

GLOUCESTER
COUNTY
COMPREHENSIVE
ECONOMIC
DEVELOPMENT
STRATEGY (CEDs)

August 8

2014

Abstract: The (CEDs) is a vehicle for channeling U.S. Economic Development Administration (U.S. EDA) funds and other development financing to initiate projects that are essential for Gloucester County to attract, grow and sustain new business and industry.

ADDENDUM TO THE
2008 (CEDs)



Presented by The Gloucester County Department of Economic Development
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2014

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INTRODUCTION

Gloucester is a bustling county located just southeast of Philadelphia in the metro Philadelphia market. With over 14,000 businesses, small and large Gloucester County is no doubt the prime location for the long term, sustainable growth for new business.

Our economy is a thriving and diverse mixture of agri-business, manufacturing, heavy industry, commercial enterprise and innovative new technology companies. Local businesses produce and distribute a number of goods such as chemical products, fabricated metals, medical instruments and devices, as well as a vast assortment of food products.

In 2008, Gloucester County adopted a Comprehensive Economic Development Strategy or CEDs. Two years later, the County prepared an Addendum to that CEDs which updated various goals, objectives and projects. This document represents an additional addendum or update to the 2008 CEDs.

The National Economic Recession of 2008 has had a significant impact on all New Jersey counties, for Gloucester County and 2009 and 2010 were particularly challenging, job growth stagnated and unemployment rates skyrocketed. There were three major corporate layoffs announced between 2009 and 2012.

Over the last three years and particularly since 2012, the local economy has moderated and our business environment has begun to improve. In 2013 New business coming into Gloucester County that has worked with the department represents 1.6 million sq. ft. of new or renovated space, 604 new jobs, 448 retained jobs and \$41.5 million dollars in new investment in the County.

Yet still, Gloucester County began 2013 with an unemployment rate well above the national average at 10.3%. As of April 2014 (the latest month

for which N.J. Department of Labor figures are available) the unemployment rate had dropped to 6.6%. However, as has been seen throughout the Country, this drop in unemployment was impacted to some extent by a shrinking of the labor force. Since the 2010 CEDs update, Gloucester County's labor force declined from 154,300 to 152,600 persons due to people simply dropping out of the workforce during the recession. This is a trend seen nationally and one that is not unique to Gloucester County.

These undesirable circumstances added importance on this update of the Comprehensive Economic Development Strategy, (CEDs). While not a short term strategy or plan, the CEDs is a vehicle for channeling U.S. Economic Development Administration (U.S. EDA) funds and other development financing to initiate projects that are essential for the county to attract, grow and sustain new business and industry.



KTM Brrr! – Logan Township, Gloucester County

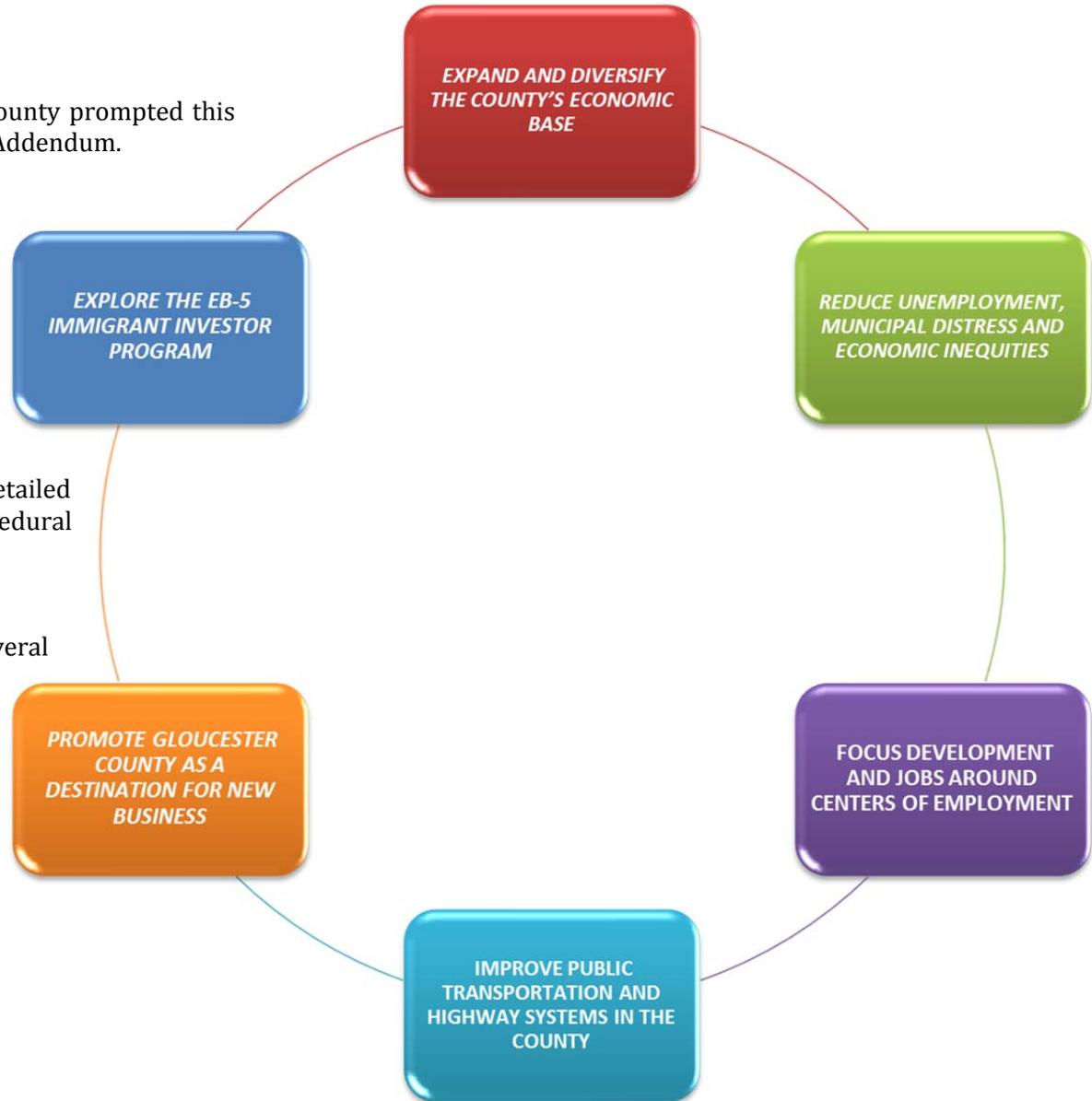
KEY AREAS OF FOCUS

The changing economic circumstances facing the County prompted this update of the Gloucester County CEDs and its 2010 Addendum.

The County government is particularly interested in seeing the recommendations of the CEDs more focused than in previous documents. This means that project concepts identified in the CEDs are ones that are achievable within the lifetime (approximately 3-5 years) of this update.

The implementation agenda, therefore, is more detailed and tied to specific benchmarks, timelines, and procedural recommendations.

With reference to policy, the CEDs focuses on several key issues and challenges, which are important to the Gloucester County economy as it emerges from recession.



LEADERSHIP

Under the leadership of the Gloucester County Board of Chosen Freeholders and the County Department of Economic Development, a CEDs Committee was formed for this 2014 CEDs update. Over the course of several months and a number of meetings and public discussions, the Committee developed basic principles that guided the CEDs process. These principals are central to this 2014 Plan Update and Addendum.

To maintain a strong and welcoming business environment, the County must continue to nurture a culture of collaboration, realizing that an area's well-being and its ability to compete are conditioned by the level of trust, inherent in its society. This belief has led the CEDs Committee and the County's leadership to focus its efforts on an innovation based economy with a shared vision, widely discussed. The conclusion is that the County's social consensus is built by leadership that is broad, explicit and action oriented. This Addendum continues to reflect the County's belief in these principles.

The CEDs committee was drawn from all the major interests of the County including women, minorities, and the private sector to institute a continuing planning process.

Membership on the CEDs Committee ensures broad participation by business, the public sector and hard-to-reach communities and populations. Half of the Committee membership is from private sector and non-profit organizations.

2014 REPRESENTATION ON THE CEDs COMMITTEE INCLUDES:

- **Business and Industry**
- **Chambers of Commerce**
- **Southern New Jersey Development Council**
- **Hospitals and Health Care Providers**
- **Faith Based Organizations**
- **Non Profit Groups**
- **Municipal Government**
- **County Government**
- **County WIB**
- **County College**
- **Rowan University**
- **South Jersey Tech Park**

As part of this update, there were two CEDs Committee meetings and one public meeting conducted by the County Board of Chosen Freeholders, prior to adoption of this Addendum. Minutes from the CEDs Committee Meetings and the Public Meeting are incorporated into this Strategy.

ECONOMIC AND DEMOGRAPHIC ANALYSIS

Gloucester County has attractive and varied landscapes and an abundance of developable land. This, along with the County's close proximity to historically major metro areas like Camden, Philadelphia, Atlantic City and Wilmington, assisted the County to witness considerable growth between 1970 to 2000. The trend of population growth has continued and according to the Delaware Valley Regional Planning Commission, Gloucester County is expected to see a 30.5% population change from 2010-2040. DVRPC has recognized that Gloucester County will see the largest percent change in population growth in the nine-county DVRPC region.

