

Dale Summit

Area Plan Report
College Township, PA
October 16, 2023

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Part I. Introduction

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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 w 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**. In 2023, this initiative was coupled with the development of an illustrative master plan and a proposal for a new form-based code to anchor the Dale Summit Area Plan and provide a path towards achieving its vision statement.

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 seeks to answer the first of those questions through an in-depth evaluation of Existing Conditions. The Existing Conditions section evaluates 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 reveals 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 presents 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 first considers development trends that may influence future development and the area’s capacity to meet any demand stemming from those trends. From there, it considers the Strengths, Weaknesses, Opportunities and Threats (SWOT) of the current Dale Summit Area. With an eye toward this SWOT Analysis, the Area Plan then outlines a series of Goals and Objectives for the future of Dale Summit. The community’s vision for the future is framed by providing themes for establishing a more readily definable sense of place within the Dale Summit. This section will conclude with the inclusion of the 2023 illustrative master plan that is based on existing site conditions and the aspirations of this Area Plan. It provides a comprehensive vision under which parcels can redevelop in a more compact, connected and walkable development pattern.

Answering the final question is accomplished through the Implementation Strategies section of the Dale Summit Area Plan. These Implementation Strategies provides 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:

Introduction

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, SUFFICIENT PUBLIC SERVICES, AND TRAFFIC IMPROVEMENTS THROUGH IMPROVED CONNECTIVITY FOR ALL TRANSPORTATION MODES.

In 2023, College Township engaged DPZ CoDesign to develop the Dale Summit Master Plan and Form-Based Code as part of this ongoing effort. The scope of work was divided into 4 phases: Phase 1: Baseline Assessment consists of a review of all relevant background reports, studies, and base information and a community engagement plan for this effort. It also included an update to the fundamental market analysis which was originally completed pre-COVID and needed to be revisited to determine what development program for the project area could be accommodated over the next 2 decades. Phase 2 entailed the development of the master plan and accompanying code. Phase 3 consists of assisting staff with the code's adoption process and making public presentations. Finally, Phase 4 is for implementation which involves training sessions of the new code with staff and supporting the new code with the preparation support material to guide developers, property owners, architects, and others in the successful redevelopment of the Dale Summit Area.

Over the course of 6 days from June 18-23, 2023, the DPZ CoDesign team conducted a public design charrette which included multiple tasks. Focused public meetings were held during the week to discuss development issues related to: a) land use and zoning, b) parks and amenities; c) economic development; d) the results of the market study; and 5) transportation and infrastructure. Recommendations from those meetings were tested in the master plan options. Additionally, during the week, the design team toured and continued documenting the site, evaluated potential infill sites from a zoning capacity standpoint, suggested necessary street, trail and open space connections to the greater Dale Summit Area, and designed, presented, and refined a range of development scenarios for many sites. Part III: Future Conditions includes the final illustrative plan and its supporting documents, based on the charrette work and public comments received.

Part II. Existing Conditions

What is Dale Summit today?

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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.

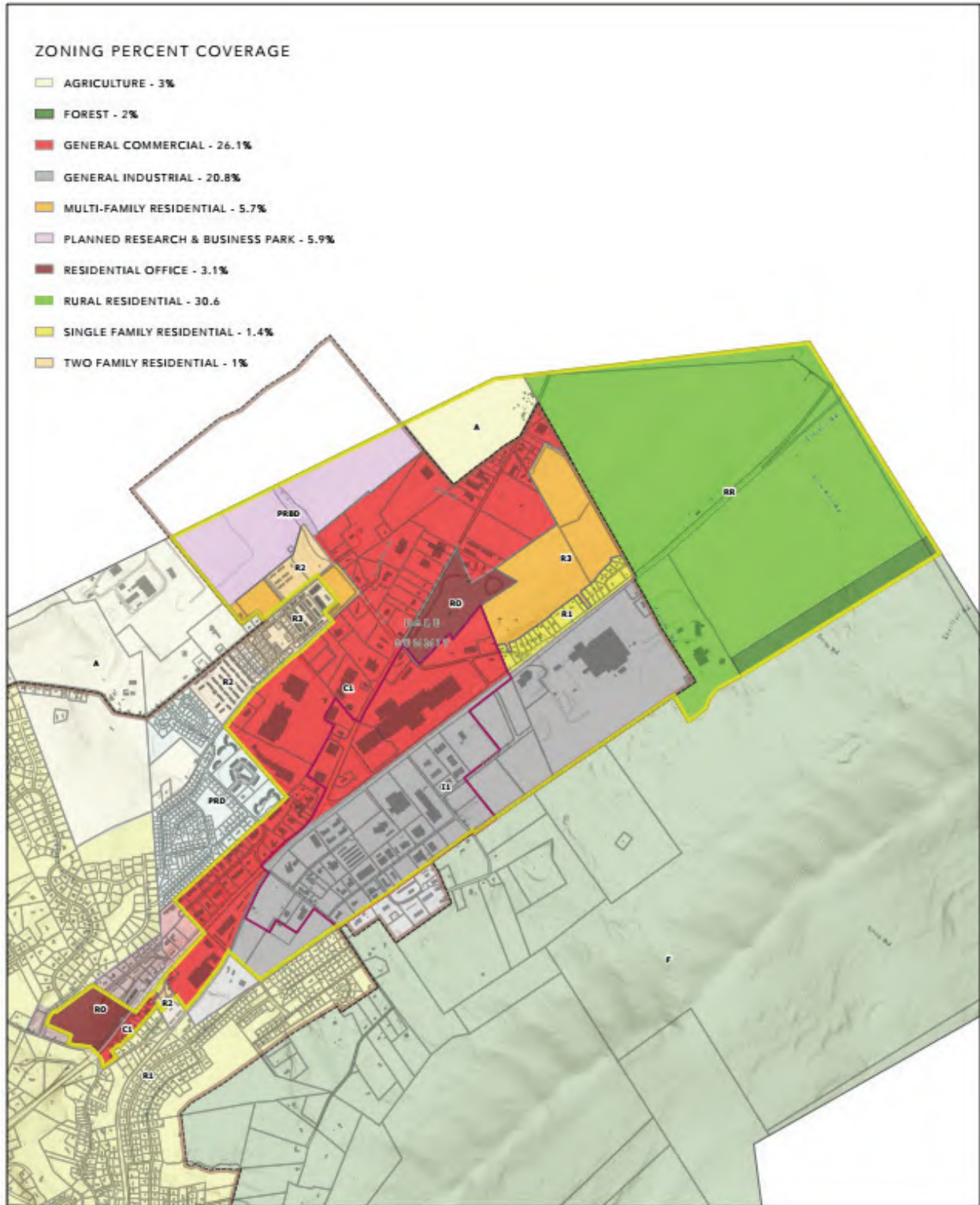
The 10 zoning districts are listed below in order of percent coverage, with the same reflected in the graphic on the following page :

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

Existing Conditions



Existing Conditions

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.

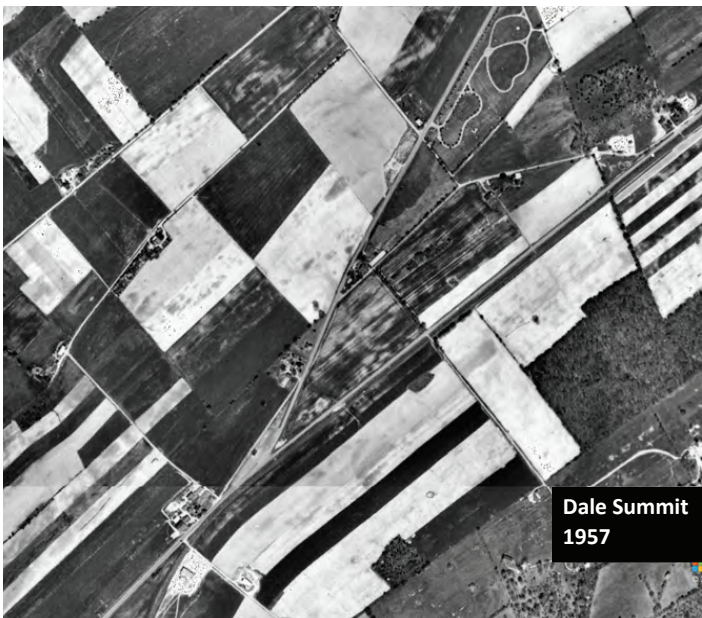
Beyond its transportation heritage, Dale Summit has also historically been identified as an important employment center and retail/commercial destination within the larger region. These designations can be linked to two "defining" developments that occurred in the late 1960's in the Dale Summit.

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
1957

Existing Conditions



**Dale Summit
1971**



**Dale Summit
2020**

Existing Conditions

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.

Socio-Economic Analysis

4Ward Planning Incorporated’s 2019 College Township Commercial and Industrial Zoning Analysis into 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.

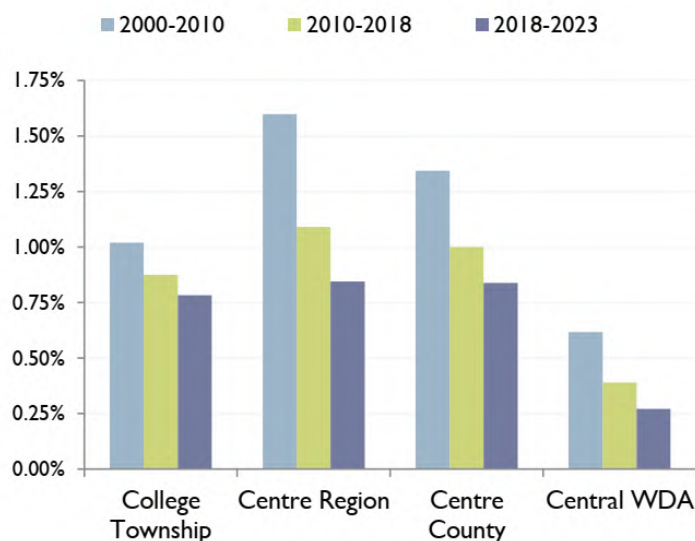
The intent of this Socio-Economic Analysis was to outline important trends in population and other key demographic information. These factors, when coupled with regional and

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

Existing Conditions

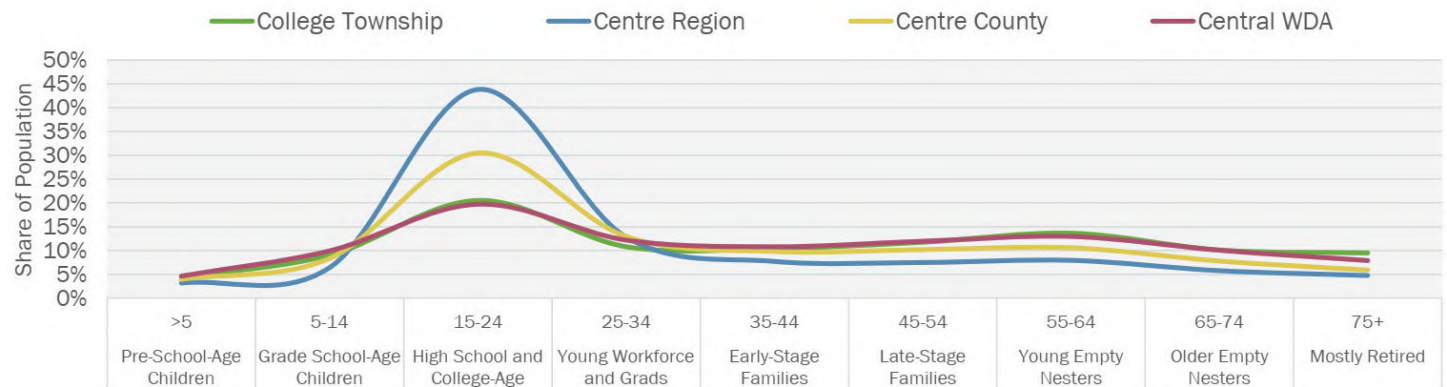
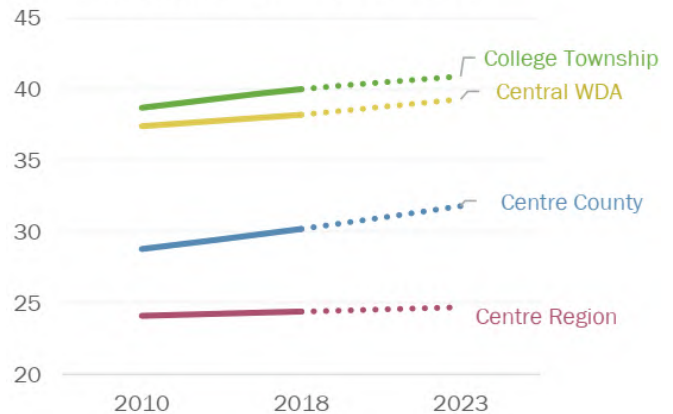
Modern Challenges and Opportunities

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.

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.

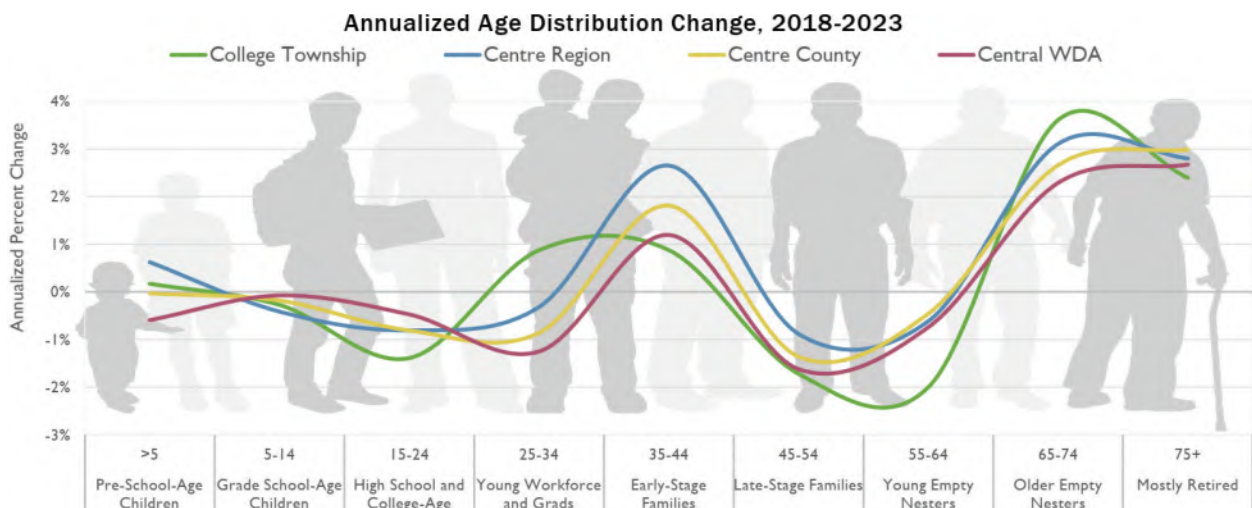
Median Age 2010-2023



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.



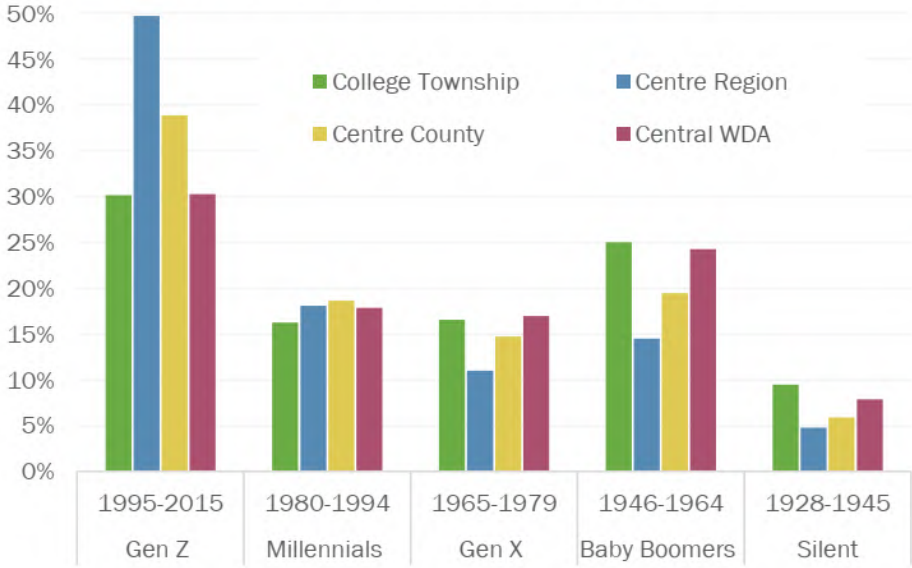
Existing Conditions

Modern Challenges and Opportunities

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.

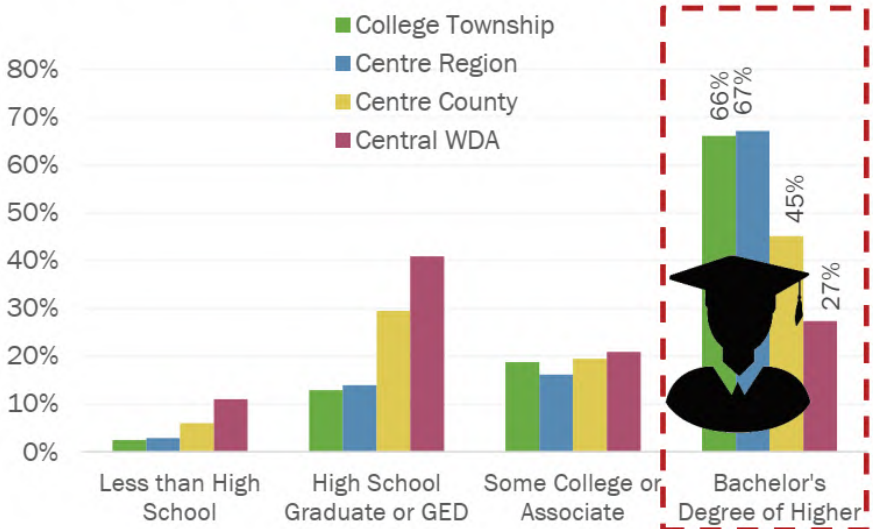
Share of Population by Generation



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



Existing Conditions

Modern Challenges and Opportunities

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.

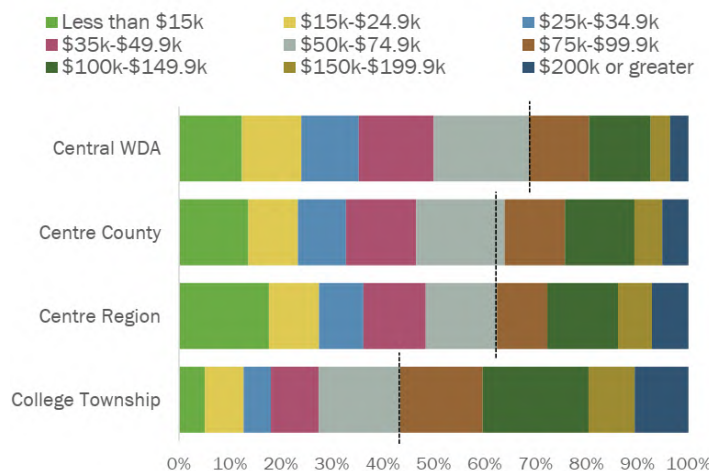
Median Household Income 2018-2023

	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%

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.

Income Distribution, 2018



Annualized Percent Household Income Change, 2018-2023

	College Township	Centre Region	Centre County	Central WDA
Less than \$15k	-3.8%	-1.9%	-2.3%	-3.5%
\$15k-\$24.9k	-2.6%	-0.6%	-1.4%	-2.0%
\$25k-\$34.9k	-2.1%	0.1%	-0.9%	-1.4%
\$35k-\$49.9k	-1.5%	0.5%	-0.1%	-0.9%
\$50k-\$74.9k	-0.3%	1.0%	0.6%	-0.2%
\$75k-\$99.9k	1.0%	1.9%	2.1%	1.8%
\$100k-\$149.9k	3.5%	4.0%	5.1%	6.2%
\$150k-\$199.9k	2.5%	2.6%	3.7%	4.3%
\$200k or greater	3.6%	3.2%	4.1%	4.0%

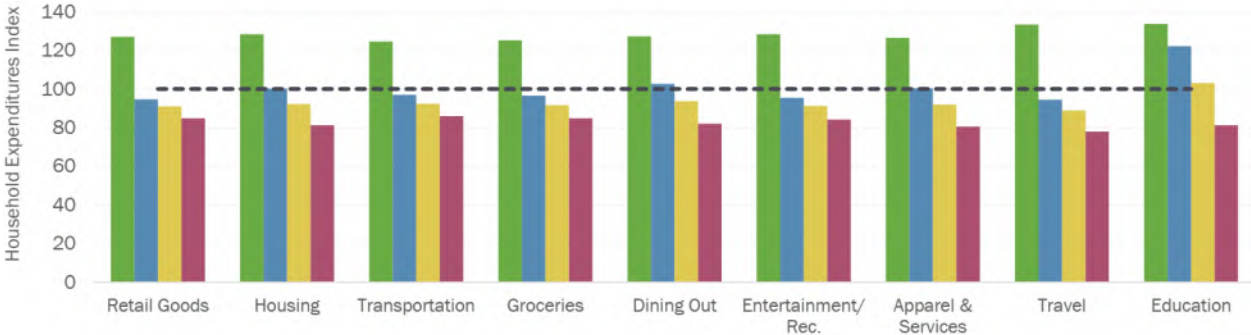
Sources: US Census Bureau; Esri; 4ward Planning Inc., 2018

Existing Conditions

Modern Challenges and Opportunities

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

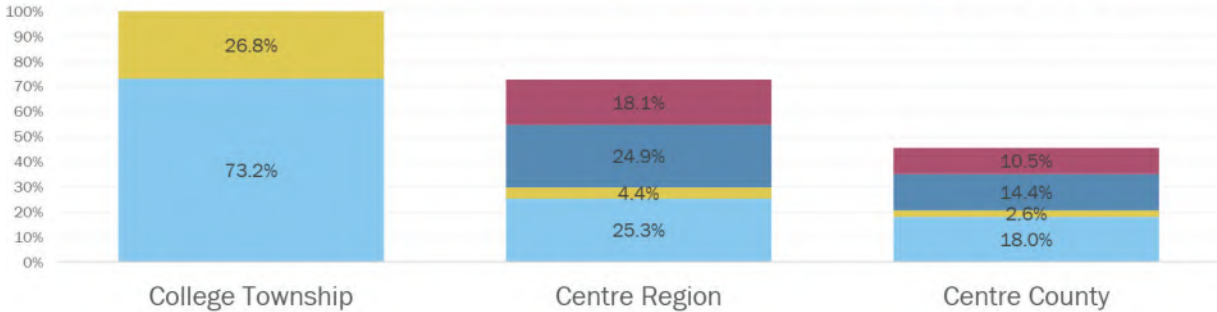
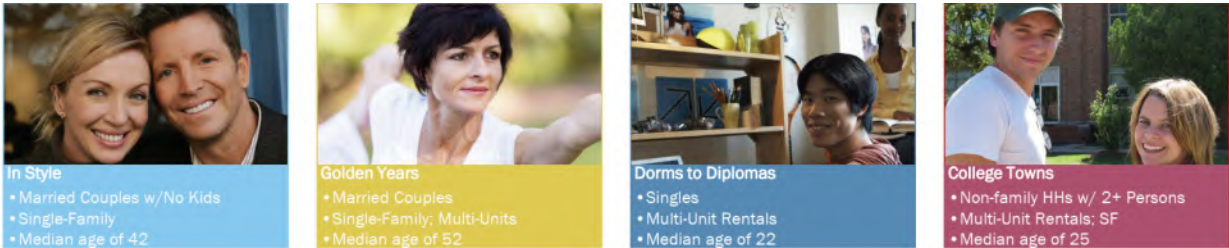
ESRI’s Tapestry Segmentation process classifies U.S. residential neighborhoods into 65 unique segments based on demographic variables such as age, income, home value, occupation, household type, education, and other consumer behavior, demographic, and socio-economic characteristics.

