

Part I. Introduction

Communities are a tapestry of unique areas; some of these areas are easily definable, while others may only be identifiable by a key feature or property. Each area has its own set of attributes, issues, opportunities and challenges that contribute to its place in the larger community. The challenge for local and regional officials is to be constantly planning for how best to preserve or reshape these areas through implementation of strategic regulations and investments that aim to meet the ever-evolving needs of the community while properly managing growth.

In 2017, College Township engaged 4Ward Planning Incorporated, to evaluate its existing General Industrial and General Commercial zoning districts, and provide recommendations for their modification. A primary goal of the College Township Commercial and Industrial Zoning Analysis, which was completed in July 2019, was to ***“develop market-feasible zoning recommendations and identify redevelopment opportunities within the Nittany Mall, which had been losing major retail anchors in recent years.”***

While the College Township Commercial and Industrial Zoning Analysis evaluated zoning districts encompassing a larger area footprint, the focus on the Nittany Mall is noteworthy. The studied zoning districts were located in an area known by some locally as Dale Summit. The Dale Summit Area of College Township represents a complex transect of land uses that have resulted in development patterns that to an extent have fragmented its overall sense of place. As a result, the larger Dale Summit Area is currently best identified by its proximity to the Nittany Mall.

Upon review of the College Township Commercial and Industrial Zoning Analysis, Council and staff recognized that before significant changes to the regulations within these respective zoning districts could occur, the Township must first consider how those changes would work in concert to better define Dale Summit area as a recognizable place in the community. It was determined that the best way to reframe this effort was through the development of a **Dale Summit Area Plan**.

Area Plans provide a way to actively engage residents and businesses in the planning process to further understand the defining characteristics of their area, how it fits into the larger community, and how to address issues or concerns of particular importance to their place. To be successful, the area plan process should also recognize the context of the broader goals of community-wide and regional planning efforts and should contain a series of realistic actions to implement the plan

The Dale Summit Area Plan aims to answer the following fundamental questions:

- ***What is Dale Summit today?***
- ***What should Dale Summit be in the future?***
- ***What steps should be taken to realize the vision for the future of Dale Summit?***

The Dale Summit Area Plan will seek to answer the first of those questions through an in-depth evaluation of **Existing Conditions**. The Existing Conditions section will evaluate how the existing regulations, infrastructure and ongoing development patterns within the study area have contributed to the current state of the Dale Summit Area. Further, this section will reveal trends in population, employment and other key demographic information that will influence the future of Dale Summit.

To answer the second question, the Dale Summit Area Plan will present the **Future Conditions** section of the Area Plan. The Future Conditions section is essentially the heart of this plan and is derived directly

from the community input, data analysis, and Community Advisory Committee discussions. This section will first consider development trends that may influence future development and the area's capacity to meet any demand stemming from those trends. From there, it will consider the Strengths, Weaknesses, Opportunities and Threats (SWOT) of the current Dale Summit Area. With an eye toward this SWOT Analysis, the Area Plan will then outline a series of Goals and Objectives for the future of Dale Summit. This section will conclude by framing the community's vision for the future, by providing the themes for establishing a more readily definable sense of place within the Dale Summit.

Answering the final question will be accomplished through the **Implementation Strategies** section of the Dale Summit Area Plan. These Implementation Strategies will provide the community with a roadmap for how to move the Dale Summit from its current condition to meet the future vision. This section of the plan provides a strategic guide for College Township's future decision-makers regarding regulations, policies and infrastructure investments that will help reshape the overall context of Dale Summit to align with the vision for the future.

In order to set the tone, the Community Advisory Committee established an overarching **Goal Statement** for the Dale Summit Area Plan. Before beginning a full review of the Area Plan, please consider the following:

*The overarching **Vision** of this Area Plan is to transform Dale Summit into **The Gateway to College Township**. Establishing Dale Summit as an attractive and instantly recognizable **PLACE** within the context of the larger Township, Region and County. The community envisions an activity hub that is vibrant, economically prosperous, socially equitable and environmentally sustainable. A place, which through proactive planning and well-tailored regulations, strikes a sound balance between encouraging business and industry expansion, while remaining respectful to important community livability factors such as improving housing affordability, providing sufficient public services, and lessening traffic congestion through improved connectivity for all transportation modes.*

What is Dale Summit today?

Part II. Existing Conditions

Dale Summit Area Land Uses

Dale Summit is located in the Northeastern portion of College Township, approximately 2 miles North of Downtown State College and the main campus of Pennsylvania State University, and 5 miles South of Historic Bellefonte. The Benner Township municipal boundary and Spring Creek Canyon Public Lands comprise the northern border of the study area and feature predominately-agricultural parcels.

To the West, the residential areas of Houserville and the Village of Lemont, (a Census Designated Place (CDP) also encompasses the Lemont Historic District, a Nationally Registered Place) border the commercial gateway commercial zoned portion of the study area. Route 26 (East College Avenue) bisects the study area and serves as the predominate transportation corridor. The vast swath of the public lands of Mount Nittany Conservancy and undeveloped State Lands make up a forested boundary to the South and Eastern portions of the study area.

In total, Dale Summit covers an area of approximately 1,490 acres or 2.3 square miles and is one of the primary gateways to College Township and the Centre Region. Within that study area footprint, there are currently 10 zoning districts. These districts were established through traditional Euclidian Zoning, which divided the Dale Summit into rigidly defined areas with designated uses in each area.

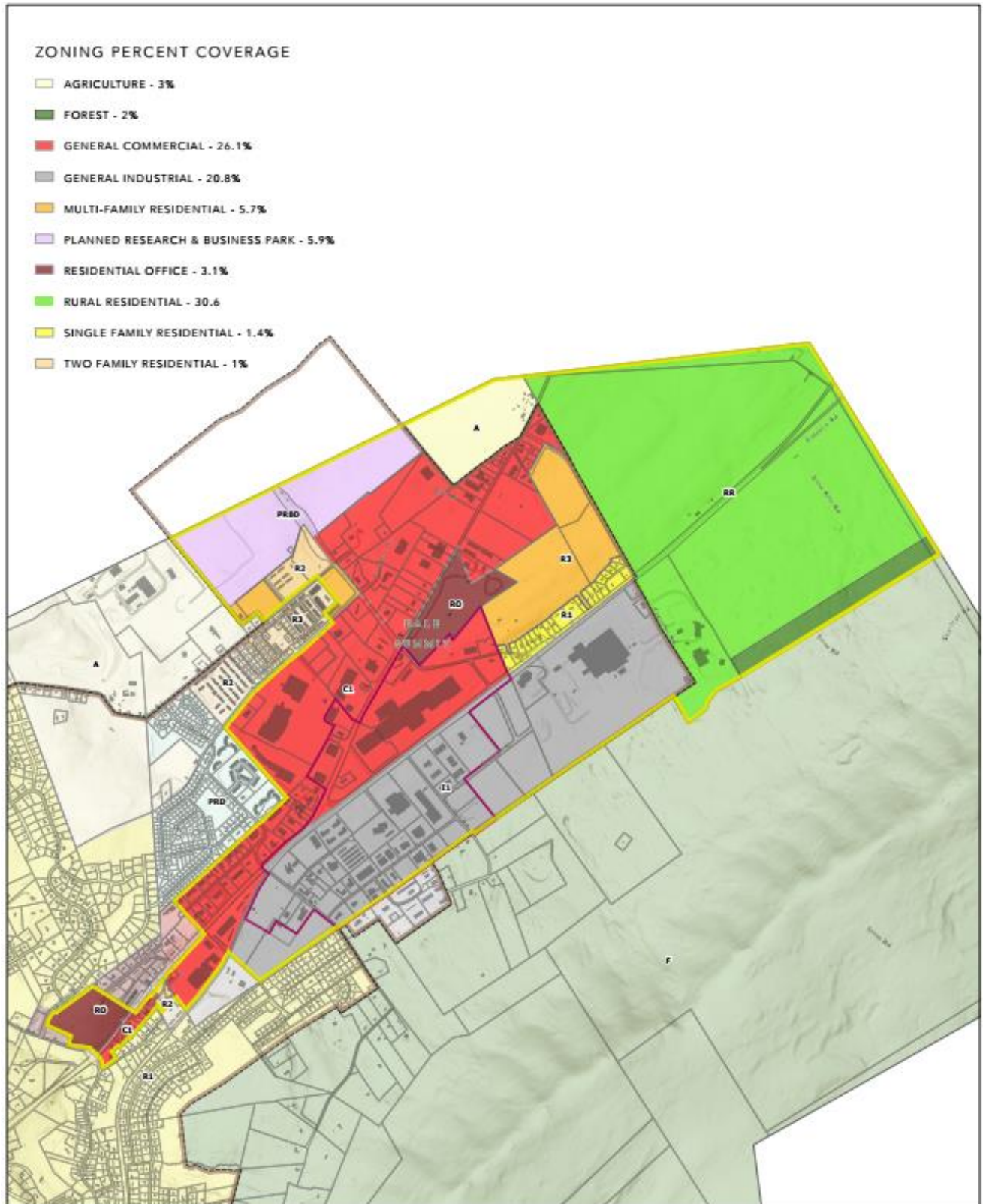
The 10 zoning districts are listed below in order of percent coverage, with the same reflected in the graphic on the following page :

- RR – Rural Residential (30.6%)
- C1 - General Commercial (26.1%)
- I1 – General Industrial (20.8%)
- PRBD – Planned Research & Business Park (5.9%)
- R3 – Multi-Family Residential (5.7%)
- RO – Residential Office (3.1%)
- A – Agriculture (3%)
- F – Forest (2%)
- R1 – Single Family Residential (1.4%)
- R2 – Two Family Residential (1%)

As this list and following graphic depict, Dale Summit is currently dominated by three particular zoning districts: Rural Residential, General Commercial and General Industrial. The remaining land uses are scattered as infill along the periphery of those primary uses.

While growth in the Dale Summit has traditionally been gradual, it has periodically been marked by periods of rapid expansion spurred by what can be termed as “defining’ developments. These “defining” developments are projects that reshape the overall character of an area as a result of their scale and potential to attract significant visitors to a place. At the time of this publication, the Dale Summit has been

experiencing some acceleration of development and has another potential “defining” development expected to come to fruition within the next 12-18 months.



Historical Snapshots of Dale Summit

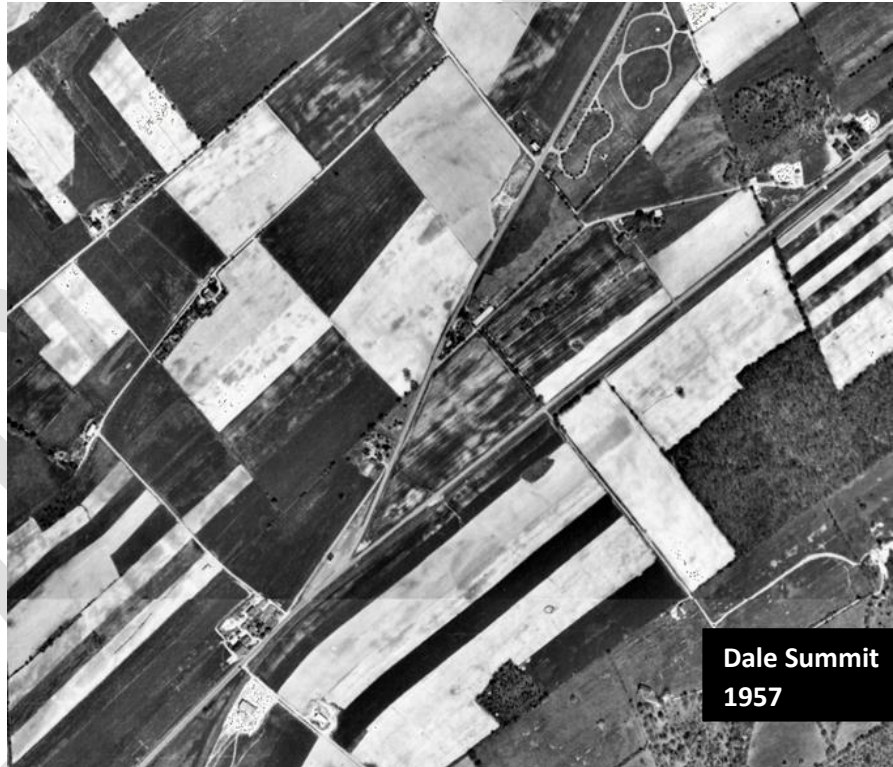
To understand how the Dale Summit's development pattern evolved, it is also worthwhile to consider some historical context of the area. The Community Advisory Committee has provided a wealth of knowledge, including portions of the following brief history of Dale Summit or as it was once known Dale's Summit.

As shared by one committee member, Paul Dubbs was the County Editor of the Centre Daily Times for many years and authored the following brief descriptions of Dale Summit in his "Where to Go and Place Names in Centre County" publication in 1960:

"At a point about midway between State College and Bellefonte where the four-lane highway divides into two branches, one to Bellefonte and the other to Pleasant Gap, is Dale's Summit."

"The area received its name from the railroad station, which was just beyond the Y on the Pleasant Gap branch of the highway. Since the station was at the top of a long grade, with Bellefonte at one end and Lemont at the other, and was on land cleared by Christian Dale, a pioneer College Township landowner, it was called Dale's Summit".

"In the last few years the area has been building up rapidly with a custard stand at the highway Y, and with the Nease Chemical Co. plant, Corl Brothers trucking, Centre Concrete plant and other industries nearby."



As Mr. Dubbs's descriptions outline, a key element of Dale Summit's history is its place within the larger transportation network. First as a railroad station between the communities of Bellefonte and Lemont, and subsequently as the intersect between two roadways (Route 26 and Route 150).

Today, transportation still features as a key element of Dale Summit, with it serving as the intersection of Routes 26 and 150, an Interstate 99 exit at Shiloh Road and home to a portion of the SEDA COG Joint Rail Authority rail line. Given its placement within the highway network and being somewhat removed from the major population centers in the Centre Region and neighboring Nittany Valley, development in Dale Summit has historically been automobile focused and lacking in pedestrian and bicycle connectivity.

Beyond its transportation heritage, Dale Summit has also historically been identified as an important employment center and retail/commercial destination within the larger region. These designations can be linked to two “defining” developments that occurred in the late 1960’s in the Dale Summit.

Corning

Just seven years after Mr. Dubbs’s publication, the single largest industrial development plan within the Dale Summit was realized. In 1967, the approximately 96-acre Corning State College Picture Tube Plant opened and would remain the anchor of the industrial district within Dale Summit for the next 35 years. The Corning facility was at one time a top 3 employer in the Centre Region and remained a top 25 employer until its closure in 2003, which eliminated the nearly 1,000 remaining positions of its employees. The Corning Plant was a welcome infusion numerous family sustaining employment opportunities to the region and helped attract additional industrial development to the area.

Nittany Mall

Less than one year later, in January 1968, Crown American officially opened the Nittany Mall. Situated at the “highway Y” that featured prominently in Mr. Dubbs’s description of the Dale Summit, the Nittany Mall changed the retail landscape of the Centre Region. Given the popularity of traditional malls from the 1960’s through the early 2000’s, the Nittany Mall became a focal point in Dale Summit and helped transform this section of College Township into a regional retail and commercial destination. The Nittany Mall’s presence in the Dale Summit can in part be credited for the future developments of Wal-Mart, Sam’s Club, Barnes and Noble Books and a number of other retail/commercial developments throughout the study area footprint.



**Dale Summit
1971**

Modern Challenges and Opportunities

As will be outlined in more detail in the Section III, one of the primary challenges facing Dale Summit today is the pressure for these existing regulations to be more flexible in response to development proposals that are both attractive and complementary to the desirable future context of the Dale Summit.

Compounding the urgency of this challenge is another potential Dale Summit “defining” development, the Bally’s Category 4 Mini-Casino, which is proposed to be located within the former Macy’s Department Store location within the Nittany Mall. Much like the original Nittany Mall development in 1968, this proposed casino development presents its own unique set of opportunities and threats to the current and future context of the Dale Summit. The decision-makers of today are faced with making critical decisions that will hopefully realize those opportunities, while mitigating the threats, from this type of development. The one certainty in “defining” developments is that they will further accelerate development pressures, which significantly truncate the typical timeline for making fundamental community development or re-development decisions.