Growth in Gloucester County will not be limited to population increases, employment forecasts indicate that the County will experience a 26% change in employment figures by 2040. DVRPC's Connections 2040, the adopted Long Range Plan concludes that Gloucester County will see the largest percent change in employment growth as well.

Supporting these forecasts, the following sets of statistics compare some of the key economic and demographic figures from the 2008, 2010, and current CEDs documents.

The population of Gloucester County is estimated (in 2012) at 291,608 persons. This is an increase of 3,320 persons since the 2010 Census count of 288,288 individuals and an increase of 36,006 persons from the 255,602 count in 2000. This translates to a growth rate of approximately 14% over this period, which is well ahead of most New Jersey counties.

The County and region are emerging from their economic downturn resulting from the 2008 recession. Between 2010 and 2013, the County estimates that it lost approximately 1,200 jobs due to plant closings or businesses moving out of the County. Reinforcing the emergence from the recession, GCDED reports that between 2010-2013 over 2,200 jobs were added or retained through Business Retention and Attraction efforts.

The chart on the next page illustrates some additional changes in the economic conditions of the County and its workforce. This graphic demonstrates the unemployment rate in the County, at 6.6% is still above its pre-recession rate, but well below previous figures, which reached 11% or more at the height of the recession. These figures, while higher than desirable, are healthier than many counties in the State. Unemployment rates in Gloucester County have recovered fairly quickly from the recessionary lows, particularly given that New Jersey's unemployment rate is currently estimated at 6.9%, a figure slightly higher than Gloucester County.

The size of the labor force increased fairly significantly from 2000 levels, which is not surprising given the County's rate of population growth. However, since 2010, the size of the labor force has declined slightly from 158,600 persons to an average of 155,600 persons in 2013. Typically in a recession some people simply drop out of the workforce – in other words they stop actively seeking employment – and wait until the recovery starts to occur.

In 2012, the number of persons living below poverty has declined to 11,700 currently from an estimated 21,366 in 2008, (2008-

2012 American Community Survey.) Although Gloucester County is one of the fastest growing counties in New Jersey, its 2012 median household income, at \$71,324 was just over 80% of the State average which was \$79,584.

**Changes in Economic Conditions 2008-2014
Gloucester County, New Jersey**

ECONOMIC INDICATOR	JANUARY 2007 FIGURES	AVERAGE 2009 FIGURES	APRIL 2014 FIGURE
Unemployment Rate ¹	4.8%	10.0%	6.6%
Size of Labor Force Numbers of Persons	154,900 7,400	154,300 15,500	152,600 10,100
Unemployed Poverty Rate	6.8%	7.5%	7.7%
Median Household Income	\$66,759	\$69,990	\$71,324

Sources: 1. NJ Department of Labor and Workforce Development. Most recent figure is April 2014. 2. Poverty rate stats from American Fact Finder, 2012 American Community Survey; 3. Median Household Income Estimate from 2012 ESRI Data.

Similar to most counties in New Jersey, the retail and service sectors are significant components of the County’s employment base. The manufacturing sector, once a dominant presence in the economy represents only 3.5% of all businesses and 7.9% of all County employment.

The health services and educational sectors of the economy are large contributors to employment as is the construction industry. ESRI estimates in 2012 that there were 7,902 persons employed in the healthcare industry and 6,814 persons employed in educational services. Combined, this workforce of 14,716 individuals is larger than any other single sector of the economy

except retail trade. Another important sector of the local economy is agriculture. There is ongoing interest in preserving the County’s agricultural heritage and promoting value added agricultural industries and agri-tourism. Interest in the wine industry is expanding significantly, which includes both wine production and retail outlet sales.

In addition, through the County’s partnership with Rowan University, significant opportunities exist to expand the technology sector of the County economy through the development of the South Jersey Technology Park. As illustrated in the table below, the New Jersey Department of Labor projects that through 2016, Gloucester County will be the South Jersey regional employment growth leader. The rate of employment growth is expected to outpace the State’s growth rate significantly. This Strategy addresses this finding and its implications for the County’s leadership.

Southern New Jersey Employment Growth Rates through 2016

COUNTY/JURISDICTION	PROJECTED GROWTH RATE
Atlantic County	7.2%
Burlington County	6.8%
Camden County	6.1%
Cape May County	3.9%
Cumberland County	5.2%
Gloucester County	9.6%
Salem County	2.3%
NEW JERSEY	6.0%

Source: NJ Department of Labor and Workforce Development, 2009

While the recession certainly impacted employment trends countywide, there have been new companies and job openings that have occurred in recent years, as noted earlier. Another indication that economic activity in the County is increasing is the significant number of participants that moved through the County WIB in 2013. The number of job openings, 2,435 was particularly encouraging helping to move the County’s unemployment rate from a high of 10.3% at the start of 2013 to 6.6% as of April 2014.

Workforce Investment Board Statistics, 2013

ASSISTANCE PROVIDED	NUMBERS SERVED
Participants Served	25,164
One-Stop Orientation	2,998
Job Assistance Workshops (GA 28 Day Program)	4,340
Assessment Numbers	1,503
Job Openings Received	2,435
Staff Assisted Services	4,203
Job Placements	689
Division of Vocational Rehabilitation Services	122
Job Orders	902
Tuition Waivers	105
Learning Link Participants	210
WIA Individual Training Account Grants	197

Source: Gloucester County WIB

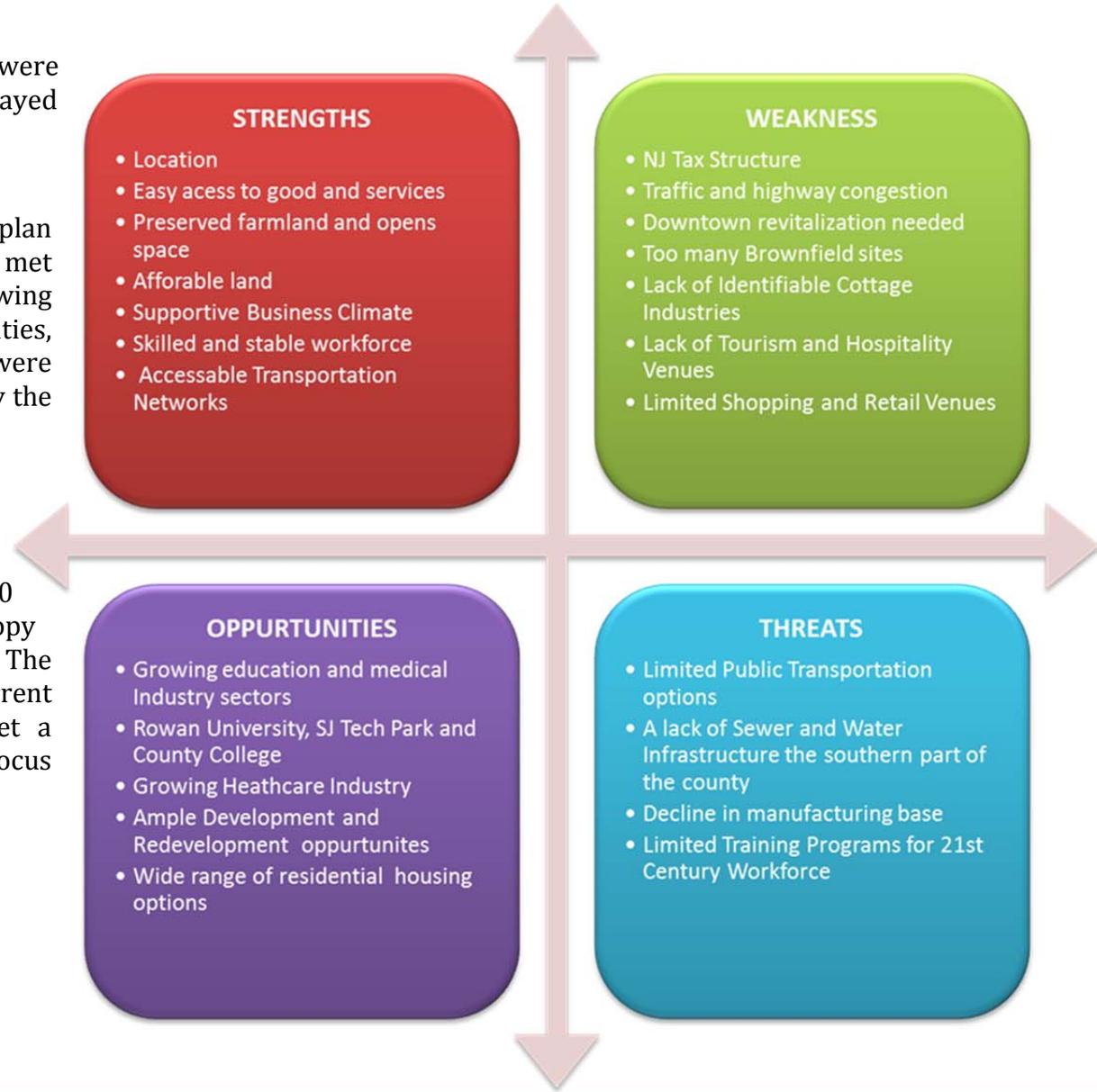


THE S.W.O.T. ANALYSIS

A number of Strengths and Weaknesses were identified by the CEDs Committee as displayed in the chart.