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).



Existing Conditions

Modern Challenges and Opportunities

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

Households: 2,764,500

Average Household Size: 2.35

Median Age: 42.0

Median Household Income: \$73,000

5B

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%.

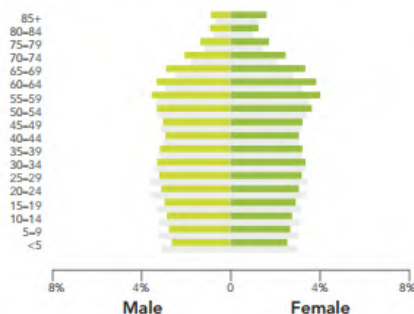
SOCIOECONOMIC TRAITS

- 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.

AGE BY SEX (Esri data)

Median Age: 42.0 US: 38.2

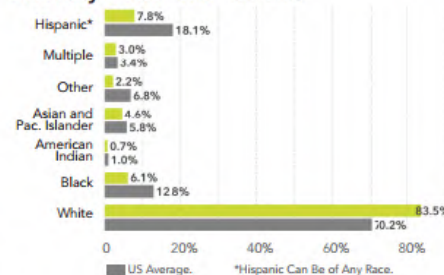
■ Indicates US



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

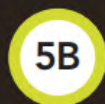


Median Net Worth



Existing Conditions

Modern Challenges and Opportunities



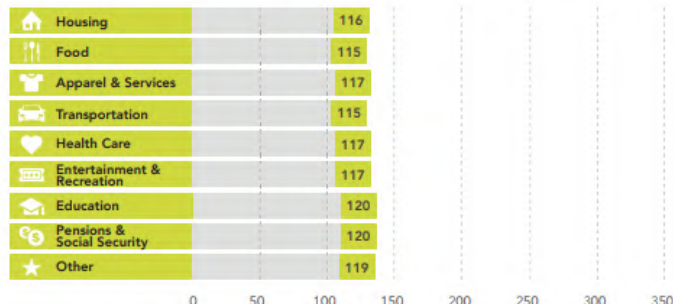
LifeMode Group: GenXurban
In Style



TAPESTRY SEGMENTATION
esri.com/tapestry

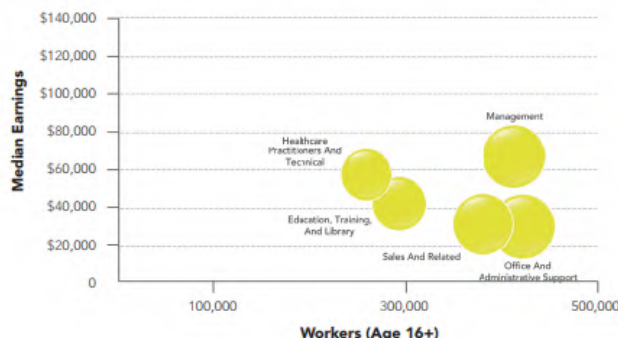
AVERAGE HOUSEHOLD BUDGET INDEX

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

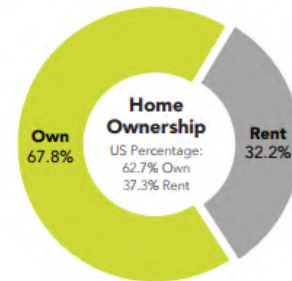
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

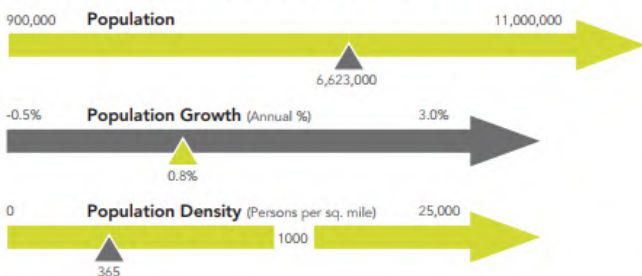
Median Value:
\$243,900

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.



Existing Conditions

Modern Challenges and Opportunities

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.

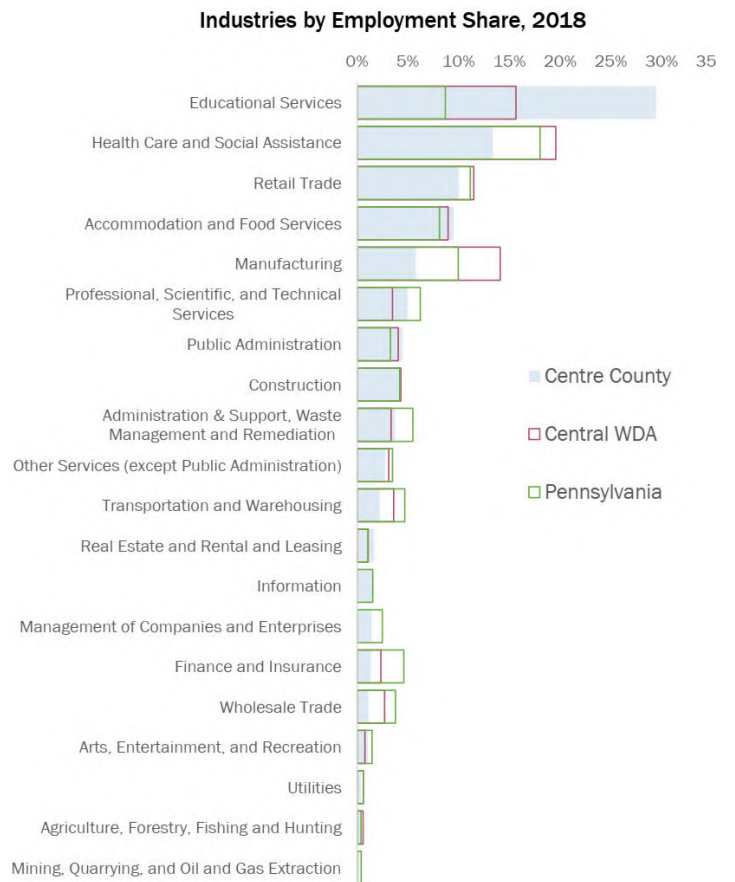
Labor and Industry Analysis

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).



Existing Conditions

Key Findings: Socio-Economic Analysis

Earnings

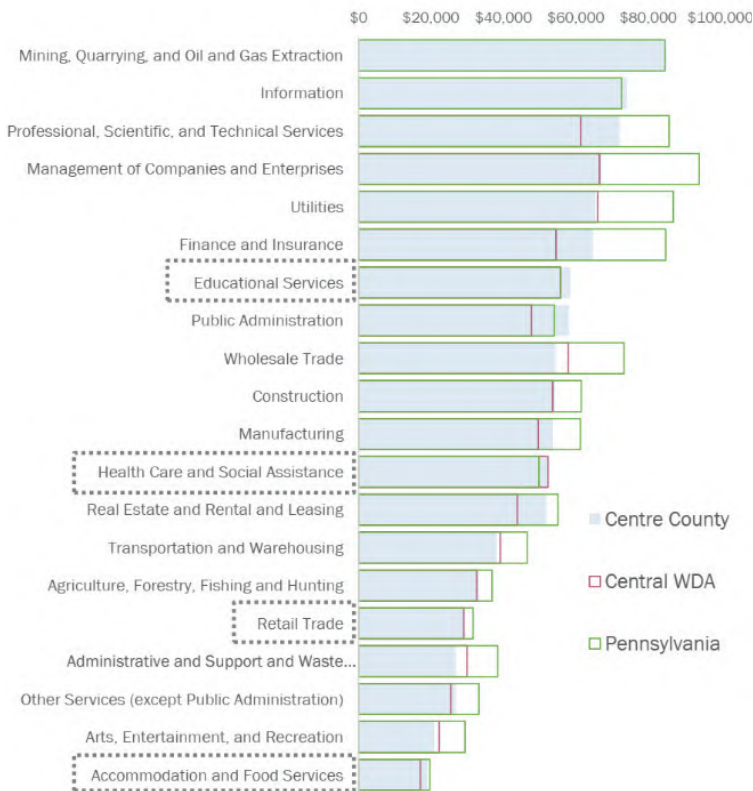
The top two sectors by employment share within the County, the educational services and health care and social assistance sectors, provide relatively mid-wage employment opportunities (average annual earnings of \$58,520 and \$52,270, respectively). In contrast, the third and fourth top sectors by employment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

Average Annual Earnings, 2017 Q2



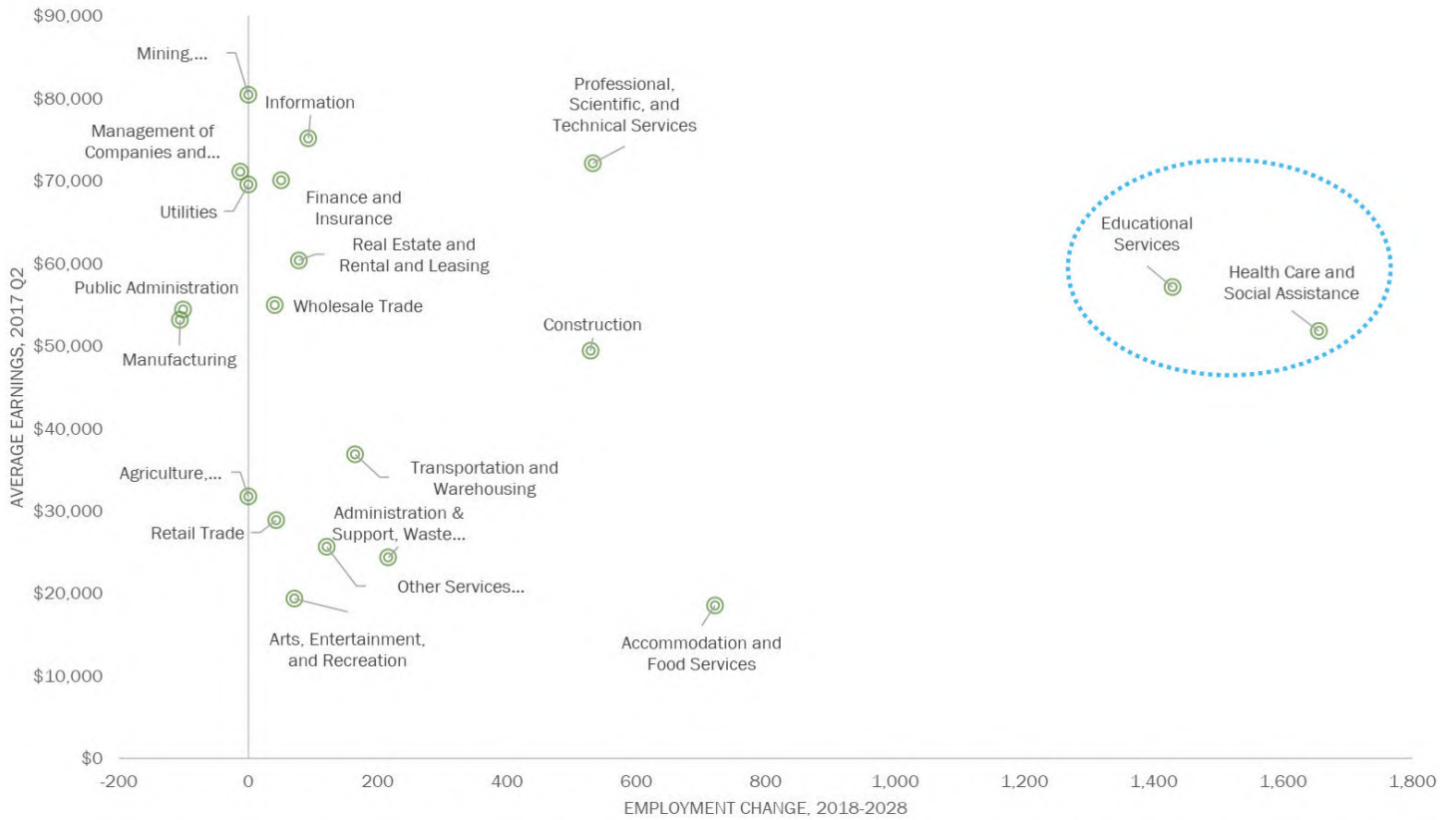
Industry	2018 Estimated Employment	2028 Projected Employment	Numeric Change	Annualized Change	Average Annual Earnings (2017 Q2)
Educational Services	19,430	20,860	1,430	0.7%	\$57,090
Health Care and Social Assistance	8,900	10,560	1,660	1.9%	\$51,774
Retail Trade	6,580	6,630	50	0.1%	\$28,866
Accommodation 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

Existing Conditions

Key Findings: Socio-Economic Analysis

Employment Change by Average Earnings: Centre County



Part III. Future Conditions

What should Dale Summit be in the future?

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Future Conditions

Introduction

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. In June 2023, Weitzman & Associates provided an updated market study which suggested a potential development program for Dale Summit broken down by residential building types, commercial, lodging and industrial uses. This program was used by the DPZ CoDesign Team to identify areas of intensification and areas for redevelopment in the vision plan.

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

Future Conditions

National Trends

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 e-commerce 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 – benefiting 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

Future Conditions

Supply/Demand

'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.

Future Conditions

SWOT

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 averse 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

Future Conditions

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.



Future Conditions

Objectives

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

Future Conditions

Objectives

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

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.

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%

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 socio-economic 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.

Future Conditions

Objectives

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 non-conformance. 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.



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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 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.

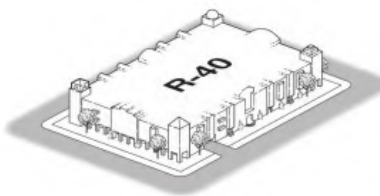
Conventional Zoning

Density use, FAR (floor area ratio), setbacks, parking requirements, maximum building heights specified



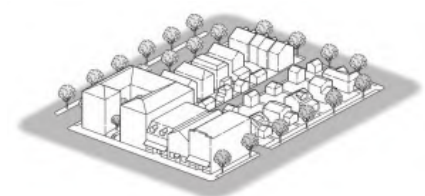
Zoning Design Guidelines

Conventional zoning requirements, plus frequency of openings and surface articulation specified



Form-Based Codes

Street and building types (or mix of types), build-to lines, number of floors, and percentage of built site frontage specified



Future Conditions

Objectives

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

Future Conditions

Objectives

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:

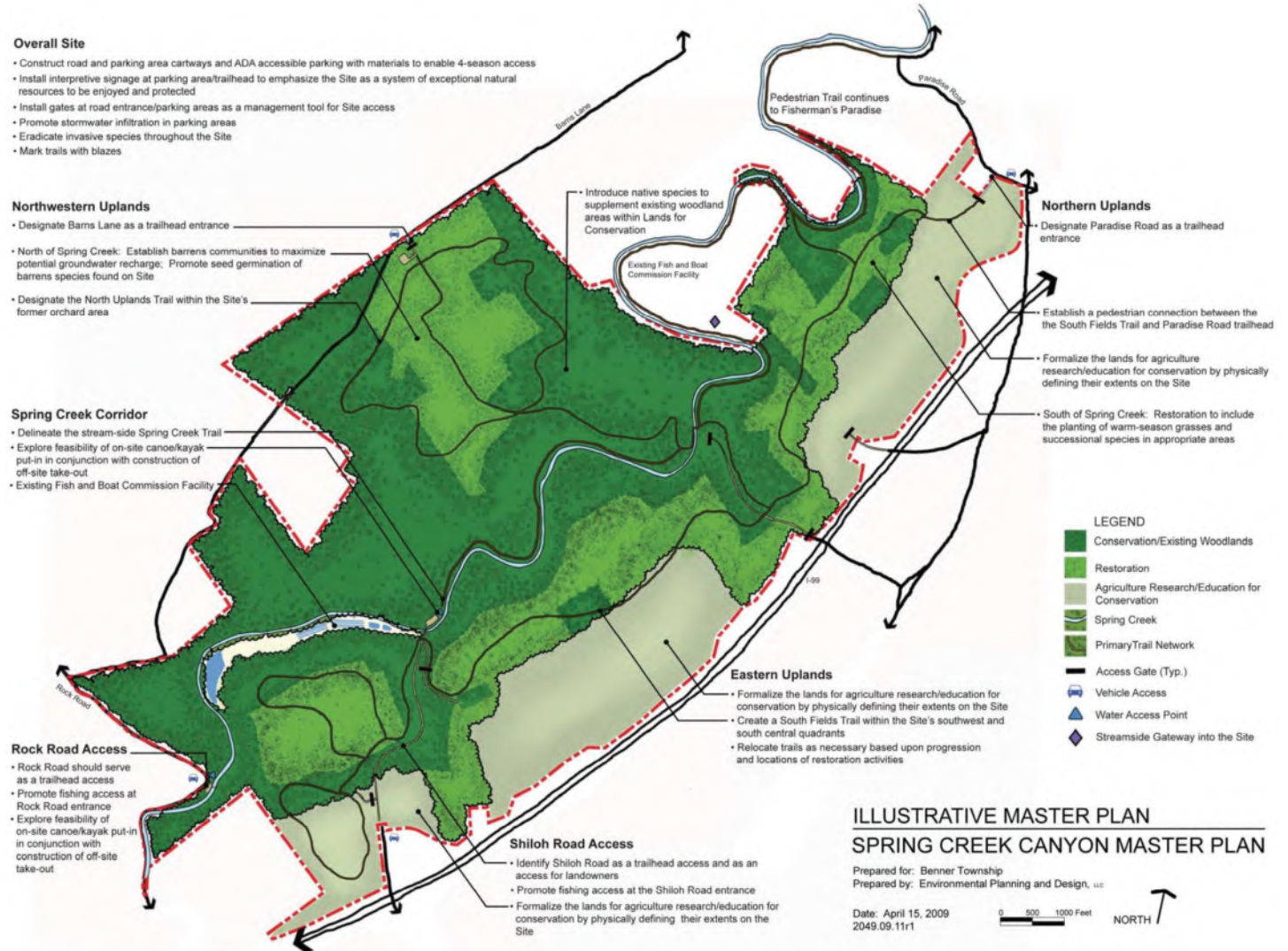
- Ecological protection and restoration;
- Cultural preservation and celebration; and
- Public access, passive recreation and education

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.

Future Conditions

Objectives



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.

Future Conditions

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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

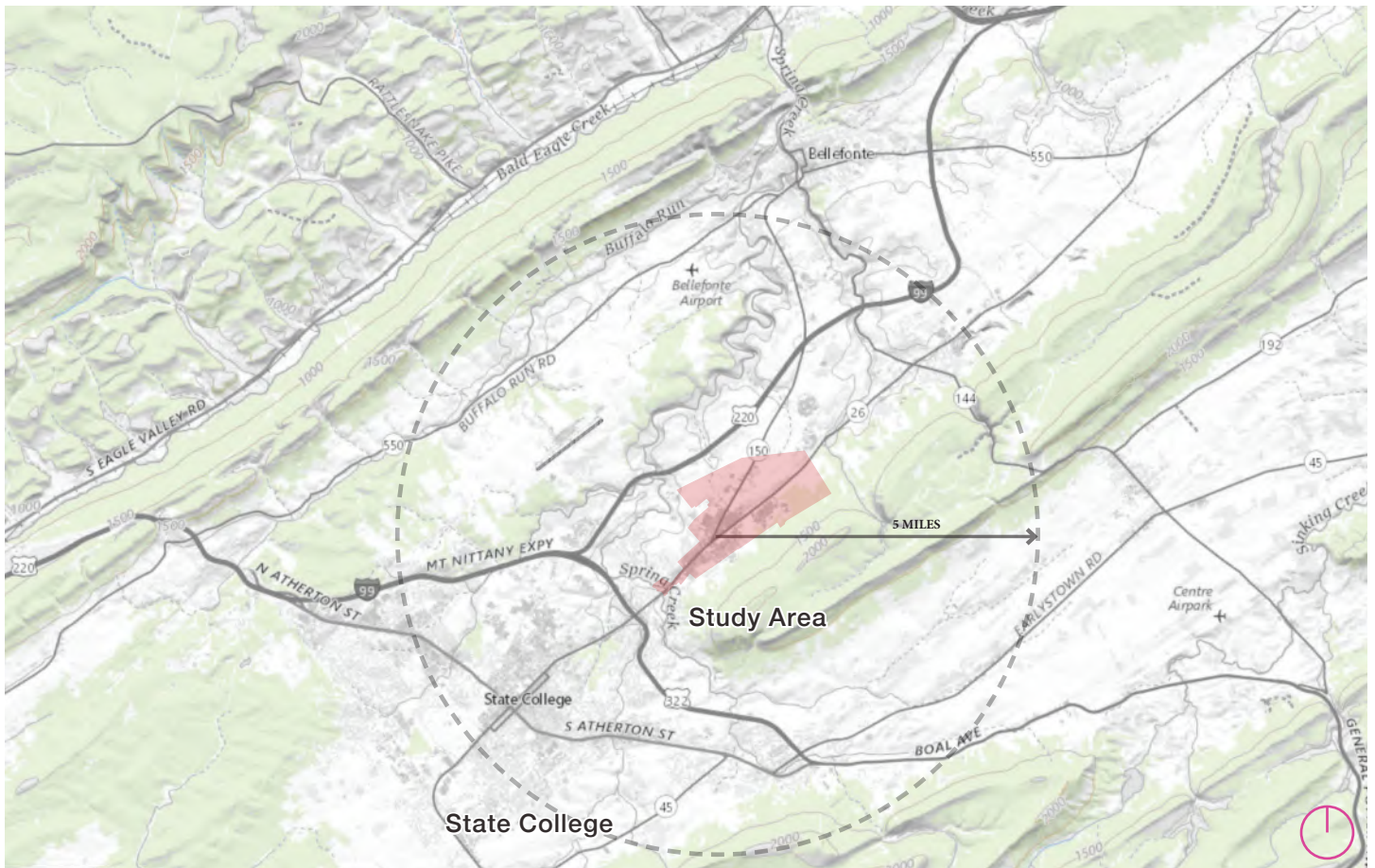
This final objective touches upon a long-standing hot button issue within the Dale Summit. There are currently several properties spanning both College and Benner Township along the Shiloh Road corridor that are lacking key utility infrastructure.

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.

Part IV. Visioning Charrette

Site Location & Context

Regional Context



The Dale Summit study area, highlighted here, is 1,487 acres and is roughly 5 miles from State College.