Dale Summit
2020

Aerial Photos Courtesy of the Pennsylvania Spatial Data Access

Socio-Economic Analysis

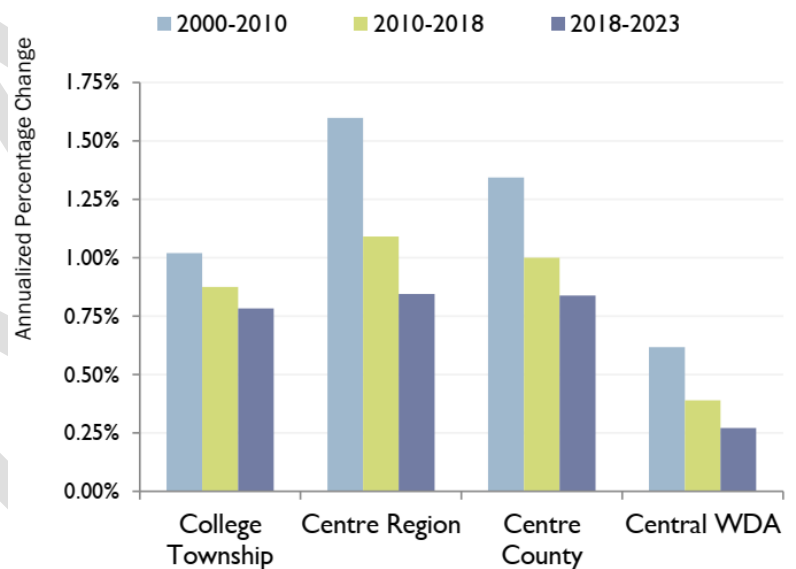
4Ward Planning Incorporated’s 2019 College Township Commercial and Industrial Zoning Analysis contained a thorough Socio-Economic Analysis extracted from recent data sets and will be cited extensively throughout this section of this Area Plan. The data within this section is further supplemented with information from the 2010 Decennial Census and ESRI data prepared by the College Township’s GIS Technician. *Please note that preparation of this Area Plan commenced during the 2020 decennial census and the more current data was not readily available at the time of publication.* In addition, during the time of this publication, the world was going through a worldwide pandemic known as the COVID-19 Pandemic.

The intent of this Socio-Economic Analysis was to outline important trends in population and other key demographic information. These factors, when coupled with regional and national development trends, will help decision-makers better understand the market demands and community capacity when considering revisions to land use regulation within Dale Summit.

Total Population

Since 2000, the rate of population growth within College Township, and its primary and secondary market areas has been positive, albeit slowing. Most recently, from 2010 to 2018, College Township’s population grew by a modest 0.9 percent per year (strong growth would be in excess of 1.25 percent per year). Absent large-scale development, College Township’s population is expected to grow by 0.8 percent per year over the next five years (an increase of approximately 400 people). Both the Centre Region and Centre County are projected to experience a similar rate of growth over the next five years, increasing by approximately 4,230 and 6,970 new residents, respectively, by 2023 (representing new household demand).

Annualized Percentage Change, Total Population



Population by Geography

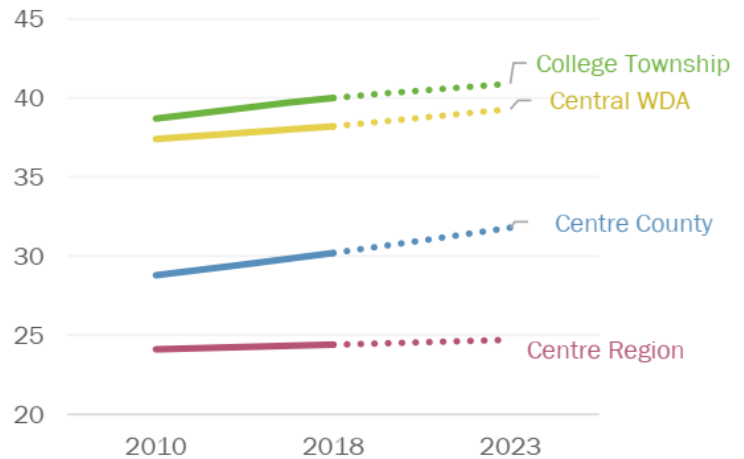
	2000	2010	2018 (Estimated)	2023 (Forecasted)	Net Change (2018-2023)
College Township	8,640	9,521	10,188	10,587	399
Centre Region	79,400	92,096	100,137	104,365	4,228
Centre County	135,758	153,990	166,313	173,286	6,973
Central WDA	438,357	465,411	479,932	486,436	6,504

Source: US Census Bureau; Esri; 4ward Planning Inc., 2018

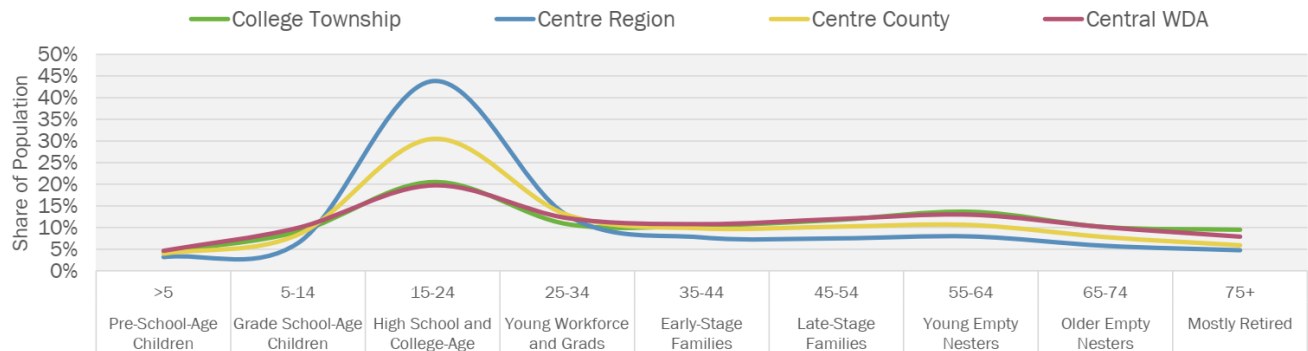
Age Distribution

As illustrated in the chart to the below, the median age in College Township (40 years) is much higher than those within both the Centre Region and Centre County (24 and 30 years, respectively). Although the median age in all geographies is expected to increase through 2023, the median age in College Township will remain much higher than those within the Region or County.

Median Age 2010-2023



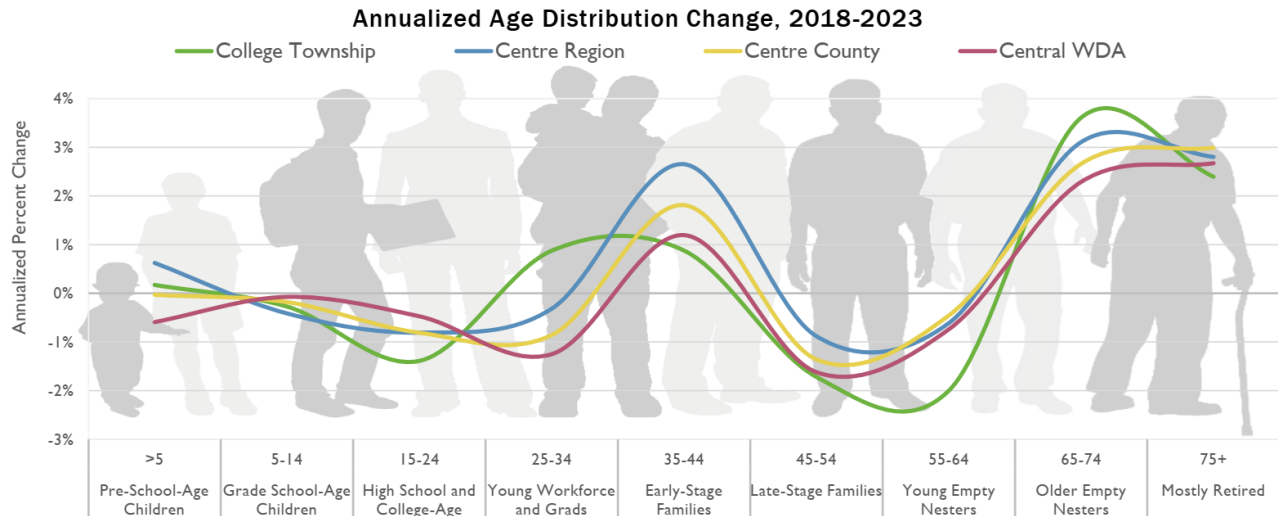
As illustrated below, the Region has a much greater share of high-school and college-age residents (e.g., persons between ages 15 and 24) due to large college-age student population living in those municipalities.



Source: Esri; 4ward Planning Inc., 2018

Age Cohort Growth Patterns

Through 2023, all geographies are expected to experience the fastest population growth among adults ages 30 to 44 (partially represented by the millennial generation: those born between 1981 and 1996 or currently ages 22 to 37), and adults over age 65 (partially represented by the baby boomer generation: those born between 1946 and 1964 or currently ages 54 to 72). The shifting and aging of the region's population will present opportunities for new housing types, as early-stage families seek to purchase homes (whether existing or newly built) and older empty nesters downsize from single-family housing to multi-family rental units.

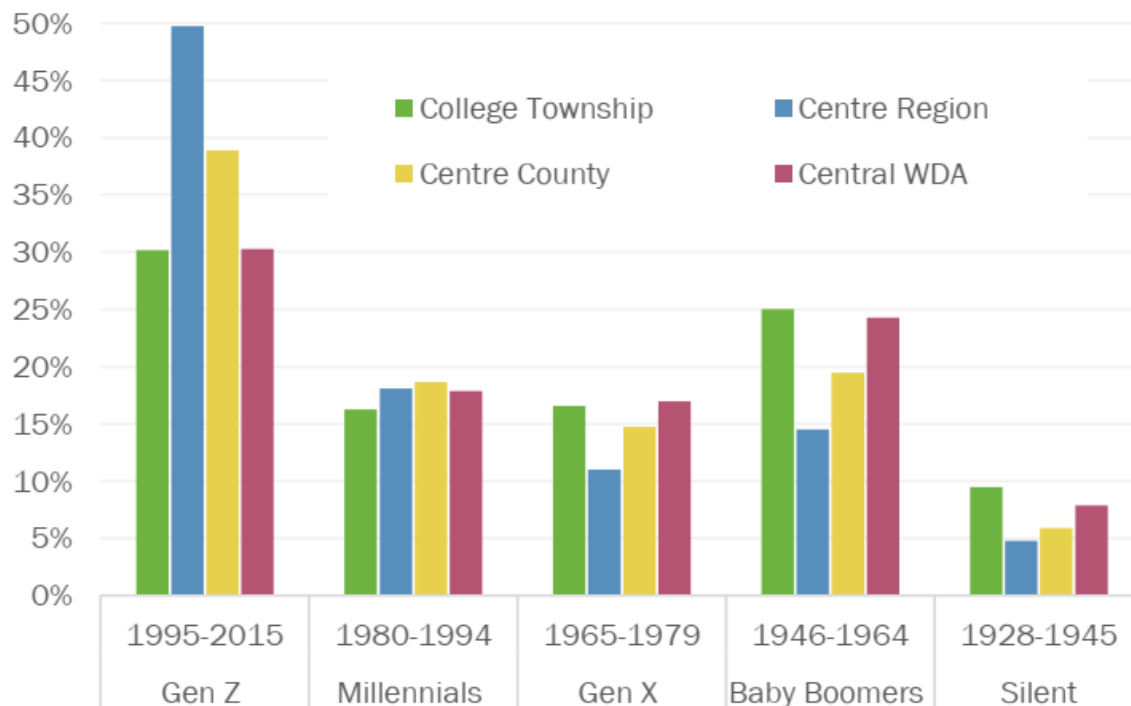


Source: US Census Bureau; Esri; 4ward Planning Inc., 2018

Market Trends by Generation

According to a 2018 Emerging Trends in Real Estate survey published by Urban Land Institute (ULI), millennials (persons born between 1981 and 1996) who were expected to remain in major urban cities, are increasingly forming households, having kids, and moving to more affordable secondary market areas. Like millennials, Gen Z (persons born between 1997 and 2015) are expected to converge in urban areas. Currently, the Gen Z and millennial generations represent 50 percent of residents in the Centre Region.

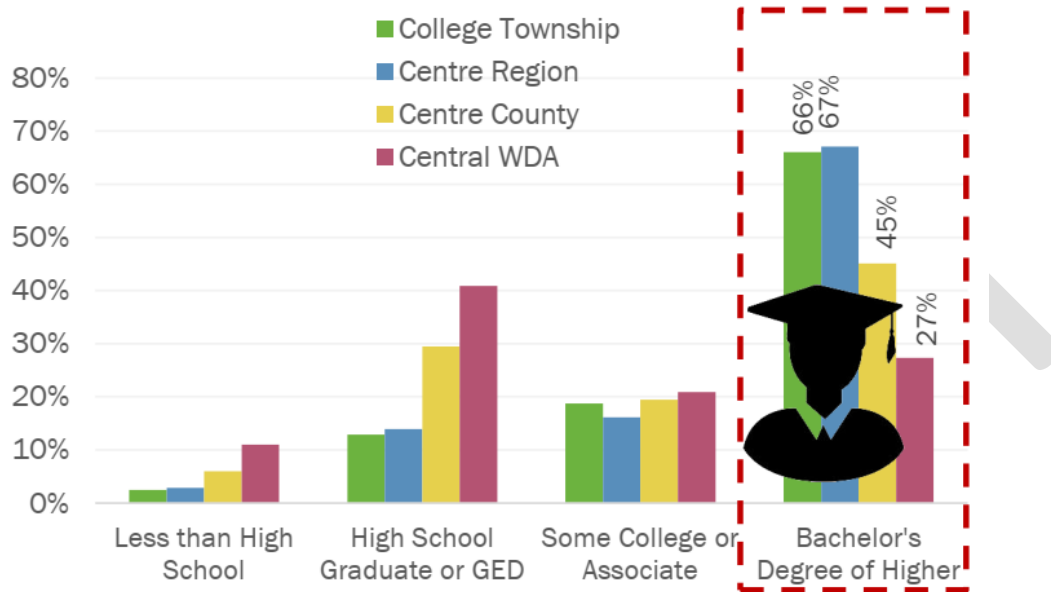
Share of Population by Generation



Educational Attainment & Income

The chart below comparatively illustrates estimated 2018 educational attainment across all four geographies. Educational attainment is relatively high in both College Township and the Centre Region, where 66 to 67 percent, respectively, of adult residents 25 and older hold a bachelor’s degree or higher level of education (compared to 45 and 27 percent in Centre County and the Workforce Development Area (WDA), respectively).

Educational Attainment (% of Adult Population) 2018



Since median household income is often correlated with educational attainment, it is not surprising that 2018 median household income within College Township (\$83,344) is also relatively high compared to the Primary Market Area (PMA) and Centre Region and Centre County (\$52,033 and \$53,570, respectively). Although the median household income in all geographies is expected to rise over the next five years, it is expected to remain much higher in College Township. The relatively high levels of educational attainment and household incomes demonstrate the influence of Penn State University and associated enterprises in the region.

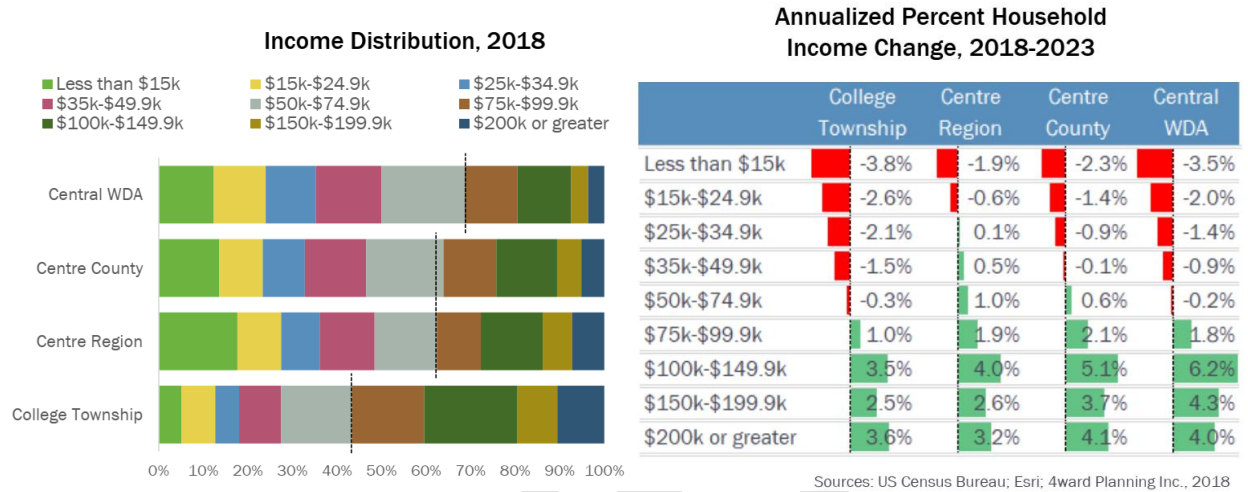
Median Household Income 2018-2023

	2018	2023	2018-2023	% Change
College Township	\$83,344	\$91,136	\$7,792	9.3%
Centre Region	\$52,033	\$57,634	\$5,601	10.8%
Centre County	\$53,569	\$59,575	\$6,006	11.2%
Central WDA	\$49,997	\$55,519	\$5,522	11.0%

Source: Esri; 4ward Planning Inc., 2018

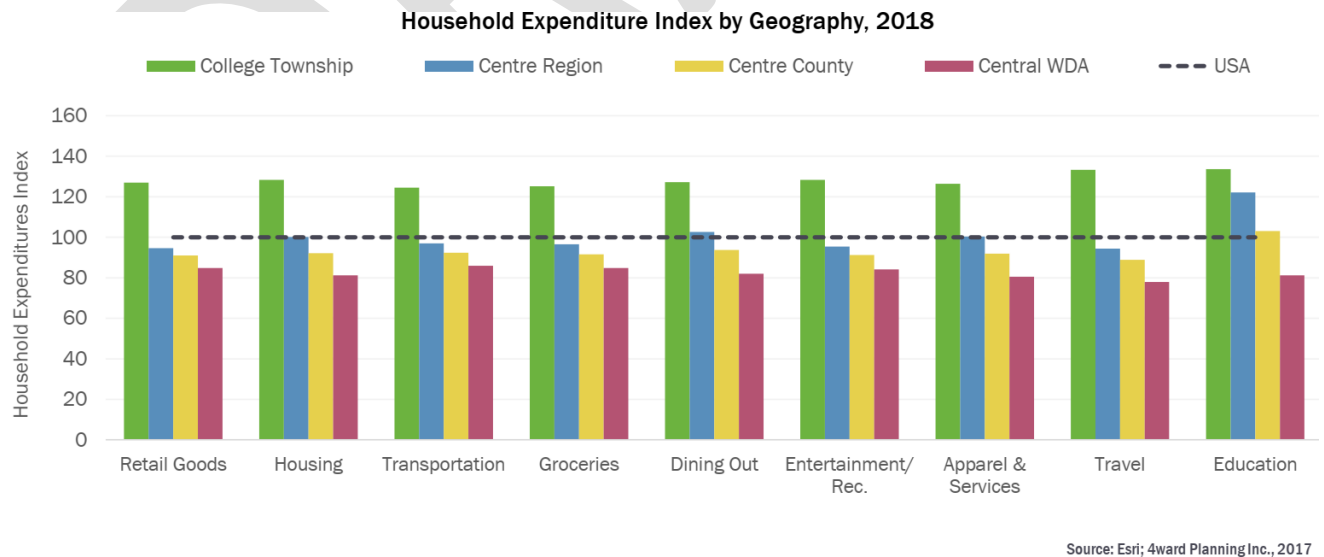
Income Distribution

As shown in the chart below (left), in 2018, approximately 57 percent of households in College Township earned more than \$75,000 per year, compared to just 38 and 36 percent within the Region and County, respectively. As shown in the chart below (right), ESRI expects that households earning more than \$75,000 per year will grow the fastest in all four geographies over the next five years. The relatively high household incomes in College Township has and will continue to place upward pressure on local area housing prices, among other goods and services.