In addition, in May 2014, as part of the plan amendment process, the CEDs Committee met to review these characteristics. The following is a listing of the top strengths/opportunities, and perceived weaknesses/threats that were identified by the Committee and defined by the survey responses.

In addition, as part of the outreach plan Gloucester County prepared and distributed a short survey to more than 500 economic development stakeholders. A copy of the Survey is found in the Appendix. The purpose of the survey was to define current economic development issues and to get a sense of the priorities that should be the focus of the CEDs.



SURVEY RESPONSES

There is reasonable compatibility among the various observations of the CEDs Committee regarding the County’s strengths; the economic recession significantly changes the perceptions of weakness.

The following table compares the ranking of the 2007, 2009 and 2014 responses about County weaknesses. Survey results for this CEDs update can be found in Appendix of this document.

2007 RESPONSES	2009 RESPONSES	2014 RESPONSES
<ul style="list-style-type: none"> • Traffic and Highway Congestion • Need for Economic Diversification 	<ul style="list-style-type: none"> • Limited Public Transit Options • A Declining Manufacturing Base 	<ul style="list-style-type: none"> • Rental Costs and NJ Tax Structure • Limited Public Transit Options
<ul style="list-style-type: none"> • No Identifiable Cottage Industries • • Limited Public Transit Options 	<ul style="list-style-type: none"> • High Taxes and Rental Costs • Downtowns in Poor Condition 	<ul style="list-style-type: none"> • A Declining Manufacturing Base • Traffic and Highway Congestion
<ul style="list-style-type: none"> • Occupational Demand and Economic Opportunities Not Aligned • High Taxes and Rental Costs 	<ul style="list-style-type: none"> • Traffic and Highway Congestion • Too Many Brownfields and Vacant or Underutilized Industrial and Commercial Properties 	<ul style="list-style-type: none"> • Downtowns in Poor Condition • Too Many Brownfields and Vacant or Underutilized Industrial and Commercial Properties
<ul style="list-style-type: none"> • Lack of Shovel Ready Sites 	<ul style="list-style-type: none"> • A Heavily Suburbanized Development Pattern 	<ul style="list-style-type: none"> • Downtowns in Poor Condition
<ul style="list-style-type: none"> • Downtowns in Poor Condition 	<ul style="list-style-type: none"> • A Lack of Tourism or Hospitality Venues 	<ul style="list-style-type: none"> • No Identifiable Cottage Industries

OUR VISION

As the result of several months of discussions by the CEDDS Committee and public participation, a Vision Statement was developed that focused on the County's assets and building on its strengths, offering new economic opportunities and advancing the quality of life for both residents and businesses. This Vision frames the 2014 Update as it encompasses the wide range of issues and projects identified by the CEDDS Committee.

CEDDS Vision Statement

County officials, business leaders and community stakeholders envision a future where new, smart growth development practices are centers-based to preserve productive agricultural lands and open space; where access to jobs and industry is supported by improvements to the transportation network; where job training and employment opportunities are provided to alleviate distress and create new career paths for residents; and where investments are made in new technology and 21st Century industries that help diversify the County's economy.

This CEDDS Addendum identifies 6 goals, 13 objectives, and almost 100 strategies and projects that will advance the County's economic agenda. These goals were modified slightly in 2010 from the original CEDDS and this current 2014 document makes some additional modifications and recommendations.

The following six (6) broad goals reflect the 2014 CEDDS Plan priorities:

- 1. Work to expand and diversify the County's economic base to provide a broader range of new jobs and a more viable mix of industries.**
- 2. Preserve existing jobs and industry and reduce unemployment, municipal distress and economic inequities throughout the County.**
- 3. Focus development and jobs around centers of employment and population with an emphasis on the revitalization of the downtowns and the redevelopment of brownfield and underutilized commercial and industrial properties.**
- 4. Improve the public transportation, highway circulation systems and public utilities access in the County to serve businesses and commercial centers more effectively.**
- 5. Enhance and coordinate Municipal, County and Regional marketing efforts to promote Gloucester County as a destination for new business.**
- 6. Explore new opportunities for funding industrial and business development.**

CEDs OBJECTIVES

1. Develop new business clusters that provide locations for cutting edge technologies and priority business sectors such as healthcare, education, food processing and agribusiness that ensure the expansion and diversification of the economy.
2. Expand the County's tourism and agribusiness economies with a particular emphasis on new opportunities provided by the growth in the regional wine industry.
3. Reinvest in the County's traditional port, waterfront, chemical and refinery industries.
4. Improve access to shovel ready properties through the revitalization of brownfield sites and the ongoing marketing of these sites using the County's Brownfield Inventory & Marketing Guide.
5. Continue to support job training programs that target key industries and emerging employment markets.
6. Identify innovative partnerships with non-profit, community development, educational, healthcare related and other organizations that promote job development in the County.
7. Expand business retention programs in the County.
8. Continue to support strategies and target resources that promote the redevelopment and revitalization of the County's downtowns and "Main Street" communities.
9. Encourage new development in "centers-based" growth patterns.
10. Encourage a greater investment in public transit.
11. Improve and expand utilities, infrastructure, and highway and traffic circulation patterns in the County by investing in targeted projects that improve access to key job and employment centers.
12. Continue to expand and build on County marketing materials.
13. Develop an inventory of revenue and funding sources for priority projects identified in the CEDs.

ESTABLISHING PERFORMANCE MEASURES

The 2014 CEDs Committee agreed on the following performance metrics from which to measure the success of the Strategy:

- **Economic Diversification:** The number of businesses developing in the full range of economic sectors is something that can be measured over time using Economic Census Data and/or sources such as ESRI.
- **Reducing Areas of Economic Distress:** Municipal and County unemployment rates and poverty rates can be tracked countywide and by municipality.
- **Community and Private Sector Partnerships:** The number and types of partners engaged in economic development initiatives can be tracked and measured over time.
- **Quality of Life Indicators:** Indicators such as income levels, housing values, population increases, downtown revitalization initiatives and other indicators can be tracked over the course of this CEDs.

The above criteria are measurable factors used to place a value on the purpose of each action strategy proposed for implementation and will continue to be evaluated as the CEDs Plan sets guidelines for the coming years.



ADVANCING THE 2014 CEDs AGENDA

One of the purposes of preparing a CEDs Update is to define some key sectors and development priorities that the County would like to establish. In addition, the CEDs provides a chance to identify the success it has had in addressing some of the challenges facing the economy; to reset priorities, as necessary; and to monitor the overall implementation of the CEDs. The following outline addresses the business sectors that remain key priorities of the County's economic development strategy.



Educational Services. This growing and significant sector of the County economy that is contributing to our economic growth in many ways. Educational services and facilities play an increasingly important role in job training, entrepreneurial development, workforce development, and as an integral contributor to the general quality of life in Gloucester County. Rowan University has become increasingly renowned with a top rated engineering program, a growing technology park, and its newly found partnership the Cooper University medical center. Rowan University is an important asset in attracting new business and industry to the community. Educational services generally comprise 6,500 jobs in the County, representing 7.3% of all jobs.



Medical and Health Care Services. In the field of medical Services, both Inspira and Kennedy Health Systems have undergone major expansion over the last few years. The healthcare industry is rapidly evolving and expanding with new services and patient care products including; senior care, rehab, medical research, and home health care, in addition to the in-patient hospital related services traditionally provided by the healthcare industry. Today, healthcare services represent 6.0% of all jobs in the County or a total of 5,300 jobs.



South Jersey Technology Park @ Rowan University
View 1, Phase 1 – North Campus

Technology Development. The presence of Rowan University, the **South Jersey Technology Park**, Rowan College at Gloucester County, and the Gloucester County Technology Institute provide the County with tremendous business development assets. The opportunity to explore advanced technologies for manufacturing and to provide partnerships with companies, entrepreneurs or existing businesses seeking to develop new technologies or improve existing ones needs to be a priority of the County as the

reliance on computer driven and other technologies become an increasingly common part of day-to-day business. The South Jersey Technology Park is exploring the possibility of a new “**Defense Electronics Triangle**” by attracting business that complement the security and defense industry and radar technology. According to the U.S. Census of Manufacturers, there has been a 22% increase in the number of technology firms in the County in the five year period between 2006 and 2011. While still a relatively small number, the trend is an encouraging one and points to the County as a good location for these types of businesses.

Agribusiness. Statistics from the 2011 County Business patterns indicate that there are currently 1,456 food industry jobs in the County. When traditional agriculture is included in this number, the total increases to 2,376. The food manufacturing industry represents 19% of all County manufacturing jobs. While farming, nursery operations, food processing and related businesses have long been a staple of the County economy, new and exciting opportunities are on the horizons in agribusiness. The Wine Industry in New Jersey is growing rapidly. This industry has contributed greatly to the economic strength of the state. New Jersey's wine, grape and related industries had a total economic value of \$231 million in 2011 with roughly 100,000 people visited New Jersey wineries in that year. Wine, grapes and related industries accounted for 1,462 jobs in New Jersey with an associated payroll in excess of \$57 million. In 2005, there were only 5 or 6 wineries in South Jersey. Now, there are almost 30. In

addition, much progress has been made by industry leader though new partnership with the three neighboring states to promote a regional winery experience. In concert with Pennsylvania, Maryland and Delaware – a region that is approximate in size to the Finger Lakes Wine Region in central New York – there are 60 wineries that visitors can experience. Gloucester County wants to capitalize on its viticulture industry and the spin off it can have for value added products, retail outlets, production, and tourism.



