan.

North Central has taken an innovative approach in developing this plan. A variety of organizations, both public and private, were consulted in order to determine what programs and initiatives are important for the future of our region.

The key to comprehensive implementation of the plan is commitment from our partners and an ongoing integrated process that involves addressing four key questions:

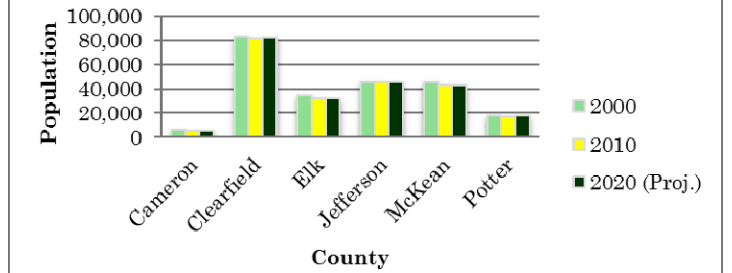
- What is our vision for the future?
- How do we achieve our goals?
- Where do we target our investments?
- Which decisions will help ensure our success?

“Regions have become the basic building blocks of the global economy; and our ability to cooperate regionally will determine our ability to compete globally...” NARC

Summary Observations

- ⇒ Our region is home to nearly 225,000 people who rely on our transportation system for a variety of needs, including travel to work, school, church, shopping, or medical care.
- ⇒ The region's population growth rate is declining while the population is aging.
- ⇒ Unemployment rates closely follow state and national trends.
- ⇒ The region's substantial powdered metals industry cluster is consolidating internationally.
- ⇒ There is a level of uncertainty concerning the impacts of the Natural Gas Shale Industry.