Household Expenditures

As shown in the chart below, in 2018, average household expenditures within College Township are appreciably higher than 2018 national average household expenditures on a range of goods and services. Household expenditures in College Township are reflective of its relatively higher levels of educational attainment and median household income, compared to those of the Centre Region and Centre County.



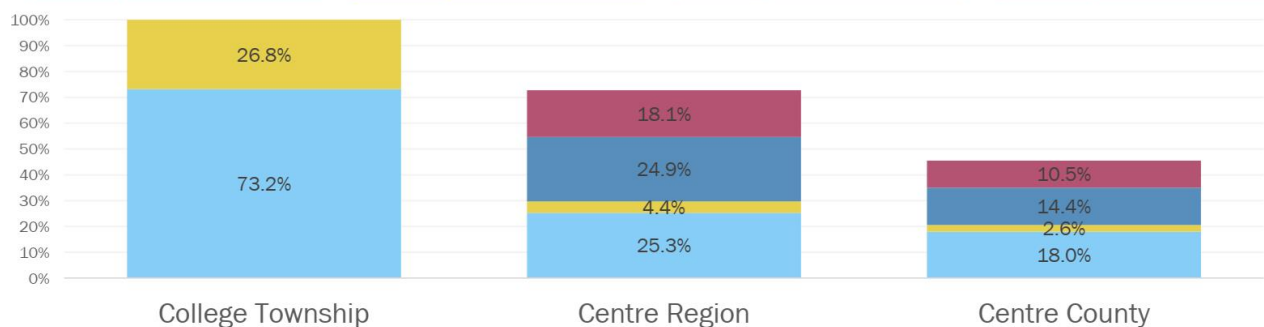
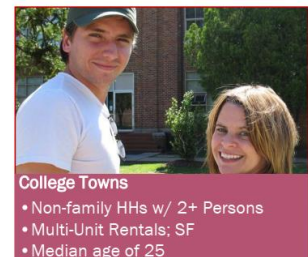
ESRI Tapestry Segmentation

ESRI’s Tapestry Segmentation process classifies U.S. residential neighborhoods into 65 unique segments based on demographic variables such as age, income, home value, occupation, household type, education, and other consumer behavior, demographic, and socio-economic characteristics.

According to ESRI, companies, agencies, and organizations have used segmentation to divide and group consumer markets to more precisely target their best customers and prospects. This targeting method is, purportedly, superior to using “scattershot” methods that might attract preferred groups. Segmentation explains customer diversity, simplifies marketing campaigns, describes lifestyles and life-stages, and incorporates a wide range of data.

Segmentation systems operate on the theory that people with similar tastes, lifestyles, and behaviors seek others with the same tastes - “like seeks like.” These behaviors can be measured, predicted, and targeted. ESRI’s Tapestry Segmentation system combines the “who” of lifestyle demography with the “where” of local neighborhood geography to create a model of various lifestyle classifications or segments of actual neighborhoods with addresses - distinct behavioral market segments.

Most notably, while College Township is primarily composed of older tapestry segments preferring single-family housing (e.g., In Style and Golden Years segments have respective median ages of 42 and 52 years), the Region and County have greater shares of younger segments preferring multi-family rental housing (e.g., Dorms to Diplomas and College Towns segments have respective median ages of 22 and 25 years).



Source: Esri; 4ward Planning Inc., 2018

Specifically, ESRI’s Tapestry Segmentation Analysis identifies Dale Summit as the LifeMode Group, GenXurban – In Style. The following pages include analysis and graphics that further underscore what that classification means:



LifeMode Group: GenXurban
In Style

5B

Households: 2,764,500
Average Household Size: 2.35
Median Age: 42.0
Median Household Income: \$73,000

WHO ARE WE?

In Style denizens embrace an urbane lifestyle that includes support of the arts, travel, and extensive reading. They are connected and make full use of the advantages of mobile devices. Professional couples or single households without children, they have the time to focus on their homes and their interests. The population is slightly older and already planning for their retirement.

OUR NEIGHBORHOOD

- City dwellers of large metropolitan areas.
- Married couples, primarily with no children (Index 112) or single households (Index 109); average household size at 2.35.
- Home ownership average at 68% (Index 108); nearly half, 47%, mortgaged (Index 114).
- Primarily single-family homes, in older neighborhoods (built before 1980), with a mix of town homes (Index 132) and smaller (5–19 units) apartment buildings (Index 110).
- Median home value at \$243,900.
- Vacant housing units at 8.6%.

SOCIOECONOMIC TRAITS

- College educated: 48% are graduates (Index 155); 77% with some college education.
- Low unemployment is at 3.6% (Index 66); higher labor force participation rate is at 67% (Index 108) with proportionately more 2-worker households (Index 110).
- Median household income of \$73,000 reveals an affluent market with income supplemented by investments (Index 142) and a substantial net worth (Index 178).
- Connected and knowledgeable, they carry smartphones and use many of the features.
- Attentive to price, they use coupons, especially mobile coupons.



Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GRK MRI.



AGE BY SEX (Esri data)

Median Age: **42.0** US: 38.2

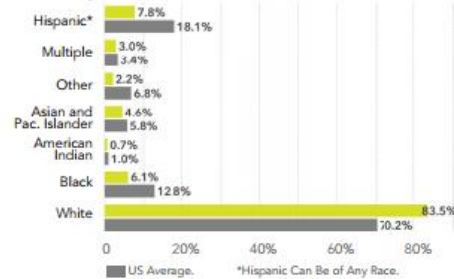
■ Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **39.8** US: 64.0



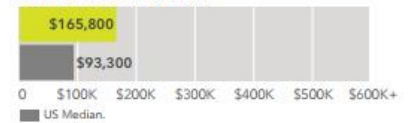
INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

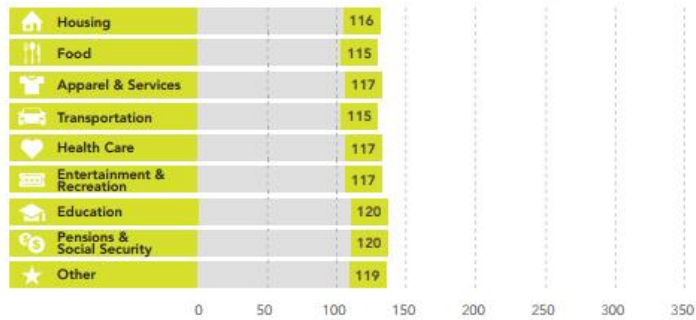


Median Net Worth



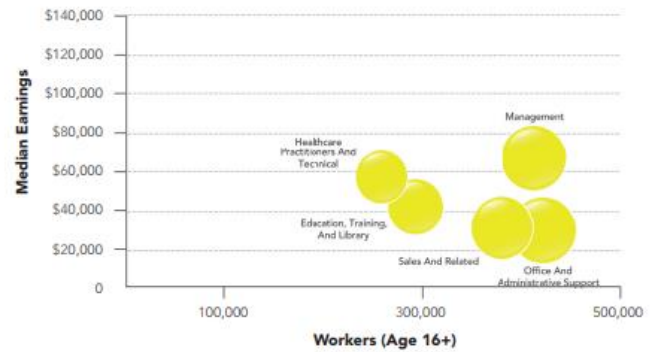
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





MARKET PROFILE (Consumer preferences are estimated from data by GfK MRI)

- Partial to late model SUVs: compact SUVs are gaining popularity.
- Homes integral part of their style; invest in home remodeling/maintenance, DIY or contractors; housekeeping hired.
- Prefer organic foods, including growing their own vegetables.
- Financially active, own a variety of investments often managed by a financial planner.
- Meticulous planners, both well insured and well invested in retirement savings.
- Generous with support of various charities and causes.
- Actively support the arts, theater, concerts, and museums.

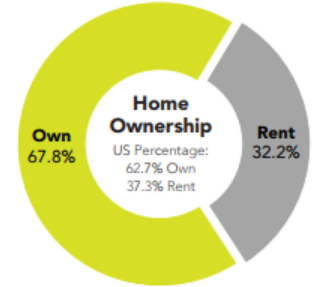
HOUSING

Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



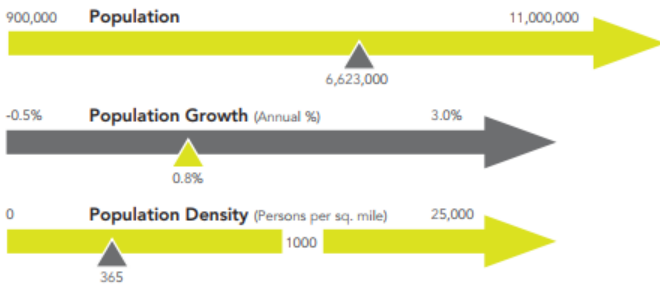
Typical Housing:
Single Family

Median Value:
\$243,900
US Median: \$207,300



POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.



Key Findings: Socio-Economic Analysis

4,230 new residents expected within the Centre Region by 2023

Absent large-scale development, College Township's population is expected to grow by a modest 0.8 percent per year over the next five years (an increase of approximately 400 people). Both the Centre Region and Centre County are projected to experience a similar modest rate of growth over the next five years, increasing by approximately 4,230 and 6,970 new residents (representing new household demand), respectively, by 2023.

Shifting and aging of the region's population

Currently, the median age in College Township (40 years) is much higher than those within both the Centre Region and Centre County (24 and 30 years, respectively). Through 2023, all geographies are expected to experience the fastest population growth among adults ages 30 to 44 (partially represented by the millennial generation), and adults over age 65 (partially represented by the baby boomer generation). As these two large population segments continue to age, the shifting of the region's population will present opportunities for new housing types, as early-stage families seek to purchase homes and older empty nesters downsize.

Township is composed of older households preferring single-family housing

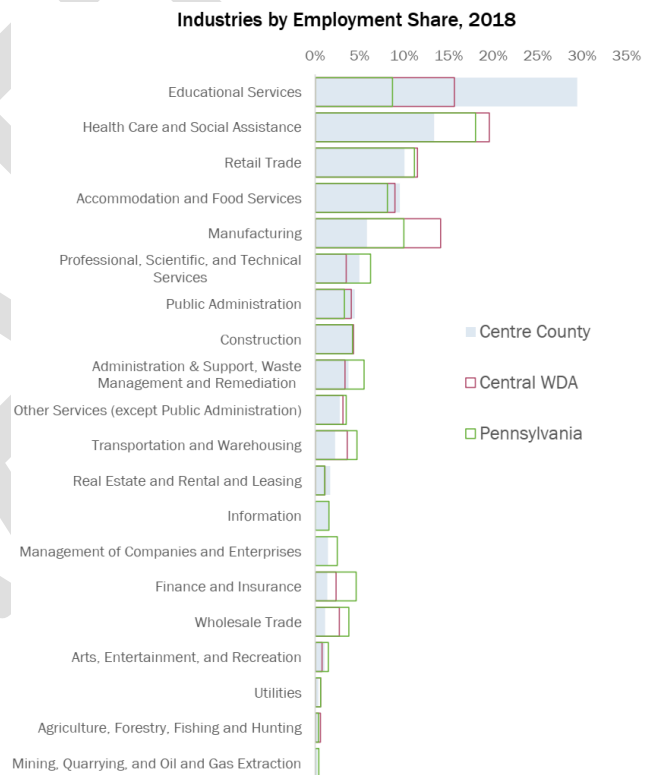
According to ESRI's Tapestry Segment data (which classifies households into unique segments based on demographic socio-economic characteristics), approximately 27 percent of households in College Township have some preference for multi-family housing (with 41 percent preferring rental housing), compared to 55 percent and 34 percent within the Region and County, respectively. This is due to the fact that the Township is mostly composed of older tapestry segments preferring single-family housing, while the Region and County have higher shares of younger segments preferring multi-family rental housing – indicative of relatively few students living in College Township, at the moment. But times are always changing and purpose built student housing is a trend in university towns. In 2021, a plan for two, four - story buildings right outside of the Dale Summit Area Plan Boundary was approved and during the time of this publication, was under construction. This development could ultimately house up to 600 of the dorms to diploma population, potentially changing the demographic landscape west of the DSAP.

Labor and Industry Analysis

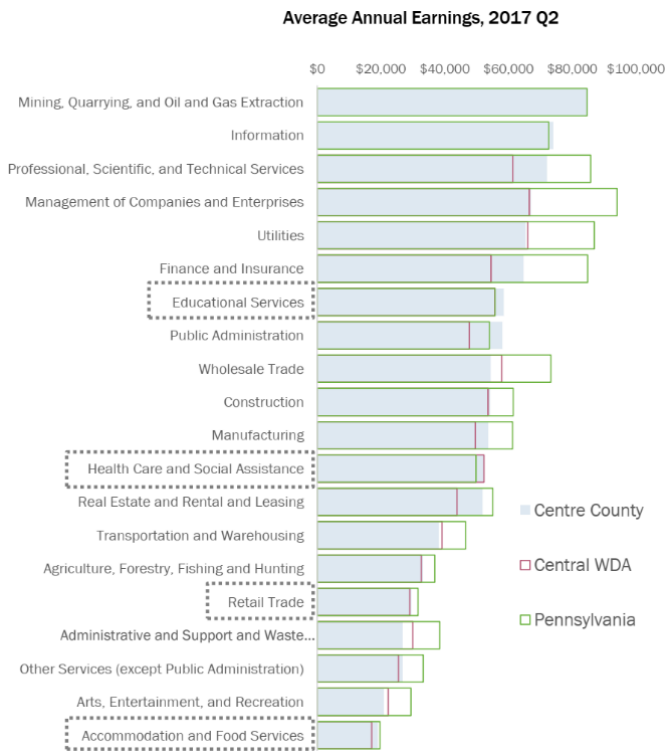
4Ward Planning closely examined current labor market and industry trends within Centre County (equivalent to the State College MSA) and the Central Workforce Development Area (WDA), to include current and projected employment by industry data. The examination of projected employment data provides necessary insight into the amount of office square footage which might be demanded within the 20-minute PMA (currently and prospectively) and the portion of that demand likely captured within College Township. 4Ward Planning analyzed and presented key industry metric projections (e.g., office-using employment and wage growth) through 2028 for the County and, by extrapolation, the 20-minute PMA.

Employment Share

Likely due to the presence of Pennsylvania State University, the educational services sector (representing 29 percent of total employment) is the top sector by share of total employment within Centre County. The next top three sectors in the County include the health care and social assistance sector (13 percent), the retail trade sector (10 percent), and the accommodation and food services sector (10 percent).



Source: U.S. Census Bureau, Center for Economic Studies, LEHD



Earnings

The top two sectors by employment share within the County, the educational services and health care and social assistance sectors, provide relatively mid-wage employment opportunities (average annual earnings of \$58,520 and \$52,270, respectively). In contrast, the third and fourth top sectors by employment share within the County, the retail trade and accommodation and food services sectors, provide relatively low-wage employment opportunities within the County (average annual earnings of \$29,510 and \$19,030, respectively).