Port and Waterfront. One of the successes of the 2008 CEDs is the attention it brought to port redevelopment. \$1.8 million in U.S. EDA funding has been invested at the Paulsboro Marine Terminal for a new well and water treatment plant that will serve new industry at the port. Another \$1.8 million has been requested for a water tower to service the port facility. In 2012, the South Jersey Port Corporation was awarded \$24 million in TIGER Grant funding through the U.S. DOT to improve rail access at the port and link the port with an efficient regional rail network in southern New Jersey. This makes the Paulsboro Marine Terminal a very viable location for logistical uses and other industries seeking rail/ship transloading or sea going transportation of various kinds.



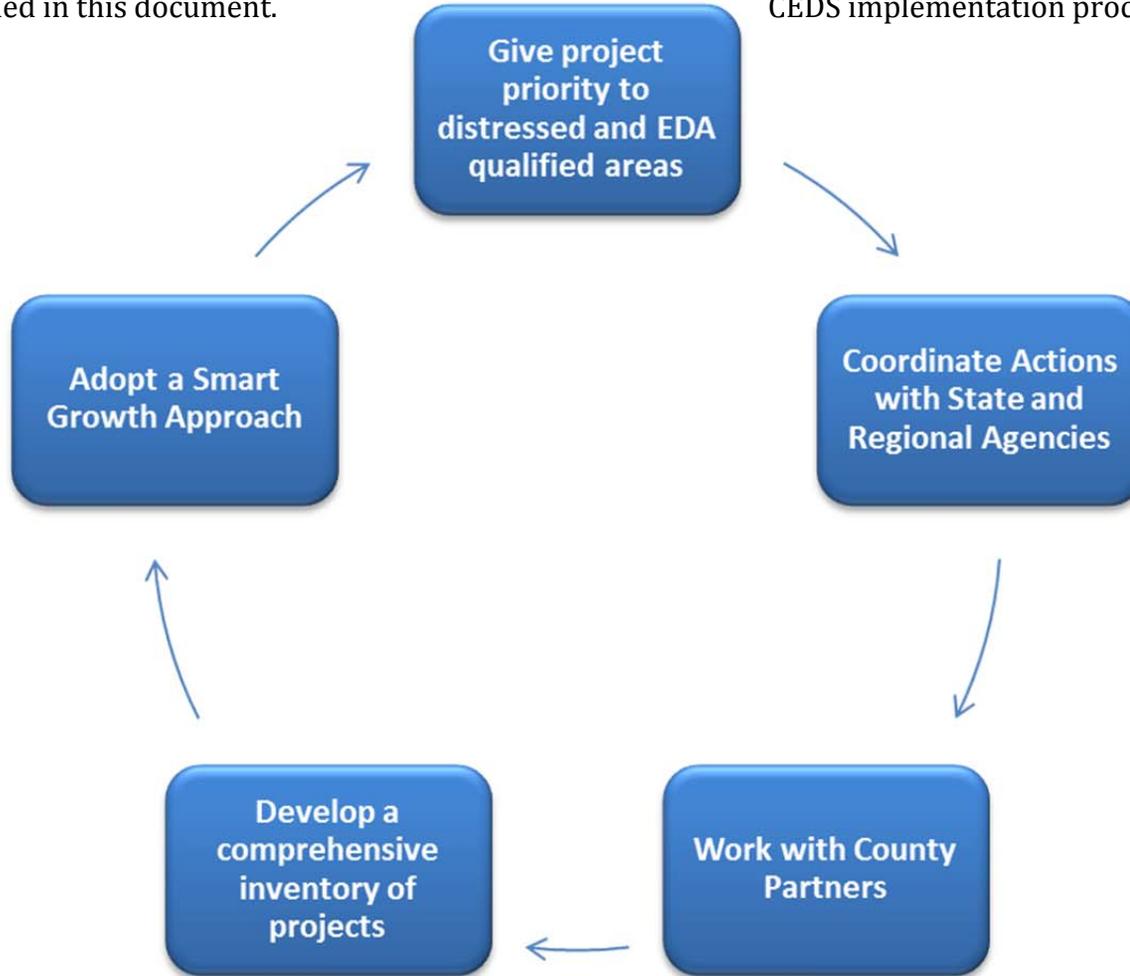
Transportation and Utilities Infrastructure. Another project that significantly advances the goals of the CEDs is the proposed extension of a light rail (PATCO) system to Gloucester County. The initial plan for this extension calls for the phase one portion of the rail line to have Woodbury station that will eventually extend the line south to Glassboro. CEDs projects for employment and job generation should be targeted at locations that are accessible via the light rail network. Expanding water and sewer infrastructure at targeted project areas will attract new business development and job creation opportunities in the county. Utilities along with port, rail, and highway transportation investments remain high on the County's list of priorities.

Brownfield and Downtown Redevelopment. While certainly addressed in the 2008 CEDs, the County was not quite poised to advance the issue of brownfield redevelopment aggressively since it did not have a comprehensive compilation of brownfield sites. In 2010, the County prepared such an inventory to include DEP and EPA sites previously not part of the County inventory. It positions the County very well to identify quickly potential redevelopment sites, particularly those in U.S. EDA eligible communities. Downtown redevelopment also remains a high priority of the County. Retail trade, service establishments and other businesses that typically locate in town or city centers are also sectors of the economy for which there should be significant outreach and job training programs.

REVISED PLAN OF ACTION

This 2014 CEDs Addendum identifies the strategies and projects envisioned by the County and its stakeholders to advance the goals and priority areas outlined in this document.

A Plan of Action was developed based on the following key principles, which remain relevant and will continue to drive the CEDs implementation process:



THE ACTION AGENDA

The 2014 CEDs Addendum includes a complete list of all of the County's projects that were identified by the CEDs Committee and participating stakeholders. Given, however, that the County wishes to bring additional focus on economic development initiatives that would cover the next 3-5 years, the project inventory was surveyed to identify those projects that are most ready; that have funding potential; and that can be completed in the near term.

Each of the projects identified on the Matrix that follows is tied to a CEDs Goal and objective. The total priority score provides a sense for which projects the County should focus on first. It will be around the sum of these initiatives and the key partners and stakeholders who can play a role in helping to implement them that the County will prioritize in the upcoming years. ***That is not to say these will be the only economic development efforts that the County undertakes.*** But they will form the centerpiece for federal funding and collaboration.

This Matrix provides an analytical approach to defining key project priorities for the CEDs. Obviously, it is subjective to some extent, but by virtue of the approach the subjectivity has been limited. The Tier One Priorities are the ones that scored in excess of 25 points. Tier Two Priorities scored between 20 and 24 points. Tier Three are the projects that scored less than 20 points, but are nonetheless key CEDs priorities.

There are certainly a variety of actions that can be taken under each of the Top Tier priorities to advance these initiatives. The same is true for the other projects identified. Some specific examples for the first tier initiatives include:

- 1. Work with Rowan Technology Park @ Rowan University to expand infrastructure, needed for phase 2 and 3 construction and help develop the "Defense Electronics Triangle".**
 - Define engineering costs for public elements of project construction
 - Explore grant opportunities with U.S. EDA and other State and Federal funding sources
 - Work with Rowan and other partners to identify and secure initial tenants
 - Work to attract businesses to help support and develop the "Defense Electronics Triangle"
- 2. Work with Rowan University, Rowan College at Gloucester County, and the Healthcare Industry to create an Academy of Allied Health-Medical Sciences**
 - Define location of facility
 - Work with health and medical partners to generate curriculum
 - Provide network for ensuring adequate levels of medical and health trained workers for nursing, technical equipment operation and other needed fields
 - Link with educational opportunities provided by other healthcare training programs and facilities

- Develop South Jersey Talent Network for nursing, healthcare innovation and technology training and job placement programs
- 3. Work with regional, county, and municipal economic development and planning partners to promote development, redevelopment and expansion of business parks**
- Identify other locations for business park development and expansion
 - Identify engineering costs for infrastructure and other public improvements
 - Market existing facilities with commercial brokers and project partners
 - Explore and apply for funding to create/expand new business park facilities around the County
 - Expand marketing network to ensure ongoing occupancy of existing business parks and industry clusters
- 4. Continue to invest in the Paulsboro Marine Terminal and other facility infrastructure needed to expand waterfront development.**
- Work with SJPC and other partners to enhance port development through additional grant funding and infrastructure financing
 - Target new industrial marketing efforts to secure tenants at the newly revitalized port facility
 - Continue to work with regional public and private sector partners to ensure improvements in rail, highway and intermodal access to Paulsboro and other waterfront development projects
- 5. Create a Gloucester County Low Interest Loan Pool that can augment commercial and other financing for large and small businesses.**
- Work with NJ EDA to identify funds to create loan pool
 - Identify and work with local banks to create a consortium of loan funding
 - Explore possibility of creating a non-profit entity to provide low interest financing to retain and attract new business
- 6. Work with Federal, State and regional partners to identify areas to expand and upgrade water and sewer capacity, road, highway and transit systems.**
- Work with County Planning to identify road and highway projects (as identified in the CEDs) for funding through U.S. and N.J. DOT
 - Advance County road improvements that serve industrial parks, retail and commercial centers, and tourism venues
 - Support the ongoing possibility of a (PATCO or NJT) light rail extension to Woodbury and Glassboro
 - Expand public utilities access in the southern region of the County to serve businesses and commercial centers more effectively and attract new business