Site Location & Context

Site Analysis

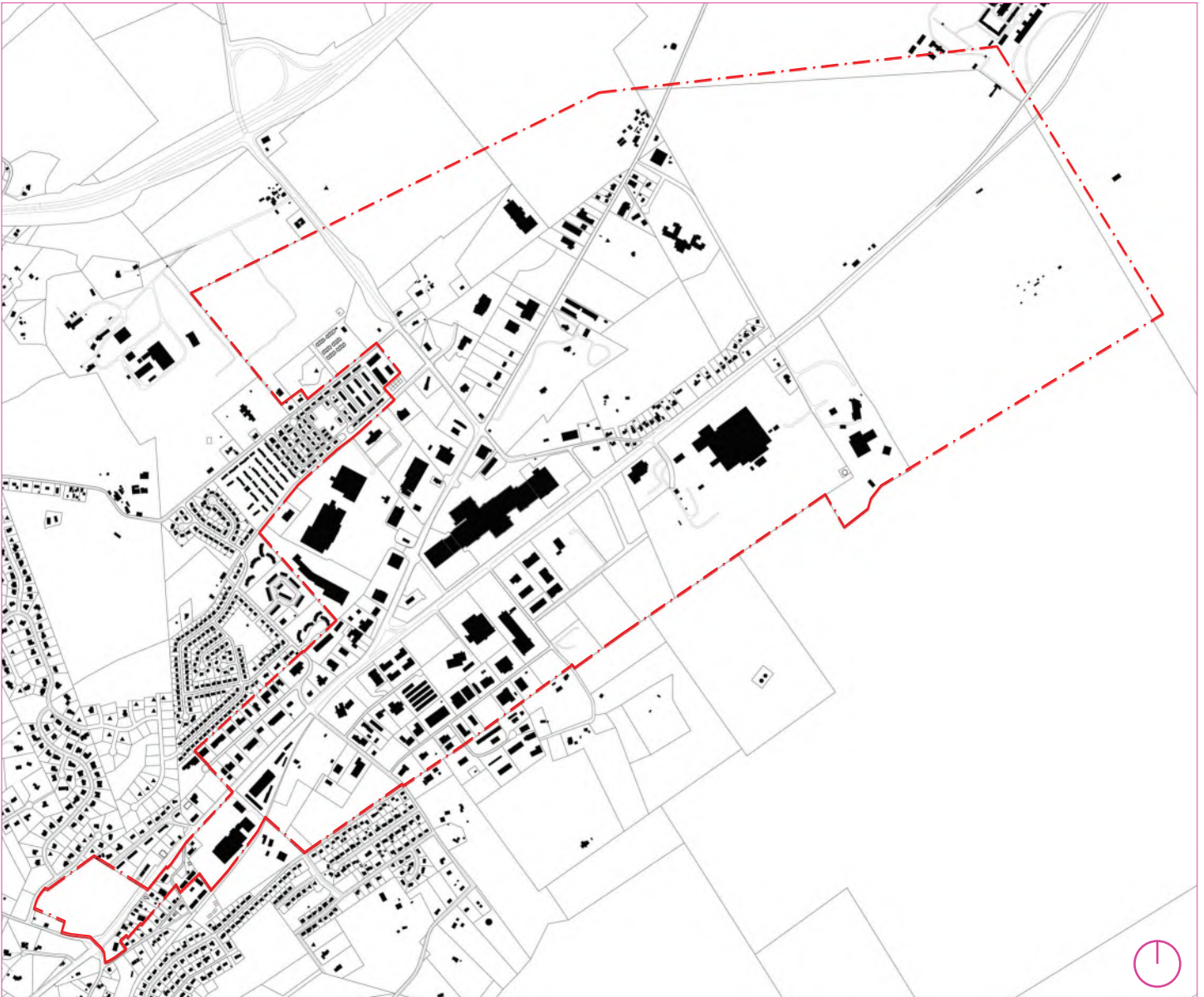


This pedestrian shed corresponds to a 5-minute walk (1/4 mile) from edge to center. Additionally is the 10 minute shed which corresponds to electric scooters broadening the capture area for goods and services.

The study area could conceivably withstand a series of neighborhoods along its artery with the largest concentration at its node, being one of the major intersections.

Site Analysis

Figure/Ground



The figure ground here shows how much land is underutilized in Dale Summit.

Site Analysis

Thoroughfare Network



The existing thoroughfare network shown here illustrates just how few thoroughfare connections exist within the study area, as there are virtually 2 east-west connections and 1 north-south connection. A lot of circulation occurs through parking lots as a result.

Site Analysis

State-owned Roads



- Owned by Penn. DOT
- Owned by the Township

The majority of the circulation within the study area is owned and controlled by PennDOT, which will require coordination if any of these thoroughfares have a hope of being tamed.

Site Analysis

Open Space



Dale Summit has very few purposeful open spaces, the main one being the Memorial park, which also serves as a cemetery.

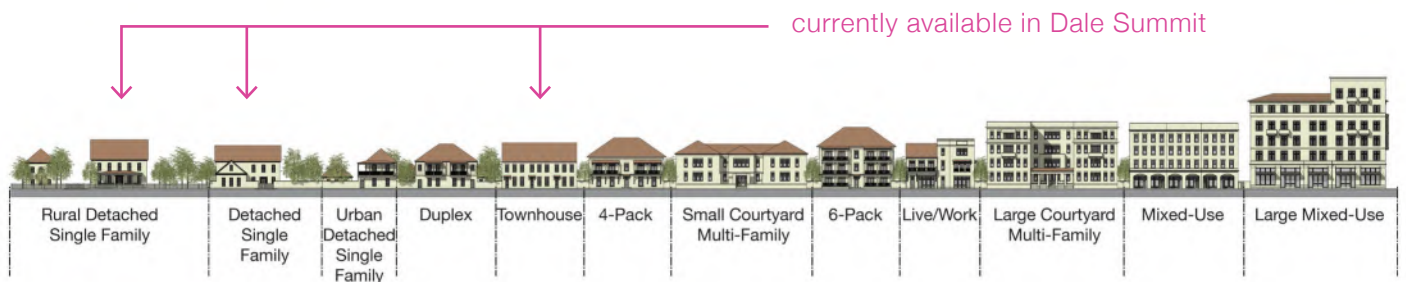
Site Analysis

Surface Parking



22% of land in the Dale Summit Area Plan is devoted to surface parking, which given the marketability analysis is not the highest and best use of land in this area. A desire to balance the need for parking and provide opportunities for additional uses will be a primary focus.

Missing Middle Housing



Dale Summit is really made of 2 to 3 residential housing types, with strip mall commercial. According to the number of marketability studies which have been conducted, there is demand for a more robust mix of unit types which can meet the different market demands, income levels, and ultimately allow a greater diversity allowing people to age in place.

Missing Middle Housing

Examples of atypical building types embedded into low density residential blocks are included here, for consideration for Dale Summit.



▲ Stacked Flats (6-pack)

- 3 stories
- 2 units per floor / 6 units
- 40ft x 60ft building footprint
- self parks on lot

▼ Stacked Flats (4-pack)

- 2 stories
- 2 units per floor / 4 units
- 40ft x 60ft building footprint
- self parks on lot



Missing Middle Housing

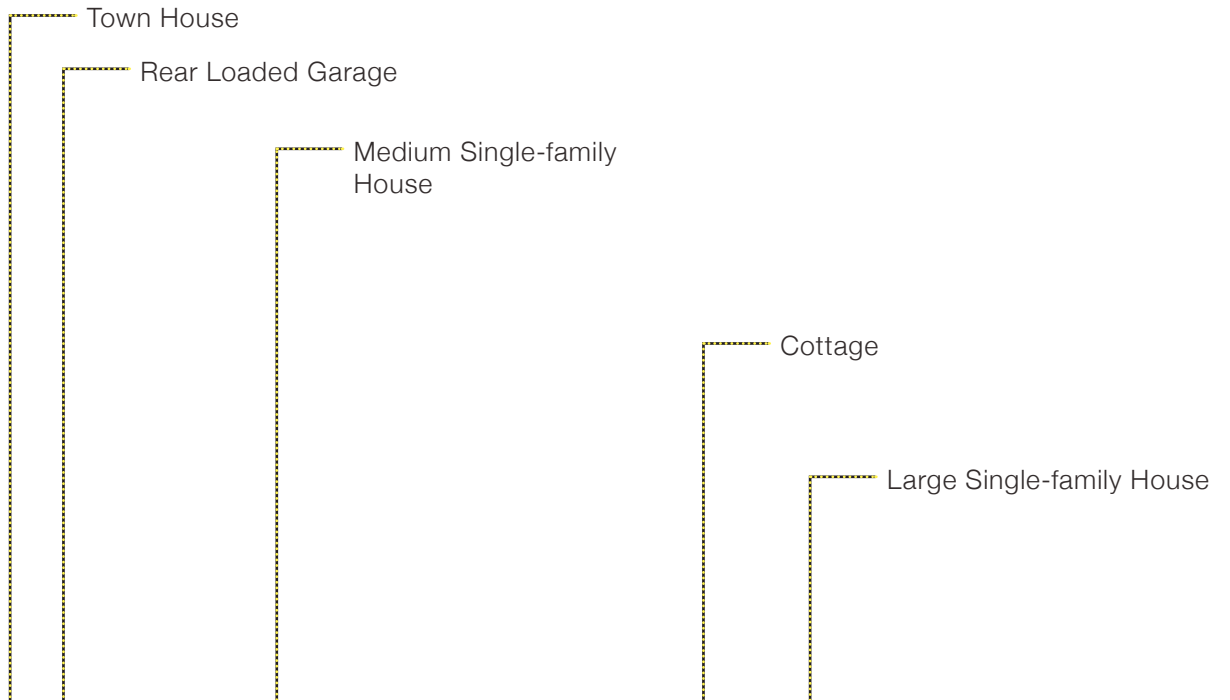


Tower House

- 2-3 stories
- 30ft x 36ft (+/-) building footprint
- parks under, on the ground floor



Missing Middle Housing



Missing Middle Housing



Dale Summit DNA

User Interface

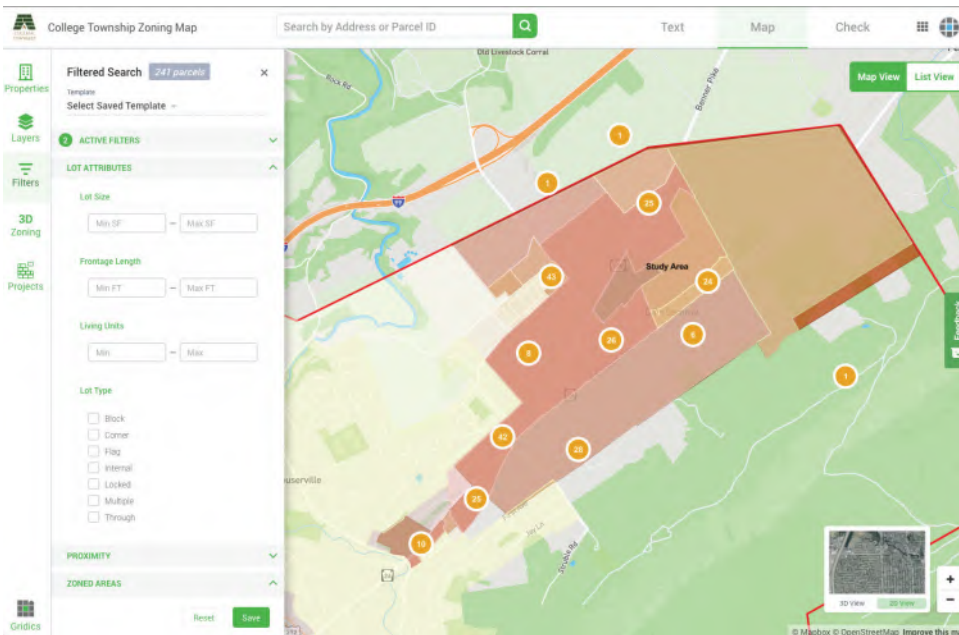
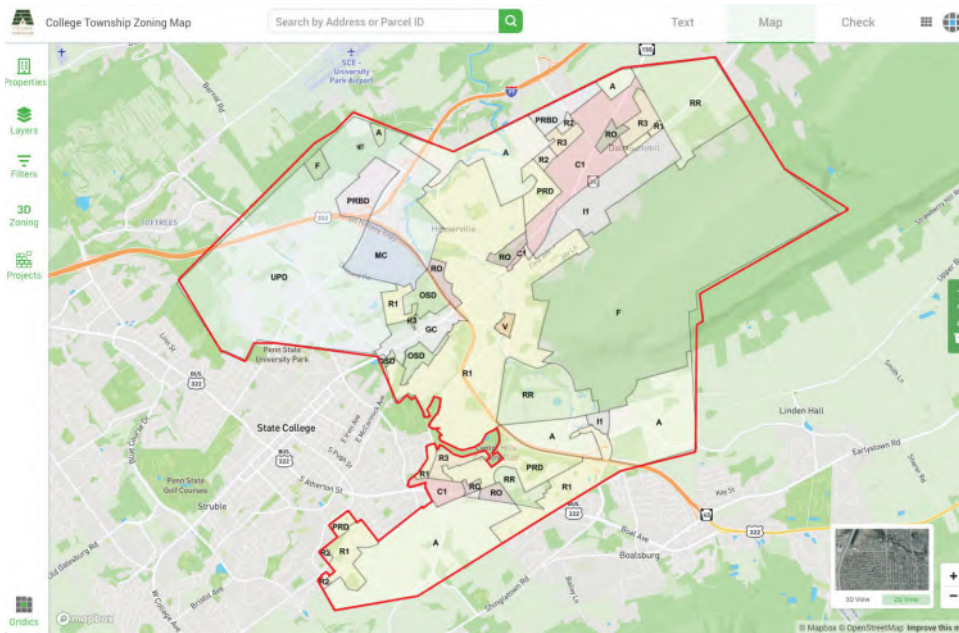
Munimap Interface

Gridics has reviewed the existing zoning regulations and calibrated the main development values to our zoning engine.

<https://map.gridics.com/us/pa/college-township>

The map interface allows to:

- See Zoning Layers and Study Area
- Click every parcel to see
- Property Record data
- Zoning Designation
- Calculated Zoning Allowance
- Allowed Uses
- Links to Zoning Regulations
- Filter parcel and calculated data
- Share parcels



Gridics zoning engine allows to analyze any individual parcel or assemblage or parcels, based on the current zoning regulations or proposed zoning regulations.

The analysis includes:

- Maximum Height
- Maximum Lot Coverage
- Maximum Intensity
- Maximum Residential Density
- Allowed uses
- Parking Requirements

200 SHILOH RD > New Development 1 > New Building 1

Active Notifications:

- 1 Tower separation
- 1 Lot Area Discrepancy

Maximum Lot Capacity	
Lot Area (GIS)	60,179 SF
Lot Area in Acres	1.382 acres
Dwelling Units per Acre	N/A
Dwelling Units Allowed	N/A
Lodging Density	N/A
Lodging Rooms Allowed	121 rooms
FLR	N/A
Building Coverage	30 %
Minimum Open Space	30 %
Principal Building Max. Level (Podium)	4 Levels
Principal Building Max. Height (Podium)	45 ft

200 SHILOH RD > New Development 1 > New Building 1

Active Notifications:

- 1 Pedestrian Passage
- 1 Tower separation
- 1 Lot Area Discrepancy
- 1 Zone "T4" and Overlay "General Gridics"

Maximum Lot Capacity	
Lot Area (GIS)	60,179 SF
Lot Area in Acres	1.382 acres
Dwelling Units per Acre	6 du/acre
Dwelling Units Allowed	9 units
FLR	N/A
Building Coverage	80 %
Minimum Open Space	20 %
Principal Building Max. Level (Podium)	5 Levels
Principal Building Max. Height (Podium)	N/A
Principal Building Min. Level (Podium)	2 Levels
Principal Tower Allowed Height	N/A

Marketability Study

Introduction

Following 4Ward Planning's 2019 College Township Commercial & Industrial Zoning Districts Analysis, Weitzman Associates, LLC conducted an extensive marketability study encompassing a variety of real estate uses within the Dale Summit Area. In alignment with 4Ward Planning's initial study, Weitzman performed updated national and regional economic and demographic assessments. Weitzman also conducted in-depth market analyses for various property types, including rental apartments, for-sale housing, retail establishments, hotels, office spaces, and industrial facilities within the Dale Summit vicinity. Unlike 4Ward Planning's study, Weitzman found that current market conditions do not support large-scale office, industrial, or hotel development. Weitzman has found demand for both rental and for-sale housing units catering to a wide range of users, with a notable high demand at affordable and work-force-level rents and prices. While retail and service space in Dale Summit is not necessarily limited, Weitzman also found existing demand for additional retail uses.

Based on their refined market research, evaluation of the subject area's competitive positioning, engagement with relevant stakeholders, and a comprehensive SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis, Weitzman has outlined strategic recommendations for the development of mixed-use projects within Dale Summit, with the aim of establishing the region as a vibrant mixed-use "town center." These recommendations encompass both short-term and long-term strategies and are tailored to attract demand from a wide range of residential areas. Moreover, they address the unmet needs in the food and beverage market, offer diverse entertainment options for families and adults, and aim to capture visitor spending through distinctive and experiential retail offerings.

Executive Summary

Based on our market research, our assessment of the subject area's competitive position, discussions with stakeholders, and SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis throughout this report, we have outlined recommendations for the development of mixed-use projects that would take place incrementally in the Dale Summit area over the short and longer terms. **Our recommendations are made with the intention of establishing Dale Summit as a mixed-use "town center" that provides a unique atmosphere, different than Downtown State College, that serves to attract demand from broad residential areas, provides diverse and appealing housing options for the locally located community, caters to the underserved food and beverage market, provides families**

and adults with entertainment options, and attracts visitor spending with unique and experiential retail offerings. While the current market conditions do not support large-scale office, industrial, or hotel development, and **our recommendations do not overly focus on those use groups, we recommend flexible zoning that will not limit future development of office, industrial, and hotel space if the market for such uses changes.**

As illustrated in the previous sections of our report, the Dale Summit offers a rich potential for guided growth and diversification of College Township's tax base through the enabling of an appropriately scaled mixed-use town center in a setting that offers many attractive features. Advantages include pending local demand and complementary demand from outlying areas for a wider range of housing options and for retail, small businesses, and services.

The first phase of development will be a critical exercise in establishing new benchmarks for both residential space and commercial uses within Dale Summit, while establishing a baseline from which future developments can be designed and developed with greater refinement and placemaking features. Thus, while we have made recommendations for the total amount of space that should be forecasted now to be built, with specific underwriting assumptions for the first phase extrapolated to future phases in general, the total scope of development may (and likely should) change as future phases are planned and designed. **The Dale Summit area's zoning will have to be fully re-imagined in order to facilitate the appropriate mix of uses. Furthermore, the zoning should be as flexible as possible, should certain initiatives (specifically, a new retail development) struggle to gain momentum.**

Miscommunication and information gaps will need to be controlled in the face of any potential resistance to change and anti-growth sentiment. Given the difficulty of explaining the costs and benefits of new growth and services, this includes managing the perceived threat of new businesses to existing ones, as well as strategic consensus building in promoting optimal economic diversity and long-term fiscal sustainability.

We are generally optimistic about the opportunity to develop mixed-use properties within Dale Summit that can not only capture the housing demand seen throughout Centre County but also promote the growth and diversification of the area's retail offerings to meet local and visitor demand. **The Dale Summit area can be the non-university-oriented town center in the State College region and serve the non-student local population while also acting as a gateway to the established downtown State College.**

Phasing

We have formulated a proposed development and phased growth program for the Dale Summit area based upon an estimated and conceptual development size of 865 housing units (525 rental units, 340 for-sale units), 140,000 square feet of restaurant, retail, and entertainment space, and 20,000 square feet of industrial and/or office space. We believe that growth of this scale should be built in at least three phases over a development period that is likely to exceed ten years. This is based upon our sense of the timing necessary to absorb the space, the necessary critical mass of uses that should be developed and occupied first in order to build momentum into future phases, and the need to establish important pricing and rent benchmarks early so as to adapt the development plans as the project moves beyond its early offerings. To reiterate, each suggested phase of growth is based upon the success of the previous phase and will be affected by changing market dynamics as Dale Summit grows. Pending public contribution to the charrette process and the projected additional phases of zoning studies, our analysis has avoided identifying any specific sites for the development of these scenarios.

This growth scenario is envisioned as an example of how growth could evolve in the Dale Summit area at a number of potential sites, including vacant land and underutilized improved properties. Our growth scenarios are subject to public contribution to the charrette process, available land to develop on, developer activity and desire to build in Dale Summit, and the ability of the zoning code and city ordinances to promote growth in Dale Summit. As such, the development program is based on the following shared concepts and features:

- Recommended growth assumes the incremental development of mixed-use projects.
- Each development phase proposes a mix of uses based on the synergy between specific commercial and residential uses which would accelerate the growth of Dale Summit.
- Each residential component assumes a portion of affordable units.
- We envision that incremental growth will be further supported by existing or new community uses.
- Mixed-use development is proposed in a town-center character, promotes the creation of pedestrian friendly pockets of development.
- Proposed residential uses in all scenarios address ample demand within Centre County for a wider range of residential options than the prevalent pattern of single-family homes, address the needs of downsizing households and of older residents as well as those of younger

residents, and of service-industry households seeking either/or smaller size, entry-level and, in many cases, more affordable housing.

- Proposed commercial uses in all scenarios would provide many basic service, food and beverage, and entertainment retail as well as small business uses currently lacking in Dale Summit and which would help retain local residents, attract newcomers and visitors, create new jobs and help diversify College Township's fiscal base.

We have also included a distant fourth phase that suggests the inclusion of a boutique 100-key hotel development. The feasibility of the hotel will be contingent upon (a) the successful sell-out / lease-up of the residential and retail components, (b) the creation of a bustling commerce component, (c) the creation of a boutique hotel that partially generates its own demand through a unique hospitality offering, and (c) the completion of the proposed casino within Nittany Mall. In tandem, these components of growth will support a future hotel development by generating new demand for hospitality space within Dale Summit.

Phase 1

The first phase should include approximately 250 units, of which 75 would be for-sale homes. The rental apartments in this phase can be projected to be absorbed over 15 months, and the for-sale homes over 36 months. We also recommend approximately 50,000 square feet of retail space in the first phase, most of which should be developed in the context of a mixed-use residential neighborhood, distributed as follows:

- Local Creator & Food Market: 10,000 SF;
- An arcade and other gaming experience use (such as Dave and Busters) that offers a wide range of games, including video games, simulators, and prize redemption games as well as a food and beverage experience: 10,000 SF;
- Restaurants, bars, and dining, also built on the ground floor of rental apartment developments: 10,000 SF;
- A family entertainment and activity center (such as a YMCA) that includes an aquatic center, pickle ball and tennis courts, an indoor basketball court, and a commercial kitchen for cooking classes and nutritional education programs : 15,000 SF; and
- Additional convenience retail and services, potentially including a childcare center, a wine shop, professional services, or a co-working destination: 5,000 SF.

We note that a majority of the retail in the first phase of development and throughout the project's phases should be built on the ground floor of residential structures, except where the massing possibilities present a tiered approach

Marketability Study

SWOT Analysis

toward the retail and residential components. For example, food venues should feature additional expansive multi-level outdoor space to facilitate a rooftop bar experience and ground-level outdoor dining where possible. In addition to conventional retail tenant offerings, the new retail growth within Dale Summit should be curated to draw in visitor spending and capture unmet entertainment demand. Centering the retail experience around food and its local connections will in turn bolster the marketing appeal of all other growth within Dale Summit. This means placing an emphasis on unique offerings (rather than, for example, fast food establishments) that are tied to local produce and the local culture.

It is critical that the first phase of development to act as a successful catalyst that will generate excitement for future phases of growth. As such, Phase 1 should have a more accessible residential rent and for-sale pricing structure than future phases, as well as a lower density of residential development. Over all three phases, we suggest incrementally increasing residential development density to focus on traditional multifamily apartment and condominium units. We believe it will be advantageous to focus the density of the first phase of development along Berner Pike to begin the creation of a higher density area and begin to shift the public's view of Dale Summit to a growing "village center".

Phase 2

The second phase of development is suggested to include 175 rental units and 130 for-sale units, though they would likely command a higher price point than those built in Phase 1. Phase 2 should include approximately 45,000 square feet of retail, likely of a similar makeup to that of Phase I (pending its lease-up and stabilization). We would suggest retail uses similar, but not limited to, the following:

- A children's STEAM-oriented experience center with dedicated tinkering and making space, performing arts spaces, and nature-inspired outdoor spaces: 10,000 SF;
- A modern bowling alley (such as Bowlero) with state-of-the-art equipment, advanced scoring systems, additional recreational activities such as laser tag, and a bar area: 20,000 SF;
- A white tablecloth restaurant: 5,000 SF;
- Unique bar or nightlife experiences: 5,000 SF; and
- Additional convenience retail and services, potentially including a local pharmacy and coffee shop: 5,000 SF.