Employment by Top Six Industries: Centre County

The table below presents projected employment estimates for Centre County, based on long-term employment projections by industry, provided by the Pennsylvania Department of Labor and Industry for Centre County (State College MSA)

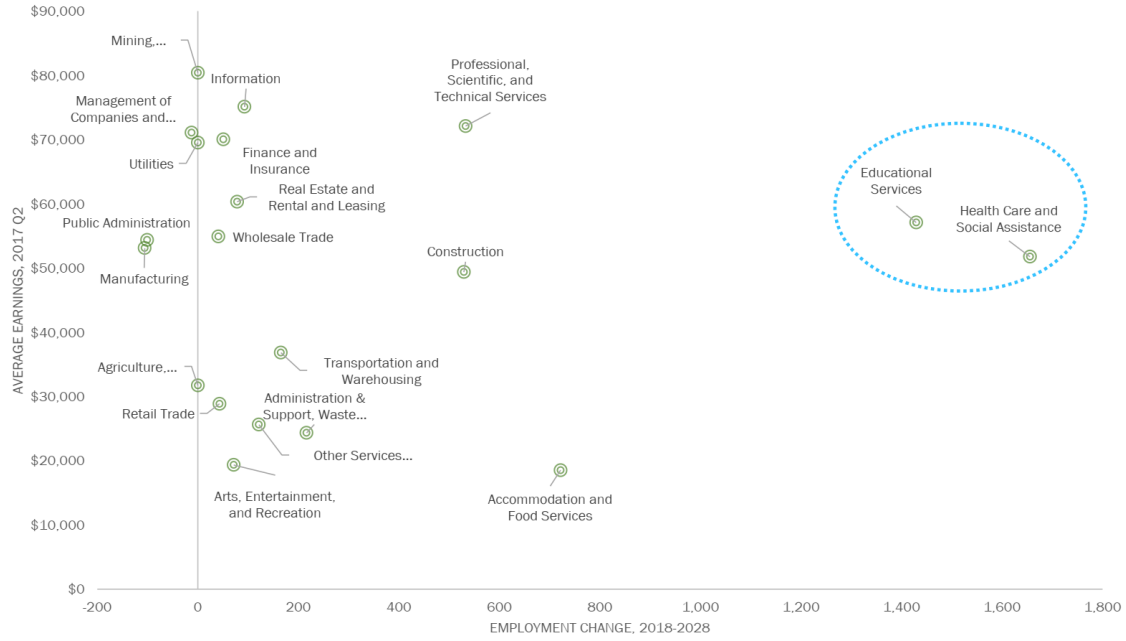
labor market regions (assumes an average growth rate), and estimated employment figures provided by the U.S. Census Bureau.

By 2028, the health care and social assistance sector is expected to be the largest industry by new job growth within the County, adding 1,660 new, relatively mid-wage jobs (average annual earnings of \$51,770). By 2028, the educational services sector is expected to be the second largest industry by new job growth within the County, adding 1,430 new, relatively mid-wage jobs (average annual earnings of \$57,090). Growth in mid-wage employment will also create opportunity for the development of housing catering to this particular income class.

Industry	2018 Estimated Employment	2028 Projected Employment	Numeric Change	Annualized Change	Average Annual Earnings (2017 Q2)
Educational Services	19,430	20,860	1,430	0.7%	\$57,090
Health Care and Social Assistance	8,900	10,560	1,660	1.9%	\$51,774
Retail Trade	6,580	6,630	50	0.1%	\$28,866
Accommodation and Food Services	6,300	7,030	730	1.2%	\$18,522
Manufacturing	3,810	3,700	-110	-0.3%	\$53,118
Professional, Scientific, and Technical Services	3,310	3,840	530	1.6%	\$72,108
Public Administration	2,900	2,800	-100	-0.3%	\$54,384
Construction	2,900	3,430	530	1.8%	\$49,386
Admin. & Support, Waste Management and Remediation	2,480	2,700	220	0.9%	\$24,336
Other Services (except Public Administration)	1,820	1,940	120	0.7%	\$25,620

Source: U.S. Census Bureau, QWI Explorer; Pennsylvania Department of Labor and Industry, 2014-2024 Long-Term Projections

Employment Change by Average Earnings: Centre County



DRAFT

What should Dale Summit be in the future?

Part III. Future Conditions

When considering what a place should be in the future, it is important to first consider the higher level demographic and development trends that will likely influence forthcoming growth opportunities. Further, it is imperative that decision-makers also understand the area’s capacity to meet those demands for development.

4Ward Planning Incorporated’s 2019 College Township Commercial and Industrial Zoning Analysis provided a broad overview of both the trends and capacity that helps inform this Area Plan. As such, the 4Ward study will once again be cited extensively throughout the early portions of the Future Conditions section.

As Section II outlined, College Township and the larger Centre Region are an interesting confluence of age groups that have unique demands of their respective places. However, the Region is also further influenced by changes in National demographics, and their resulting impacts to overall development trends. Further, the impacts of technology on how we live and work can’t be overlooked when considering the future of a place.

The Effects of Demographics on Commercial and Industrial Real Estate

Nationally, the baby boomer (those born between 1946 and 1964 or currently ages 54 to 72) and millennial (those born between 1981 and 1996 or currently ages 22 to 37) generations, representing the largest shares of the general population, will, by virtue of their numbers and representative participation in the economy, continue to propel real estate investment patterns for the foreseeable future.

- **Baby Boomers:** The aging baby boomer cohort, at or near retirement, is driving demand for specialized healthcare and wellness facilities close to their places of residence. Moreover, many of this generation are opting to downsize to mixed-use residential developments, where their daily retail and convenience needs are within close proximity. The holders of the majority of the nation’s wealth and still active for many years to come, baby boomers’ preferences and spending patterns will continue to play a significant role in commercial real estate demand.
- **Millennials:** Meanwhile, millennials, who make up most of the nation’s young workforce and will, therefore, influence the next few decades of workspace demand, typically prefer working remotely, yet, doing so in more public, shared spaces. As such, this generation is playing a large part in shifting demand from traditional office space to collaborative office or commercial venues that offer more casual workspaces and digital connectivity. When they are not working, millennials tend to favor 18-hour locations with abundant, aesthetically pleasing amenities, and focus much of their expenditures on local, personal, and leisure-oriented businesses such as dining, entertainment, and wellness-related offerings.

Mixed-Use Development and Redevelopment

Parallel to these demographic-driven trends, there is, generally, greater demand for proximity between residential, office, commercial, entertainment, and mass-transit offerings. In other words, walkable,

mixed-use developments should be a significant component of future real estate development and redevelopment considerations. Renewed focus on civic spaces in areas that were once solely reserved for commercial and industrial development would encourage a vibrant, more sustainable mix of public buildings, retail, office, and multi-family residential units (including senior-living spaces).

Moreover, the proximity of various land uses serves to anchor smaller local retail and entrepreneurial activities, cushions the local economy from land-use-trend fluctuations, provides a sense of place, and facilitates social interactions across demographic groups, as well as leisure opportunities and active lifestyles. This overarching concept, prescribed by the New Urbanism movement, is founded on the idea that communities in which its residents are able to “live, work, and play” in the same general area are the healthiest and most sustainable communities.

The Effects of Technology on Commercial and Industrial Real Estate

E-Commerce vs. Brick-and-Mortar Retail

Clearly, digital technology has made shopping and working from home more convenient and cost-effective for many businesses and individuals. This was obviously further emphasized throughout the COVID-19 Pandemic. The prevalence of e-commerce and telecommuting has resulted in a shift in demand for traditional retail and office spaces to other commercial and industrial real estate uses. The growth of online shopping, for instance, has increased demand for more local distribution and warehouse facilities to house and ship online purchases, while dramatically decreasing profits for brick-and-mortar retailers. According to Statista, an online database of national statistics, in 2017, the nation’s ecommerce sales totaled over \$409 billion. This figure has direct bearing on the recent closures of numerous major retail giants’ brick-and-mortar locations. Recognizing the need to support their new e-commerce platforms, many surviving traditional retailers are redirecting capital from store openings to expanding their warehouse footprints.

Industrial Real Estate Boom

Disruption in the retail market has had an inverse effect on industrial real estate. Warehousing and distribution sites have experienced increased demand due to exponential growth in online purchases. Strategically located technical fulfillment centers, established by large retailers, are cropping up around the country – creating substantive savings for the businesses that have made such investments, as the cost per square foot of warehousing space is typically much less expensive than traditional retail space. Additionally, increased digitization has increased demand for data centers.

Evolving Office Space Demand

Technological advances have altered demand for office space, allowing some companies to streamline their office footprints by offering their employees telecommuting options. As this model is not viable for all employers and their workers, some companies are exploring new office-sharing models (i.e., open-concept, collaborative workspaces). Whether as a result of technological capabilities or shifting workplace ethos, demand for traditional office space has declined, generally, while giving way to smaller, more flexible, greener, and “smarter office” space needs. Much like the retail sector, the office portion of commercial real estate is undergoing significant transformation, as a result. While demand for office

square-footage has decreased, it will more likely change shape than decline much further, as businesses look to recreate more efficient, communal workspaces.

National Trends – Key Findings

Warehouse facilities and data centers are expanding their footprint with technology, while traditional retail and office space has been on the decline.

Broad changes in where and how we live and work create different needs in commercial and industrial real estate, and as such, industrial real estate demand is expected to remain strong as retail and office space demand is expected to be relatively flat, after having been on the decline.

Commercial demand shifts are more evolutionary than apocalyptic.

Demand for retail and office spaces, though diminished, will not disappear. Moreover, obsolete commercial spaces offer opportunities for conversion to new uses. As such, economic development efforts should include focus on efficient uses of space, encouraging businesses - from small firms to large retail stores - to seek more thoughtful, useful brick-and-mortar presences.

Demand for service-focused commercial spaces will remain strong.

Although consumers continue to patronize traditional retail businesses, these businesses will increasingly offer service components in an effort to compete in the evolving economy. Moreover, strictly service-oriented commercial spaces such as restaurants, health and fitness centers, financial services, and entertainment venues will remain in demand, based on current and projected consumer habits. The strength of the “experience economy,” as widely supported by the millennial generation, will be an important element of future commercial real estate development.

Smaller, flexible commercial real estate solutions will create opportunities.

As there will likely be less demand for traditional stand-alone retail spaces, designing or redesigning flexible physical space that can be customized to tenant and consumer needs will create opportunities and anticipate changing trends in the economy. The commercial sector’s flux has been reflected in the way many leases are being created. Similarly, the office market will likely benefit from the creation of smaller, more flexible, open workspaces, which companies can readapt with changing times.

Mixed-use developments are more sustainable.

Both demographic trends and the ever-growing role technology plays in our economy spell greater demand for more public, mixed-use spaces that allow the intersection of residential, civic, and professional life. The proximity of various land uses serves to anchor smaller local retail and entrepreneurial activities, cushions the local economy from land-use-trend fluctuations, provides a sense of place, and facilitates social interactions across demographic groups, as well as leisure opportunities and active lifestyles – benefitting all stakeholders.

Collaborations in “town and gown” communities help attract new businesses

Town and gown are two distinct communities of a university town; 'town' being the non-academic population and 'gown' being the university community. Case studies from “town and gown” communities across the country show how collaborations between municipal and higher education stakeholders can attract new businesses.

Understanding the Capacity to Meet Demand

In 2017, the Centre Regional Planning Agency developed a Regional Development Capacity Report (REDCAP) that provided the following key analyses:

1. Estimates the total amount of remaining development potential within the Regional Growth Boundary (RGB) and Sewer Service Area (SSA) of the Centre Region,
2. Assesses the ability of that potential to accommodate forecasted growth, and
3. Examines the capacity of the Region’s sewer system to support anticipated growth.

Non-Residential Supply/Demand Analysis

According to the 2017 REDCAP report, existing vacant or underutilized non-residential land within College Township can support 8.9 million square feet of nonresidential development. The following summarizes the near-term non-residential demand findings from the real estate supply/demand analysis:

- **Retail:** Given College Township’s existing “surplus” of retail sales and ample supply of existing vacant retail space within the Centre Region (230,570 square feet or 5.3 acres available for lease or sale), there is little existing net positive retail demand within the Township to support new retail stores. Nevertheless, new multi-family development will bring new local demand for service-oriented commercial spaces such as restaurants, health and fitness centers, financial services, and entertainment venues and such new service retail entrants are likely to enter the market not long after the completion of new multi-family development.
- **Office:** Based on projected total net new employment, office workers, and office demand by industry for the Centre Region, there will be an estimated net new demand for approximately 256,080 square feet of office space by 2028. Since office space type demand varies by industry, office growth is expected to require 88,910 square feet of institutional office space; 84,430 square feet of professional office space; and 49,810 square feet of medical office space. Some of this office demand could be accommodated within the 159,660 square feet of office space currently available for lease or sale within Centre Region. Additional office space demand could also, potentially, be accommodated within new office development within College Township, particularly within smaller, more flexible, open workspaces.
- **Industrial:** Demand growth in the warehousing and distribution sector, due to exponential growth in online retail sales, may be reflected in the 18.4 million square feet of warehouse and distribution space currently under construction within the three closest industrial submarkets (the Northeast PA; Central PA; and Lehigh Valley industrial submarkets). While there is relatively little available warehousing and distribution space within the Centre Region (47,500 square feet of warehouse and flex space available for

lease or sale), there is a large supply of competitive flex industrial space located less than four miles northeast of College Township in the Titan Energy Park (500,000 square feet available to lease).

Residential Supply/Demand Analysis

According to the 2017 REDCAP report, existing vacant or underutilized commercial land within College Township can support 1,260 new multi-family units. The following summarizes the near-term net multifamily residential demand findings from the real estate supply/demand analysis:

- **Multi-Family Residential:** According to the residential supply/demand analysis, there is currently a net demand for approximately 2,550 residential units in the Centre Region. By 2028, there will be an estimated net demand for approximately 2,670 residential units. Assuming that between 5 and 10 percent of these units could be captured within College Township, the Township could accommodate between 130 and 270 units by 2028.
- **Student Housing:** According to third-quarter 2018 data provided by Reis, a national real estate research firm focused on commercial, industrial, hospitality, and institutional properties, there are approximately 32,150 potential student housing tenants within Pennsylvania State University's student housing market, based on full-time undergraduate and graduate student enrollment and existing dorm capacity.
- **Senior Housing:** Based on Reis's identified senior housing inventory for the County and ESRI's household estimates for householders ages 75 and older (the principal source of demand), demand for new senior housing is projected through 2023. Assuming that senior housing penetration rates by senior housing type are similar to those for the nation and that the 240 new units/beds currently being developed are completed, by 2023 there will be demand for approximately 310 additional senior housing units/beds, which could, potentially, be accommodated within College Township.

Strengths, Weaknesses, Opportunities and Threats (SWOT)

Thus far the Dale Summit Area Plan has equipped decision-makers with a high-level overview of existing conditions, current and future development trends and the area's capacity to accommodate growth. Using these factors as a lens, allows for a better understanding of the area's Strengths, Weaknesses, Opportunities and Threats (SWOT).

A SWOT Analysis is a frequently utilized tool that assesses an area's positioning to inform the development of a strategy that will move the location from its current context toward the future vision. As part of the Dale Summit Area Plan development, the Citizen Advisory Committee working with Township staff conducted a SWOT Analysis that facilitated development of the plan's Goal, Objectives and Implementation Strategies.