GLOUCESTER COUNTY CEDs PROJECT PRIORITY MATRIX

PROJECT IDENTIFICATION	ADDRESSES MULTIPLE CEDs GOALS AND OBJECTIVES	POTENTIAL FOR U.S. EDA OR OTHER FUNDING	PROJECT READINESS	PRIORITY SCORE
Work with Rowan Technology Park to secure infrastructure, (eg. sewer, water, fiber) needed for Phase 2 and 3 construction	10	10	8	28
Work with Rowan University, Rowan College at Gloucester County, and the Healthcare Industry to create an Academy of Allied Health-Medical Sciences	10	8	7	25
Create Post-Secondary Training Facility for Nurses and other Key Professionals in the Healthcare Industries	10	8	4	22
Work with County, municipal and other partners to promote development and expansion of business parks	10	5	9	24
Explore creation of a Viticulture Technology Incubator that will support the growth and development of the County's wine industry	8	7	4	19
Invest in infrastructure to support expansion of Riverwinds Mixed Use Complex, including hospitality, convention and recreational uses	9	7	6	22
Continue to invest in Paulsboro Marine Terminal and other facility infrastructure needed to expand waterfront development	10	10	7	27
Continue to invest in rail freight infrastructure that will enhance access to rail service and distribution	8	7	4	19
Work with realtors and developers to promote investment in priority brownfield properties as defined by the County's Brownfield Inventory	10	5	3	18
Work with South Jersey Technology Park, county business, educational and medical partners to invest in new lab space that will support ongoing R&D initiatives and emerging industries	8	7	3	18

PROJECT PRIORITY MATRIX - Continued

PROJECT IDENTIFICATION	ADDRESSES MULTIPLE CEDs GOALS AND OBJECTIVES	POTENTIAL FOR U.S. EDA OR OTHER FUNDING	PROJECT READINESS	PRIORITY SCORE
Create a Gloucester County Low Interest Loan Pool that can augment commercial and other financing for large and small businesses	10	10	5	25
Promote new special events such as Wine Festivals that can bring attention to emerging industries and augment tourism	6	5	6	17
Invest in infrastructure repairs and replacement to support/retain commercial activity in the County's older downtowns and CBDs	8	7	4	19
Work with municipal government to enhance Streetscapes along County roads that traverse the County's cities, towns and villages	6	10	4	20
Work with DVRPC, PATCO and N.J. DOT to identify and upgrade the regional road, highway and transit systems	10	10	6	26
Continue to work with Pascal Sykes and other funders to expand transit linkages to centers of employment and the larger transit systems	8	4	7	19
Continue to implement the Countywide multi-purpose trail network as defined in the County's Master Plan	6	8	8	24
Continue to network and market local agribusinesses, including retail outlets, farm stands and other venues for farm products	8	6	8	24

SUMMARY

For over a decade, the Gloucester County CEDs has been a significantly useful document for defining projects and securing project funding. For example, one of the County 2010 CEDs priority projects was the \$250 million development of the 190 acre, **Paulsboro Marine Terminal** site into a high-tech Port/Distribution/Logistics Center. With the involvement of the County and the leadership of the South Jersey Port Corporation, a TIGER III Grant Application was prepared and funded. This successful application to U.S. DOT resulted in a \$24 million dollar grant being given to the Port Corporation for the restoration of rail/port infrastructure at Paulsboro and throughout the Delaware River rail/port Corridor.

Another high priority project for the County was the development of the **South Jersey Technology Park @ Rowan University**. This project at total build out will result in over 1.5 million square feet of technology-based development in conjunction with Rowan University, Drexel University, and other leading institutions in the region. This program has completed its first phase of development and is listed in this 2014 Update as a priority project for the Phase 2 and 3 initiatives.

Business park development most recently in Franklin Township has also been a primary focus of CEDs related funding. Infrastructure and the necessary support network to serve business parks is a typical U.S. EDA investment and a primary initiative of the CEDs.

Beyond the hard, bricks and mortar costs associated with economic development, the County's Workforce Development

Board (WIB) will also be a key partner in job and business development. Clearly, where there have been layoffs in the workforce, the WIB is the County's leader in job training and retraining. The WIB is a significant partner in pursuing many of the new business prospects, projects and initiatives outlined in this Plan Addendum.

The Project Matrix, along with the ongoing work of this County's Board of Chosen Freeholders and Economic Development Department, will continue to guide the implementation of the CEDs through to the next five year time horizon in 2017. This inventory of programs and projects is found in Tab 2 of this document.

The 2014 update to the Gloucester County CEDs comes at a critical time. The County is emerging from recession, yet the economy has not fully bounced back to its pre-recession levels. This document will assist the County in revising its economic development priorities and its approach to funding, partnerships and resource development.

The revisions outlined in this Addendum have:

- Provided new data on the trends and characteristics of the County today;
- Expanded public outreach to be more inclusive of the business community and hard-to-reach populations and municipalities;
- Revised the S.W.O.T analysis, priority project list and Action plan to reflect Current County priorities and conditions.

This remains an exciting time for economic development projects in South Jersey. **Gloucester County is the County with the most job growth and economic development opportunity over the coming decade** according to the New Jersey Department of Labor and Workforce Development.

By leveraging assets like our strategic location and skilled workforce Gloucester County will continue to be attractive to new economic investment opportunities. The County has outstanding partnerships in Rowan University, Rowan College at Gloucester County, the Workforce Investment Board, Municipal Government, Delaware Valley Regional Planning Commission (DVRPC) and the Private Sector.

Over the next five years, Gloucester County can move forward with confidence that it will work through the recent national recession and emerge a strong competitor for attracting new jobs, new investment and emerging industry. The funding possibilities, project potential, and collaborations defined in the County CEDs and this Addendum pave the way for future development.

GLOUCESTER COUNTY DEPARTMENT OF ECONOMIC DEVELOPMENT

2014 GLOUCESTER COUNTY CEDS COMPLETE PROJECT INVENTORY

ADDENDUM TO THE 2008 CEDS

<u>PROPOSED PROJECTS</u>	<u>MUNICIPAL LOCATION</u>
REDEVELOP WOODBURY COUNTRY CLUB TO ACCOMMODATE A MIX OF NEW MEDICAL AND RESIDENTIAL USES	CITY OF WOODBURY
PROMOTE THE ONGOING DEVELOPMENT OF THE SOUTH JERSEY TECHNOLOGY PARK, INCLUDING PHASES 2 AND 3	MANTUA/HARRISON/GLASSBORO/ROWAN UNIVERSITY
CREATE POST-SECONDARY TRAINING FACILITIES FOR NURSES AND OTHER KEY HEALTH CARE PROFESSIONALS.	COUNTY LOCATION TO BE DETERMINED
DEVELOP A SMALL BUSINESS INCUBATOR IN THE COUNTY	COUNTY-WIDE APPLICATION
INVEST IN ALTERNATIVE ENERGY DEVELOPMENT SUCH AS ETHANOL, LIQUEFIED NATURAL GAS (LNG), AND OTHER CLEAN ENERGY OPTIONS.	COUNTY LOCATION TO BE DETERMINED
WORK WITH ROWAN UNIVERSITY AND ROWAN COLLEGE AT GLOUCESTER COUNTY (RCGC) TO DEVELOP ACADEMY OF ALLIED HEALTH-MEDICAL SCIENCES TO HELP MEET THE GROWING DEMANDS OF THE HEALTH CARE AND SCIENTIFIC INDUSTRIES IN THE COUNTY.	DEPTFORD, GLASSBORO
WORK WITH THE NJ DEPARTMENT OF LABOR AND WORKFORCE DEVELOPMENT, THE COUNTY WIB AND OTHER PARTNERS TO IDENTIFY "TALENT NETWORKS" THAT WILL PROVIDE NEW NETWORKS FOR IDENTIFYING SKILLED LABOR AND NEW TRAINING OPPORTUNITIES.	COUNTY-WIDE APPLICATION
REDEVELOP THE FORMER NIKE BASE IN WOOLWICH TOWNSHIP.	WOOLWICH TOWNSHIP
SUPPORT THE ONGOING DEVELOPMENT OF THE MERIDETH FARMS BUSINESS PARK, CURRENTLY UNDERWAY	FRANKLIN TOWNSHIP
PROMOTE IMPROVED ACCESS AND ROAD INFRASTRUCTURE AT THE LOGAN TOWNSHIP BUSINESS PARK TO HELP FACILITATE A NEW BUSINESS CLUSTER.	LOGAN TOWNSHIP