With the additional residential population and added retail space, we suggest this phase of growth include a small amount of client-facing office space at the grade of mixed-use buildings, of approximately

Phase 3

The third phase of the Dale Summit development growth would include 175 rental units and 135 for-sale units. Phase 3 should include approximately 40,000 square feet of retail space, pending the lease-up of the retail space created in Phases 1 & 2. Building off the previously suggested retail, we would suggest retail in Phase 3 include the following:

- A movie theater offering modern amenities and 4-D movie screenings (similar to an Alamo Drafthouse): 20,000 SF;
- An interactive golf driving range (such as Top Golf) that combines a driving range experience with a social atmosphere and interactive games: 15,000 SF;
- Additional, food and beverage venues, convenience retail, and service-oriented retail: 5,000 SF.

Similar to Phase 2, we believe there will be demand from new residents and retail space for additional office space within Dale Summit. We would suggest about 10,000 square feet of growth in office space during this last phase to capture the anticipated and created demand.

Phase 4

Depending on the success of the earlier phases, the creation of an envisioned "village center", and the finalized development of the proposed casino within Nittany Mall, we suggest the potential to develop a 100-key boutique hotel room. The success and feasibility of a hotel development within Dale Summit is contingent on the success of the overall area's growth, but we do believe there will be hotel demand generated from the operational casino, the new entertainment and visitor-focused retail offerings, and the area's potential to capture demand from visiting families and friends attending Penn State events (particularly sporting events).

The analysis conducted by Weitzman of residential rents, unit mixes, and other factors is intended to inform Phase 1 of the project. At a later date and as development progresses, College Township should conduct an updated marketability study to effectively plan the details of future phases based on both changing market conditions and the performance of Phase 1. However, from a programmatic standpoint and based upon our market research in this report, we believe that the level of development and distributed uses by phase are well supported.

We present a table breaking down our phasing plan on the following page.

TABLE 104

WEITZMAN DEVELOPMENT RECOMMENDATIONS											
REVIEW OF RESIDENTIAL AND COMMERCIAL DEVELOPMENT PHASING											
DALE SUMMIT, COLLEGE TOWNSHIP, PA											
Phase	Traditional Apartments (Rentals)	Townhomes (Rentals)	Condominiums (For-Sale)	Townhomes (For-Sale)	Cottages (For-Sale)	Detached Patio Homes (For-Sale)	Retail (Square Feet)	Industrial / Office (Square Feet)	Hotel (Keys)	Rental Absorption	For-Sale Absorption
Phase 1	150 Units	25 Units	-	25 Units	20 Units	30 Units	55,000 Square Feet	-	-	15 Months	36 Months
Phase 2	150 Units	25 Units	50 Units	50 Units	30 Units	-	45,000 Square Feet	10,000 Square Feet	-	14 Months	40 Months
Phase 3	150 Units	25 Units	50 Units	25 Units	20 Units	40 Units	40,000 Square Feet	10,000 Square Feet	-	14 Months	38 Months
Phase 4	-	-	-	-	-	-	-	-	100 Keys	-	-
Total (Units / Square Feet)	450 Units	75 Units	100 Units	100 Units	70 Units	70 Units	140,000 Square Feet	20,000 Square Feet	100 Keys		

Source: Weitzman Associates, LLC

*SEE PAGE 78-79 FOR LARGE VERSION

Retail Commercial Rents

CoStar reports average retail rent in State College is approximately \$18.81 per square foot, with recent leasing activity is achieving retail rents notably higher at \$20.86 per square foot. Averages are notably higher among newer properties. Based on current market metrics, we expect that retail built in the context of mixed-use, clusters in Dale Summit could likely achieve rental rates between \$20.00 to \$25.00 per square foot on a triple net or modified gross basis, depending on the type of retailer, the size of the space leased, and the tenant improvement package offered. This commercial rental rate

would need to be massed to allow for sufficient open views, parking, and vehicular access. However, we note that large areas within residential rental developments should be preserved as outdoor space for the enjoyment of residents. This will provide significant opportunities to develop recreation areas, walking and biking trails, wooded areas, and community gardens.

We have distributed recommended unit mixes among approximately 450 conventional rental apartments, which is set for demonstration purposes. The average unit size of the recommended unit mix is 865 square feet per unit.

We have targeted an average unit size that is accommodating to an array of households while maintaining design efficiencies that maximize the utility of the apartments within a small footprint. We have recommended studio units averaging 550 square feet. One-bedroom unit types are recommended to average 700 square feet. The two-bedroom unit types are recommended to average 950 square feet, with the three-bedroom recommendation averaging 1,200 square feet. Our recommended unit mix is outlined in the following tables.

Rental Apartments

Conventional Unit Mix and Achievable Rents

We have formulated recommended unit mixes for the conventional rental apartments, shown in the following tables, based on a total rental offering of approximately 525 units. It is our opinion that this quantity of units developed within Dale Summit would be readily absorbed by the market over an extended period of time, as demonstrated in the three phases below. All residential rental developments

TABLE 105

WEITZMAN RECOMMENDED UNIT MIX AND PROJECTED RENTS							
PHASE I - DALE SUMMIT AREA DEVELOPMENT							
MID-LINE RENTS AS OF MAY 2023							
Unit Type	# of Units	Unit Mix	Avg. Sq. Ft.	Avg. Monthly Rent	Avg. Monthly Rent PSF	Avg. Annual Rent PSF	
Studio	8	5%	550	\$1,325	\$2.41	\$28.91	
One Bedroom	60	40%	700	\$1,650	\$2.36	\$28.29	
Two Bedroom	60	40%	950	\$2,100	\$2.21	\$26.53	
Three Bedroom	22	15%	1,200	\$2,500	\$2.08	\$25.00	
Total / Weighted Avg.	150	100%	865	\$1,937	\$2.26	\$27.13	

Source: Weitzman Associates, LLC

Marketability Study

SWOT Analysis

TABLE 106

WEITZMAN RECOMMENDED UNIT MIX AND PROJECTED RENTS						
PHASE 2 - DALE SUMMIT AREA DEVELOPMENT						
MID-LINE RENTS AS OF MAY 2023						
Unit Type	# of Units	Unit Mix	Avg. Sq. Ft.	Avg. Monthly Rent	Avg. Monthly Rent PSF	Avg. Annual Rent PSF
Studio	8	5%	550	\$1,445	\$2.63	\$31.53
One Bedroom	60	40%	700	\$1,800	\$2.57	\$30.86
Two Bedroom	60	40%	950	\$2,300	\$2.42	\$29.05
Three Bedroom	22	15%	1,200	\$2,750	\$2.29	\$27.50
Total / Weighted Avg.	150	100%	865	\$2,120	\$2.47	\$29.68

*Rental rates assume an approximate 3-year time period between phases and corresponding 3% escalation per year

Source: Weitzman Associates, LLC

TABLE 107

WEITZMAN RECOMMENDED UNIT MIX AND PROJECTED RENTS						
PHASE 3 - DALE SUMMIT AREA DEVELOPMENT						
MID-LINE RENTS AS OF MAY 2023						
Unit Type	# of Units	Unit Mix	Avg. Sq. Ft.	Avg. Monthly Rent	Avg. Monthly Rent PSF	Avg. Annual Rent PSF
Studio	8	5%	550	\$1,575	\$2.86	\$34.36
One Bedroom	60	40%	700	\$1,975	\$2.82	\$33.86
Two Bedroom	60	40%	950	\$2,515	\$2.65	\$31.77
Three Bedroom	22	15%	1,200	\$3,000	\$2.50	\$30.00
Total / Weighted Avg.	150	100%	865	\$2,320	\$2.71	\$32.48

*Rental rates assume an approximate 3-year time period between phases and corresponding 3% escalation per year

Source: Weitzman Associates, LLC

We have recommended, in Phase 1 of growth, that rental units range in rent between an average of \$1,325 among the studio apartments to an average of \$2,100 among the larger two-bedroom units. The three-bedroom units should be underwritten at \$2,500 per month. Overall, the units are positioned at an average of approximately \$1,937 per month, or \$27.13 per square foot per year. The recommended rents are affordable on average for households earning between \$53,000 and \$100,000 annually.

The rents assume the inclusion of one surface parking space per unit. A second parking space could be rented to tenants at the cost of \$25 per space per month after stabilization. This remains quite reasonable in the market, yet creates additional revenue derived from many of the apartments that will require more parking spaces than the allocation. Units with better or worse views will achieve commensurate higher or lower rents than the average we have recommended. Overall, the average rents should be utilized for underwriting purposes until such a time as the building is designed, where a full rent model should be prepared to price every home based upon its unique characteristics.

Because we have communicated our rent recommendations in May 2023 dollars, we recommend underwriting quarterly rent increases beginning in the first quarter of

occupancy at the rate of 0.75% per quarter through stabilization and continuing at 0.75% per quarter thereafter. As seen in the Phase 2 and Phase 3 unit mix and projected rent tables, the success of the first residential developments will drive higher prices amongst the later phases, on top of the quarterly rent increases. While we also recommend, to be conservative, assuming a lease-up incentive equivalent to one-month free rent, we note that it may be possible to avoid offering this at all or only on some units that prove to be more challenging to lease.

These recommended rents are well-positioned in the market and are supported by our demographic analysis. Given the lack of multi-family development in the market area since 2011, that is not tailored to students or seniors, new rental product in the market will achieve higher than average market rental rates. We believe these rents are achievable and very marketable given the product we have recommended and access to employment and highway transportation. New residential rental development should be well-received by the market as a good value option, accessibly priced while still providing a new and quality housing option. Our demand analysis indicates that the rents are supportable with the income levels that exist in the market.

The apartments can be efficiently designed to present the best value to the market. Typical renters in a market like State College pay very little attention to rent on a per square foot basis. They only care about the monthly chunk rent they must pay to live in an apartment and community. Thus, while the studio and one-bedroom units are higher on a per square foot basis, the more efficient design that is possible for this unit type versus typical plans with wasted space available in the market, the average rent is recommended as being fairly close to what is already being achieved in new, but less efficiently designed comparables.

Affordability

We have performed an analysis of the affordability of the recommended unit mix and rents for the typical rental apartments recommended for Dale Summit at their projected Phase 1 rental rates, which is summarized in the following table. Our analysis assumes that 30% of a household's gross income is dedicated to rent, although this is conservative because many rental properties are likely to allow a tenant to rent an apartment that costs as much as 40% of their gross household income. This affordability analysis demonstrates that the average recommended rental apartment unit should be affordable for households earning approximately \$63,250 annually. The least expensive units would be affordable for households earning \$44,000 on average, while the most expensive homes would be affordable for households earning \$84,000 on average. The affordability analysis presents an estimate by unit type of the minimum income necessary to comfortably afford to rent an apartment within Dale Summit.

Townhome Apartments

A small portion of the suggested residential rental development should be allocated, towards lower density rental units, as those are what the market has been most accustomed to. While we promote shifting Dale Summit's density to a higher density mixed-use community, we see value in providing a range of housing at different densities. To accommodate community members who prefer lower density housing, but who are still under served in the rental housing market, we suggest larger, townhome rental units be promoted as Dale Summit grows. These townhome rental units can be attached or semi-attached buildings with shared community amenities.

We have targeted an average unit size that is spacious and competitive with the local rental market. We have recommended one-bedroom units averaging 1,000 square feet. The two-bedroom unit types are recommended at an average of 1,200 square feet. The three-bedroom unit types are recommended at 1,500 square feet. Our recommended rental unit mix is outlined in the following tables.

TABLE 108

AFFORDABILITY COMPARISON PROPOSED CONVENTIONAL RENTAL UNIT MIX DALE SUMMIT AREA					
	Studio	One-Bedroom	Two-Bedroom	Three-Bedroom	Avg. Annual Rent PSF
Avg. unit Size Sq. Ft.	550	700	950	1,200	865
Average Rent PSF	\$2.41	\$2.36	\$2.21	\$2.08	\$2.26
Overall Monthly Rent	\$1,325	\$1,650	\$2,100	\$2,500	\$1,937
Total Annual Housing Payment	\$15,900	\$19,800	\$25,200	\$30,000	\$23,248
Required Annual income	\$53,000	\$66,000	\$84,000	\$100,000	\$77,493

*Assumes 30% of pre-tax income is devoted to housing

Source: Weitzman Associates, LLC

Marketability Study

TABLE 109

WEITZMAN RECOMMENDED UNIT MIX AND PROJECTED RENTS PHASE 1 - DALE SUMMIT AREA DEVELOPMENT MID-LINE RENTS AS OF MAY 2023						
Unit Type	# of Units	Unit Mix	Avg. Sq. Ft.	Avg. Monthly Rent	Avg. Monthly Rent PSF	Avg. Annual Rent PSF
One Bedroom	5	20%	1,000	\$1,950	\$1.95	\$23.40
Two Bedroom	10	40%	1,200	\$2,300	\$1.92	\$23.00
Three Bedroom	10	40%	1,500	\$2,725	\$1.82	\$21.80
Total / Weighted Avg.	25	100%	1,280	\$2,400	\$1.88	\$22.60

Source: Weitzman Associates, LLC

TABLE 110

WEITZMAN RECOMMENDED UNIT MIX AND PROJECTED RENTS PHASE 2 - DALE SUMMIT AREA DEVELOPMENT MID-LINE RENTS AS OF MAY 2023						
Unit Type	# of Units	Unit Mix	Avg. Sq. Ft.	Avg. Monthly Rent	Avg. Monthly Rent PSF	Avg. Annual Rent PSF
One Bedroom	5	20%	1,000	\$2,130	\$2.13	\$25.56
Two Bedroom	10	40%	1,200	\$2,515	\$2.10	\$25.15
Three Bedroom	10	40%	1,500	\$3,000	\$2.00	\$24.00
Total / Weighted Avg.	25	100%	1,280	\$2,632	\$2.06	\$24.77

*Rental rates assume an approximate 3-year time period between phases and corresponding 3% escalation per year

Source: Weitzman Associates, LLC

TABLE 111

WEITZMAN RECOMMENDED UNIT MIX AND PROJECTED RENTS PHASE 3 - DALE SUMMIT AREA DEVELOPMENT MID-LINE RENTS AS OF MAY 2023						
Unit Type	# of Units	Unit Mix	Avg. Sq. Ft.	Avg. Monthly Rent	Avg. Monthly Rent PSF	Avg. Annual Rent PSF
One Bedroom	5	20%	1,000	\$2,350	\$2.35	\$28.20
Two Bedroom	10	40%	1,200	\$2,750	\$2.29	\$27.50
Three Bedroom	10	40%	1,500	\$3,300	\$2.20	\$26.40
Total / Weighted Avg.	25	100%	1,280	\$2,890	\$2.27	\$27.20

*Rental rates assume an approximate 3-year time period between phases and corresponding 3% escalation per year

Source: Weitzman Associates, LLC

We have recommended that the townhome rental units, developed in the Phase 1 of growth, range in rent between an average of \$1,950 among the one-bedroom units to an average of \$2,725 among the larger three-bedroom units. Overall, the units are positioned at an average of approximately \$2,400 per month, or \$22.60 per square foot per year. The recommended rents are affordable on average for households earning between \$78,000 and \$109,000 annually.

The rents assume the inclusion of one surface parking space per unit. Units with better or worse views will achieve commensurate higher or lower rents than the average we have recommended. Overall, the average rents should be utilized for underwriting purposes until such a time as

the building is designed, where a full rent model should be prepared to price every home based upon its unique characteristics.

Because we have communicated our rent recommendations in May 2023 dollars, we recommend underwriting quarterly rent increases beginning in the first quarter of occupancy at the rate of 0.75% per quarter through stabilization and continuing at 0.75% per quarter thereafter. While we also recommend, to be conservative, assuming a lease-up incentive equivalent to one-month free rent, we note that it may be possible to avoid offering this at all or only on some units that prove to be more challenging to lease.

These recommended rents are well-positioned in the market, and supported by our demographic analysis, as well as

the success of comparable apartment communities in the market. We believe these rents are achievable and very marketable given the product we have recommended and access to employment and highway transportation. Low density, rental housing developments should be well-received by the market as a good value option, accessibly priced while still providing a new and quality housing option. Our demand analysis indicates that the rents are supportable with the income levels that exist in the market.

Affordability

We have performed an analysis of the affordability of the recommended unit mix and rents projected for Phase 1 of growth, which is summarized in the following table. Our analysis assumes that 30% of a household’s gross income is dedicated to rent, although this is conservative because many rental properties are likely to allow a tenant to rent a unit that costs as much as 40% of their gross household income. This affordability analysis demonstrates that the average recommended rental townhome unit should be affordable for households earning approximately \$96,000 annually. The least expensive units would be affordable for households earning \$78,000 on average, while the most expensive homes would be affordable for households earning \$109,000 on average. The affordability analysis presents an estimate by unit type of the minimum income necessary to comfortably afford to rent an apartment priced at the recommended rental rates.

Suggested Rental Apartment Design, Amenities, and Services

The zoning of Dale Summit should allow residential developers to easily enter the Dale Summit market with clear and flexible zoning regulations that do not impede natural growth in the area. We suggest that any residential development in Dale Summit include tightly programmed outdoor green and recreation spaces interspersed between the residential structures and buildings designed to allow for the maximum number of residential units to face the natural areas of Dale Summit.

The architectural style should be derived from modern architecture but with a more contemporary use of stone and wood on the exterior. By no means should the zoning prohibit certain kinds of apartment communities but rather promote higher density communities. Parking should be designed to be conveniently located for residents to pull a car near their building or unit entry, as Dale Summit is vehicle dependent.

We would suggest any new residential offerings in Dale Summit to include the following:

- A central clubhouse facility with amenities and services;
- A library or co-working space for residents who work from home;
- A package room or package lockers;
- Outdoor lounge and/or entertaining space;
- A fitness center;
- And laundry appliances in each apartment or a building laundry room.

TABLE 112

AFFORDABILITY COMPARISON PROPOSED TOWNHOME RENTAL UNIT MIX DALE SUMMIT AREA				
	One-Bedroom	Two-Bedroom	Three-Bedroom	Avg. Annual Rent PSF
Avg. unit Size Sq. Ft.	1,000	1,200	1,500	1,280
Average Rent PSF	\$1.95	\$1.92	\$1.82	\$1.88
Overall Monthly Rent	\$1,950	\$2,300	\$2,725	\$2,400
Total Annual Housing Payment	\$23,400	\$27,600	\$32,700	\$28,800
Required Annual income	\$78,000	\$92,000	\$109,000	\$96,000

*Assumes 30% of pre-tax income is devoted to housing

Source: Weitzman Associates, LLC

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Phasing and Absorption

Based upon our demand analysis, there appears to be sufficient market depth for rental apartment units within Dale Summit and the surrounding State College area. We found that sufficient underlying market demand in the Secondary Market Area would support the absorption of Phases 1, 2, and 3 rental units at an average rate of 12 units per month. We project that Phase 1 would take approximately 15 months to reach full lease-up, while Phase 2 & 3, with higher unit counts, would take approximately 14 months each to reach full lease-up.

Due to the speculative nature of all suggested development past Phase 1, we believe that it is reasonable to be cautious about underwriting absorption pace and rental rates at the recommended rent levels for Phase 2 & 3, as they are dependent on the success of Phase 1's commercial and residential development.

We also note that the lease rollover in the initial phases of growth will create competition for subsequent phases, and therefore absorption rates may slow as growth progresses. We recommend reevaluating the market as Dale Summit grows.

For-Sale Homes

Unit Mix and Achievable Sale Prices

We have formulated recommended unit mixes for the for-sale components of Dale Summit's growth, which are shown in the following tables and based upon a total for-sale offering of approximately 340 units. It is our opinion that this quantity of units developed within Dale Summit would be readily absorbed by the wider market as the area grows commercially. As previously noted with new rental development, new for-sale development would need to be massed to allow for sufficient open views, parking, vehicular access, and private outdoor space. We believe the area has a great opportunity to incorporate a higher density of for-sale home supply with services and amenities that will make the project a unique offering in Dale Summit and the wider State College residential market.

We have distributed recommended unit mixes among a hypothetical 340 for-sale units, which are set forth for demonstration purposes. We believe that developing the for-sale component over an extended period of time, demonstrated in three phases, could be readily marketed and absorbed. Thus, the unit mix here could be extrapolated to a modestly smaller or larger project size, depending on the developer's appetite. In our proposed mix, we have recommended 100 traditional condominiums at an average of 1,350 square feet, 100 townhomes at an average of 1,888 square feet, 70 cottages at an average of 2,000 square feet, and 70 detached patio homes at an average of 1,640 square feet.

Traditional Condominiums

Traditional condominiums are not a common for-sale residential type in Dale Summit, but as density increases in the area with continued commercial growth, we believe low-rise condominium units will be an in-demand residential type, offering the security of home ownership with fewer maintenance and upkeep burdens. We suggest condominium developments include private outdoor areas, such as balconies or patios. Condominium developments should include community amenities such as a residential gym and delivery security in the form of a package room and/or package lockers.

We have targeted an average condominium unit size that is more spacious when compared to the proposed rental apartments and competitive with the local single-family home market. We have recommended one-bedroom units averaging 950 square feet. The two-bedroom unit types are recommended at an average of 1,300 square feet. The three-bedroom unit types are recommended at 1,700 square feet. Our recommended unit mix is outlined in the following tables. We have recommended that the condominiums, in Phase 2 of growth, range in price from an average of \$255,000 among the one-bedroom units to an average of \$440,000 among the three-bedroom units. This recommended pricing is affordable for households earning between \$69,584 and \$120,796 annually. These prices are in May 2023 dollars. We recommend underwriting pricing increases of 2.0% annually beginning in 2024. The following tables summarize our recommended unit mix for potential condominium development and growth in Dale Summit.

TABLE I 13

WEITZMAN RECOMMENDED UNIT MIX AND PROJECTED ASKING PRICES						
PHASE 2 - DALE SUMMIT AREA DEVELOPMENT						
FOR-SALE CONDO PRICING AS OF MAY 2023						
Unit Type	# of Units	Unit Mix	Avg. Sq. Ft.	Avg. Asking Price	Avg. Asking PSF	
One Bedroom	10	20%	950	\$255,000	\$268	
Two Bedroom	25	50%	1,300	\$345,000	\$265	
Three Bedroom	15	30%	1,700	\$440,000	\$259	
Total / Weighted Avg.	50	100%	1,350	\$355,500	\$264	

Source: Weitzman Associates, LLC

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TABLE I14

WEITZMAN RECOMMENDED UNIT MIX AND PROJECTED ASKING PRICES					
PHASE 3 - DALE SUMMIT AREA DEVELOPMENT					
FOR-SALE CONDO PRICING AS OF MAY 2023					
Unit Type	# of Units	Unit Mix	Avg. Sq. Ft.	Avg. Asking Price	Avg. Asking PSF
One Bedroom	10	20%	950	\$280,000	\$295
Two Bedroom	25	50%	1,300	\$380,000	\$292
Three Bedroom	15	30%	1,700	\$480,000	\$282
Total / Weighted Avg.	50	100%	1,350	\$390,000	\$290

*Asking price assumes an approximate 3-year time period between phases and corresponding 2% escalation per year

Source: Weitzman Associates, LLC

Townhomes

Townhome units should be built in semi-attached, two-story configurations with undulating footprints and private outdoor areas. Our recommended townhome unit mix is more spacious when compared to the proposed condominium development and rental townhomes. We do not recommend one-bedroom for-sale townhomes and instead recommend two-bedroom units averaging 1,600 square feet and three-bedroom units averaging 2,000 square feet. Our recommended unit mix is outlined in the following tables. We have recommended the townhomes range in price between an average of \$370,000 among the two-bedroom units to an average of \$455,500 among the three-bedroom units, in Phase 1 of growth. This recommended pricing is affordable for households earning between \$100,424 and \$123,933 annually. These prices are in May 2023 dollars. We recommend underwriting pricing increases of 2.0% annually beginning in 2024. The following tables summarize our recommended unit mix for potential townhome development in Dale Summit.