The following is a summary of the identified Strengths, Weaknesses, Opportunities and Threats:

Strengths

- **Centralized location with proximity to:**
 - Interstate 99
 - Downtown State College
 - Penn State University

- Tourism and Recreation opportunities
- Nittany Mall
- **Potential of infill development**
 - Size and gentle topography of the overall area
 - Available land and buildings for development
 - Summit Park (Corning) multi-tenant opportunities
 - Commercial and industrial zoning
- **Existing Infrastructure**
 - Roadway network – I-99, SR 26, SR 150
 - Utilities in place for most of area
 - Beneficial reuse water
- **General Characteristics**
 - Hub of activity
 - Live, Work, Play opportunities
 - Gateway area to State College, Centre Region and University
 - Creative community
 - Low crime rates
- **Government**
 - College Township is often proactive and willing to try new approaches
 - Council and Staff are fair

Weaknesses

- **Declining Area**
 - Mall vacancies and condition
 - Vacant properties
 - Losing traditional retail and industrial sectors
 - Region economy is growing overly dependent on the University
- **Transportation Limitations**
 - Circulation is somewhat complex
 - Lack of pedestrian and bicycle facilities
 - Limited CATA circulation
 - Traffic congestion
 - Car focused area
 - Connection to I-99 from certain segments of the area is constrained by local roads
- **Community Context**
 - No sense of place
 - Lacks visual continuity or interesting features
 - Abundance of paving, not much green space
 - Cemeteries limit opportunities

- Growing negative perception as “that side of town”
- Lack of distinction between commercial and industrial districts
- **Characteristics limiting growth**
 - Ordinances/regulations are inflexible, too much red tape
 - Area is resistant/close minded to change and certain types of development
 - Risk avert community
 - No true economic development champion
 - Weak incentives for development
 - Lack of vision

Opportunities

- **Strong transportation connections**
 - Access to Interstate 99
 - Proximity to SR 322
 - SEDA-COG JRA rail line
- **Location characteristics**
 - Centralized location
 - Infill opportunities exist
 - Abundant area to accommodate growth
 - Mixed uses
- **Key demographics and markets**
 - Abundance of younger people nearby
 - Older generations are remaining more active
 - Retirees returning to Happy Valley
 - Recreation and tourism
- **Demand for development types**
 - Mixed use/town center development
 - Retirement communities and senior housing
 - Multi-family/affordable housing
 - Entertainment – indoor recreation, civic spaces, gaming, eating establishments
 - A possible location of Service Organization Headquarters
 - Sustainability focused industries
 - Locations for start-ups, spinoffs
- **Triggers for future development**
 - Tax and business development incentives
 - Category 4 mini-casino
 - Improvements to streetscape and connectivity

Threats

- **Location characteristics**
 - Haphazard development
 - Traffic congestion, no connectivity for pedestrians, public transit circulation is weak
 - Area is not aesthetically appealing
 - Loss of key defining industry bases (retail and industrial)
 - Viewed as a forgotten segment of the Centre Region
 - UAJA Odor remains an issue, although it is improving
 - Interstate 99 (bypassing College Avenue and the Benner Pike)

- **Government/Regulations**
 - Overly aggressive setback regulations
 - Height limitations are too stringent
 - Inflexible ordinances
 - Centre Region Code can be tough to work with

- **Status Quo**
 - Doing nothing will result in more of the same (mostly stagnant, uncreative development, further decline in key sectors)
 - Wasted time = wasted opportunities
 - Mall property will continue to deteriorate
 - Digital retail will continue to erode demand for traditional brick and mortar stores
 - Impacts from the pandemic will linger

- **Casino development**
 - Increased crime
 - Increased traffic
 - Stress on government services (police, fire, EMS, code/ordinance enforcement)
 - May make the area unappealing for certain development opportunities

Goal Statement and Defining Objectives

Following review of the information provided by 4Ward Planning and development of the SWOT Analysis, the Community Advisory Committee and staff crafted the following Goal Statement, which encapsulates the vision for the future trajectory of the Dale Summit:

The overarching vision of this Area Plan is to transform Dale Summit into The Gateway to College Township. Establishing Dale Summit as an attractive and instantly recognizable PLACE within the context of the larger Township, Region and County. The committee envisions a community activity hub that is vibrant, economically prosperous, socially equitable and environmentally sustainable. A place, which through proactive planning and well-tailored regulations, strikes a sound balance between encouraging business and industry expansion, while remaining respectful to important community livability factors such as improving housing affordability, providing sufficient public services, and lessening traffic congestion through improved connectivity for all transportation modes.

To fully appreciate the Goal Statement of the Dale Summit Area Plan, it is important to break this broad overarching statement into defining objectives that further expand upon the vision. For organizational purposes, we have grouped these defining objectives by the following categories:

- Aesthetics
- Economic Development
- Land Use & Zoning
- Recreation
- Transportation & Infrastructure

The Community Advisory Committee was broken into focus groups that were tasked with assisting in the development of defining objectives within these respective categories. The overarching theme within these objectives is simply that maintaining the status quo in the Dale Summit is not a viable option if the Goal Statement is to be achieved.

The following segment of the Dale Summit Area Plan will outline those objectives grouped by the aforementioned categories.

Aesthetics Objectives

The Aesthetics Focus Group was first asked to think of recognizable places that fit their vision of what an aesthetically pleasing Dale Summit could be in the future. Aesthetics was also further vetted through a visual preference survey of the Community Advisory Committee. The ensuing aesthetics objectives aim to address the following segment of the Goal Statement: ***“Establishing Dale Summit as an attractive and instantly recognizable PLACE within the context of the larger Township, Region and County.”***

AO.1. - Incorporate Thematic Design

Thematic design is the design of a variety recurring elements on any environmental level according to a set of organizing principles. This could include design cues that interplay specifically through architecture, landscape, streetscape, lighting and overall scale.



As outlined within the existing conditions and the SWOT Analysis, the Dale Summit lacks cohesion in the transects of land uses, facades, streetscape and other elements that help define the overall sense of place. Locations with a recognizable sense of place have, either through sheer coincidence or strategic planning, incorporated organized and recurrent design themes.

As a local example, consider the photos from the Colonnade in Patton Township, which incorporated the use of similar construction materials, colors and landscaping standards to make the development more visually appealing and recognizable.



AO.2. Emphasis on Historical with a Contemporary Flair

As part of thematic design, it is imperative to understand what image the community and designers want to project in terms of the overall form of the area. Currently, if a group of individuals was asked to define the theme of the Dale Summit's development, the variety of answers that followed would likely only be consistent in their inconsistency. Therein lies a significant challenge for the reshaping of the Dale Summit. *How can you re-theme an area that is current devoid of any consistent theme?*

To tackle this challenge, the Focus Group was once again asked to provide their vision for the future theme of the Dale Summit. The answer is a vision of an area that melds a ***historical feel with some contemporary flair***. In further examining this theme from an aesthetics standpoint, the committee looked specifically toward construction materials, landscaping, streetscaping and scale.

For materials, an emphasis is placed on incorporation of brick and stone within building facades, signage and other exterior elements. Brick and stone give a more lasting and historical impression that other material types being incorporated in modern developments. To further emphasize this statement, the Visual Preference Survey results confirm the thinking behind the branding.

To give the contemporary flair, the committee recommended the use of painted steel and glass for accenting features. The application of brick and stone with painted steel and glass is not solely a function of new development, but could be incorporated in renovations and retrofits. As an example, the focus group offered the design recently used by the State College School District and its consulting architect Crabtree, Rohrbaugh & Associates, for the facades of the district's renovated elementary schools.



Photo of Radio Park Elementary School courtesy of Crabtree, Rohrbaugh & Associates website

AO.3. Focus More on Human Scale Development

Simply defined, human scale is making sure that the objects that we interact with every day within our built environment are of a size and shape that is reasonable for an average person to use. Beyond that, human scale is also an understanding of how, we as individuals perceive our built environment surrounding in relation to ourselves.

When considering the future of the Dale Summit, the community wants a community where they can Live, Work and Play comfortably. While Dale Summit is not especially overwhelming in terms of building scale or magnitude, it is not especially human scaled either.

Many commercial and industrial segments of communities that experienced their peak growth throughout the 60's, 70's and 80's, were often more automobile scaled in their design. Dale Summit is no exception, with the bulk of the area designed around how it interplays with either State Route 150 or State Route 26. Dale Summit is also well populated with expansive parking lots that accommodate visitors arriving by vehicle, but fairly devoid of pedestrian or bicycle amenities or proper public transportation circulation, connecting developments or even buildings within each respective development.

Currently, the Dale Summit is lacking in both green and civic spaces. Much of the Dale Summit is defined by its impervious surfaces, which while important to operation of certain businesses, do little for the overall context of place. Incorporation of well-placed green space(s) would help significantly in re-theming the Dale Summit as more historical. Further, incorporation of a civic space within the commercial landscape, would also add a more contemporary, human scale element.

As part of the overall thematic design of the future Dale Summit, it is imperative that more focus is given to human scale in new developments and future retrofitting. To develop a true Live, Work, Play community, residents and visitors alike need to perceive that the Dale Summit is built to accommodate the needs of the person.

AO.4. Use Art Strategically to Enhance Theme

Art and other cultural elements are frequently used to reveal and enhance the underlying identity of our built environment and social form. While the future of the Dale Summit is not expected to be centered on the arts, art may be strategically used to help establish both the brand and a sense of place in the Dale Summit.

Incorporation of artistic features will make Dale Summit more visually appealing and interesting to residents and visitors. Be it through a well-placed mural that helps depict historical elements of the Dale Summit or simply in artistic form used in lighting, signage, or other visible branding features, the Aesthetics Focus Group underscores that art should be part of Dale Summit's future.

An example shared for consideration are the murals in both State College and Millheim Boroughs that share some of the community's narrative and add an element to its overall character.



Economic Development Objectives

The Economic Development Focus Group began their discussion with a broad overview of the current regional economy before focusing specifically on the Dale Summit's place in that context. Before delving into the objectives, the Economic Development Focus Group noted that the Livable City principles provide an excellent model to give the Dale Summit a competitive advantage for future economic development opportunities. The Livable City model focuses on the following principles:

- Robust and complete neighborhoods,
- Accessibility and sustainable mobility,
- A diverse and resilient local economy
- Vibrant public spaces, and
- Affordability

These principles align closely with the Goal Statement and dovetail with objectives outlined in each of the five respective categories.

The ensuing economic development objectives aim to address the following segments of the Goal Statement: ***“The committee envisions a community activity hub that is vibrant, economically prosperous, socially equitable and environmentally sustainable. A place, which through proactive planning and well-tailored regulations, strikes a sound balance between encouraging business and industry expansion, while remaining respectful to important community livability factors.”***

EDO.1. – Define the Dale Summit Brand/Niche

In the past, this area was frequently defined by developments as they occurred, whether that was strategic or simply reactive can be questioned. However, those early “defining developments” did serve to shape the Dale Summit into a once thriving commercial and industrial sector within the Centre Region.

When College Township engaged 4Ward Planning , it was done with an eye toward regulation changes that may help counter the stagnation or outright decline in those same commercial and industrial areas. Following the completion of the 4Ward study, the Nittany Mall property has been experiencing a resurgence with the development of Rural King, Aldi, Gabe’s and the proposed Category 4 Casino.

While these are all positives for this specific property, they do effectively eliminate a number of the 4Ward study’s recommendations that would have begun establishing a new brand for the Dale Summit. That leaves the following questions:

- Do these positive developments collectively serve to enhance the overall sense of place in the Dale Summit?
- Do these developments establish any kind of brand/niche for the Dale Summit that can be built upon?

To fully realize the Goal Statement, decision-makers must take the time now to understand exactly how they wish to position the Dale Summit, the market sector(s) they are trying to foster and how to shape (or reshape) the area through design, investments and regulations to best fit those markets.

Of the new developments occurring in the Dale Summit today, realistically only the Casino has the magnitude to re-brand the Nittany Mall and the larger Dale Summit into the commercial/entertainment sector within the Centre Region. The community needs to decide if that is the direction to take the Dale Summit for the next 5, 10, 20 or more years. If so, corresponding changes in design standards and regulations will be needed, along with strategic investments in public areas and infrastructure.

A number of the themes outlined in the Aesthetics section provide the guideposts for the “look and feel” of the area in the future, but defining a brand and fulfilling a niche goes beyond simple aesthetics. It requires cohesion throughout each of the five categories and a commitment to staying the course, even if it means passing on attractive, yet incompatible development opportunities in the future.

EDO.2. – Develop a Marketing Strategy

When creating a marketing plan for a community, it is imperative to understand the factors that influence decisions by those looking to invest or reside in the area.

Across the world, economic development organizations expend significant resources trying to determine the kinds of information that site selectors want and how best to deliver it through their respective marketing efforts. The Most Wanted list for site selectors often includes:

- Data, including labor market information
- Details on available land, sites and buildings
- Major companies and employers
- Major industries and sectors
- Incentives
- Workforce data
- Utility and infrastructure capacity
- Education and training programs
- Quality of life

Similarly, when individuals are making decisions on where they want to live in the future, they often consider factors such as:

- Affordability
- Proximity to family
- Career opportunities
- Climate
- Community size and character
- Access to quality education
- Security
- Culture

A marketing strategy for the Dale Summit must address these factors in a manner tailored to the identified niche and underscoring of the brand that the community is trying to establish. A successful marketing plan for the Dale Summit should strive to do the following:

1. Cater to the target markets
2. Foster relationships with decision makers within the desired niche
3. Emphasize what makes the Dale Summit unique and why that matters
4. Acknowledge the barriers to buy-in and offer solutions that overcome those barriers
5. Sell the success of developments/redevelopments that fit the niche/brand identity.

EDO.3. – Use Tax Incentives to Spur Development

The built-in development costs within the Centre Region can occasionally create barriers to new development or redevelopment of underutilized sites. While there is little that can be done to offset the rising land values or the costs of existing buildings within the region, the strategic implementation of certain tax incentives may provide an alternate path to revitalization in the Dale Summit.

One potential tax incentive opportunity for consideration in the Dale Summit is the Local Economic Revitalization Tax Assistance (LERTA) program. LERTA is a tax abatement program created by the Commonwealth of Pennsylvania in 1977 authorizing local taxing authorities to provide tax exemption. The purpose of the legislation is to incentivize redevelopment of aging or deteriorating properties.

How the LERTA Tax Abatement Program Works

- All properties listed in within a LERTA district are assessed and taxed. When one of the eligible properties is improved the property is reassessed and a new value is placed on the property.
- Eligible projects must have a proposed improvement in excess of \$75,000 in value.
- Once the improvement value is established, LERTA allows property owners to pay abated property taxes for a period of 10 years. Please see the following table for the percentage of improved assessed value to be abated, by year after the initial certificate of occupancy.
- An application for exemption from real estate taxes may be made at any time within five years from the effective date of this ordinance. Only five applications for LERTA tax abatement will be accepted per year.

Percentage of Improved Assessed Value to be Abated by Year After the Initial Certificate of Occupancy

Year	Portion
First Year	100%
Second Year	90%
Third Year	80%
Fourth Year	70%
Fifth Year	60%
Sixth Year	50%
Seventh Year	40%
Eighth Year	30%
Ninth Year	20%
Tenth Year	10%
After the Tenth Year	Exemption Terminates

Another potential tax incentive program to consider in the Dale Summit would be to designate certain collections of parcels as a Keystone Opportunity Zone (KOZ). KOZs are defined-parcel-specific areas with greatly reduced or no tax burden for property owners, residents and businesses. KOZ's have been designated by local communities and approved by the state - a true partnership between each community and region among state and local taxing bodies, school districts, economic development agencies and community-based organizations. In the Dale Summit, there are areas that are large enough to accommodate a KOZ (minimum 20 acres in urban areas/ 10 areas in rural areas) and that may make sense to utilize this tax reduction strategy.

To be considered as a Keystone Opportunity Zone, a site must have:

- Displayed through a vision/strategy statement how this property through targeted growth could impact the aforementioned positively;

- Displayed evidence of adverse economic and socioeconomic conditions within the proposed zone such as high poverty rates, high unemployment rates, percentage of abandoned or underutilized property, and/or population loss;
- Passed binding resolutions or ordinances forgoing certain taxes; this included school districts, county and municipal governments.
- Public and private commitment of resources;
- Linkages to regional community and economic development activities including Team Pennsylvania and initiatives under the DCED's Center for Community Building;
- A written plan discussing the implementation of quality school improvements and local crime reduction measures
- A demonstrated cooperation from surrounding municipalities

The Binding ordinances and resolutions passed grant the waiver, abatement or exemption of certain state and local taxes. Depending on the situation, the tax burden may be reduced to zero through exemptions, deductions, abatements, and credits for the following:

State Taxes: Corporate Net Income Taxes, Capital Stock & Foreign Franchise Tax, Personal Income Tax, Sales & Use Tax, Bank Shares and Trust Company Shares Tax, Alternative Bank and Trust Company Shares Tax, Mutual Thrift Institutions Tax, Insurance Premiums Tax.

Local Taxes: Earned Income/Net Profits Tax, Business Gross Receipts, Business Occupancy, Business Privilege & Mercantile Taxes, Local Real Property Tax, Sales & Use Tax.

Of course, before implementing any tax incentive program, the community partners must first weigh the reduction in tax revenues and how that may negatively impact programs and services offered to the larger community.

EDO.4. – Partner to Balance Risks

In order for the Township to attract quality development to the area, it is imperative to show the development community that the public sector is willing help offset some of risk to better enable their ventures to succeed. This goes beyond the aforementioned tax incentive programs and moves the municipality toward the position of partnering with developers to reshape the area according to the vision outlined in this plan.

A good first step is making investments to upgrade infrastructure in a proactive manner to prove to larger industries the township is seriously invested in bringing life back to Dale Summit. This could include the township partnering with certain utilities to improve or extend connections that make underutilized sites more viable, while relieving that burden from future developers.

The township should also look to waivers of certain internal fees or perhaps even covering the cost of utility connection fees as an incentive for certain types of development. As an example, to do more to help foster additional affordable housing unit development, a program that either partially or fully covers tap-on fees could be enacted. While this type of incentive covers just a fraction of the overall development cost, it could prove to be a positive signal to developers that the township is serious about certain development types.

In terms of aesthetics, consideration should be given to the establishing a grant program that offsets the costs for private developers and business owners to update their properties to the new code standards, including building form, type, façade, and signage. This grant could be modeled off the successful façade grant programs offered in many Main Street communities throughout the country. Without this type of program, there would be limited incentive for existing businesses to upgrade to meet the envisioned thematic design.

It is advisable to make incentives fair and equitable for the developer and the township. Incentives can act as economic development tools that can create tangible benefits for the community, but safeguards should be put into place, such as performing a cost-benefit analysis to determine if a development project will benefit the community more than it will cost. Partnering with the development community can certainly attract businesses to the community, but careful consideration should be taken in order to ensure that the township does not overextend itself in the pursuit of these partnerships.

Land Use & Zoning Objectives

The Land Use and Zoning section of any plan is typically the section that implementation strategies are formed. All sections of the Plan are interrelated in some shape or form, but to give the plan “teeth” the land use regulations can be updated to reflect the recommendations within the plan. The following Objectives take into consideration the discussions from the Citizen Advisory Committee & Focus Group Meetings held early in 2021. Focusing on specific regulations and zoning districts that currently exist in Dale Summit, an effort to make those more flexible and understandable is key. Strategies are outlined below including an amortization program for existing non-conforming uses; regulating form rather than use in Dale Summit; establishing more rooftops in the areas to provide a customer base for any new developments; and finally, how to put these recommendations into place before they are actually enacted, through the form of Tactical Urbanism (or planning-by-doing).