PURSUE OPPORTUNITIES TO INCREASE THE INVENTORY OF CLASS-A OFFICE SPACE AVAILABLE IN THE COUNTY.	COUNTY-WIDE APPLICATION
INVEST IN THE VITICULTURE, MICRO-BREWING INDUSTRY, DISTILLERIES AND OTHER VALUE ADDED AGRICULTURAL USES THAT CAN ENHANCE THE INDUSTRY. AN INCUBATOR THAT FOCUSES ON THE TECHNICAL AND SCIENTIFIC NEEDS OF THE WINE INDUSTRY WOULD BE ANOTHER POSSIBILITY.	COUNTY-WIDE APPLICATION
PROMOTE WOOLWICH TOWNSHIP AS A TRANSFER OF DEVELOPMENT RIGHTS PILOT PROJECT IN GLOUCESTER COUNTY.	WOOLWICH TOWNSHIP AND COUNTY-WIDE APPLICATION
PROMOTE THE VITICULTURE INDUSTRY TO FOSTER BOTH GRAPE GROWING, WINE PRODUCTION AND TOURISM OPPORTUNITIES IN THE COUNTY	COUNTY-WIDE APPLICATION
WORK TO SUSTAIN THE PITMAN MUSEUM IN HISTORIC PITMAN GROVE	PITMAN BOROUGH
COMPLETE THE RENOVATION AND REUSE OF THE GLASSBORO TRAIN STATION FOR A WELCOME CENTER AND MUSEUM	GLASSBORO BOROUGH
PROMOTE THE ONGOING DEVELOPMENT OF THE ARTS DISTRICT IN DOWNTOWN GLASSBORO	GLASSBORO BOROUGH
DEVELOP AN ARTS DISTRICT IN PITMAN	PITMAN BOROUGH
DEVELOP A FOSSIL PARK AT THE INVERSAND CORPORATION SITE IN PARTNERSHIP WITH AREA EDUCATIONAL INSTITUTIONS.	MANTUA TOWNSHIP
DEVELOP A RIVERWINDS MIXED USE COMPLEX COMPLETE WITH HOTEL AND CONVENTION CENTER; A MARINA; AND RETAIL AND PROFESSIONAL USES.	WEST DEPTFORD TOWNSHIP
INVEST IN FACILITIES TO SUPPORT THE PAULSBORO MARINE TERMINAL	PAULSBORO BOROUGH
REDEVELOPMENT OF THE FORMER DUPONT SITE	GREENWICH TOWNSHIP

REDEVELOPMENT PROJECT OF FORMER HERCULES PROPERTY	GREENWICH TOWNSHIP
DEVELOP TRANSLOADING FACILITIES, INTERMODAL FACILITIES, AND OTHER PROJECTS THAT ENHANCE WATER TO LAND FREIGHT TRANSFERS.	PAULSBORO, GREENWICH TOWNSHIP
BUILD ON THE TIGER FUNDING RECEIVED FROM U.S. DOT TO ENHANCE RAIL FREIGHT AND PORT INFRASTRUCTURE IN PAULSBORO AND THROUGHOUT THE GREATER SOUTHERN NEW JERSEY REGION.	PAULSBORO, GREENWICH TOWNSHIP
PROMOTE THE ONGOING IMPLEMENTATION OF THE COUNTY'S BROWNFIELD INVENTORY.	APPLICABLE TO ALL MUNICIPALITIES
DEVELOP A FUNDING AND REMEDIATION STRATEGY FOR PRIORITY BROWNFIELD SITES.	APPLICABLE TO ALL MUNICIPALITIES
DEVELOP A COMPREHENSIVE COUNTY-WIDE MARKETING STRATEGY FOR REMEDIATED BROWNFIELD PROPERTIES.	COUNTY-WIDE APPLICATION
CONTINUE THE PROCESS OF CLEANING UP THE ROUTE 55 REDEVELOPMENT AREA IN MANTUA TOWNSHIP.	MANTUA TOWNSHIP
SUPPORT INVESTMENTS IN DESIGNATED REDEVELOPMENT AREAS SUCH AS THOSE IN PAULSBORO, SWEDESBORO, AND LOGAN TOWNSHIP.	PAULSBORO, SWEDESBORO, AND LOGAN TOWNSHIP
REDEVELOP THE ROBERT HAWTHORNE LANDFILL AREA IN NATIONAL PARK BOROUGH	NATIONAL PARK BOROUGH
CONTINUE IMPLEMENTING REDEVELOPMENT PLAN ALONG DELSEA DRIVE	CLAYTON BOROUGH
REHAB THE FMC BROWNFIELD PROPERTY IN WOOLWICH TOWNSHIP.	WOOLWICH TOWNSHIP
CONTINUE THE REDEVELOPMENT OF THE KINSLEY LANDFILL AND ADJOINING PROPERTIES AS PSEG SOLAR FIELD (ONGOING)	DEPTFORD

SUPPORT THE DEVELOPMENT OF COURSE CURRICULA THAT PROVIDE TRAINING FOR THE TRADES PROFESSIONS AND APPRENTICESHIP OPPORTUNITIES AT RCGC AND GCIT	COUNTY-WIDE APPLICATION
CONTINUE TO SUPPORT AND PROMOTE THE NEW FOOD SCIENCE AND FOOD PROCESSING TECHNOLOGY PROGRAM AT ROWAN COLLEGE OF GLOUCESTER COUNTY (RCGC)	COUNTY-WIDE APPLICATION
ADVANCE GOALS FOR STEM EDUCATION/CAREER PREPARATION FOR STUDENT POPULATION	COUNTY-WIDE APPLICATION
PURSUE ADDITIONAL PARTNERSHIPS WITH ROWAN UNIVERSITY TO ASSIST IN VARIOUS ASPECTS OF INDUSTRIAL AND BUSINESS TRAINING	COUNTY-WIDE APPLICATION
CONTINUE TO SUPPORT AND PROMOTE THE NEW EQUINE SCIENCE ASSOCIATE DEGREE PROGRAM AT RCGC.	COUNTY-WIDE APPLICATION
CREATE PROGRAMS TO ASSIST SMALL BUSINESS, INCLUDING COUNTY-WIDE MICRO AND REVOLVING LOAN FUNDS.	COUNTY-WIDE APPLICATION
INVEST IN PARTNERSHIPS WITH THE RUTGERS FOOD INNOVATION CENTER.	COUNTY-WIDE APPLICATION
DEVELOP LAB AND OTHER SCIENTIFIC TRAINING FACILITIES AND PROGRAMS IN THE COUNTY THAT COMPLEMENT THE NEEDS OF INDUSTRY.	COUNTY-WIDE APPLICATION
WORK WITH THE WIB TO IMPLEMENT SUMMER YOUTH EMPLOYMENT AND APPRENTICESHIP PROGRAMS.	COUNTY-WIDE APPLICATION
DEVELOP A WORKFORCE RE-ENTRY PROGRAM.	COUNTY-WIDE APPLICATION
CREATE MORE OPPORTUNITIES FOR CHILD CARE AND WORKFORCE SUPPORT PROGRAMS.	COUNTY-WIDE APPLICATION
DEVELOP CAREER CENTERS THROUGH BOYS/GIRLS CLUBS IN PAULSBORO	COUNTY-WIDE APPLICATION

AND GLASSBORO	
CREATE A BUSINESS AND INDUSTRY LOAN POOL	COUNTY-WIDE APPLICATION
CONDUCT PERIODIC BUSINESS RETENTION WORKSHOPS TO ACQUAINT LOCAL BUSINESSES WITH AVAILABLE PROGRAMS AND RESOURCES	COUNTY-WIDE APPLICATION
THROUGH THE BUSINESS RETENTION PROGRAM, PROVIDE ONE-ON-ONE SUPPORT TO BUSINESSES LOOKING TO CONSOLIDATE OPERATIONS OR EXPAND THEIR EMPLOYMENT BASE IN GLOUCESTER COUNTY AND PROVIDE TOOL KITS SPECIFIC TO INDUSTRY	COUNTY -WIDE APPLICATION
COORDINATE COMMUNITY EVENTS AND DOWNTOWN FESTIVALS WITH GLOUCESTER COUNTY AND REGIONAL TOURISM PROGRAMS	COUNTY-WIDE APPLICATION
STUDY AND INVEST IN NEW RETAIL OPPORTUNITIES THAT EXPAND THE REGIONAL ECONOMY OF THE COUNTY.	DEPTFORD AND WASHINGTON TWPS. AND CITY OF WOODBURY
SUPPORT INVESTMENTS AND OPPORTUNITIES FOR EXPANDED WATER/SEWER INFRASTRUCTURE THROUGHOUT THE COUNTY.	COUNTY-WIDE APPLICATION
REPLACE OLD SEWER AND WATER MAINS AND EXTEND AND/OR UPGRADE SUCH INFRASTRUCTURE IN KEY DEVELOPMENT AND REDEVELOPMENT AREAS THROUGHOUT THE COUNTY.	PRIORITY APPLICATION IN THE BOROUGHS OF NEWFIELD, SWEDESBORO, AND CLAYTON; AND IN MULLICA HILL, HARRISON TOWNSHIP
PROVIDE FUNDING FOR REDEVELOPMENT PLANNING	PRIORITY APPLICATION IN WOODBURY
INVEST IN FIBER OPTIC IMPROVEMENTS	COUNTY-WIDE APPLICATION
SUPPORT BUSINESS PARK DEVELOPMENT ALONG CENTER SQUARE ROAD IN LOGAN AND WOOLWICH TOWNSHIPS	WOOLWICH AND LOGAN TOWNSHIPS
REDEVELOP PAULSBORO PLAZA	PAULSBORO BOROUGH