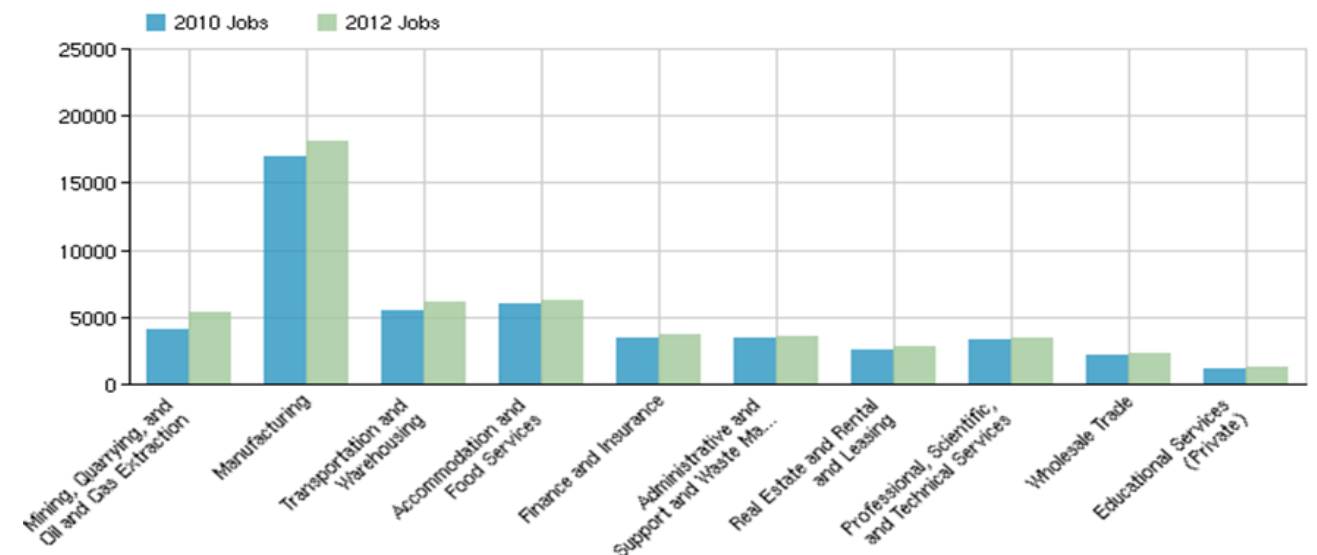
County Population Change 2000-2010



Largest Industries



Fastest Growing Industries



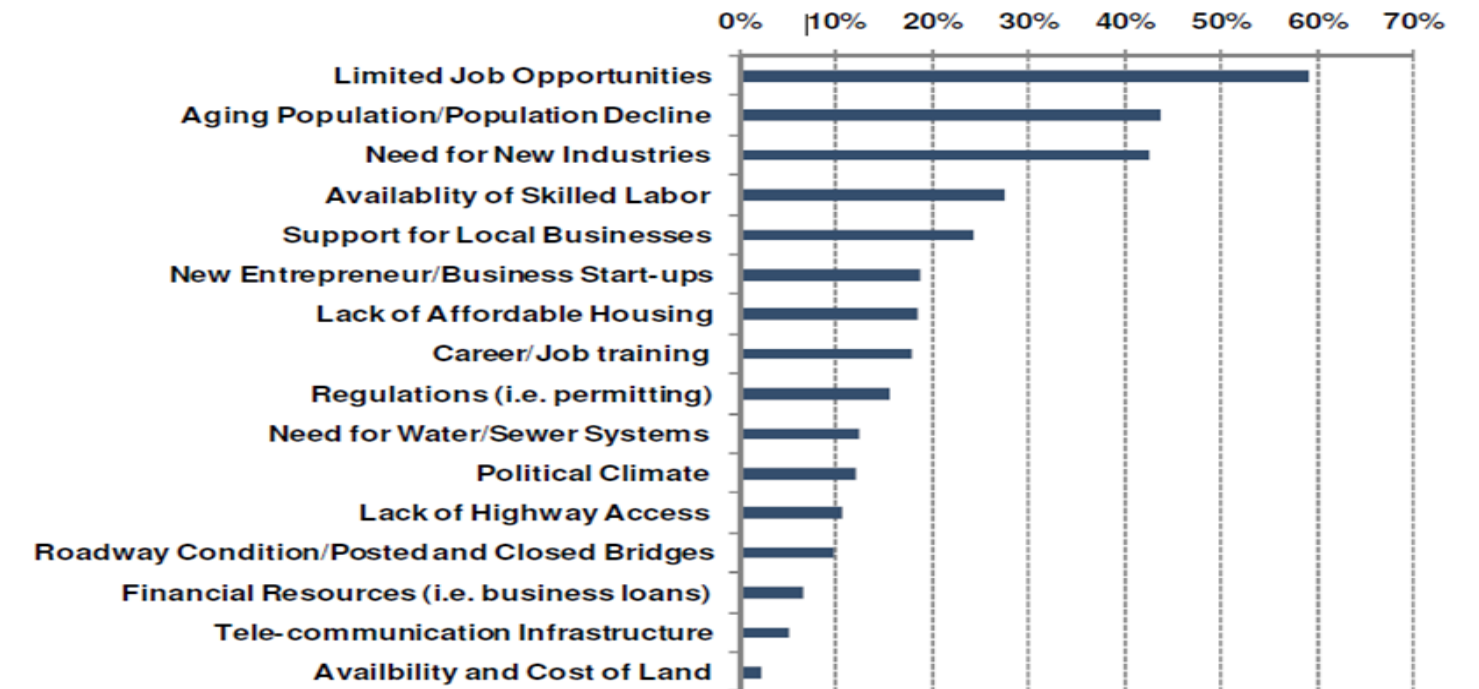
A Regional SWOT Analysis

North Central completed an ongoing and inclusive outreach to regional, county and municipal officials, residents, business and commercial interests and representatives, the administrators of institutions of higher education, and economic development groups. Common Themes identified include:

	POSITIVE	NEGATIVE
INTERNAL	STRENGTHS <ul style="list-style-type: none"> Low Cost of Living Family Sustaining Jobs Attractive landscape and scenic views Low Crime Rates Community Pride and Historic Heritage Lack of Congestion Abundance of Natural Resources 	WEAKNESSES <ul style="list-style-type: none"> Brain Drain Regional Competition and Parochialism Rural and Isolated Aging Population Lack of Skilled Workers Deteriorating Infrastructure
	THREATS <ul style="list-style-type: none"> Lack of diversity in economy hinders economic growth and ingenuity Business Cluster Collapse Impending retirements remove experienced and knowledgeable employees from workforce Outmigration of population threatens any notion of skilled workforce Lack of affordable and quality housing Poor Infrastructure provides challenges to developers Collapse of existing infrastructure requires attention and inhibits the region from developing new infrastructure Lack of limited access highway running north-south to connect our region to bordering interstates and nearby Metropolitan Statistical Areas (MSAs) Uncertainty about impacts of the natural gas industry economically and on the environment Reduced public funding for programs and projects Declining population leads to a declining tax base 	OPPORTUNITIES <ul style="list-style-type: none"> Capitalize on our natural forests and scenic views to promote our region as Pennsylvania's premier Recreation destination. Increased number of tourism attractions to raise awareness to the world outside of our region. Specialized industries and manufacturing provide for opportunities to attract ancillary businesses and talent. Promote low cost of living to attract new business and industry and residents to the region. Promote the use of natural gas along Route 219 as a fuel source Abundant natural gas provides energy opportunities for local businesses and industry development. Abundant natural resources attract oil, natural gas and logging industries. Abundant amount of developable land Impending retirements bring opportunity to recruit outside talent Aging population provides opportunity to develop mentorship programs Strong willingness to develop and foster apprenticeship programs. Proximity to Canadian border and Erie Canal provides trade opportunity Advances in technology provide the opportunity to market the region to telecommuters looking to vacate large, congested cities and suburbs. Access to capital for business development through local, regional and state programs
EXTERNAL		

Regional Survey Response

During February 2012, North Central administered a public survey to gauge the public's opinion on the issues affecting our region. The table below is a summary of the responses and what we heard from area residents.



Source: North Central Public Survey

Planning in an era of Economic Uncertainty

The region's future will be determined based on the directions identified in the Comprehensive Economic Development Strategy (CEDS) five year plan. The projects and policies that flow out of our planning program will however be affected by several factors:

- Uncertainty at the federal level
- Needs overwhelming available resources
- Increasing costs
- Environmental Regulations