As with the Economic Development objectives, the Land Use & Zoning objective strive to address the following segment of the Goal Statement: ***“A place, which through proactive planning and well-tailored regulations, strikes a sound balance between encouraging business and industry expansion, while remaining respectful to important community livability factors.”***

LZO.1. Allow for Flexibility within Regulations

The focus group acknowledged there are real or perceived barriers to development that come from overly stringent regulations and inflexible ordinances. While many of the regulations in question are beyond local control, there are certain aspects of the current local regulations that could be tweaked to provide some flexibility to developers.

For example, any ordinance updates that occur as a result of this plan will likely create nonconforming uses. *Establishing amortization provisions as a means of eliminating nonconformities would provide the owner of the nonconforming use with a given period of time in which they are expected to amortize or recoup their investment to correct the nonconformance.* This could provide a balance between the public benefit of eliminating of nonconformities and the potential for private losses as result.

To bring Dale Summit into conformance with updated regulations, an amortization program should be considered. Starting small with sign regulations and if benefits are seen from such a program, expand it to include nonconforming buildings.

In the future, if funds are available, the Township should consider a local grant program for township business and property owners. This program would allow the owners to apply for a competitive grant to update their buildings and signage. Advancing an amortization program can show the municipality sees the benefit of investing in our community. In some cases, when one property owner sees their neighbor updating their property, it can motivate them to do the same, acting as a domino effect until the area becomes visually consistent in the context of the visual preference survey outcome.

LZO.2. Regulate on Form Instead of Use

As was acknowledged early in this plan, the Dale Summit is a *complex transect of land uses* that have resulted in development patterns that to an extent have fragmented its overall sense of place. The utilization of traditional Euclidian Zoning, has divided the Dale Summit into rigidly defined uses within designated areas. Further, the Dale Summit developed in a manner that neglected *human scaling* in favor of a more auto-centric design. This unfortunately has led to a lack of the cohesion that is typically present in more recognizable, attractive places. In thinking of human-scale architecture, consider the following three photos. The first leaves much to be desired in the sense of feeling connected to a place when



walking. The second is a good attempt to scale down the area by adding buildings of different scales, street trees, and open first floor buildings. The third incorporates more street trees, which then act as a barrier between the cars on the street and the enjoyment of walking down the street on a wide sidewalk with street furniture, busy storefronts and window shopping opportunities. Considering human scale, the second and third photo give a better sense of comfort.

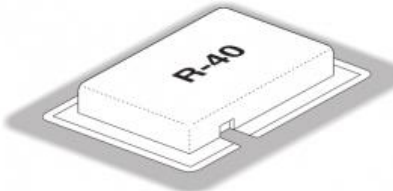
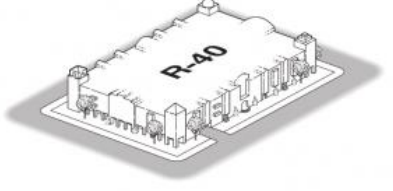
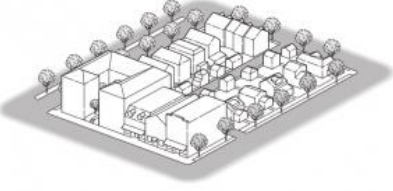
To reverse this development pattern and bring cohesion to the Dale Summit, consideration should be given to regulating on form instead of land use. This would necessitate a transition away from traditional Euclidian Zoning to a Form Based Code within the Dale Summit footprint.

As outlined by the Form-Based Code Institute, form-based code is a land development regulation that fosters predictable built results and a high-quality public realm by using physical form (rather than separation of uses) as the organizing principle for the code. A form-based code is a regulation, not a mere guideline, that would be adopted into municipal law. A form-based code offers a powerful alternative to conventional zoning regulation.

Form-based codes address the relationship between building facades and the public realm, the form and mass of buildings in relation to one another, and the scale and types of streets and blocks. The regulations and standards in form-based codes are presented in both words and clearly drawn diagrams and other visuals. They are keyed to a regulating plan that designates the appropriate form and scale (and therefore, character) of development, rather than only distinctions in land-use types.

This approach contrasts with conventional zoning's focus on the micromanagement and segregation of land uses, and the control of development intensity through abstract and uncoordinated parameters (e.g.,

dwellings per acre, setbacks, parking ratios, traffic LOS), to the neglect of an integrated built form. Not to be confused with design guidelines or general statements of policy, form-based codes are regulatory, not

<p>Conventional Zoning Density use, FAR (floor area ratio), setbacks, parking requirements, maximum building heights specified</p> 	<p>Zoning Design Guidelines Conventional zoning requirements, plus frequency of openings and surface articulation specified</p> 	<p>Form-Based Codes Street and building types (or mix of types), build-to lines, number of floors, and percentage of built site frontage specified.</p> 
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advisory. They are drafted to implement a community plan like this Dale Summit Area Plan. They try to achieve a community vision based on time-tested forms of urbanism. Ultimately, a form-based code is a tool; the quality of development outcomes depends on the quality and objectives of the community plan that a code implements.

Five Main Elements of Form-Based Codes

- **Regulating Plan** - A plan or map of the regulated area designating the locations where different building form standards apply.
- **Public Standards** - Specifies elements in the public realm: sidewalk, travel lanes, on-street parking, street trees and furniture, etc.
- **Building Standards** - Regulations controlling the features, configurations, and functions of buildings that define and shape the public realm.
- **Administration** - A clearly defined and streamlined application and project review process.
- **Definitions** A glossary to ensure the precise use of technical terms.

Some good examples of Form Based Codes developed implementing the recommendations in a small area plan are the Nashville Downtown Code, the City of Hopkins Development Code, and the Developer’s Guide to the City of New Rochelle’s Downtown Overlay Zone.

LZO.3. Add Rooftops to Drive Revitalization

As part of the Citizens Advisory Committee, one prominent local developer contrasted the recent surge of development activity along the North Atherton Street Corridor with the relative stagnant pace of development in the Dale Summit. A primary factor in this growth disparity was the abundance of residential areas adjacent to the North Atherton Street Corridor versus the relative lack of residential units present in the Dale Summit.

By virtue of being a population center, the North Atherton Street Corridor has a “built-in” customer base that has been very attractive to developers seeking a location to locate their respective businesses. While

Dale Summit is envisioned to accommodate single family housing development on the scale of a Park Forest Village, an opportunity to develop more rooftops does exist.

To ensure the ability for residential development, transect mapping is being developed to outline where this use fits best within the context of Dale Summit. The Regional Growth Boundary and Sewer Service Area (RGB/SSA) may need to be expanded to the east along the Benner Pike to accommodate residential growth. The opportunity for multi-family and senior attainable housing exists within the core area of Dale Summit, while these outlining areas, such as the farmland located outside of the RGB/SSA is a prime spot to expand the boundary and develop a conservation-type subdivision, making Dale Summit a unique place, in the sense that this type of development is not typical within the Centre Region.

The Dale Summit could also fill a niche by allowing for more densely developed, affordable multi-family and senior living complexes. This type of development correlates with both the demographics within College Township as outlined in Section II and the development trends discussed earlier in this Section of the Area Plan.

LZO.4. Utilize Demonstration Projects to Highlight Changes

Throughout the Dale Summit Area Plan, a number of sweeping changes that affect the “look and feel” of the area have been recommended. One way to economically see immediate results in the area is through the use of demonstration projects, also known as Tactical Urbanism, Planning by Doing, or DIY Urbanism. This refers to low-cost temporary changes to the urban environment that are intended to demonstrate the potential impact a change can have. For example, a temporary bike lane could be established in an area in which it is desired; empty storefronts (inside or outside) of the mall, within the industrial park, etc. can be temporarily occupied by pop-up shops; large parking areas can be temporarily turned into parks; sidewalks could be extended with chalk; and busy intersections can be sites for crosswalks enhanced with street furniture, plants and trees. These types of demonstration projects require the cooperation of both elected officials and township staff, but by temporarily incorporating these elements, it allows the community to better envision the potential of Dale Summit.

To organize a tactical urbanism day in Dale Summit, it would be beneficial to plan the day/weekend/week with local contractors, landscape companies, and local businesses. Advertising this event will also be of importance, as traffic patterns could be changed.

Consideration could be given to working with PennDOT on a demonstration project corner of Shiloh Road and Benner Pike. This would allow residents and visitors to experience the future potential of the intersection. Working with local businesses such as College Gardens and Lezzer Lumber, temporary trees, planters and flowers could add to the aesthetics. Installation of temporary seating areas and street furniture could showcase potential streetscape upgrades. Paint treatments could show the potential for future sidewalk, multi-use path or bike lane projects that transition toward a more complete street design. If the timing is right, the ALDI grocery store’s grand opening may be an opportune time to implement this demonstration project.

Recreation Objectives

Availability of recreational opportunities is a key contributor toward an overall positive quality of life. In turn, quality of life is imperative for individuals making decisions on where they choose to live, work and recreate. Companies also frequently rank quality of life high amongst the criteria they evaluate when they are looking to locate a new facility or relocate their existing operations.

As part of the SWOT Analysis, Tourism and Recreational opportunities were counted amongst the strengths for the Dale Summit. While this is likely more reflective of the larger region at this time, it inevitably provides the community an opportunity to build to one of its strengths as opposed to trying to overcome a weakness. The following recreation objectives provide decision-makers with some guidance on how to build upon these strengths within the Dale Summit, thereby improving both the regional economy and overall quality of life.

The Recreation objectives once again strive to address the following segments of the Goal Statement: ***“A place, which through proactive planning and well-tailored regulations, strikes a sound balance between encouraging business and industry expansion, while remaining respectful to important community livability factors such as improving housing affordability, providing sufficient public services”.***

RO.1. Recognize the Value of an Entertainment Niche

The 4Ward study noted that entertainment was a strong sector to consider in the Dale Summit. This entertainment niche, featuring uses such as theatres, civic spaces, gaming, restaurants and others, would be consistent with the Live-Work-Play community lifestyle that is being envisioned. The Dale Summit could provide these uses with convenient access to residential areas and other places of employment within adjacent transects.

As the goal statement outlines, *“the community envisions an activity hub that is vibrant, economically prosperous, socially equitable and environmentally sustainable.”* Proper incorporation of an entertainment niche would go far in achieving vibrancy, economic prosperity as these uses tend to thrive in areas with comparable socio-economic factors to those found within the Centre Region. Consideration should be given to allowing entertainment based uses within both current commercial and industrial zones. Building types that accommodate entertainment based uses should also be woven into the various transects in the future Form Based Code of the Dale Summit.

Of course, this discussion is not complete without consideration of the proposed Category 4 mini-casino at the Nittany Mall. While there have been concerns expressed over the potential community impacts associated with development of a casino, it is also important to consider the possible positives coming from this type of defining development in the Dale Summit. In particular, the casino could be the catalyst for rapid expansion and clustering of related businesses to fulfill the entertainment niche in the area. That said, the 4Ward study predates the proposed casino and, as such, serves to reinforce that the entertainment niche should be considered regardless of the casino development.

RO.2. Capitalize on Indoor Recreation Demand

As new development occurs in the Dale Summit, Region and County, there will be a corresponding increase in demand for service-oriented businesses such as restaurants, health and fitness centers, financial services, and entertainment venues. Venues that provides a sense of place, facilitates social

interactions across generations, and provides leisure opportunities for active lifestyles are poised to be the most successful.

A key subset of the envisioned entertainment niche in the Dale Summit will be a focus on indoor recreation venues. The Dale Summit already has the underpinnings of a cluster of these types of venues with the Nittany Mall, Premiere Theatre 12, C3 Sports & Events Center, Get Air Trampoline Park and the proposed Mini-Casino. These climate-controlled venues provide four-season recreation opportunities and in the instance of the Sports & Events Center, a location for hosting of events that draw even more visitors to the area. These types of venues not only cater to the existing community, but also contribute to tourism industry within Centre County. Visitors coming to the area for other events (Ex. Penn State Football, Arts Fest, 4th Fest) are more likely to extend their respective stays, if there are other attractive entertainment options. The Dale Summit is well-positioned to attract more of these types of venues and as such, regulations should be crafted that accommodate them.

Further, Centre Region Parks and Recreation's 2020 Comprehensive Recreation, Parks and Open Space Plan proposed a feasibility study for acquiring and/or developing an indoor recreation center that provides aquatic facilities and dedicated programming space for year-round activities and events. While this feasibility study is still aspirational, the Dale Summit could be an excellent host for this type of community facility.

RO.3. Connect the Natural Recreational Resources

The Dale Summit is situated directly between two of the finest natural recreation areas in Centre County, the Spring Creek Canyon and Mount Nittany. As part of the larger strategies to improve both recreational/entertainment offerings and expand connectivity in the Dale Summit, an eye should also be on making a connection to and between these resources.

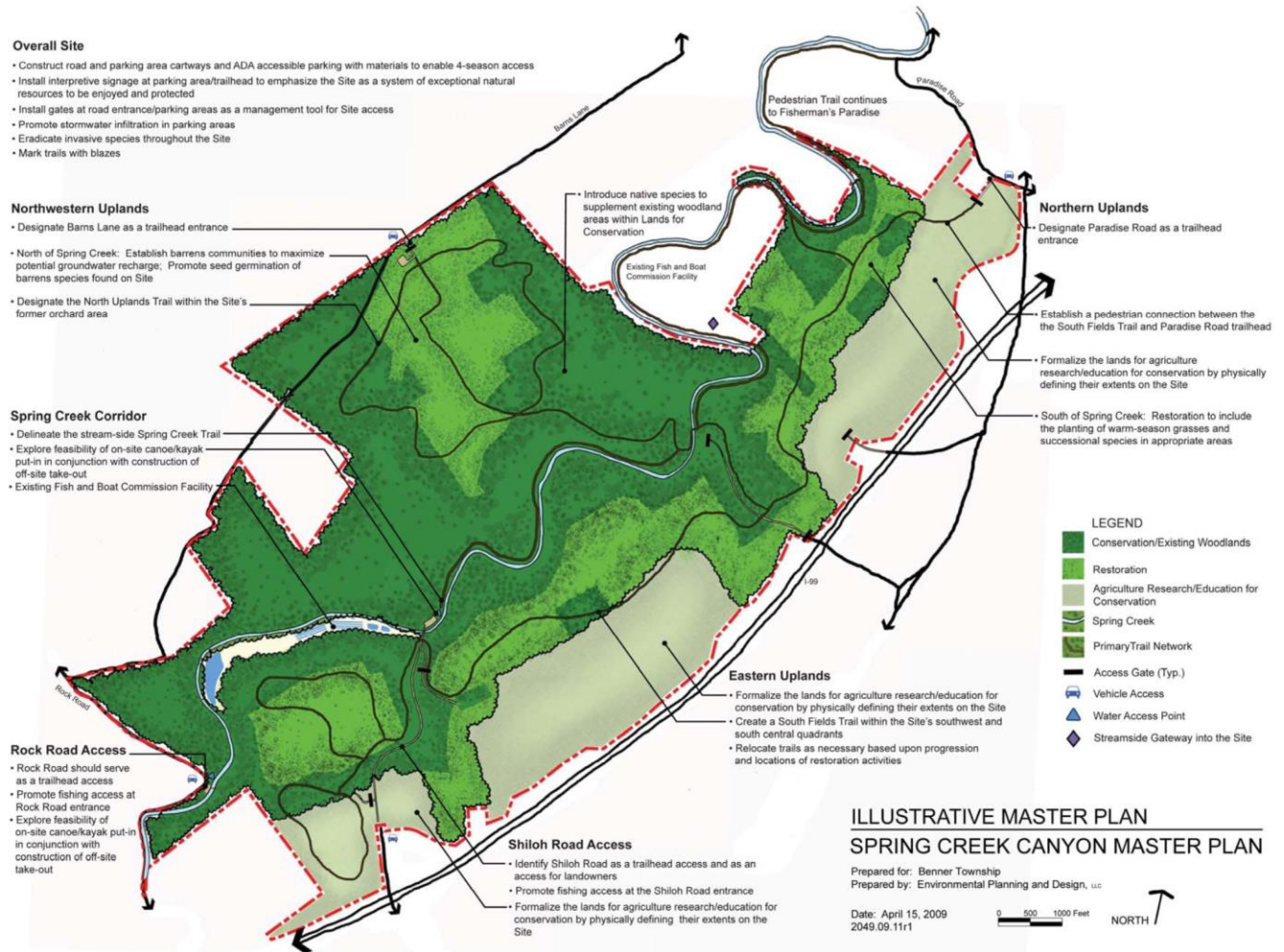
At over 1,800 acres, the Spring Creek Canyon is recognized for its natural resource richness and cultural significance. The 2009 Spring Canyon Master Plan was compiled to develop a symbiotic relationship between the desires and needs for:

- Ecological protection and restoration;
- Cultural preservation and celebration; and
- Public access, passive recreation and education

The Dale Summit is situated immediately south of the Spring Creek Canyon and is connected via the Shiloh Road interchange, which spans Interstate 99. Within the Master Plan, the Shiloh Road access is acknowledged as a future trailhead to the proposed trail network within the Spring Creek Canyon. In order to make this future trailhead accessible to the Dale Summit, consideration should be given to expanding the sidewalk and/or developing bike lanes or a new multi-use trail along Shiloh Road in both College and Benner Townships connecting into the Shiloh Road access.