DEVELOP FAÇADE AND STREETScape IMPROVEMENT PROGRAMS THROUGHOUT GLOUCESTER COUNTY	COUNTY-WIDE APPLICATION
DEVELOP A PEDESTRIAN MALL IN PITMAN	PITMAN BOROUGH
DEVELOP HOME EQUITY PROGRAMS TO ENHANCE LENDING IN URBAN AREAS THAT PROMOTE HOME FIX UP AND REPAIR	COUNTY-WIDE APPLICATION
REDEVELOP AND ENHANCE PITMAN GROVE NEIGHBORHOOD	PITMAN BOROUGH
REDEVELOP SHERTEL PARK AND DEVELOP A COMMUNITY RECREATION CENTER	PITMAN BOROUGH
EXPLORE OPPORTUNITIES AND PROVIDE SUPPORT TO IDENTIFY LOCATIONS FOR "TOWN CENTERS" IN MUNICIPALITIES THROUGHOUT THE COUNTY	COUNTY-WIDE APPLICATION
SUPPORT THE ONGOING DEVELOPMENT OF THE CLAYTON BOROUGH AND FRANKLIN TOWNSHIP REDEVELOPMENT AREA	CLAYTON BOROUGH AND FRANKLIN TOWNSHIP
U.S. 322 CORRIDOR REDEVELOPMENT PROJECT	MULTIPLE MUNICIPALITIES
N.J. ROUTE 130 CORRIDOR REDEVELOPMENT PROJECT	MULTIPLE MUNICIPALITIES
SWEDESBORO AVENUE SEWER EXTENSION PROJECT	EAST GREENWICH AND GREENWICH TOWNSHIPS
I-295 SEWER EXTENSION PROJECT	EAST GREENWICH TOWNSHIP
DEVELOP A NEW CENTER IN WOOLWICH TOWNSHIP AS PART OF THE OVERALL TDR PLAN	WOOLWICH TOWNSHIP
CONTINUE TO SUPPORT ONGOING GROWTH AND DEVELOPMENT OF ROWAN BOULEVARD	GLASSBORO BOROUGH

DEVELOP A TRANSPORTATION (BUS) CENTER IN WOODBURY	WOODBURY
PROMOTE THE REPAIR EXISTING BUS SHELTERS AROUND THE COUNTY THROUGH MUNICIPAL PARTNERSHIPS WITH NJ TRANSIT	PRIORITY APPLICATIONS COUNTY-WIDE
SUPPORT THE EXTENSION OF THE PATCO LIGHT RAIL SYSTEM THROUGH GLOUCESTER COUNTY	COUNTY-WIDE APPLICATION AT LOCATION TO BE DETERMINED (EG. ROUTE 55 CORRIDOR, ROUTE 42 CORRIDOR, ELSEWHERE.)
EXPLORE EXPANSION OF BUS SERVICE TO GLASSBORO, MANTUA AND PITMAN AND OTHER RURAL TOWN CENTERS	COUNTY-WIDE APPLICATION
PROVIDE A LOCAL TRANSIT SHUTTLE THAT LINKS WITH THE NJ TRANSIT SYSTEM TO PROVIDE DIRECT ACCESS TO THE UNIVERSITY, NEIGHBORHOODS , EMPLOYMENT CENTERS AND OTHER LOCATIONS AROUND THE COUNTY	COUNTY-WIDE APPLICATION
PREPARE A TRANSIT ORIENTED DEVELOPMENT (TOD) STRATEGY	PITMAN BOROUGH , WOODBURY
CONTINUE INVESTMENTS ALONG THE U.S. ROUTE 322 CORRIDOR IMPROVEMENTS, INCLUDING IMPROVEMENTS NEEDED IN THE VICINITY OF ROWAN UNIVERSITY IN GLASSBORO'S DOWNTOWN	MULTIPLE MUNICIPAL APPLICATIONS
SUPPORT INVESTMENTS FOR THE REHABILITATION OF THE ROUTE 55/40 INTERCHANGE	FRANKLIN TOWNSHIP
COORDINATE TRANSPORTATION PROJECTS WITH COUNTY AND DVRPC TRANSPORTATION IMPROVEMENT PROGRAM (TIP)	COUNTYWIDE APPLICATION
PARKING IMPROVEMENTS	WOODBURY
CONTINUE DEVELOPMENT OF MULTI-PURPOSE TRAILS, AND BICYCLE FACILITIES AT TRANSIT STATIONS, BUSINESS LOCATIONS, DOWNTOWNS AND OTHER LOCATIONS IN THE COUNTY.	COUNTY-WIDE APPLICATION

DEVELOP BICYCLE AND PEDESTRIAN MASTER PLAN	PITMAN BOROUGH
CONTINUE DISTRIBUTION OF THE NEW, COUNTY-WIDE TOURISM BROCHURE AND MAP, AND EXPLORE TECHNOLOGY APPLICATIONS TO PROMOTE TOURISM SUCH AS SMART-DEVICE APPLICATIONS AND TOUCH-SCREEN KIOSKS.	COUNTY-WIDE APPLICATION
PROVIDE ONGOING SUPPORT FOR FARM MARKETS	COUNTY-WIDE APPLICATION
UPDATE WELCOME PACKETS FOR HOTELS AND RESTAURANTS THAT HIGHLIGHT GLOUCESTER COUNTY ATTRACTIONS.	COUNTY-WIDE APPLICATION
SUPPORT THE CREATION OF A NEW VISITOR CENTER AT REDBANK, IN NATIONAL PARK	NATIONAL PARK
DEVELOP A COUNTY-WIDE MARKETING PROGRAM THAT PROMOTES NEW RETAIL OPPORTUNITIES FOR DOWNTOWNS, COMMERCIAL CORRIDORS, AND OTHER SMART GROWTH CENTERS.	COUNTY-WIDE APPLICATION
UPGRADE ECONOMIC DEVELOPMENT WEBSITE TO INCLUDE SEARCHABLE INCENTIVES, PROPERTIES, DEMOGRAPHICS, ETC.	COUNTY-WIDE APPLICATION
EXPLORE FUNDING OPPORTUNITIES FOR NEW BUSINESS AND INDUSTRY INVOLVING THE EB-5 IMMIGRANT INVESTOR PROGRAM	COUNTY-WIDE APPLICATION
EXPLORE FOUNDATION FUNDING SOURCES WITH ORGANIZATIONS SUCH AS PASCALE SYKES AND OTHERS	COUNTY-WIDE APPLICATION

GLOUCESTER COUNTY DEPARTMENT OF ECONOMIC DEVELOPMENT

2014 CEDS Committee Meeting Minutes and Agendas

ADDENDUM THE 2008 (CEDS)

AGENDA - GLOUCESTER COUNTY COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

**KICK-OFF MEETING
MARCH 6, 2014
8:30AM - 10:30AM**



Welcome and Introductions

Robert Damminger
Freeholder Director

Heather Simmons
Freeholder Liaison to
Economic Development

The CEDS Committee: Our Roles as Committee Members

Michelle Shirey
Economic Development

What is a Comprehensive Economic Development Strategy?

Michael Zumpino
Triad Associates

- *The CEDS and USEDA Funding*
- *The 2010 CEDS*
- *Changing Demographics*
- *SWOT Analysis of Gloucester County*
- *Current County CEDS Goals*

Updating the 2010 CEDS: Review and Discussion

Michael Zumpino
Triad Associates

Questions

Adjourn

MINUTES FOR THE MARCH 6, 2014 – CEDS COMMITTEE MEETING

ATTENDEES

Collen Maguire, Pascal Sykes Foundation
Les Vail, Gloucester County Chamber of Commerce
Chuck Rose, Gloucester County Parks Director
Claire Riggs, Axeon Specialty Products
Anthony Bellia, Bellia Enterprises
Mark Wilgus, Paulsboro Refining Company
Richard Westergaard, Gloucester County Planning
Mark Gravinese, Harrison Township
Ken Barnshaw, Deptford Township
Mike McManamy, West Deptford Township
Randi Woerner, City of Woodbury
Michelle Bruner, Mantua Township EDC
Ken Biddick, KB Consulting Group
Linda Streeter, Rutgers Cooperative Extension

Amanda Grossmick, Borough of Clayton
Dr. W. King, Faith Based Organization
Marc Policarpo, Binswanger
George Strachan, Gloucester County Improvement Auth.
Jake Buganski, SJ Tourism
Ray Chintall, West Deptford
David Slack, Elk Township
Jane DiBella, Woolwich Township
Eileen Cardile, Inspira Heath Systems
Michele Vallone, Harrison Township
David Ricci, The Flynn Company
Sue Miller, Borough of Clayton
Lisa Morina, Kennedy Health System

Discussion with Committee and Questions:

David Ricci, Flynn Co.

Mr. Ricci discussed the importance of understanding EB-5 Immigrant Investor Program. The region has recently seen significant interest and ultimately investment from foreign companies looking to grow their industry in the United States. Gloucester County should understand how these investment centers can impact the economy.

- EB-5 program is administered by the United States Citizenship & Immigration Services was created by the United States Congress in 1990 to provide permanent residency (a "Green Card" or "EB-5 Visa") to foreign individuals who stimulate the U.S. economy through job creation and capital investment. Congress later created the Regional Center Pilot Program, whereby investors may choose to invest through a Regional Center, a USCIS approved and designated entity tasked with promoting economic growth. Investments made through Regional Centers are credited with the additional indirect effects of the investments. In either program, if an investor invests a minimum*

of \$500,000 in specially designated areas and creates 10 jobs, a Green Card can be issued, allowing the investor and his or her family members to live permanently in the United States.