TABLE I15

WEITZMAN RECOMMENDED UNIT MIX AND PROJECTED ASKING PRICES					
PHASE I - DALE SUMMIT AREA DEVELOPMENT					
FOR-SALE TOWNHOME PRICING AS OF MAY 2023					
Unit Type	# of Units	Unit Mix	Avg. Sq. Ft.	Avg. Asking Price	Avg. Asking PSF
Two Bedroom	7	28%	1,600	\$370,000	\$231
Three Bedroom	18	72%	2,000	\$455,500	\$228
Total / Weighted Avg.	25	100%	1,888	\$431,560	\$229

Source: Weitzman Associates, LLC

TABLE I16

WEITZMAN RECOMMENDED UNIT MIX AND PROJECTED ASKING PRICES					
PHASE 2 - DALE SUMMIT AREA DEVELOPMENT					
FOR-SALE TOWNHOME PRICING AS OF MAY 2023					
Unit Type	# of Units	Unit Mix	Avg. Sq. Ft.	Avg. Asking Price	Avg. Asking PSF
Two Bedroom	15	30%	1,600	\$400,000	\$250
Three Bedroom	35	70%	2,000	\$495,000	\$248
Total / Weighted Avg.	50	100%	1,880	\$466,500	\$248

*Asking price assumes an approximate 3-year time period between phases and corresponding 2% escalation per year

Source: Weitzman Associates, LLC

TABLE I17

WEITZMAN RECOMMENDED UNIT MIX AND PROJECTED ASKING PRICES					
PHASE 3 - DALE SUMMIT AREA DEVELOPMENT					
FOR-SALE TOWNHOME PRICING AS OF MAY 2023					
Unit Type	# of Units	Unit Mix	Avg. Sq. Ft.	Avg. Asking	Avg. Asking PSF
Two Bedroom	7	28%	1,600	\$435,000	\$272
Three Bedroom	18	72%	2,000	\$540,000	\$270
Total / Weighted Avg.	25	100%	1,888	\$510,600	\$271

*Asking price assumes an approximate 3-year time period between phases and corresponding 2% escalation per year

Source: Weitzman Associates, LLC

Cottages

We have recommended 70 cottage homes which should be built in detached two- to three-story configurations in small lots that back up to natural areas and feature private rear exposures and a private entrance. Our recommendations for phase 1 include 5 two-bedroom homes for an average of 1,600 square feet; 10 three-bedroom homes for an average of 2,000 square feet; and 5 four-bedroom homes for an average of 2,400 square feet. We have recommended the cottages range in price from \$410,000 for the two-bedroom homes to \$585,000 for the four-bedroom homes. Overall, the cottages are positioned at an average of \$498,750 or \$250 per square foot per year. This recommended pricing is affordable on average for households earning between \$103,151 to \$147,882 annually. These prices are in May 2023 dollars. We recommend underwriting pricing increases of 2.0% annually beginning in 2024.

TABLE I18

WEITZMAN RECOMMENDED UNIT MIX AND PROJECTED ASKING PRICES					
PHASE I - DALE SUMMIT AREA DEVELOPMENT					
FOR-SALE COTTAGE PRICING AS OF MAY 2023					
Unit Type	# of Units	Unit Mix	Avg. Sq. Ft.	Avg. Asking Price	Avg. Asking PSF
Two Bedroom	5	25%	1,600	\$410,000	\$256
Three Bedroom	10	50%	2,000	\$500,000	\$250
Four Bedroom	5	25%	2,400	\$585,000	\$244
Total / Weighted Avg.	20	100%	2,000	\$498,750	\$250

Source: Weitzman Associates, LLC

TABLE I19

WEITZMAN RECOMMENDED UNIT MIX AND PROJECTED ASKING PRICES					
PHASE 2 - DALE SUMMIT AREA DEVELOPMENT					
FOR-SALE COTTAGE PRICING AS OF MAY 2023					
Unit Type	# of Units	Unit Mix	Avg. Sq. Ft.	Avg. Asking	Avg. Asking PSF
Two Bedroom	8	27%	1,600	\$435,000	\$272
Three Bedroom	14	47%	2,000	\$530,000	\$265
Four Bedroom	8	27%	2,400	\$620,000	\$258
Total / Weighted Avg.	30	100%	2,000	\$528,667	\$265

*Asking price assumes an approximate 3-year time period between phases and corresponding 2% escalation per year

Source: Weitzman Associates, LLC

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WEITZMAN RECOMMENDED UNIT MIX AND PROJECTED ASKING PRICES PHASE 3 - DALE SUMMIT AREA DEVELOPMENT FOR-SALE COTTAGE PRICING AS OF MAY 2023					
Unit Type	# of Units	Unit Mix	Avg. Sq. Ft.	Avg. Asking Price	Avg. Asking PSF
Two Bedroom	5	25%	1,600	\$470,000	\$294
Three Bedroom	10	50%	2,000	\$570,000	\$285
Four Bedroom	5	25%	2,400	\$665,000	\$277
Total / Weighted Avg.	20	100%	2,000	\$568,750	\$285

*Asking price assumes an approximate 3-year time period between phases and corresponding 2% escalation per year

Source: Weitzman Associates, LLC

Detached Patio Homes

We have recommended 70 patio homes with front-yard maintenance covered by their HOA fees. These homes should be detached 1.5 story configurations with an undulating footprint and private patio areas. We have recommended, for Phase 1 of growth, 12 two-bedroom homes at an average of 1,400 square feet and 18 three-bedroom homes at an average of 1,800 square feet. We have recommended that the serviced patio homes range in price between an average of \$375,000 among the two-bedroom homes to an average of \$470,000 among the three-bedroom homes. Overall, these homes are positioned at an average of approximately \$432,000 or \$264 per square foot per year. This recommended pricing is affordable on average for households earning between \$108,290 to \$136,358 annually. These prices are in May 2023 dollars. We recommend underwriting price increases of 2.0% annually beginning in 2024. The following table summarizes our unit mix recommendations for the serviced patio homes.

TABLE 121

WEITZMAN RECOMMENDED UNIT MIX AND PROJECTED ASKING PRICES PHASE I - DALE SUMMIT AREA DEVELOPMENT FOR-SALE DETACHED PATIO HOME PRICING AS OF MAY 2023					
Unit Type	# of Units	Unit Mix	Avg. Sq. Ft.	Avg. Asking Price	Avg. Asking PSF
Two Bedroom	12	40%	1,400	\$375,000	\$268
Three Bedroom	18	60%	1,800	\$470,000	\$261
Total / Weighted Avg.	30	100%	1,640	\$432,000	\$264

Source: Weitzman Associates, LLC

TABLE 122

WEITZMAN RECOMMENDED UNIT MIX AND PROJECTED ASKING PRICES PHASE 3 - DALE SUMMIT AREA DEVELOPMENT FOR-SALE DETACHED PATIO HOME PRICING AS OF MAY 2023					
Unit Type	# of Units	Unit Mix	Avg. Sq. Ft.	Avg. Asking Price	Avg. Asking PSF
Two Bedroom	16	40%	1,400	\$445,000	\$318
Three Bedroom	24	60%	1,800	\$555,000	\$308
Total / Weighted Avg.	40	100%	1,640	\$511,000	\$312

*Asking price assumes an approximate 3-year time period between phases and corresponding 2% escalation per year

Source: Weitzman Associates, LLC

Affordability

We have performed an analysis of the affordability of the recommended unit mix and pricing for the for-sale units within Dale Summit, which are summarized in the following tables. Our analysis assumes that purchasers will make a 25% down payment and finance their purchase with a 30-year fixed conservative interest rate. The real estate taxes are estimated to be 1.25% of the purchase price. Homeowners Association Fees are estimated to be \$0.30 per square foot per month for condominiums, \$0.25 per square foot per month for townhomes, \$0.15 per square foot per month for cottages, and \$0.35 per square foot per month for detached patio homes. Our income requirements assume 30% of a household's gross income is dedicated to housing costs. This affordability analysis demonstrates that the least expensive for-sale units would be affordable for households earning \$69,584 on average, while the most expensive homes would be affordable for households earning \$147,882 on average. The affordability analysis presents an estimate by unit type of the minimum income necessary to comfortably purchase a home at a potential development within Dale Summit. The following tables present our affordability analysis for every recommended type of for-sale within Dale Summit.

TABLE 123
FOR-SALE CONDO
AFFORDABILITY ANALYSIS AS OF MAY 2023
DALE SUMMIT AREA

	One-Bedroom	Two-Bedroom	Three-Bedroom	Average
Avg. Unit Sq. Ft.	950	1,300	1,700	1,350
Avg. Price Per Sq. Ft.	\$268	\$265	\$259	\$264
Overall Avg. Price	\$255,000	\$345,000	\$440,000	\$355,500
Mortgage %	75%	75%	75%	75%
Amount of Mortgage	\$191,250	\$258,750	\$330,000	\$266,625
Assumed Interest Rate	6.25%	6.25%	6.25%	6.25%
Projected Monthly Mortgage	\$1,189	\$1,609	\$2,052	\$1,658
Real Estate Taxes	\$266	\$359	\$458	\$370
HOA Maintenance	\$285	\$390	\$510	\$405
Total Monthly Housing Payment	\$1,740	\$2,358	\$3,020	\$2,433
Total Annual Housing Payment	\$20,875	\$28,296	\$36,239	\$29,195
Required Annual income	\$69,584	\$94,320	\$120,796	\$97,316

Source: Weitzman Associates, LLC

Assumptions:

- 1) Down payment is assumed to be 25%
- 2) Financing is assumed to be 30-year fixed, conservative interest rate
- 3) RE Taxes are estimated to be 1.25% of purchase price
- 4) HOA Fees are estimated to be \$0.30 psf per month
- 5) Required Annual Income assumed 30% of pre-tax income is devoted to housing

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TABLE 124

FOR-SALE TOWNHOME AFFORDABILITY ANALYSIS AS OF MAY 2023 DALE SUMMIT AREA			
	Two- Bedroom	Three- Bedroom	Average
Avg. Unit Sq. Ft.	1,600	2,000	1,888
Avg. Price Per Sq. Ft.	\$231	\$228	\$229
Overall Avg. Price	\$370,000	\$455,500	\$431,560
Mortgage %	75%	75%	75%
Amount of Mortgage	\$277,500	\$341,625	\$323,670
Assumed Interest Rate	6.25%	6.25%	6.25%
Projected Monthly Mortgage	\$1,725	\$2,124	\$2,012
Real Estate Taxes	\$385	\$474	\$450
HOA Maintenance	\$400	\$500	\$472
Total Monthly Housing Payment	\$2,511	\$3,098	\$2,934
Total Annual Housing Payment	\$30,127	\$37,180	\$35,205
Required Annual income	\$100,424	\$123,933	\$117,351

Source: Weitzman Associates, LLC

Assumptions:

- 1) Down payment is assumed to be 25%
- 2) Financing is assumed to be 30-year fixed, conservative interest rate
- 3) RE Taxes are estimated to be 1.25% of purchase price
- 4) HOA Fees are estimated to be \$0.25 psf per month
- 5) Required Annual Income assumed 30% of pre-tax income is devoted to housing

TABLE 125

FOR-SALE COTTAGE AFFORDABILITY ANALYSIS AS OF MAY 2023 DALE SUMMIT AREA				
	Two- Bedroom	Three- Bedroom	Four- Bedroom	Average
Avg. Unit Sq. Ft.	1,600	2,000	2,400	2,000
Avg. Price Per Sq. Ft.	\$256	\$250	\$244	\$250
Overall Avg. Price	\$410,000	\$500,000	\$585,000	\$498,750
Mortgage %	75%	75%	75%	75%
Amount of Mortgage	\$307,500	\$375,000	\$438,750	\$374,063
Assumed Interest Rate	6.25%	6.25%	6.25%	6.25%
Projected Monthly Mortgage	\$1,912	\$2,331	\$2,728	\$2,326
Real Estate Taxes	\$427	\$521	\$609	\$520
HOA Maintenance	\$240	\$300	\$360	\$300
Total Monthly Housing Payment	\$2,579	\$3,152	\$3,697	\$3,145
Total Annual Housing Payment	\$30,945	\$37,826	\$44,364	\$37,740
Required Annual income	\$103,151	\$126,087	\$147,882	\$125,802

Source: Weitzman Associates, LLC

Assumptions:

- 1) Down payment is assumed to be 25%
- 2) Financing is assumed to be 30-year fixed, conservative interest rate
- 3) RE Taxes are estimated to be 1.25% of purchase price
- 4) HOA Fees are estimated to be \$0.15 psf per month
- 5) Required Annual Income assumed 30% of pre-tax income is devoted to housing

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TABLE 126

FOR-SALE DETACHED PATIO HOME AFFORDABILITY ANALYSIS AS OF MAY 2023 DALE SUMMIT AREA			
	Two- Bedroom	Three- Bedroom	Average
Avg. Unit Sq. Ft.	1,400	1,800	1,640
Avg. Price Per Sq. Ft.	\$268	\$261	\$264
Overall Avg. Price	\$375,000	\$470,000	\$432,000
Mortgage %	75%	75%	75%
Amount of Mortgage	\$281,250	\$352,500	\$324,000
Assumed Interest Rate	6.3%	6.3%	6.3%
Projected Monthly Mortgage	\$1,749	\$2,191	\$2,014
Real Estate Taxes	\$469	\$588	\$540
HOA Maintenance	\$490	\$630	\$574
Total Monthly Housing Payment	\$2,707	\$3,409	\$3,128
Total Annual Housing Payment	\$32,487	\$40,908	\$37,539
Required Annual income	\$108,290	\$136,358	\$125,131

Source: Weitzman Associates, LLC

Assumptions:

- 1) Down payment is assumed to be 25%
- 2) Financing is assumed to be 30-year fixed, conservative interest rate
- 3) RE Taxes are estimated to be 1.5% of purchase price
- 4) HOA Fees are estimated to be \$0.35 psf per month
- 5) Required Annual Income assumed 30% of pre-tax income is devoted to housing

For-Sale Unit Suggested Finishes, Features, and Amenities

Similar to the rental residential recommendations, the zoning of Dale Summit should allow residential developers to easily enter the market with clear and flexible zoning regulations that do not impede natural growth in the area. We suggest that any for-sale residential development in Dale Summit include outdoor space, including but not limited to rear patio areas or balconies with adjoining yard space (where applicable).

We recommend that condominium units and townhome communities have access to a residential amenity area that can include a gym, package security, and a clubhouse and/or lounge space. We would encourage for-sale developments to also include a residential swimming pool environment with an outdoor lounge and entertainment space.

The architectural style should be derived from modern architecture but with a more contemporary use of stone and wood on the exterior. Parking should be designed to be conveniently located for residents to pull a car near their building or unit entry, as Dale Summit is vehicle dependent.

For-Sale Absorption

Based upon our demand analysis, there appears to be sufficient market depth for-sale units within the Dale Summit area. We found that sufficient underlying market demand in the market area would support the absorption of the Phase 1 for-sale unit development at a rate of 2 units per month. As the Dale Summit area grows commercially and in popularity, we expect Phase 2 & 3 of growth to see for-sale unit absorption at a rate of 3 units per month.

As stated previously in regards to rental residential development past Phase 1, for-sale development past Phase 1 is also speculative and dependent on the for-sale unit's performance in Phase 1. We similarly suggest that any underwriting of absorption pace be conservative for Phase 2 & 3 and reflective of any observed residential performance in Phase 1. It is also crucial to recognize that absorption will fluctuate with the availability of selection, seasonality, and other factors. We recommend that any for-sale residential development in Dale Summit come to market in the spring on a pre-sale basis and aggressively market during the months of April, May, June, July, and August.

TARGETED MARKETS

Residential Target Markets (For-Sale and Rental)

Weitzman Associates believes demand will come from a broad array of demographic profiles, many of which will be primarily drawn to the quality and location of new developments within Dale Summit, including its retail offerings and entertainment assets. We anticipate that new residential developments will primarily attract empty-nesters and seniors as well as younger singles and couples households—most household types that would be attracted to the promise of a burgeoning, village-center styled mixed-use area with ease of access and all needed residential amenities.

We expect there will be a wide range in age among the residents of any housing development in Dale Summit, with both prospective renters and homebuyers of all backgrounds viewing the proposed development as a quality housing option at a good value. However, we believe that the vast majority of demand for the proposed development will come from households presently living in State College or College Township and within a 30-minute drive of the district, as those most likely to choose the housing location are homeowners who already live within the region.

Our demand analysis concludes that a reasonable lease-up timeline for new residential projects, based on households earning at least \$35,000 per year, would not only require future projects to attract buyers and renters from the Primary market but would likely also attract demand from the Secondary market given the County's lack of modernized housing. We also note that while the Penn State population is not necessary to achieve reasonable lease-up timelines for new residential projects in Dale Summit, the student population should not actively be deterred from renting at new developments, as the population will play an important role in supporting Dale Summit's initial phases of growth.

Given the necessity of car-based commutes in this area of Pennsylvania, we believe it is reasonable to expect that future residents will accept potentially longer drive times to their places of work in exchange for the amenities and environment created by a series of developments in Dale Summit, but we anticipate that new residential development in Dale Summit would put residents closer to their places of work. Older residents may also find the proposition of moving into the subject district appealing in order to “downsize” and live in a more walkable environment, close to amenities.

Because we view the residential developments within Dale Summit as being able to attract residents of all ages, we believe the main difference between the target markets for rental apartments and for-sale products will be the ability to make a down payment and the ability to obtain mortgage

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financing. We note that we believe that households earning median incomes will also choose to rent in the district due to the fact that rental housing provides a low-commitment and low-responsibility residential experience for households who believe this lifestyle may be attractive to them, which is an increasingly popular trend nationwide. In summary, we believe the design and location of future residential developments will attract households of all kinds looking for a well-located, quality housing option at a good value.

Commercial Retail and Office Target Markets

The most likely retailers that would be interested in opening a location in future developments within Dale Summit include those servicing the new and existing residential populations, nearby employees, those that are destinations in and of themselves to attract visitors, and those that are seeking new, top-of-market space that does not currently exist within Dale Summit and wider the State College region. It is critical that the retail components of future projects in Dale Summit fill current gaps in the local market, as it is currently a predominantly commercial market, while creating a thriving mixed-use town experience centered on street-oriented amenities and pockets of pedestrian connections. Examples of needed retail in Dale Summit include service establishments, local food markets, local food and beverage establishments, bar and nightlife venues, entertainment venues, small artisan shops, local cafes and bookstores, and a children's STEAM-oriented experience center or similar family-oriented experiences.

In our prior experience with retail space that serves both a daytime worker population as well as an evening / daytime residential population, the nature of the retail can be more diverse because it serves a broader array of wants and needs within the market. We believe there are several distinct types of demand for retail in the district:

- Evening, daytime, and weekend demand from nearby residents – with hundreds of households residing in College Township and State College, as well as the residents living in nearby areas, the evening and weekend demand for retail goods and services will be for all of the previously mentioned uses, but also for retail that takes a longer amount of time to patronize. Specifically, evening demand for entertainment that does not cater to university students is scarce in the entire State College retail market. Certainly, grocery and personal care shopping, fitness, and dining options will be in demand for customers who have both limited and unlimited time available. However, full-service restaurants and bars with outdoor seating will be in greater demand in the evening and weekend periods. There is also potential support for client-facing professional spaces, emergency clinics, pet supply stores, and pharmacies. Furthermore, we

note the importance of catering to families with children.

- Daytime demand from local employees – these workers will seek fast casual dining options in the Dale Summit area, suitable for a quick lunch in close proximity to their employment. While the market does have a few fast casual dining options, it lacks variety and, specifically, health-oriented fast casual options. Many workers will seek to run errands, go to the gym, or visit medical professionals during their breaks from work, and future projects will be capable of meeting these needs.
- Residents of nearby neighborhoods and municipalities – given the location of the Commercial District, there is an opportunity to integrate destination retail, restaurants, and cultural amenities that will draw interest from outside of Dale Summit. For example, households residing within a 30-minute drive of Dale Summit may journey to the area for a destination dining experience, or to bring their children to an educational experience center.

Future projects within the Dale Summit area will benefit from a very strong on-site residential population that can walk from their homes into the retail environment and from nearby residential enclaves, for which the district will be the most conveniently accessible retail node in the area.

While we do not recommend a robust office component be included in future development projects in the subject district, a small portion of the retail space could be designated as office space (as within our third scenario), catering to medical tenants and local entrepreneurs who desire a co-working environment or “maker space” at grade. Again, office space should be limited, as we have identified an oversupply, but it could lend additional marketability to the residential spaces built within Dale Summit. Additional “maker” and “flex space” could also be provided to accommodate incubator and accelerator space in support of the town's economy and as a bridge with Penn State and related operations.

Hospitality Target Markets

While we recommend that any hotel development be considered for the latter phase of development within Dale Summit, we believe there is potential to capture hotel demand from Casino visitors, Penn State visitors, and from Penn State's sports fans. As previously stated, any new hotel development within Dale Summit will not act as a market demand driver but instead new residential and commercial developments will drive hotel demand in Dale Summit.

Creating a flexible zoning code that allows for future hotel developments to capture these target markets will be crucial from Dale Summit's continuing growth.

CONCLUSION

As summarized in this report, Weitzman is optimistic that Dale Summit could result in a thriving mixed-use development that creates a new, resident-focused town center. Regionally, the County is growing and has numerous competitive advantages over other markets. Equal support from land owners, private developers, and the public will be crucial for Dale Summit's success. Without the local community's support, implementing a "master plan" and achieving growth in the community would be impossible. The quality of the planning effort to define the area as a town center will be of critical importance, as will the curation of retail spaces to ensure the most compelling tenant mix is achieved rather than simply preferring tenants based on who will pay the highest rent. As stated previously, the implementation of visitor-oriented retail and entertainment venues will be an important market to target, as the additional outside money spent in Dale Summit will expand the tax base.

Ultimately, we believe that Dale Summit has the potential to house a broad array of people, both those who already live in Centre County and others who may be compelled to move there for a variety of reasons. While any new office and industrial development is speculative, as the commercial and residential communities expand in Dale Summit, they will become important uses to weave into the area. An omnichannel marketing effort is crucial to achieving the town center goal, as is the County's undertaking to provide incentives to attract new and local businesses to the area.

We recommend completing updates to this marketability study once the master planning effort has determined the basic features of the area and there is greater clarity on the desired density to be developed. We also recommend updates as actual development proceeds in the market in order to refine the projected development scope, product features, and achievable revenue. We look forward to the potential to continue our work with you and other stakeholders in this project and to seeing the culmination of your efforts to facilitate this exciting initiative.