Accessing Mount Nittany presents a more difficult challenge, as the only active trailheads in College Township are on East Mount Nittany Road in Lemont and lack direct connectivity to the Dale Summit study area. However, it is worth noting that these popular trailheads have also become problematic given the narrow cartway on East Mount Nittany Road and the lack of sufficient parking areas. As a longer-term implementation strategy, a feasibility study of a new trailhead access from the Dale Summit area to Mount Nittany should be considered by College Township in partnership with Centre Region Parks and Recreation

and the Mount Nittany Conservancy. This proposed study should also consider options to link the trailhead access to Shiloh Road.



RO.4. Strategically Preserve Open Space

As acknowledged in the SWOT analysis, the Dale Summit is marked by an abundance of impervious surfaces, specifically pavement. In order to move toward the vision of a thematically designed area that includes more natural spaces, it will be important to consider preservation of open space as part of the proposed move toward Form Based Code.

Allowing for higher levels of density in developments has a corresponding benefit of consumption of less land. As part of the Form Based Code, the higher density development areas should capture this open space and incorporate it cohesively into the overall community aesthetic. Strategically placed open space throughout the Dale Summit will further enhance area by presenting additional spaces and opportunities for passive recreation.

Transportation & Infrastructure Objectives

Recalling the SWOT Analysis, the following weaknesses were identified within the Dale Summit's transportation system:

- Circulation is somewhat complex
- Lack of pedestrian and bicycle facilities
- Limited CATA circulation
- Traffic congestion
- Car focused area
- Connection to I-99 from certain segments of the area is constrained by local roads

Transportation & Infrastructure objectives #1-3 provide some direction on moving toward a true Live-Work-Play community, that provides transportation connectivity across the land use transects through various modes that accommodate all users, regardless of age, ability or economic status.

Beyond transportation, Objective #4 also considers the utility infrastructure within the Dale Summit. As was acknowledged in the SWOT Analysis, most of the Dale Summit is well-served by utilities. However, some key properties do remain limited in development potential due to the lack of one or more utilities.

Finally, the Transportation and Infrastructure objectives aim to address the following segments of the Goal Statement: ***“... providing sufficient public services, and lessening traffic congestion through improved connectivity for all transportation modes.”***

TIO.1. Emphasize Connectivity for Pedestrians and Cyclists

During the historical phases of development of the Dale Summit, the emphasis was primarily on moving people first by train and more recently by automobile. As the Dale Summit grew and residential developments began to encroach closer to the once isolated commercial and industrial areas, the lack of pedestrian and bicycle facilities grew more readily apparent. This lack of safe amenities is further compounded by high traffic volumes on the primary access corridors of State Routes 26, 150 and Shiloh Road.

In acknowledgment of this disparity amongst transportation modes, there is a need to emphasize the expansion of the pedestrian and bicycle network in the area. Here, the Dale Summit Area Plan, will need to be informed by the ongoing College Township Pedestrian Facilities Master Plan and the Centre Region Bike Plan, which both identify key linkages through the area.

Once again, the Dale Summit could take cues from the Main Street program, which notes the following: *“Creating streets for people starts with creating a safe, sustainable, and healthy place for residents and visitors to connect, engage, and support the local economy. Truly the front porch of our communities, successful Main Streets embrace human-scale design and offer seating areas, inviting public spaces, and streetscape amenities that enhance the overall human experience. They are also easy and safe to navigate, with infrastructure and programming that prioritize and accommodate people of all abilities.”*

College Township Planning Commission and Council take pride in incorporating sidewalk facilities into proposed land development plans. This practice should certainly continue and, while it may prove controversial at times, granting waivers for the construction of these facilities should be further limited. The Pedestrian Facilities Master Plan discusses options for limiting waivers and proposes the incorporation of a new sidewalk fee-in-lieu within the township ordinances; the Dale Summit Area Plan supports incorporation of this fee-in-lieu with a recognition that funding generated through this process could be utilized to retrofit certain portions of the Dale Summit with key missing facilities.

TIO.2. Improve Public Transportation Circulation

As noted, another of the weaknesses identified in the Dale Summit was the circulation and frequency of service of public transportation offered currently by the Centre Region Transportation Authority (CATA). Public Transportation, particularly fixed route systems, thrive on serving more densely populated areas and key community activity hubs.

The issues with circulation and frequency are due to a combination of several factors:

- A CATA system that already stretched to accommodate its core routes.
- The Dale Summit being somewhat removed from those core routes.
- Declining activity in the Dale Summit, particularly at the Nittany Mall.

As the Dale Summit begins to reshape, College Township should proactively work with CATA to refine circulation patterns within the Dale Summit to ensure both efficiency and effectiveness. Frequency of service is likely a more difficult challenge given the limitation of CATA resources. To stem this weakness, different delivery models should be investigated for viability in the Dale Summit. This could correspond with CATA's internal study of how to move toward more of a mobility provider versus the traditional public transportation model.

TIO.3. Invest in the Streetscape to Support Theme

As addressed under aesthetics, the intent is to move toward a thematic design that projects the Dale Summit as historic with a contemporary flair. To fully realize this theme, adjustments in ordinances along with significant investments in common areas and public spaces will likely be required over time.

A starting point within the Dale Summit would be an investment in the streetscape along both the Benner Pike (SR 150) and Shiloh Road. Streetscape is a term "that is used to describe the natural and built fabric of the street, and defined as the design quality of the street and its visual effect." The concept recognizes that a street is a public place where people are able to engage in various activities. Streetscapes and their visual experience largely influences public places where people interact, and it ultimately helps define a community's aesthetic quality, economic activity, health, and sustainability.

Consideration should be given to identifying and implementing a template for common streetscape elements that would tie these corridors together cohesively. These elements could be common travel lane design, incorporation of street trees and furniture, common lighting standards with a historical appeal and sidewalk design/materials. The aforementioned public realm elements could be embedded within the future Dale Summit Form Based Code.

TIO.4. Expand Existing Utility Infrastructure to Unlock Undeveloped Parcels

This final objective touches upon a long-standing hot button issue within the Dale Summit. There are currently several properties spanning both College and Benner Township along the Shiloh Road corridor that are lacking key utility infrastructure.

To unlock the development potential of these sites, there needs to be some resolution over how best to extend the necessary infrastructure connections. This may require the intervention of local legislators, who could serve to facilitate a final decision. Once a decision is rendered and the infrastructure is extended, these properties could be treated in a similar manner to other planned development areas

across the nation, by making these “shovel ready sites” for development opportunities fitting with the land use regulations for these parcels.

DRAFT

What steps should be taken to realize the vision for the future of Dale Summit?

Part IV. Implementation Strategy

The Goal Statement and Objectives outlined within Part 3: Existing Conditions of this Area Plan provide both aspirations for the Dale Summit and a list of concepts that that could conceivably move the area from its current conditions toward the vision as outlined herein. As was underscored within that section, a key threat to the Dale Summit is continuing to adhere to the status quo in terms of regulations and approach to the area's overall development. To do that, is to prescribe continued patchwork development activity and the overall slow decline in certain segments of the Dale Summit that has been seen since the early 2000's.

In this section, the objectives listed below will be prioritized and organized into an expanded, sequential series of implementation steps that move the Dale Summit Area Plan from aspirational to actionable.

Aesthetics

- AO.1. Incorporate Thematic Design
- AO.2. Emphasis on Historical with a Contemporary Flair
- AO.3. Focus More on Human Scale Development
- AO.4. Use Art Strategically to Enhance Theme

Economic Development

- EDO.1. Define the Dale Summit Brand/Niche
- EDO.2. Develop a Marketing Strategy
- EDO.3. Use Tax Incentives to Spur Development
- EDO.4. Partner to Balance Risks

Land Use & Zoning

- LZO.1. Allow for Flexibility within Regulations
- LZO.2. Regulate on Form Instead of Use
- LZO.3. Add Rooftops to Drive Revitalization
- LZO.4. Utilize Demonstration Projects to Highlight Changes

Recreation

- RO.1. Recognize the Value of an Entertainment Niche
- RO.2. Capitalize on Indoor Recreation Demand
- RO.3. Connect the Natural Recreational Resources
- RO.4. Strategically Preserve Open Space

Transportation & Infrastructure

- TIO.1. Emphasize Connectivity for Pedestrians and Cyclists

- TIO.2. Improve Public Transportation Circulation
- TIO.3. Invest in the Streetscape to Support Theme
- TIO.4. Expand Existing Utility Infrastructure to Unlock Undeveloped Parcels

Implementation Steps and Schedule

On the following pages, each Objective will be broken down into incremental implementation steps that are designed to achieve the Objective.

These implementation steps are further assigned within one of the following color-coded schedule timeframes as a means to keep the community pointed toward achieving the Goal Statement:

Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
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Primary Objectives

As the Area Plan developed, it became readily apparent that two primary objectives establish the framework of an overall implementation strategy with the Dale Summit. Those two primary objectives are:

- Regulate on Form Instead of Use
- Defining the Dale Summit Brand/Niche

While achieving any of the aforementioned objectives would be a positive in the Dale Summit, it is the belief of the CAC and staff that these primary objectives are critical toward making real, measurable change in the reshaping and revitalization of the Dale Summit.

With that in mind, it imperative that the community decision-makers spend the time necessary to fully understand and appropriately implement the primary objectives early in the overall process. The remaining objectives and their respective implementation steps, while each very important, are viewed as playing more of a supporting role for these primary objectives.

Fortunately, these primary objectives can move concurrently, as they serve to inform each other. For the Form Based Code model to work appropriately, it requires the following key tasks that will be undertaken in during implementation of EDO.1:

- A better understanding of what types of development mix the community desires,
- What types of projects are viable within that mix of uses, and
- How those projects fit within the transects that makes up the Dale Summit footprint.

Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
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LZO.2. Regulate on Form Instead of Use (PRIMARY)

Form-based code is a land development regulation that fosters predictable built results and a high-quality public realm by using physical form (rather than separation of uses) as the organizing principle for the code.

Implementation Step 1: Educational Process

Before any major change can be implemented, the community must first understand both the need for and the purpose of the change in question. This step proposes an educational process to inform current property owners, key stakeholders and local/regional appointed and elected officials of why College Township is proposing the change to Form Based Code, the process for this conversion and how the implementation stands to benefit the place-making efforts underway in the Dale Summit.

Implementation Step 2: Consultant Selection Process

College Township acknowledges that a zoning change of this magnitude will require expertise from an outside consultant. This step proposes casting a wide net while seeking a qualified and experienced firm to aid the Township in crafting and the seamless implementation of a new Form Based Code.

Implementation Step 3: Refine the Transect Mapping

The mapping within this Area Plan was compiled by College Township staff and represents a good faith effort in projecting the future regulating plan under Form Based Code. However, staff acknowledges that community expectations when combined with consultant expertise could result in significant refinements to the transect mapping. As part of the crafting of the new ordinance, the mapping should be refined to best suit the future configuration of the area.

Implementation Step 4: Craft and Adopt New Form Based Code Regulations

It is envisioned that the development of the new Form Based Code will likely be a deliberate and time-consuming process. The hope is that within 24-36 months from the approval of the Dale Summit Area Plan, College Township staff and consultant would be prepared to present the new Dale Summit Area Form Based Code for consideration by the College Township Council.

Once approved, a new educational process both for staff and developers would be required as part of the implementation. As with any new ordinance there are expected to be “growing pains” while all parties grow accustomed to the new regulations.

Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
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EDO.1. Define the Dale Summit Brand/Niche (PRIMARY)

To fully realize the Goal Statement, decision-makers must take the time now to understand exactly how they wish to position the Dale Summit, the market sector(s) they are trying to foster and how to shape (or reshape) the area through design, investments and regulations to best fit those markets.

Implementation Step 1: Identify the brand of the future Dale Summit.

Analyze the market. Building from the socio-economic analysis and the SWOT analysis of the Dale Summit, determine how the area fits within the local market against peer College communities.

Identify the customers. Time should be spent on determining the types of development that are preferred for the Dale Summit and who would either build or be the customers for those developments.

Determine the personality and message that the Dale Summit should communicate in the future. A place needs to create a consistent perception, rather than trying to combine every conceivable positive trait: utility, affordability, quality, nostalgia, modernity, luxury, flash, taste, and class. All elements of a brand, such as copy, imagery, cultural allusions, and color schemes, should align and deliver a coherent message.

Implementation Step 2: Engage the development community in discussions over the viability of the preferred development types selected for the Dale Summit.

Building upon step 1, it is important to know if the preferred development types are currently viable within the Dale Summit or not. It would also be crucial to understand the barriers to the viability of any preferred development types, as these discussions would inform the implementation steps under objectives in several of the other categories, specifically Economic Development.

To do this step well, it is recommended that these discussions go beyond the frequent or regionally based developers. Understanding how the Centre Region and this area are perceived by developers throughout the state and nation would provide interesting data points. Engaging site selectors for their honest assessment of the Dale Summit would also be worthwhile.

Implementation Step 3: Identify appropriate placement within transects and the supporting menu of regulations/incentives needed to ensure cohesion and success.

Once the preferred development types or niches are identified, the next steps would be to consider the appropriate placement within the respective transects that make up the Dale Summit. Like a puzzle, these transects are designed to fit together well to make a cohesive picture. With that in mind, decision-makers should consider how to situate the preferred development types throughout the transects so that they complement those adjacent.

While the focus in the Dale Summit is on regulating on form over use, strategies can still be put in place that tailor regulations on building form or utilize incentive models that make it more attractive for future developers to follow the preferred placement model.

Supporting Objectives – Aesthetics

Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
<p>AO.1. Incorporate Thematic Design AO.2. Emphasis on Historical with a Contemporary Flair</p>			
<p><i>Thematic design is the design of a variety recurring elements on any environmental level according to a set of organizing principles. This could include design cues that interplay specifically through architecture, landscape, streetscape, lighting and overall scale.</i></p>			
<p>Implementation Step 1:</p>	<p>Engage a Landscape Architect or other design professional(s), either formally or informally, to identify the organizing design principles.</p>		
<p>Implementation Step 2:</p>	<p>Incorporate design principles into existing/future ordinances and any associated regulations.</p>		
<p>Implementation Step 3:</p>	<p>Identify and invest in projects within public spaces that emphasize the design principles.</p>		
<p>Implementation Step 4:</p>	<p>Develop a grant program that assists/incentives incorporation of design principles into new developments or retrofits.</p>		

Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
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AO.3. Focus More on Human Scale Development

Simply defined, human scale is making sure that the objects that we interact with every day within our built environment are of a size and shape that is reasonable for an average person to use. Beyond that, human scale is also an understanding of how, we as individuals perceive our built environment surrounding in relation to ourselves.

Implementation Step 1:	Incorporate design standards into existing/future ordinances and any associated regulations.
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AO.4. Use Art Strategically to Enhance Theme

Art and other cultural elements are frequently used to reveal and enhance the underlying identity of our built environment and social form. Art may be strategically used to help establish both the brand and a sense of place in the Dale Summit.

Implementation Step 1:	Identify strategic locations for placement of an art feature(s).
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Implementation Step 2:	Engage artisans to create an art feature(s) that enhances the brand/sense of place.
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Supporting Objectives – Economic Development

Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
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EDO.2. Develop a Marketing Strategy

When creating a marketing plan for a community, it is imperative to understand the factors that influence decisions by those looking to invest or reside in the area.

Implementation Step 1:	Engage a professional marketing firm to craft a strategy to best position the Dale Summit.
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EDO.3. Use Tax Incentives to Spur Development

The built-in development costs within the Centre Region can occasionally create barriers to new development or redevelopment of underutilized sites. While there is little that can be done to offset the rising land values or the costs of existing buildings within the region, the strategic implementation of certain tax incentives may provide an alternate path to revitalization in the Dale Summit.

Implementation Step 1:	Evaluate programs available at both the State and Federal levels to determine viability in this area.
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Implementation Step 2:	Convene discussions with each taxing bodies to educate all entities on the need and gauge interest in program options.
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Implementation Step 3:	Establish boundary(s) or district(s) for the designated tax incentive program.
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Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
EDO.4. Partner to Balance Risks			
<i>In order for the Township to attract quality development to the area, it is imperative to show the development community that the public sector is willing help offset some of risk to better enable their ventures to succeed.</i>			
Implementation Step 1:	Evaluate waivers of certain internal fees and covering the cost of utility connection fees as an incentive for certain types of development.		
Implementation Step 2:	Partner with key utilities to improve or extend connections that make underutilized sites more viable.		

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Supporting Objectives – Land Use & Zoning

Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
LZO.1. Allow for Flexibility within Regulations			
<i>There are real or perceived barriers to development that come from overly stringent regulations and inflexible ordinances. While many of the regulations in question are beyond local control, there are certain aspects of the current local regulations that could be tweaked to provide some flexibility to developers.</i>			
Implementation Step 1:	Evaluate existing regulations to determine if modifications are needed. This should be done in as an Interim Step to a permanent change to Form Based Code		
Implementation Step 2:	Establish amortization provisions as a means of eliminating nonconformities.		
Implementation Step 3:			
Implementation Step 4:			

Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
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LZO.3. Add Rooftops to Drive Revitalization

A primary factor in this growth disparity) was the abundance of residential areas adjacent to the North Atherton Street Corridor versus the relative lack of residential units present in the Dale Summit.