Study Area Capacity

UNIT CAPACITY BY PROGRAM

TABLE

WEITZMAN DEVELOPMENT REVIEW OF RESIDENTIAL AND COMMERCIAL DALE SUMMIT, COLORADO					
Phase	Traditional Apartments (Rentals)	Townhomes (Rentals)	Condominiums (For-Sale)	Townhomes (For-Sale)	Cottages (For-Sale)
Phase 1	150 Units	25 Units	-	25 Units	20 Units
Phase 2	150 Units	25 Units	50 Units	50 Units	30 Units
Phase 3	150 Units	25 Units	50 Units	25 Units	20 Units
Phase 4	-	-	-	-	-
Total (Units / Square Feet)	450 Units	75 Units	100 Units	100 Units	70 Units

Source: Weitzman Associates, LLC

Study Area Capacity

E 104

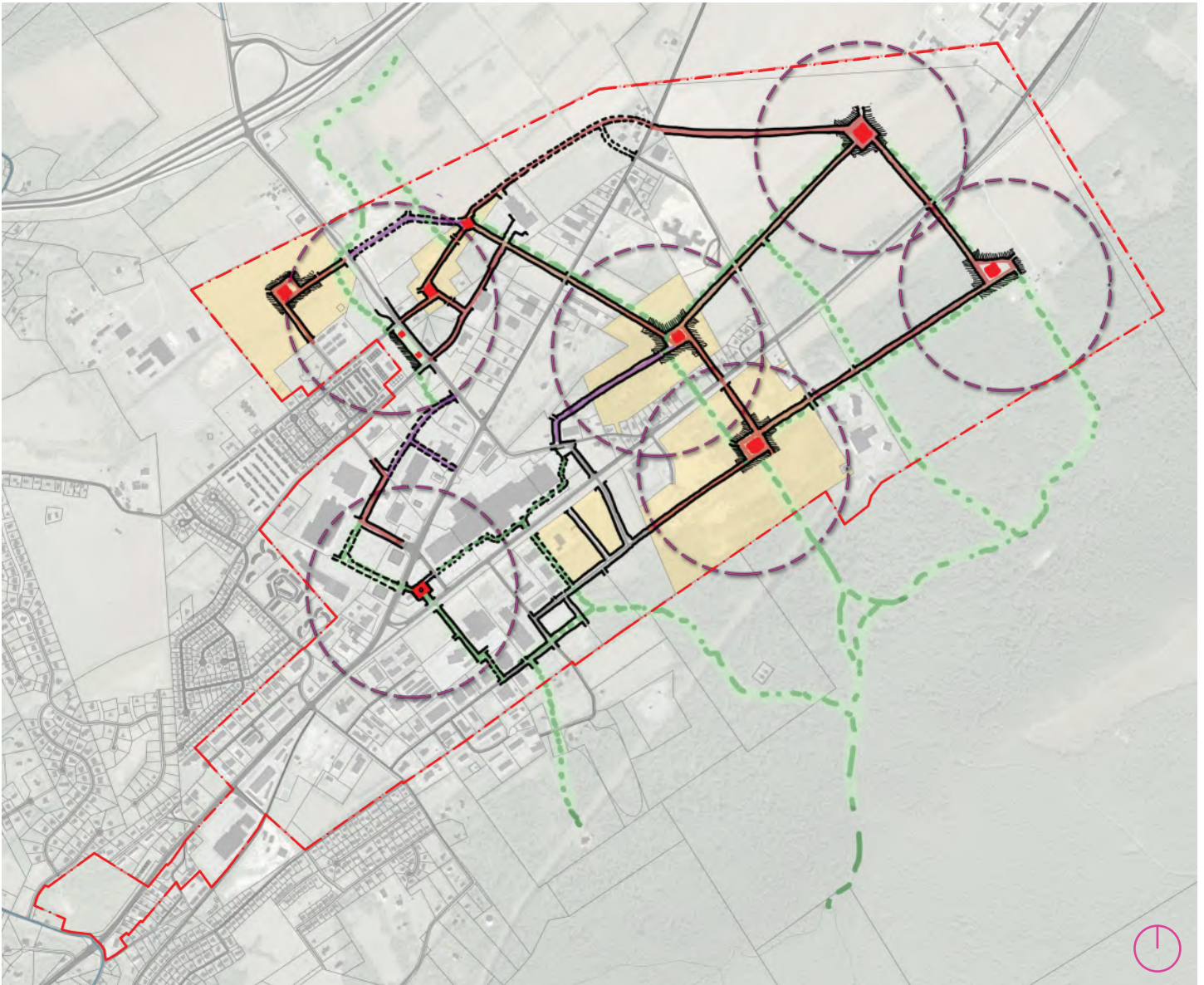
RECOMMENDATIONS						
COMMERCIAL DEVELOPMENT PHASING						
LEGE TOWNSHIP, PA						
	Detached Patio Homes (For-Sale)	Retail (Square Feet)	Industrial / Office (Square Feet)	Hotel (Keys)	Rental Absorption	For-Sale Absorption
	30 Units	55,000 Square Feet	-	-	15 Months	36 Months
	-	45,000 Square Feet	10,000 Square Feet	-	14 Months	40 Months
	40 Units	40,000 Square Feet	10,000 Square Feet	-	14 Months	38 Months
	-	-	-	100 Keys	-	-
	70 Units	140,000 Square Feet	20,000 Square Feet	100 Keys		

Site Analysis



Currently as noted in the evaluation of the existing conditions the site counts with several large commercial and industrial buildings with no continuity or pedestrian friendly scapes. This illustrations showcases the a car-centric environment with very little integration of nature or connectivity.

Preliminary Structure Plan



A preliminary draft structure plan was superimposed over the site to illustrate a general distribution of potential development over open lots. The visioning charrette process focused on testing the structure and cementing a concept on which if all lots were developed, these would work cohesively and jointly while also being effective as stand alone developments.

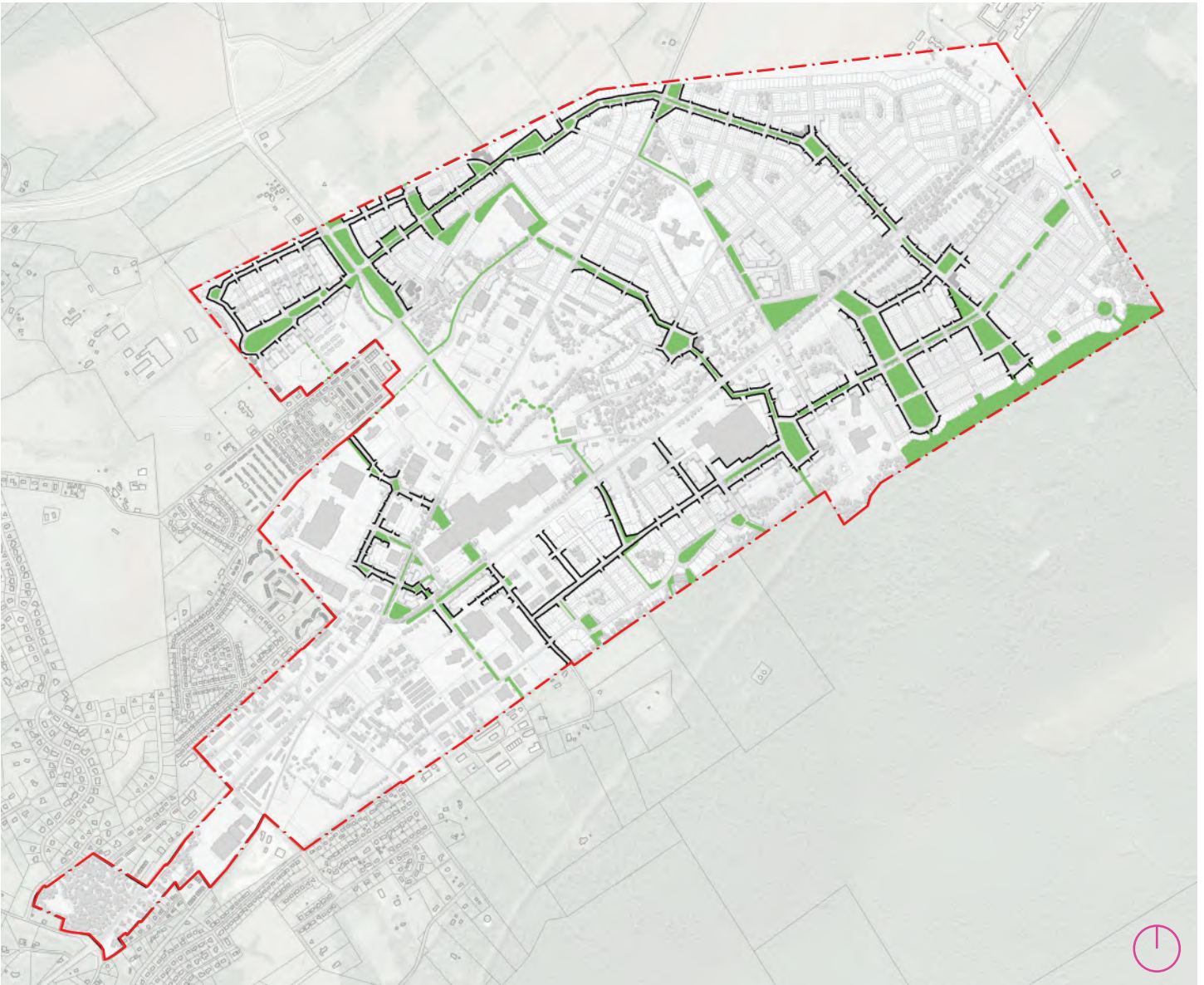
Master Plan



The structure plan served as the basis for an illustrative master plan that depicts one of several potential build-out scenarios. The development of the master plan during the charrette, coupled with an understanding of existing zoning capacity, helped test and define new code elements. One key goal was to ensure existing development capacity was maintained, while allowing the area to transform and redevelop into a vibrant downtown as suggested by the vision statement outlined in the Dale Summit Area Plan.

Support Diagrams

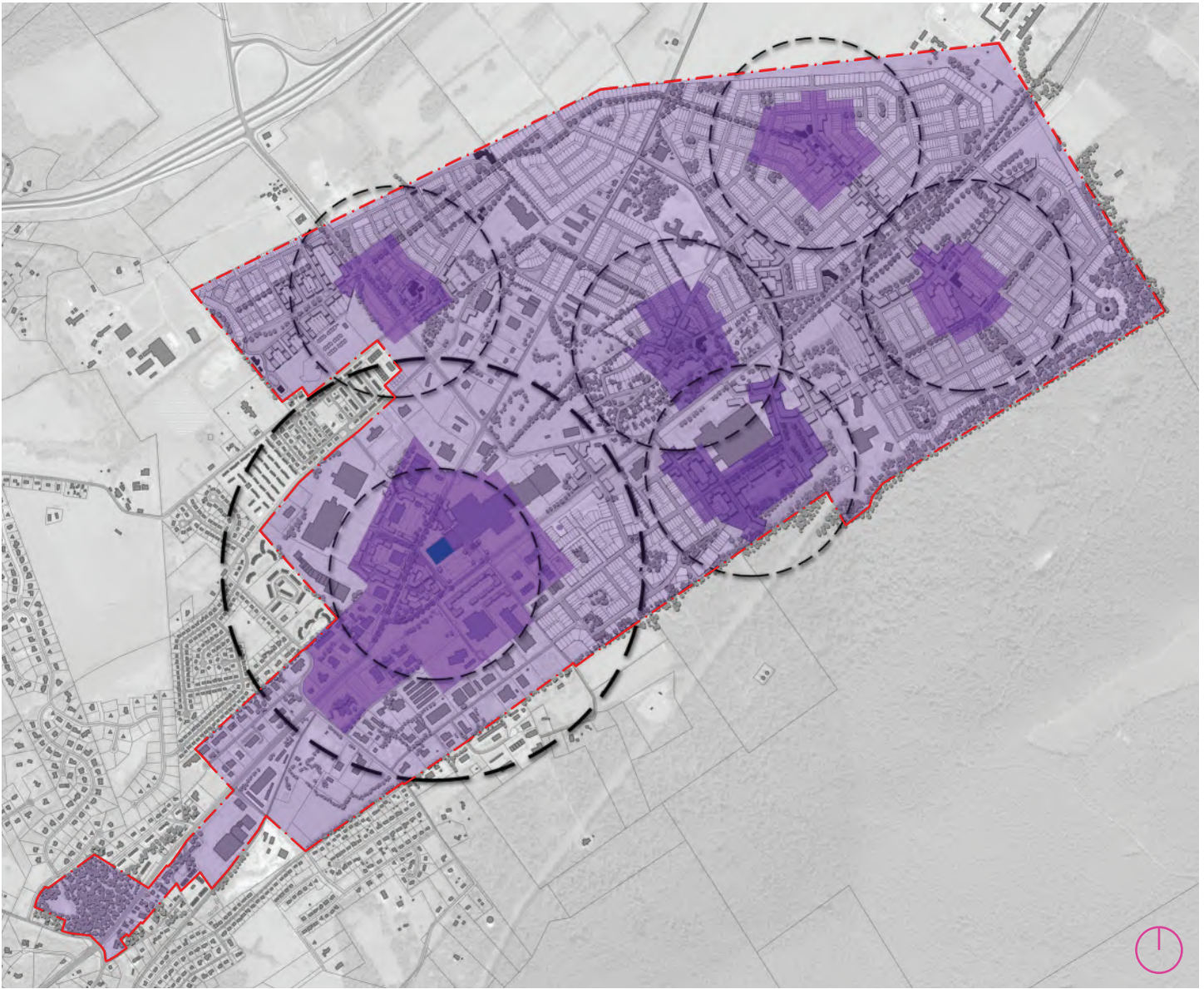
Green Structure Overlay



There is very little 'meaningful' open space in Dale Summit. The master plan envisions breaking down the scale of the larger lots by creating an open space network, making walking easier and enjoyable. A series of parks and plazas are envisioned throughout the area plan, located intentionally and shaped by buildings to create thoughtful spaces.

Support Diagrams

Proposed Regulating Plan



- Neighborhood Mixed-Use
- Mixed-Use Center
- Special District
- Pedestrian Shed - 5 minute walk
- Pedestrian Shed - 10 minute walk

An important component of a flexible plan is ensuring the regulations support plan flexibility as well as ensure natural transitions of uses between zones to result in a cohesive long term plan. The regulating plan here allows a broad range of residential types throughout each zone. The more intense uses are limited to intensity zones or centers. Each zone will have specific regulations written for them which control the form to ensure compatibility.



Open space offer opportunities for passive and active gathering and recreational spaces for the community. They are often fronted by one or two streets making them easily accessible, safe, and defined by buildings on most sides.

The Dale Summit Area Plan proposed green network can be categorize as two main types of open spaces, which are both embedded into the fabric and placed at entrances to the community. They typically function as the communal gathering place for special events such as art shows, concerts, plazas, and civic building sites. It is important to allow varying scales of activities to occur in each of these spaces.

Support Diagrams

Parcel Overlay



The property lines overlay showcases the cohesiveness of the plan within each lot, enabling each property to move forward as a stand alone development. Likewise, this overlay makes an argument for the importance of a collective Area Plan to ensure connectivity and circulation.



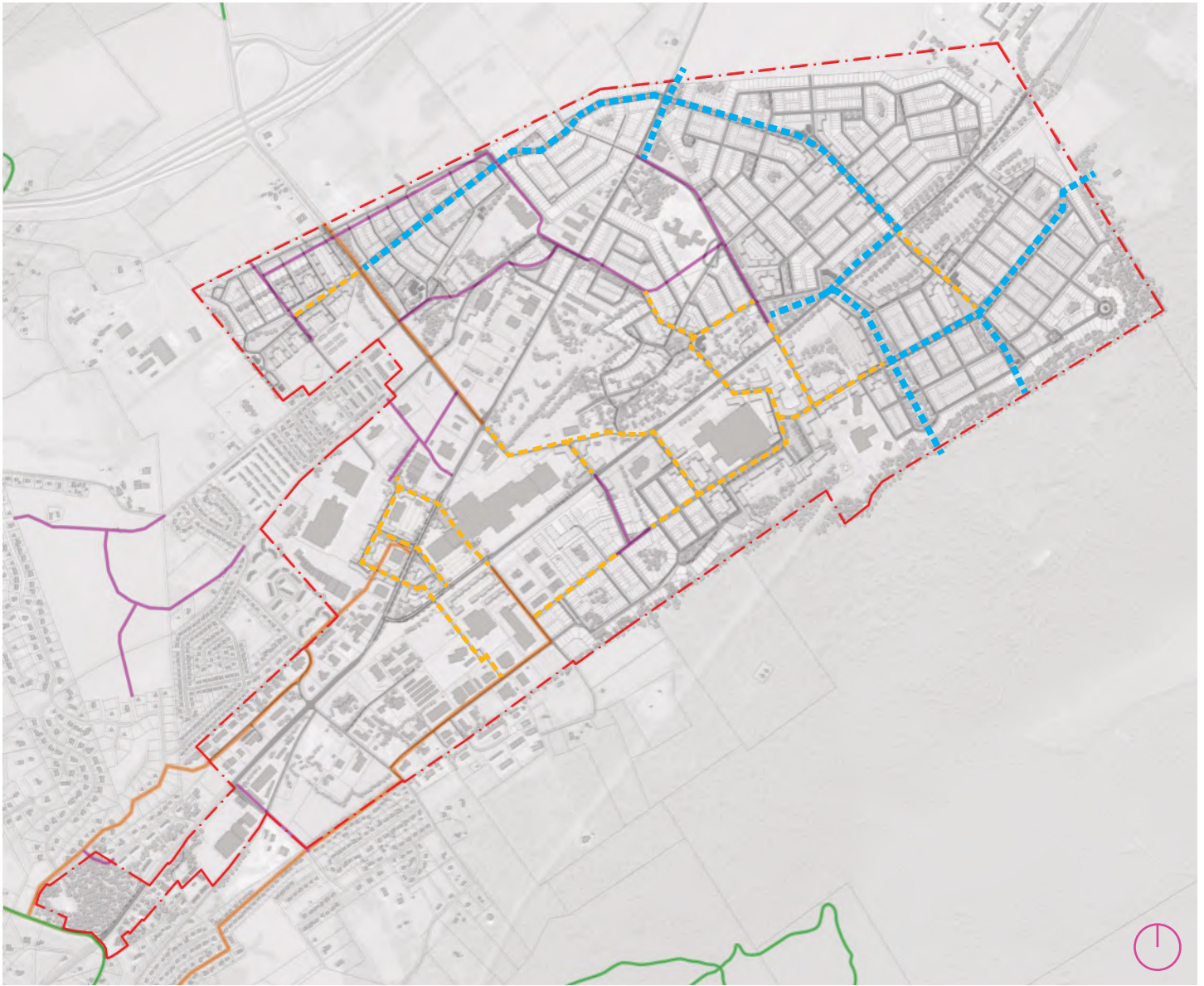
A collective system of sidewalks, paths and trails will provide pedestrians and bicyclists with more choice of routes, creating a connected, and diverse circulation.

Such a proposed network that promotes walking and cycling will further contribute to a more sustainable community and a healthier populace.

Streets are designed as public spaces. As such they play a much larger role in the public life of its users than just thoroughfares for traffic. Streets should be designed to be contextual, comfortable, and connected. Additionally they should be designed for safety where people walking, parking, shopping, bicycling, working, and driving can cross paths safely.

Support Diagrams

Existing and Proposed Trails



- Bike Trail (Existing)
- Bikeway (Existing)
- Priority Pedestrian Corridor (Existing)
- - - Proposed Multi-Use Trail
- - - Proposed Priority Pedestrian Connections
- Proposed Street Network

The Dale Summit Area Plan sits in-between Mt. Nittany Trail and connects to State College Trail and other natural preserves in the region. One of the important features of the plan is a trail network that connects the natural surroundings to urban areas as trails connect to sidewalks. The structure plan and illustrative master plan proposes a complete network of streets that connect and extend the existing Priority Pedestrian Corridor. Shown here is are proposed pedestrian connections that work to complete the existing corridor.

Master Plans / Testing the Code

Prior Developer Plan

One specific, large parcel at the north end of the township that has a current development application, provided an opportunity to demonstrate the value of traditional neighborhood design. The proposed (developer) plan is included here alongside a counterproposal (on the following pages) that was produced in concert with the structure plan.

The current proposal is illustrated here using the same graphics for comparative purposes. This existing proposal provides little to no meaningful open space, and offers only 2 building types, (either large multi-family buildings or one type of attached single-family dwellings). The thoroughfare network consists of two streets that feed into a series of parking lots. The buildings do not address either street, nor do they intentionally define or enclose the spaces in between. As a result, it is difficult to distinguish the fronts from the backs of many homes. Though centrally located, it gives its back to the entry street, fails to establish a special arrival space in favor of a parking lot, and thus misses an opportunity to offer a welcoming gesture to the community.



Master Plan Schemes

Demonstration I

Comparatively, this plan provides the same program structured as a neighborhood. It features a well-defined mixed-use center along Shiloh Road. A grid of small urban blocks connected by walkable streets lined with sidewalks extends from an entrance square. That square is linked to a series of accessible and visible open spaces imagined as linear parks and greens. This necklace of green is woven throughout the community and evenly distributes the open space and recreational amenities within easy walking distance of each residence. A mix of different types of townhouses and a variety of multi-family buildings line and define the street edges. Parking is principally screened from street view inside each block. The clubhouse in this plan is sited prominently as a destination at the end of the long entrance greenway. Its parking lot is arranged in a single layer around a lawn that connects to a re-purposed structure that can function as another shared community amenity.



Master Plan Schemes

Demonstration II

This second plan builds on the first iteration and demonstrates the potential for a greater capacity on the site. While previous attempts followed the prescribed program and zoning allowances, this exercise explored a higher and denser scenario under the same structure. This version can also be considered as a future expansion of the previous plan.

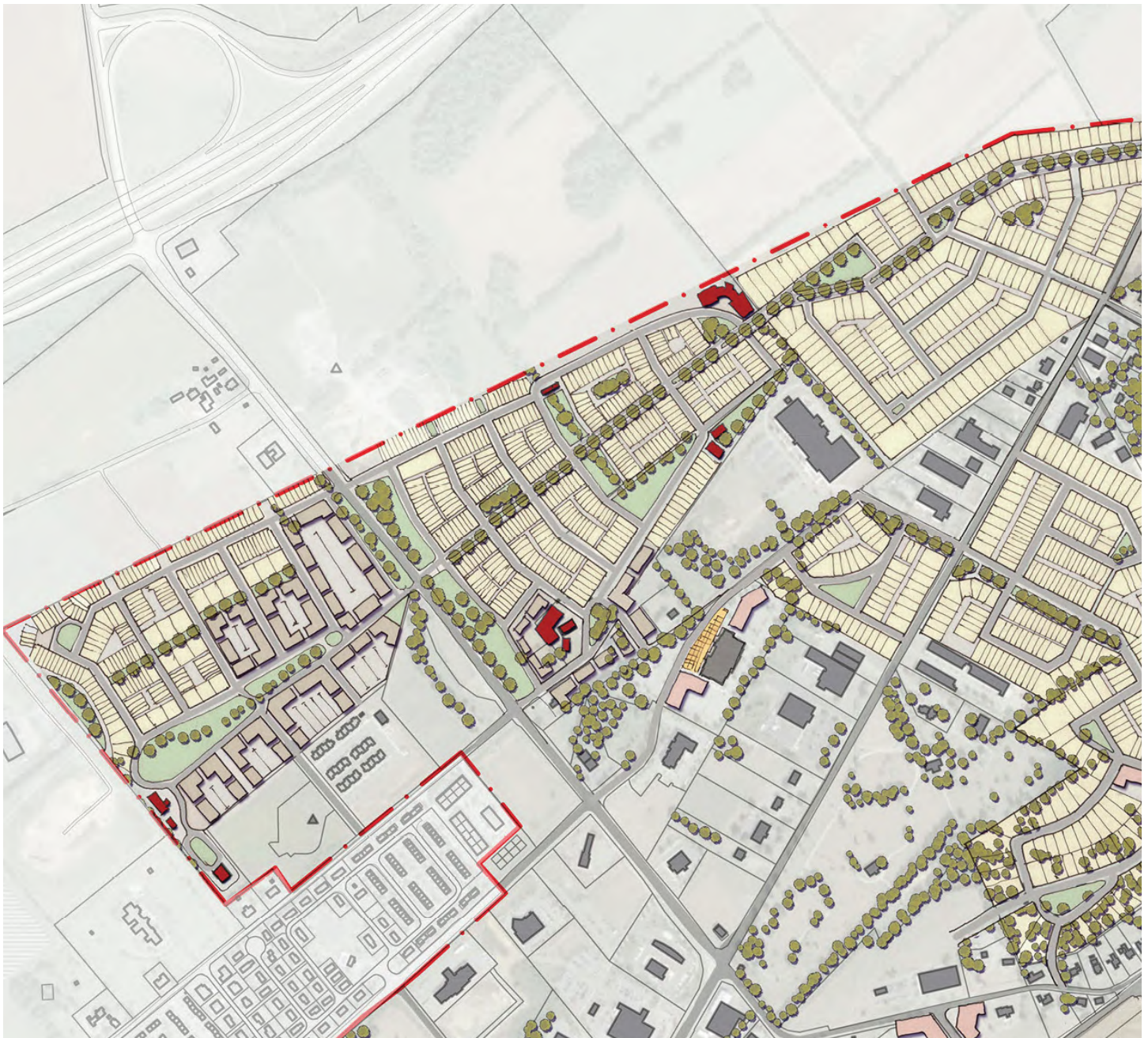


Master Plan Schemes

Demonstration Plans

This particular demonstration plan was studied when an adjacent property owner expressed interest in connecting to the property to the west of the previous demonstration plans.