Implementation Step 1:	Adjust regulations to allow for higher densities and expanded mixed uses within certain transects.
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Implementation Step 2:	Expanded Regional Growth Boundary and Sewer Service Area on the fringes of the Dale Summit to accommodate residential development.
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Implementation Step 3:	Expand incentive options for development of affordable housing options within Dale Summit.
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Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
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LZO.4. Utilize Demonstration Projects to Highlight Changes

One way to economically see immediate results in the area is through the use of demonstration projects. This refers to low-cost temporary changes to the urban environment that are intended to demonstrate the potential impact a change can have.

Implementation Step 1:	Select locations and scope of small scale demonstration projects to display potential changes.
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Implementation Step 2:	Prepare renderings for key development parcels showing development potential under Form Based Code.
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Implementation Step 3:	
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Implementation Step 4:	
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Supporting Objectives – Recreation

Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
RO.1. Recognize the Value of an Entertainment Niche			
<i>This entertainment niche, featuring uses such as theatres, civic spaces, gaming, restaurants and others, would be consistent with the Live-Work-Play community lifestyle that is being envisioned. The Dale Summit could provide these uses with convenient access to residential areas and other places of employment within adjacent transects.</i>			
Implementation Step 1:	Allow entertainment uses, such as theatres, civic spaces, gaming, restaurants and others, as a use by right in appropriate transects.		
Implementation Step 2:	Market Dale Summit as the Centre Region’s Entertainment Sector.		
Implementation Step 3:	Work with CBICC and HVAB to site a new Convention Center type use in the Dale Summit.		
Implementation Step 4:			

Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
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RO.2. Capitalize on Indoor Recreation Demand

A key subset of the envisioned entertainment niche in the Dale Summit will be a focus on indoor recreation venues. The Dale Summit already has the underpinnings of a cluster of these types of venues with the Nittany Mall, Premiere Theatre 12, C3 Sports & Events Center, Get Air Trampoline Park and the proposed Mini-Casino.

Implementation Step 1:	Ensure height restrictions within appropriate transects will accommodate indoor recreation uses.
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Implementation Step 2:	Incorporate more indoor recreation uses as use by right in Zoning or Form Based Code.
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Implementation Step 3:	Champion a feasibility study for acquiring and/or developing an indoor recreation center that provides aquatic facilities.
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Implementation Step 4:	
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Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
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RO.3. Connect the Natural Recreational Resources

The Dale Summit is situated directly between two of the finest natural recreation areas in Centre County, the Spring Creek Canyon and Mount Nittany. As part of the larger strategies to improve both recreational/entertainment offerings and expand connectivity in the Dale Summit, an eye should also be on making a connection to and between these resources.

Implementation Step 1:	Expand the sidewalk and/or develop bike lanes or a new multi-use trail along Shiloh Road connecting into the Spring Creek Canyon access at Shiloh Road.
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Implementation Step 2:	Perform a feasibility study for a new trailhead access from the Dale Summit area to Mount Nittany.
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Implementation Step 3:	Evaluate the possibility of a Regional Park within the Dale Summit.
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Implementation Step 4:	
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Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
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RO.4. Strategically Preserve Open Space

In order to move toward the vision of a thematically designed area that includes more natural spaces, it will be important to consider preservation of open space as part of the proposed move toward Form Based Code.

Implementation Step 1:	Within transect mapping, identify parcels or portions thereof that should be preserved as open space within Dale Summit.
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Implementation Step 2:	Incorporate regulations and incentives to make conservation development an attractive option for developers.
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Implementation Step 3:	Designate strategic open space areas within College Township Official Map.
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Supporting Objectives – Transportation & Infrastructure

Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
TIO.1. Emphasize Connectivity for Pedestrians and Cyclists			
<i>During the historical phases of development of the Dale Summit, the emphasis was primarily on moving people first by train and more recently by automobile. As the Dale Summit grew and residential developments began to encroach closer to the once isolated commercial and industrial areas, the lack of pedestrian and bicycle facilities grew more readily apparent.</i>			
Implementation Step 1:	Incorporate the projects identified within the College Township Pedestrian Facilities Master Plan and Centre Region Bike Plan into the transect mapping.		
Implementation Step 2:	Update the Official Map with the highest priority pedestrian and bicycle projects from associated planning documents.		
Implementation Step 3:	Select projects that will require public investment for future grant cycles and utilize revenue from proposed sidewalk fee-in-lieu as match.		
Implementation Step 4:	Implement a Complete Streets model where viable.		

Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
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TIO.2. Improve Public Transportation Circulation

As the Dale Summit begins to reshape, College Township should proactively work with CATA to refine circulation patterns within the Dale Summit to ensure both efficiency and effectiveness.

Implementation Step 1:	Working with CATA, investigate changes to fixed route circulation to improve efficiency and effectiveness.
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Implementation Step 2:	Investigate alternative service models to improve mobility throughout Dale Summit.
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Implementation Step 3:	Provide incentive for higher density developments to emphasize the use of public transportation options.
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Implementation Step 4:	Partner with CATA and higher density developments on fare incentive program.
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Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
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TIO.3. Invest in the Streetscape to Support Theme

Streetscape is a term “that is used to describe the natural and built fabric of the street, and defined as the design quality of the street and its visual effect.” The concept recognizes that a street is a public place where people are able to engage in various activities.

Implementation Step 1:	Seek funding to make improvements to the streetscape along both the Benner Pike (SR 150) and Shiloh Road.
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Implementation Step 2:	Implement a common design template for streetscapes based upon roadway classification within Dale Summit.
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Implementation Step 3:	
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Implementation Step 4:	
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Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
TIO.4. Expand Existing Utility Infrastructure to Unlock Undeveloped Parcels			
<i>There are currently several properties spanning both College and Benner Township along the Shiloh Road corridor that are lacking key utility infrastructure. To unlock the development potential of these sites, there needs to be some resolution over how best to extend the necessary infrastructure connections.</i>			
Implementation Step 1:	Seek a facilitated/mediated determination on which utility provider should make necessary infrastructure connections.		
Implementation Step 2:	Where appropriate, partner with the utility provider to make the connections to undeveloped sites.		

The preceding implementation steps provide decision-makers with a number of incremental actions that over time will help in the reshaping of the Dale Summit to achieve the ideals outlined in the Goal Statement.

While these implementation steps provide a good strategic direction, they are not all-inclusive and represent simply a snapshot in time. The expectation is that some of the steps will inevitably be rendered not valid or will evolve as development occurs throughout the Dale Summit in the coming years. As was stressed earlier, but bearing repeating, the biggest threat to the Dale Summit is continuing to adhere to the status quo. If the approach to the area’s overall development is not changed, the Dale Summit will continue to experience patchwork development activity and a likely overall slow decline.

APPENDIX -

America After Covid: What Demographics Tell Us

Covid is sure to reshape our country in profound new ways, but, write famed demographers Wendell Cox and Joel Kotkin, the most powerful will be accelerating trends that were already underway. A look at a sped-up future with big implications.

By

Joel Kotkin and Wendell Cox

October 20, 2020

“When there is a general change in conditions, it is as if the entire creation had changed, and the whole world altered.” —Ibn Khaldun, 14th century Arab historian

The Covid-19 pandemic, it's clear, will help reshape America's economic and demographic future. Yet, many of the trends that we may associate with this reshaping—the rise of online work, a growing interest in suburbia and smaller cities—were already in place before the pandemic. The pandemic did not originate these trends, but it will likely accelerate them.

For years, the conventional wisdom from economic observers like Neil Irwin of The New York Times and echoed by public relations acers and property speculators has been that “superstar cities” like New York, San Francisco and Seattle have “the best chance of recruiting superstar employees. In contrast, rural and interior regions would become home to “behind.” And experts like urbanist Christopher Leinberger predict suburban tracts would become “the next slums.”

Yet, in reality, jobs and young people have been increasingly heading toward both the suburban periphery and smaller cities. In fact, a snapshot of America

before the appearance of Covid-19 was of a country migrating more to suburbs, exurbs and smaller cities, with the U.S. Census Bureau reporting the fastest growth in domestic migration between 2010 and 2019 taking place in cities with less than a million people—a dramatic change from just a decade earlier.

In contrast, our largest metropolitan areas—New York, Chicago and Los Angeles—lost nearly as many net domestic migrants as the population of Arkansas from 2010 to 2019 (2.8 million compared to 3.0 million). New York’s population growth peaked at 130,000 in 2011 but fell to a 60,000 loss by 2019, according to Census Bureau estimates.

The Geography of Pandemics

The pandemic has been toughest on areas suffering from what we call “exposure density.” Nationwide, the highest fatality rates are in the two highest urban density categories, which are comprised of three New York City counties. Manhattan’s fatality rate, with 2.4 percent of the nation’s deaths, is 4.8 times its proportional share of deaths; Brooklyn and Bronx counties, which have the higher poverty rates associated with higher death rates, do even worse, with a fatality rate 7.5 times the national average.

In contrast, less dense counties—those with urban densities between 2,500 and 5,000—have less than their proportional share of deaths (0.8 percent), with 22.4 percent of deaths and 28.1 percent of the population. Lower density areas have even lower fatality rates, despite the occasional spikes in food-processing plants, Native American reservations and extremely poor areas like those close to the Mexican border. Even with the recent surge, fatality rates in states like Texas, Arkansas, Kansas and the Dakotas remain between one-third to one-eighth of those in New York and New Jersey.

Pandemics, like changes in climate, often alter how and where people live. In the 14th century, plagues wiped out as much as one-third of Europe's population, but the wreckage also brought opportunities for those left standing. Large tracts of land, left abandoned, could be consolidated by rich nobles or, in some cases, enterprising peasants, who looked to lower rents and higher pay. "In an age where social conditions were considered fixed," suggested historian Barbara Tuchman, the new adjustments seemed "revolutionary."

Accelerating Dispersion

We already see signs of a huge shift in the increasingly empty New York towers and failed new projects in San Francisco and downtown Los Angeles. In the first two months of the pandemic, REIT office values dropped by as much as 25 percent.

A recent Harris poll suggested that upwards of two in five urban residents are considering moves to less-crowded places, a finding shared by real estate experts. "New home demand is improving in lower-density markets, including small metro areas, rural markets and large metro exurbs," notes National Association of Home Builders Chief Economist Robert Dietz, "as people seek out larger homes and anticipate more flexibility for telework in the years ahead. Flight to the suburbs is real."

Technology Accelerates the Trends

Living in dispersion far from the coasts may not save you from contagion, but being away from people, driving in your own car and having neighbors you know considerably reduces the risk. We may debate the true causes of infection and mortality from the pandemic for decades to come, but it seems likely, judging from real estate trends and emerging demographics, that the

table is well-set for attractive peripheral areas and smaller, less densely packed cities.

Remote working, notes Stanford economist Nicholas Bloom, increased from 5 percent before the pandemic to above 40 percent and may hold firm or even continue. A University of Chicago study suggests it could settle at as much as one-third of the workforce, a finding also confirmed by a recent Chief Executive CEO survey. Sixty percent of people working from home express a preference, according to Gallup, for continuing to do so.

Corporate executives have been surprised by how seamless the shift to online work has been, reaping surprising productivity gains. Many companies, including leading tech firms like Facebook, Salesforce and Twitter, now expect a large proportion of their workforce to continue working remotely after the pandemic. Rising disorder in our major cities—exemplified by a shocking rise in homicides in places like Los Angeles, Chicago and New York—is likely to increase insurance costs for downtown shopping and scare middle-class residents of all races out of the big cities.

The impact may be most intense in the tech industry, which already has high rates of telecommuting and jobs that are intrinsically easy to do remotely. Two out of three tech workers are now willing to leave San Francisco, according to Redfin, with many seeking suburban locations or even a shift to the countryside.

The shift to online, some observers fear, will take away the “serendipity” so critical to Silicon Valley’s emergence. But, in the age of tech oligarchies, much of the grassroots “garage” valley economy has been consigned to the past. States and localities from Oklahoma to Vermont, Maine to Iowa have adopted programs to promote this environmentally friendly policy. These

include providing cash incentives for companies and workers, as well as housing subsidies.

Who Wins?

Covid is likely to accelerate the shift to suburbia, which already accounts for 82 percent of all new jobs. In 34 of the 53 metropolitan areas with populations of more than 1,000,000, 90 percent or more of new jobs have been located in the suburbs since 2010, according to research by Indeed Hiring Lab. Meanwhile, the fastest drops in job postings have not been, as expected, in tourism-dominated economies (outside of Hawaii) but in the elite regions such as San Francisco, New York, Chicago, Boston and San Jose.

Over the next few years, growth will likely continue to shift to large Sunbelt metros such as Dallas-Ft. Worth, Nashville and Phoenix. Perhaps more surprising, dynamic growth will also spread to smaller areas such as Madison, Wisconsin; Des Moines, Iowa; Fayetteville/Northwest Arkansas; and Huntsville, Alabama. Over the past decade, these have generally outperformed the large metros—New York, Chicago and Los Angeles—in creating new jobs in fields such as business services and technology, according to the Bureau of Labor Statistics.

Even before Covid, the concentration of tech jobs was creating what the Brookings Institute described as “ruinous degree of territorial concentration” in cities like Seattle and San Francisco, resulting in hyper-inflated real estate, mass homelessness and monumental traffic congestion. A shift to more diverse locales could be better for the country, the tech industry and the people who work in it.

The process has already begun, as evidenced by Lyft's move of many key operations to Nashville, Uber's move to establish its second-largest office in Dallas-Ft. Worth and Apple's establishment of its second-largest facility in the suburbs north of Austin. Elon Musk started shifting more Space X operations to Texas, including building his next electric vehicle factory in Austin, Texas.

Suburbs or small cities with the best infrastructure will benefit most. Good medical care will be a big determinant, suggests Dan Young, former president of the Irvine Company, in terms of where people and companies choose to locate.

We cannot suggest that these trends will turn around the decades-long decline in older Midwest industrial centers such as Cleveland, Detroit and even Chicago. But the South, the Great Plains, the mountain West and parts of the Midwest are attracting two key demographic groups—millennials and immigrants. More millennials, including those Richard Florida, a professor and head of the Martin Prosperity Institute at the Rotman School of Management at the University of Toronto, identifies as the creative class, are heading to the Cincinnati and Grand Rapids metropolitan areas than to New York, Los Angeles or Washington, D.C. Renewed interest in single-family homes after the pandemic may accelerate these trends.

Despite media accounts about young people not wanting to start families or buy homes, most surveys show this remains the preference of the vast majority. To many of these young families, affordable single-family housing is a top concern. Housing costs based on the price-to-income ratio (median prices divided by incomes) in places like Indianapolis, Des Moines, Cincinnati and Kansas City are one-half to one-third of those in Los Angeles or the Bay Area. Commute times are also 20 percent to one-third lower in the lower-density, affordable cities.

What About America's Big Cities?

Core cities like New York and Chicago, of course, will not disappear. Instead, they will likely revive, albeit in a less grandiose way than generally imagined by urban pundits. And, for those who can afford rents—young, affluent, childless—the walkable parts of core cities, such as much of Manhattan, downtown San Francisco and the Chicago loop, may remain enormously attractive.

With the reduction in tourism—driven by cratered international air travel—city dwellers can rediscover the pleasures of urban life. They can thrive, as H.G. Wells predicted well over a century ago, as “places of concourse and rendezvous.” The city, he projected, would be a small percentage of the overall population and would be dominated by the affluent and childless, areas of “luxurious extinction,” as he waggishly predicted.

In an era of social distancing, places like Manhattan will need to become less crowded. This happened in the years after the Spanish flu, as well as other deadly outbreaks, most commonly in areas like the Lower East Side, then one of the most crowded places on earth. Manhattan, home to 2.3 million people in 1910, shrank over the next 70 years, became less congested as the population dropped to 1.6 million and people moved to the outer boroughs and surrounding suburbs that now make up more than 60 percent of the combined statistical area (CSA) population.

Yet, for the most part, the future belongs most to the suburbs and less expensive areas. This is reflected by the number of households with school-aged children (6-17), which average more than a third higher in suburbs and exurbs than in dense urban cores. The difference is even greater in places like Manhattan and San Francisco, where the share of households with school-aged children is less than one-half that of the rest of the metropolitan area.

Societies with low birthrates—as we now see in much of Europe and East Asia—inevitably suffer a kind of cultural and economic stagnation. Young people, notes economist Gary Becker, are critical to an innovative economy, and more of them are likely to come from the Heartland.

In the end, America will adjust to the pandemic as it always has to crises—slowly and incompetently at first, but decisively meeting the challenge by allowing citizens to adjust their ways of life geographically. We may despise what providence has brought us with this miserable disease, but the blessings of our vast and varied country will see us through to a better day.



[Joel Kotkin and Wendell Cox](#)

Joel Kotkin is the presidential fellow in urban futures at Chapman University and executive director of the Center for Opportunity Urbanism. Wendell Cox is a senior fellow with the Center for Opportunity Urbanism and principal of Demographia, an international public policy firm.