The plan highlights the importance of working within a structure plan, to ensure necessary connections are provided and green corridors extended. The plan also offers an agile, pedestrian-friendly street fabric that accommodates buildings of varying scales and intensities. Regular blocks were delineated that offer the flexibility to increase or decrease density as the market demands, while not altering the essential walkability of the master plan. Parks are fronted by streets making the open spaces visible and important features of the community. The neighborhood center makes use of an existing barn and other farm structures that will give character and a sense of history to the new community.



Master Plan Schemes

Demonstration Plans

The Northeast end of the Dale Summit Area Plan represents the least developed and thus the greatest opportunity for new development. Comprised of two parcels, these can both house a plausible expansion of the township under a single developer. In this exercise the team explored the structure plan directives in a gridded configuration. Both plans maintain a distance from E. College Ave. The north parcel creates a green buffer, mindful of the grade differences and in an effort to provide a 'soft' edge to the proposed residential uses. The Southern parcel lines the frontage of E. College Ave. with parking for what could be mix-use or multi-family buildings. Both the North and the South parcels line the main thoroughfares with higher density and prescribed the potential for more along these.



Master Plan Schemes

Demonstration Plans - The Corning Site

A demonstration plan was also completed for the Corning Property given its large area of undeveloped land. The plan added residential building types of varying scale, with light industrial and mixed-use buildings transitioning to the existing Corning Warehouse building. A Main Street connected through the site which could potentially become one of the neighborhood centers within Dale Summit. This plan is just one of many potential development scenarios that could occur on this site, as a result of the proposed Form-Based Code. Further studies regarding the capacity of this site under the existing code and the proposed Form-Based code are illustrated later in this section.



Master Plan Schemes

The Corning Site



Master Plan Schemes

Demonstration Plans: A Gateway to Dale Summit

The entry to Dale Summit is at the connection of two major roads which divide and go on either side of the mall site. Large surface parking lots provide the opportunity to create a gateway to Dale Summit, while connecting local streets and creating a block structure intensifying a node of urbanism around the mall.

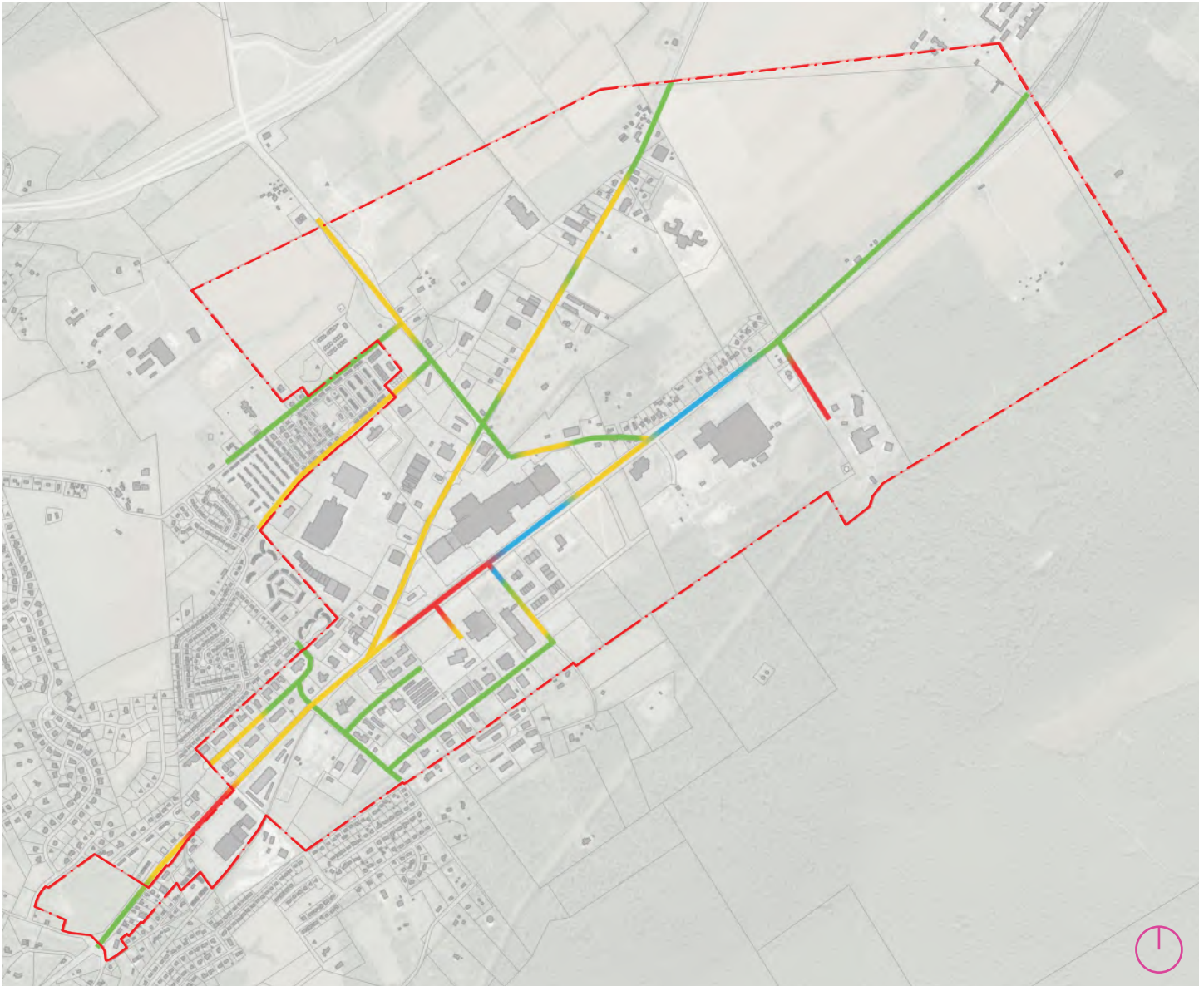


Master Plan Schemes

A Gateway to Dale Summit



Thoroughfare Retrofit Tool Kit



- A: Re-stripe
- B: Slip Lane: 100ft - 140ft
- C: Peel Street: 240ft - 350ft
- D: Perpendicular: >350ft

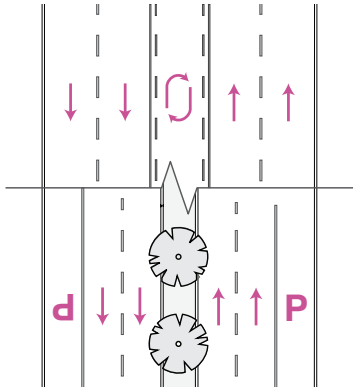
In preparation for the Visioning Charrette, the DPZ team studied the gaps and infill opportunities along thoroughfare frontages on the Area Plan. Each thoroughfare was assigned a changing grade based on the distance structures were set back.

The team then, developed a thoroughfare retrofit toolkit according to the grades assigned. The toolkit provides four strategies, each based on the existing setbacks and designed to urbanize and thus densify the corridors and streets.

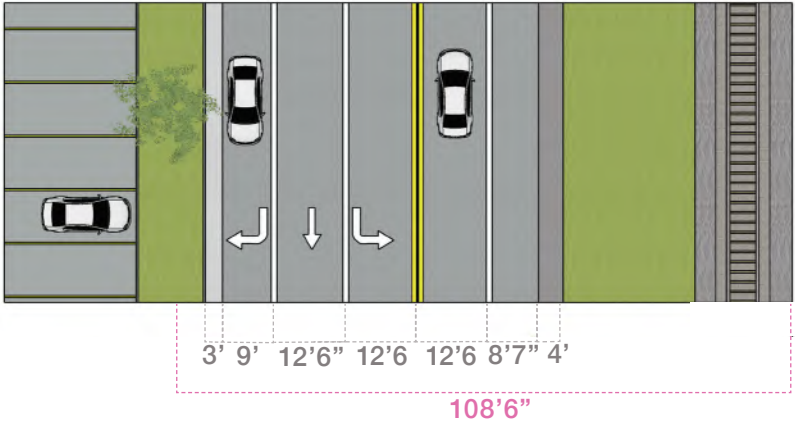
Thoroughfare Retrofit Tool Kit

Tool A - Re-paint

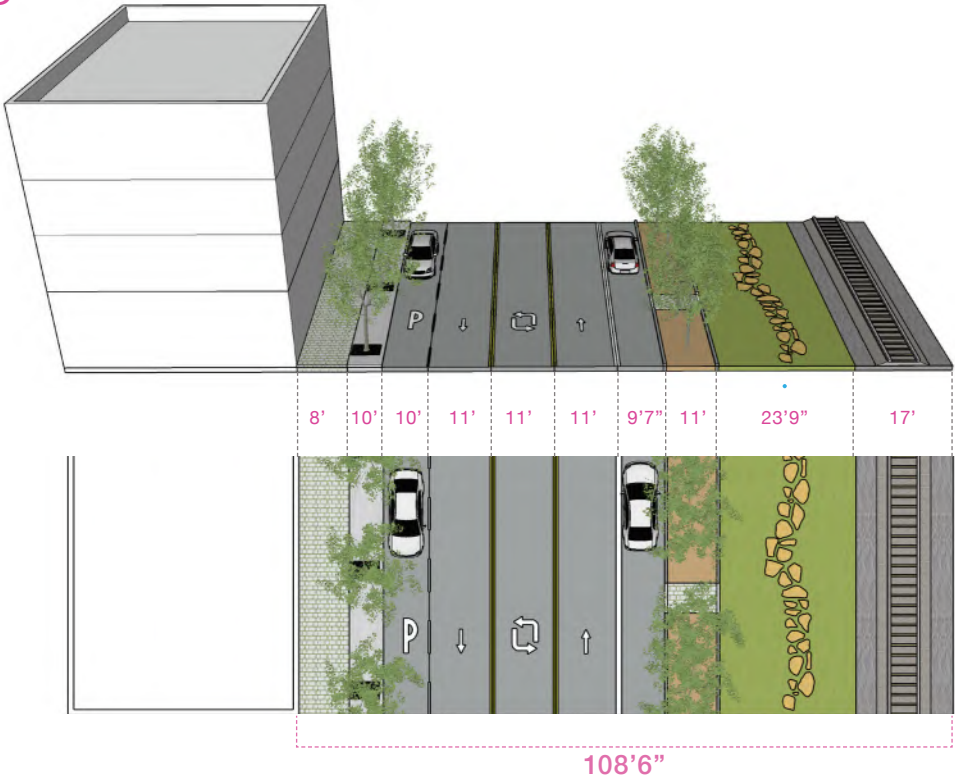
A simple and cost-effective tactical urbanism strategy is to re-paint. Illustrated is a section of E. College Avenue. The existing conditions demonstrate a significant amount of 'wasted' space. The additional space encourages higher speeds and disincentivizes commercial uses or development along the thoroughfare. Tightening the lanes, coupled with parallel parking is a tested and effective way to encourage safer speeds and insentiences walkability in a rather affordable manner.



EXISTING



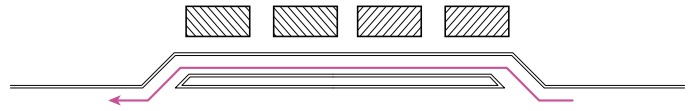
PROPOSED



Thoroughfare Retrofit Tool Kit

Tool B - Slip Lane

A slip lane is an excellent tool in creating sheltered environments along heavily traveled thoroughfares. The slip lane provides a green planted buffer, narrow traveling lanes, parallel parking, a row of tree planters and a sidewalk. These all work as layers of protection for pedestrians, affording an urban environment a short distance from speedy corridors. This retrofit strategy can also work to buffer existing uses that do not depend on being-seen-traffic, by adding a layer of new buildings and a street. It is also an infill opportunity for expanding businesses.

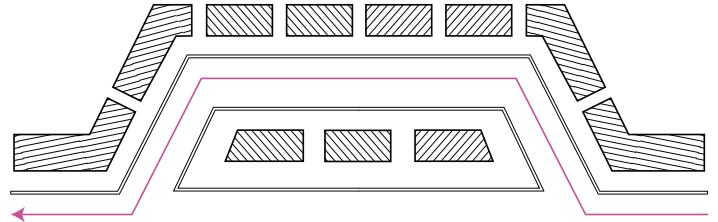


Thoroughfare Retrofit Tool Kit

Tool C - Peel

A peel street works similarly to a slip lanes, by improving the buffering of heavily-traveled-corridors adding a dual building layer to a one way street. Buildings shelter the pedestrian environment while traffic is encouraged to slow down with narrower travel lanes and parallel parking. Additional parking for commercial uses, is then placed in the rear providing yet another layer of separation from the undesired noise and emissions of the speedway.

A peel street also offers an incentive for redevelopment of car-centric commercial properties in that it can be phased-in by adding a street and a corresponding urban buildings across from already existing buildings currently too far back from the roads.



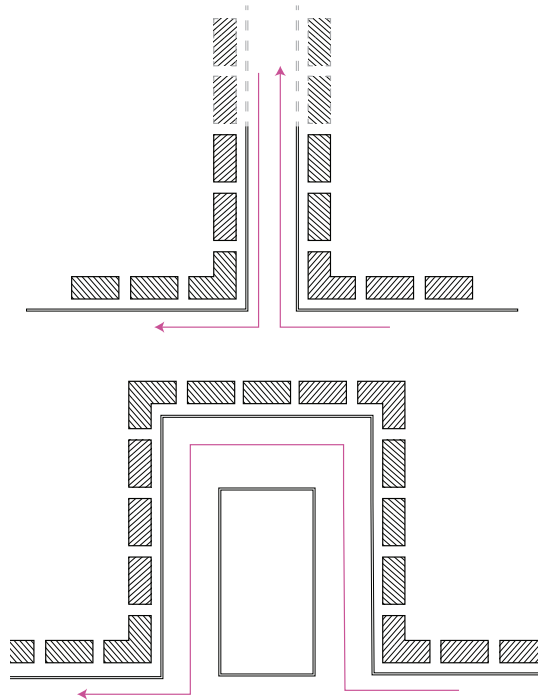
Thoroughfare Retrofit Tool Kit

Tool D - Perpendicular

This approach offers a unique opportunity to sites with significant depth along existing corridors. The potential for a traditional T-intersections creates the opportunity for connectivity or thru-traffic lined with any given use or building type.

The option for a 'court' perpendicular to a corridor is also a valuable tool in retrofitting speedways. This development type is centered around an open space that both buffers and enhances the experience of the pedestrians. In both, the T-intersection and the court scenario the vehicles must significantly decrease their speed to enter the new street-way, narrow travel lanes and parallel parking then encourage lowers speeds.

Sites with existing structures setback significantly from thoroughfares should evaluate this retrofitting strategies as a tool for densification and/or redevelopment.

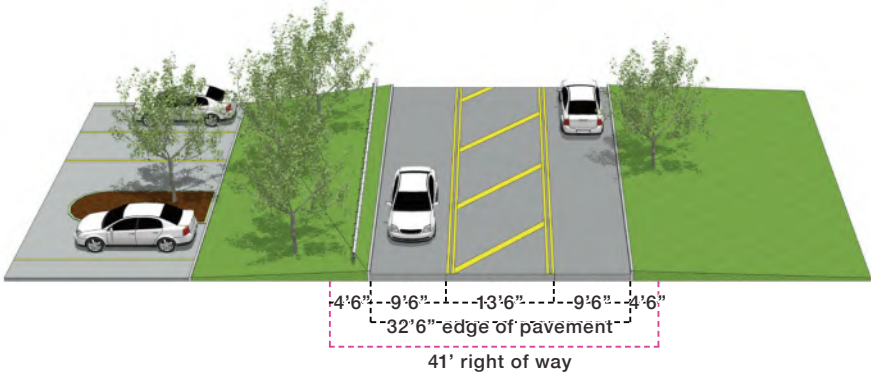


Street retrofits

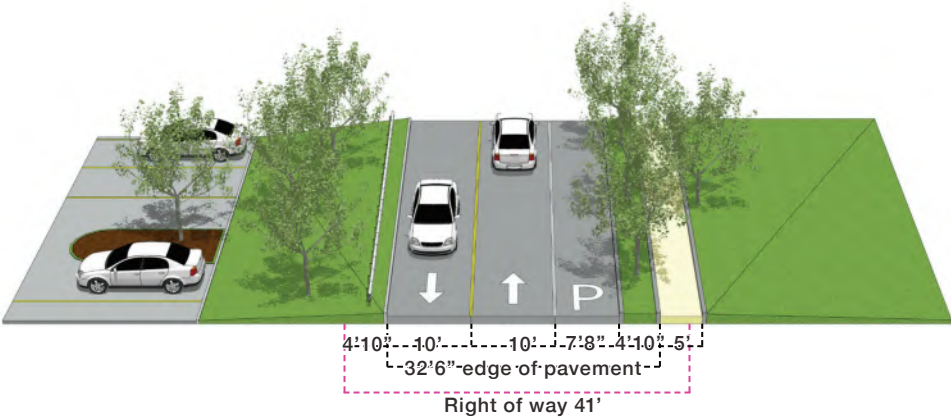
Shiloh

The following pages show potential street retrofits, all of which result in a more pedestrian friendly design. None of the proposals reduce capacity, nor do they alter curbs or property lines. Each proposed section right-sizes the travel lanes, adds on-street parking where room provides, and if possible adds a sidewalk within the rights-of-way.

EXISTING



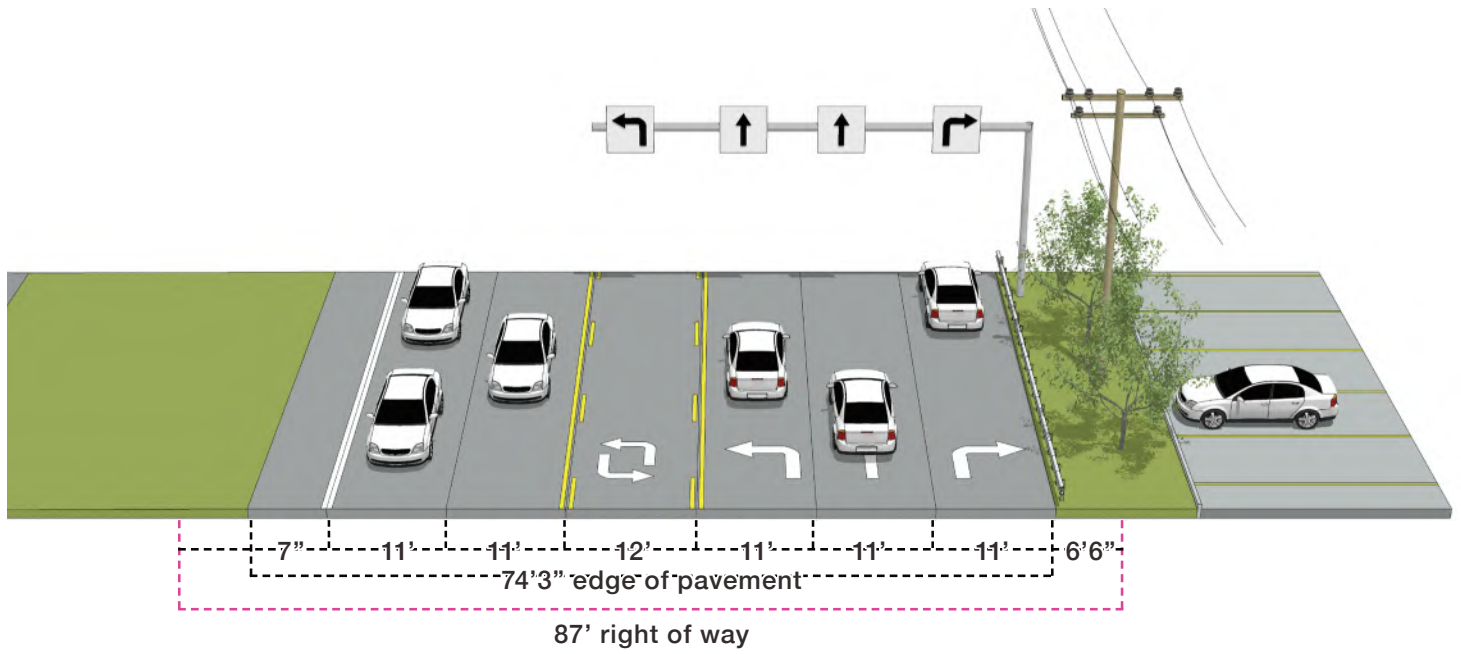
PROPOSED



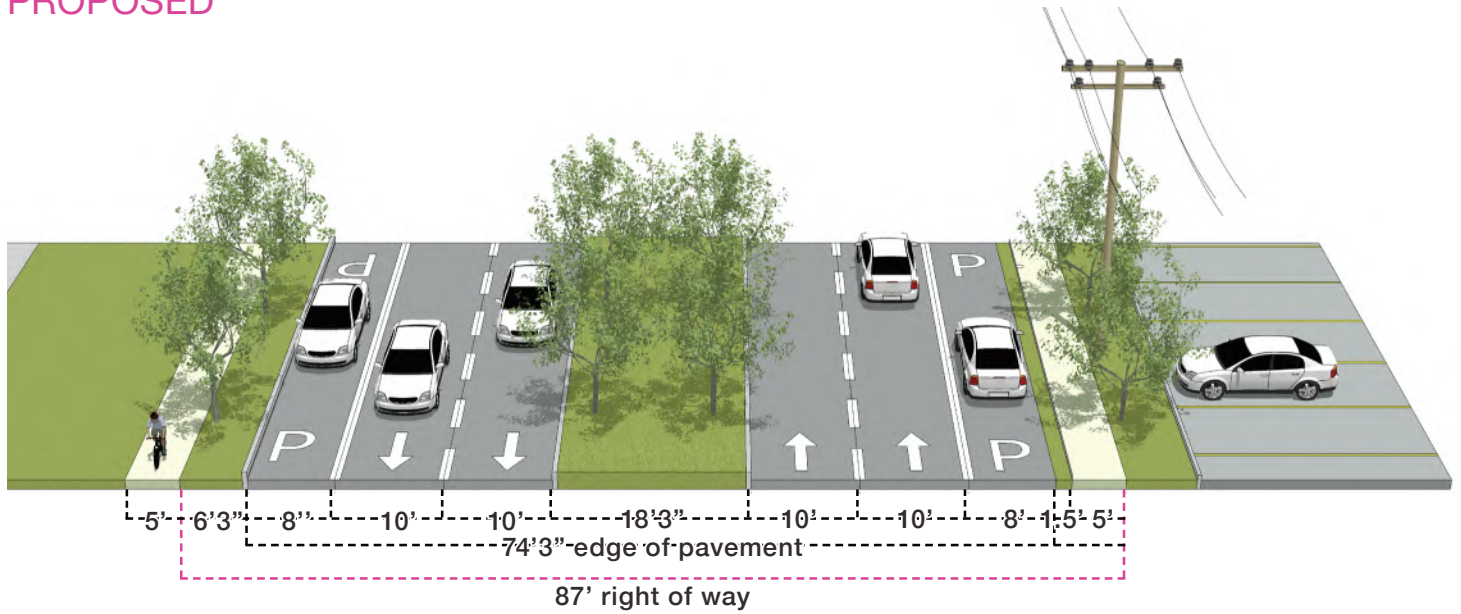
Street retrofits

Benner Pike

EXISTING



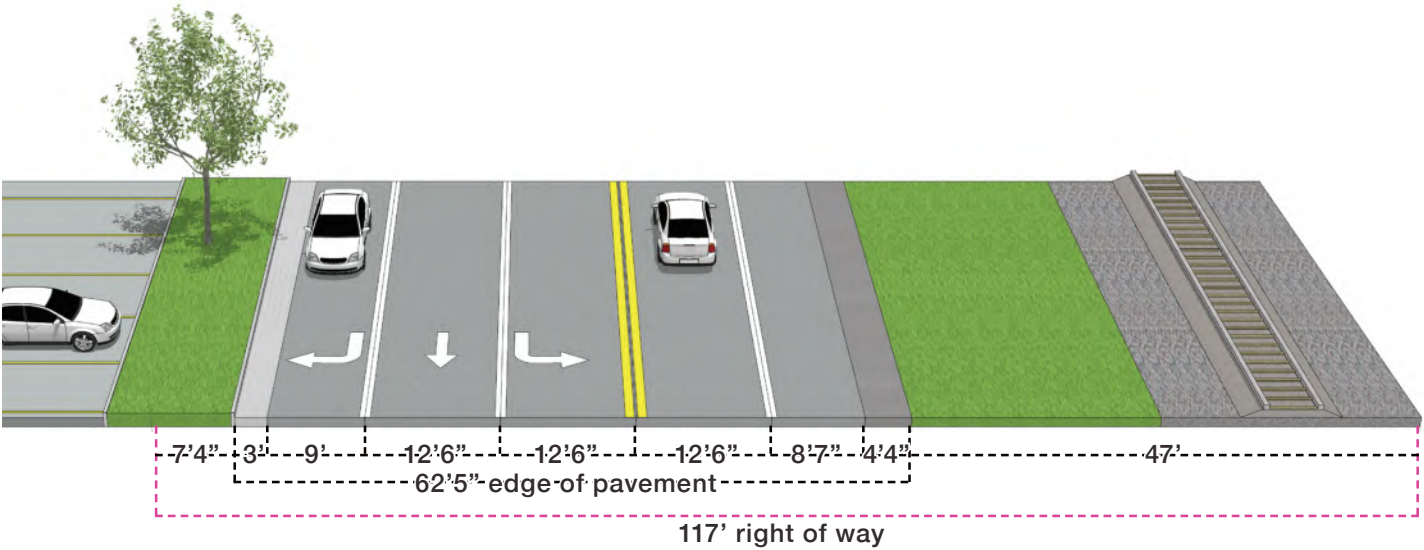
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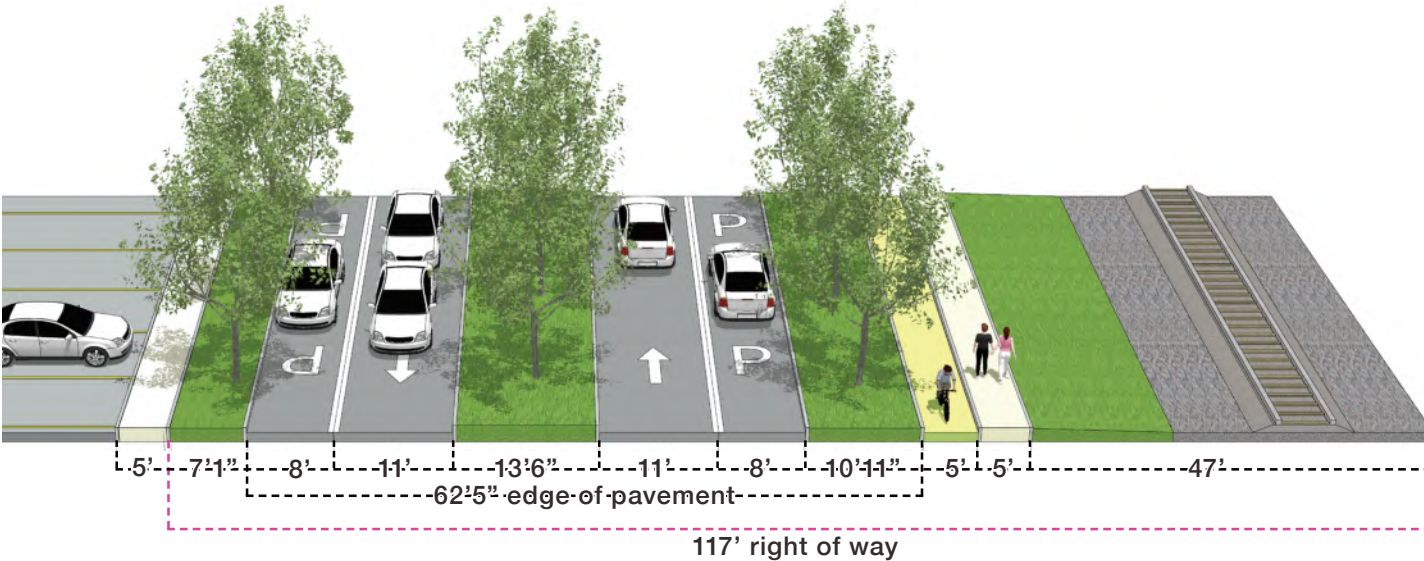
Street retrofits

E. College Ave.

EXISTING



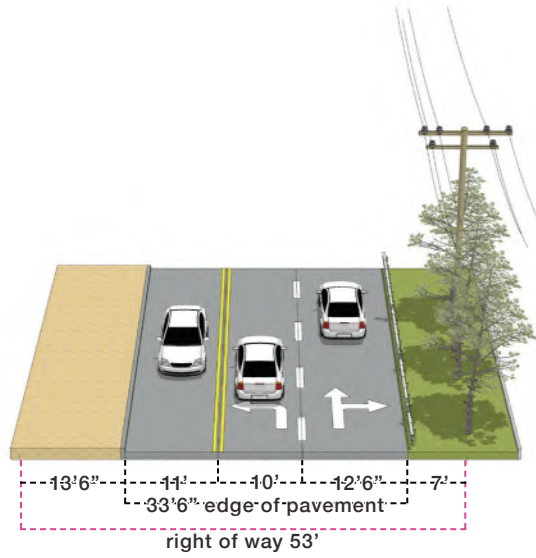
PROPOSED



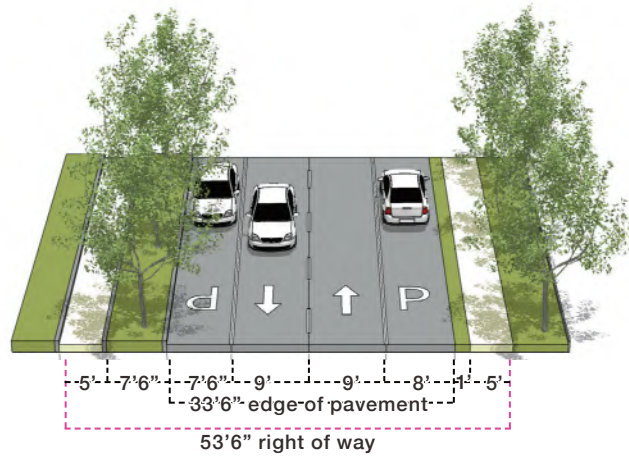
Street retrofits

Benner Pike

EXISTING



PROPOSED



Development Potential Scenario

Some large parcels have a substantial amount of development potential. The Corning site was used as a test case to demonstrate this potential.

- Parcel area: 94.9 acres
- Current Built area: +/- 900,000 sq ft
- Current Built Footprint area: +/- 448,000 sq ft (2 stories)
- Maximum Lot Coverage: 50%
- Maximum Height: 45 ft
- Front setback: 50 ft
- Side setback: 25 ft
- Rear setback: 50 ft
- Rear setback: 50 ft
- Current Development Potential: 8,340,817 sq ft
- Current Maximum Footprint Potential: 2,085,040 sq ft @ 4 stories

Zoning	Property Details	Use(s)	Layers
BASIC ZONING			
Zone:	General Industrial (I1)		
Existing Building Use:	INDUSTRIAL (GENERAL)		
Existing Land Use:	Educational		
Allowed Use(s):	View Detailed Uses		
ADDITIONAL ZONES			
FEMA Flood Zone:	N/A		
ADMIN ONLY			
Internal Overlay:	• Gridics General Assumptions		
Exclusion status:	No exclusion		
Gridics ID:	2e6c61bdf9cfe15f4		
BUILDING INTENSITY			
Maximum Lot Coverage:	50%		
Residential Density:	N/A		
Maximum Building Height:	45 ft		
Maximum Height - Stories:	4		
Floor Area Ratio:	N/A		
Maximum Built Area Allowed:	8,340,162 ft ²		
Maximum Building Footprint:	2,085,040 ft ²		
Minimum Open Space:	25.00%		
Maximum Commercial Area Allowed:	8,340,162 ft ²		
Maximum Office Area Allowed:	8,340,162 ft ²		
SETBACKS AT GROUND LEVEL			
Minimum Primary Frontage Setback:	50.00 ft		
Minimum Secondary Frontage Setback:	50.00 ft		
Minimum Side Setback:	25.00 ft		
Minimum Rear Setback:	50.00 ft		

Zoning	Property Details	Use(s)	Layers
BUILDING & LOT			
Address:	3500 E COLLEGE AVE		
City:	State College		
Zip:	16801		
County:	Centre County		
Parcel ID:	19002029C0000		
Lot Area - Public Records:	4,133,844 ft ²		
Lot Area - GIS:	4,170,248 ft ²		
Existing Building Area:	-		
Year Built:	-		
Number of Buildings:	-		
Living Units:	-		
Beds:	-		
Baths:	-		
Legal Description:	DIST:19 CITY/MUNI/TWP:COLLEGE TOWNSHIP		
OWNERSHIP			
Owner Name	Dale Summit Acquisitions		
Owner Mailing Address	2121 OLD GATESBURG RD STE 200, State College, PA, 16803		
Secondary Owner Name	-		
SALES			
Date	Amount	Type	
Apr 11, 2006	-	WARRANTY DEED	
Apr 11, 2006	-	WARRANTY DEED	
Jun 03, 2005	\$5,766,730	SPECIAL WARRANTY DEED	



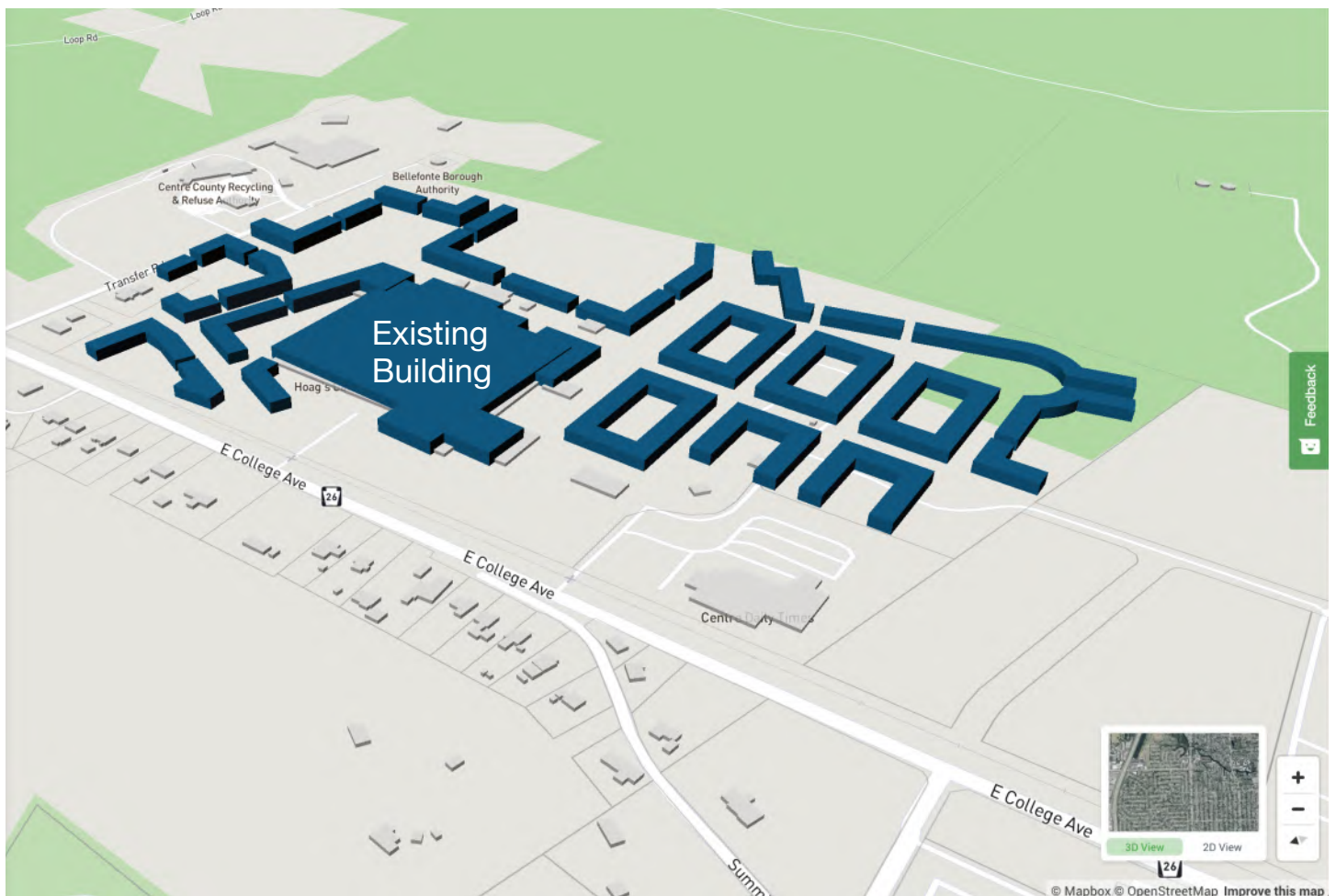
Development Potential Scenario

This scenario looks at the same development capacity in a different form consideration. These are the parameters of this scenario:

- 15% minimum open space
- assume 20% for infrastructure
- maximum lot coverage 75%
- maximum height 3-4 stories (with some iconic building elements up to 6 stories)
- front setback 5 ft
- side setback 5 ft
- rear setback 20 ft

Resulting Development potential:

- Maximum gross lot coverage: 50%
- +/- 1,200,000 sq ft, non-residential (Light Industrial, Office and Commercial Uses)
- +/- 1,400 dwelling units



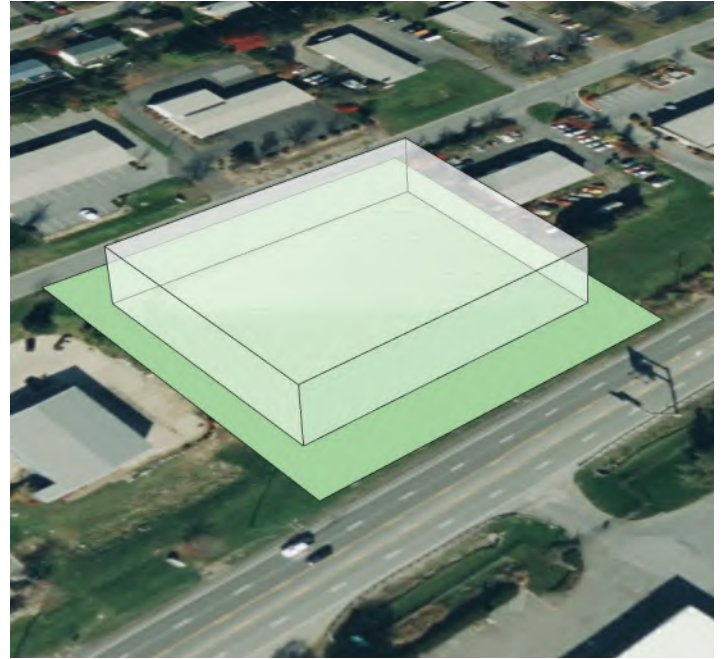
The following pages illustrate on 1 block, the existing conditions with each of the different zoning requirements, followed by a page demonstrating the different development opportunities on the site, by right-sizing setbacks, and removing FAR, which is not a predictor of built form. Both density and FAR are poor predictors of form, and can be controlled by the height and overall form instead.

The impervious lot coverage is also too restrictive, and precludes small lot development, which is demonstrated with the options illustrated on Page 107.

Development Potential Scenario

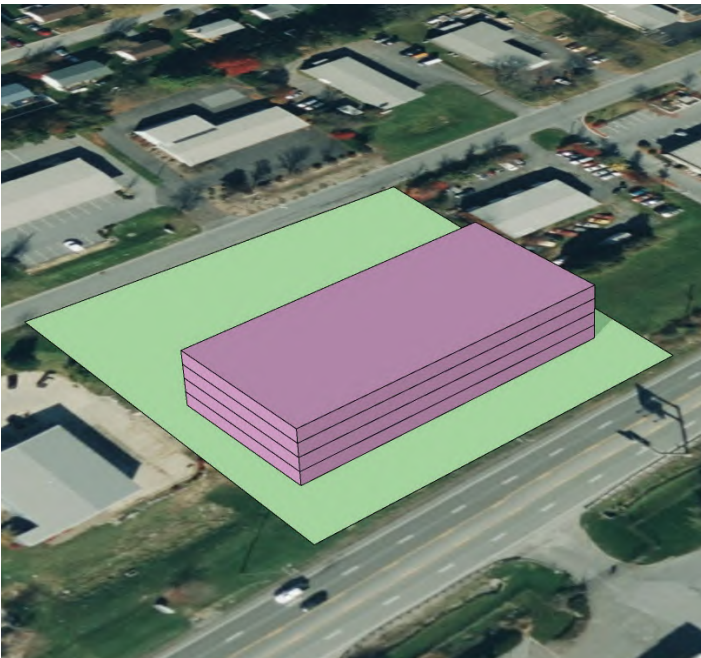


This parcel is 2.1 acres in size



The shaded area represents the setback limitations:

- 50 ft front
- 25 ft side
- 50 ft rear



This represents 30% lot coverage and 45 ft of height limitation



The FAR is 0.1, this represents the maximum development potential in this parcel.

Development Potential Scenario



This parcel is 2.1 acres in size



Single family - 14 units



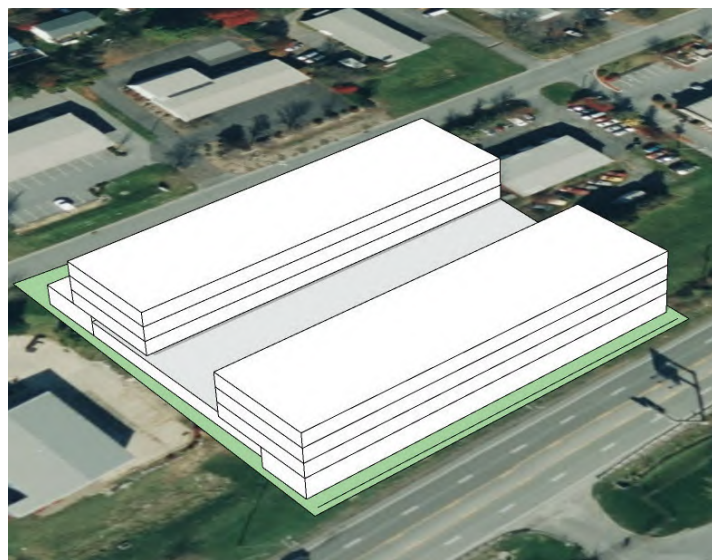
Duplexes - 14 units



Townhouses - 30 units



Six-plexes - 50 units



Multi-Family- 90 units + Commercial

Charrette Take-Aways

The following is a list of take-aways from the charrette, which all go towards supporting the Dale Summit Vision Plan.

- Confirmed strong interest in Dale Summit evolving to serve as a hub of activity, potentially with multiple smaller centers
- Confirmed desire for more walkability - still some skepticism about the details of how it can happen here
- General support for the findings in the market analysis:
- Strong interest in entertainment, indoor recreation, food & beverage uses
- Interest in variety of smaller housing types
- Recognition that need for office and industrial is limited - can be accommodated in a mix with commercial and housing
- Strong interest in the idea of building on State College's local identity connected to the outdoors by adding trails, bike lanes, and walking connections to connect to protected lands



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Part V. Implementation Strategy

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

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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:

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 Strategy

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.	

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.
<p>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.</p> <p>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.</p> <p>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.</p>	

Implementation Strategy

Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
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Implementation Step 2:	Engage the development community in discussions over the viability of the preferred development types selected for the Dale Summit.
<p>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.</p> <p>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.</p>	
Implementation Step 3:	Identify appropriate placement within transects and the supporting menu of regulations/incentives needed to ensure cohesion and success.
<p>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.</p> <p>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.</p>	

Supporting Objectives – Aesthetics

AO.1. Incorporate Thematic Design AO.2. Emphasis on Historical with a Contemporary Flair	
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.	
Implementation Step 1:	Engage a Landscape Architect or other design professional(s), either formally or informally, to identify the organizing design principles.
Implementation Step 2:	Incorporate design principles into existing/future ordinances and any associated regulations.
Implementation Step 3:	Identify and invest in projects within public spaces that emphasize the design principles.
Implementation Step 4:	Develop a grant program that assists/incentives incorporation of design principles into new developments or retrofits.

Implementation Strategy

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.

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).
Implementation Step 2:	Engage artisans to create an art feature(s) that enhances the brand/sense of place.

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.

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.

Implementation Strategy

Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
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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.
Implementation Step 3:	Establish boundary(s) or district(s) for the designated tax incentive program.

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.	
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.

Supporting Objectives – Land Use & Zoning

LZO.1. Allow for Flexibility within Regulation	
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.	
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 Strategy

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.
Implementation Step 2:	Expanded Regional Growth Boundary and Sewer Service Area on the fringes of the Dale Summit to accommodate residential development.
Implementation Step 3:	Expand incentive options for development of affordable housing options within Dale Summit.

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.
Implementation Step 2:	Prepare renderings for key development parcels showing development potential under Form Based Code.

Supporting Objectives – Recreation

RO.1. Recognize the Value of an Entertainment Niche	
This entertainment niche, featuring uses such as theaters, 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.	
Implementation Step 1:	Allow entertainment uses, such as theaters, civic spaces, gaming, restaurants and others, as a use by right in appropriate transects.

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

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.
Implementation Step 2:	Incorporate more indoor recreation uses as use by right in Zoning or Form Based Code.
Implementation Step 3:	Champion a feasibility study for acquiring and/or developing an indoor recreation center that provides aquatic facilities.

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.
Implementation Step 2:	Perform a feasibility study for a new trailhead access from the Dale Summit area to Mount Nittany.

Implementation Strategy

Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
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Implementation Step 3:	Evaluate the possibility of a Regional Park within the Dale Summit.

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.
Implementation Step 2:	Incorporate regulations and incentives to make conservation development an attractive option for developers.
Implementation Step 3:	Designate strategic open space areas within College Township Official Map.

Supporting Objectives – Transportation & Infrastructure

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.	
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 Strategy

Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
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Implementation Step 4:	Implement a Complete Streets model where viable.

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.
Implementation Step 2:	Investigate alternative service models to improve mobility throughout Dale Summit.
Implementation Step 3:	Provide incentive for higher density developments to emphasize the use of public transportation options.
Implementation Step 4:	Partner with CATA and higher density developments on fare incentive program.

TIO.3. Invest in the Streetscape to Support Theme

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:	Seek funding to make improvements to the streetscape along both the Benner Pike (SR 150) and Shiloh Road.
Implementation Step 2:	Implement a common design template for streetscapes based upon roadway classification within Dale Summit.

Implementation Strategy

Implementation Schedule	Short-Term Within 24 months	Mid-Term 24-48 months	Long-Term 48 months or more
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TIO.4. Expand Existing Utility Infrastructure to Unlock Undeveloped Parcels	
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.	
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

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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](#)

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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 aces 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.

Appendix

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

Appendix

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.

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