Ken Biddick, KB Consulting Group

Mr. Biddick suggested that one of our goals or objectives should determine plans for re-using infrastructure. Planning shouldn't stop at implementation of a necessary infrastructure improvement; we need to plan for how it will continue to be a beneficial investment for the region.

Lisa Morina, Kennedy Health Systems

Ms. Morina discussed the importance of understanding and embracing the changing research and development picture for Gloucester County. Rowan University has its research designation, which will open new federal funding streams and will undoubtedly open new markets for Gloucester County, particularly at the SJ Tech Park. The Committee should learn more about the Phase II RFQ which is targeting the defense industry.

Linda Streeter, Rutgers Cooperative Extension

Ms. Streeter commented that a consideration for the SWOT or goals and objectives should be strengthening the Nursery Industry. This industry is growing and will need the support and research assistance to grow – viticulture.

Marc Policarpo, Binswanger

Mr. Policarpo spoke of the need to also think about fiber-optic infrastructure. We need our industrial and commercial inventory fit out for the companies of the future who will need this fiber already in the building, as a way to re-invent some of our older stock buildings.

The Committee also needs to keep public transportation in the mix, the need for expanded service into our employment centers is vital for existing businesses to get their employees to the job site.

Mayor Ray Chintall, West Deptford

Goal should be looking into ways to expand shared-services model for municipalities.

Les Vail, Gloucester County Chamber of Commerce

How do we change our outside perception in Gloucester County? He talks to businesses outside of Gloucester County all the time, who know very little about what Gloucester County has to offer, their perception only changes when they visit or make an effort to learn more. This committee should make it a goal to figure out ways to change the perception of Gloucester County.

Eileen Cardile, Inspira Health Systems

Ms. Cardile commented that the health care component was missing from our initial survey. Health and wellness of our communities is a huge factor in economic development. Mental health plays a major role in Gloucester County, nearly 30% of the employment-age population has a mental health impairment and need. Not focusing on ways to improve health and wellness is dangerous and can be an economic drain.

David Ricci, Flynn Co.

One of the tasks this committee should address is identifying industries that are trending nationally and determining how Gloucester County is prepared or unprepared to start attracting those industries. How can Gloucester County ready itself for growing trends?

Michelle Bruner, Mantua Township

Ms. Bruner pointed out that housing has to be a part of our SWOT analysis, with a particular focus on the impacts of COAH on municipalities. Many towns are struggling with ways to fit in the COAH requirement, especially in towns that are seemingly "built-out".

Final Thoughts - Michael Zumpino

- Committee members and guests of the kick-off meeting, please complete the surveys and please ask co-workers or member organizations to also take the survey.
- Please start thinking about projects listed in the 2010 CEDS document, we need to think about what projects are completed, or which are maybe in infancy stages that need to be reexamined before putting them in the update.
- Committee please fill out the project nomination forms – this will help us with the SWOT analysis.

Adjournment

AGENDA - GLOUCESTER COUNTY COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

**WORK SESSION MEETING
FRIDAY, MAY 23, 2014
8:30AM - 10:30AM**



8:30 - 8:40 Welcome and Introductions

Robert Damminger
Freeholder Director

Heather Simmons
Freeholder Liaison to
Economic Development

8:40 - 8:45 Update on Survey & Projects

Michelle Shirey
Economic Development

**8:45 - 10:00 Updating the 2010 CEDS: Review
& Discussion**

Steve Kehs
Triad Associates

- **Background Data**
- **Goals and Priority Issues Review**
- **Next Steps**

10:00 - 10:30 Q & A for Committee Members

MINUTES FOR THE MAY 24, 2014 – CEDS COMMITTEE MEETING

ATTENDEES

Collen Maguire, Pascal Sykes Foundation
Les Vail, Gloucester County Chamber of Commerce
Chuck Rose, Gloucester County Parks Director
Claire Riggs, Axeon Specialty Products
Anthony Bellia, Bellia Enterprises
Mark Wilgus, Paulsboro Refining Company
Richard Westergaard, Gloucester County Planning
Mark Gravinese, Harrison Township
Ken Barnshaw, Deptford Township
Mike McManamy, West Deptford Township
Randi Woerner, City of Woodbury

Amanda Grossmick, Borough of Clayton
Dr. W. King, Faith Based Organization
Marc Policarpo, Binswanger
George Strachan, Gloucester County Improvement Auth.
Jake Buganski, SJ Tourism
Ray Chintall, West Deptford
David Slack, Elk Township
Jane DiBella, Woolwich Township
Annamarie Gonnella, DRBA
Michele Vallone, Harrison Township
Sue Miller, Borough of Clayton

Weaknesses & Threats

- **Lack of Sewer Service** - George Strachan – weakness that a large portion of the southern part of the county is not located within a sewer-service area
- **eCommerce** – Sue Miller – sees popularity of online ordering as a threat to small businesses
- **Lack of Commercial Office Space** – Anthony Bellia – Gloucester County does not have enough class A office space opportunity prevents commercial users (financial sector) typically providing high-paying jobs from locating in Gloucester County

Strengths

- **Distribution Centers Trending** – Marc Policarpo – distribution centers are getting larger but some larger chains are scaling down so this could be advantage to mom & pop business owners
- **Gloucester County Chamber of Commerce** – Randi Woerner – sees the Chamber as a strength for the County especially as it pertains to small businesses
- **Good Transportation Network** – Claire Riggs – wanted to highlight the improvements underway at the Direct Connect/Missing Moves on I-295/42/676 will be a major strength once completed in terms of goods movement
 - **Live Time Transit Guide** – Ken Barnshaw – would consider a strength if county develops a real-time travel app for residents who rely on alternative modes of transportation
- **Affordable Land** – George Strachan – land is relatively cheap in Gloucester County and still close to all necessary infrastructure
- **Eds & Meds** - Les pointed out that Eds & Meds is not identified as a strength

Vision, Goals & Objectives

- **Vision Statement** – there was consensus that the vision statement needed to be modified, Randi Woerner suggested getting rid of first paragraph. Les offered that County officials and *business leaders* be included in the first sentence, second paragraph
 - Have to include language that relates to the partnership of higher education in the county to expand educational opportunities for residents that also focuses on trades & apprenticeships.
- **Goals**
 - Tom Bianco – continue the practice of all entities working toward the common goal of growing the economy.
 - Marc P – expand education training for current and anticipated future employers
 - Sue Miller – capture those leaving the workforce to leverage talent to new hires
 - Les Vail – identify ways to secure funding sources to market the county on a national scale
- **Objectives**
 - Group seemed to concur that these were still adequate objectives
 - Jane DiBella was particularly fond of item 9 – encouraging the development of centers-based growth patterns (i.e. Woolwich Twp's TDR effort)

Identifying Priority Industry & Business Sectors

- Group seemed to agree with the listed sectors – although offered some insight to the Agribusiness:
 - Anna Marie Gonella – mentioned the importance of recognizing the hydroponic industry and for the wine industry – encouraging the manufacturing of glass bottles here in the County
 - Jake SJT – discussed the need for better communication between the grape growers and wine makers for higher quality grapes
 - Jane DiBella offered that it is expensive for landowners to grow grapes, they need to take a fair portion of acreage out to grow grapes which don't turn profit for 2-3 years

Other Comments:

- Ray Chintall – was surprised to learn that Gloucester County was always in competition with Delaware and Chester Counties in PA.
- Lyman Barnes – suggested co-location in Pureland would be an opportunity for vertical supply chain – make sales push to recognize where connections can be made between industries.

Gloucester County Department of Economic Development

2014 CEDS Survey & Results

ADDENDUM TO THE 2008 (CEDS)



GLOUCESTER COUNTY ECONOMIC DEVELOPMENT SURVEY

Help Us Define and Prioritize Economic Development Investments in the Future of Gloucester County

Gloucester County is updating its Comprehensive Economic Development Strategy. As part of this effort, we are reaching out to YOU as a prominent leader and stakeholder in the community to assess your opinions about the issues, investments, and potential project priorities that will help to shape that Strategy. This is a very short questionnaire. Please help us by taking just a few minutes to respond to the following questions.

1. Which of the following do you believe are the most significant strengths of Gloucester County? (Select as many as you believe are appropriate.)

- The County's Location
- A Diverse and Sophisticated Industrial Base
- A Thriving Tourist Economy
- A Well Trained Workforce
- Preserved Farmland and Open Spaces
- A Strong System of Elementary and Secondary Education
- Ample Development and Redevelopment Opportunities
- A Supportive Business Environment
- The Presence of a Growing Rowan University
- Strong Retail and Commercial Centers
- A Good Transportation Network of roads, railroads, ports and public transit
- The Gloucester County Institute of Technology
- Well Developed Recreational Opportunities

- Lively Entertainment Venues
- A Wide Range of Housing and Residential Options
- A Good Job Base and Employment Opportunities
- Other: (Identify) _____
- Other: (Identify) _____

2. Which of the following do you perceive as significant weaknesses or challenges for Gloucester County? (Select as many as you believe are appropriate.)

- A Declining Manufacturing Base
- Limited Public Transit Options
- Traffic and Highway Congestion
- A Lack of Economic Diversification
- No Identifiable "Cottage" Industries (ie. Those that have a special niche in Gloucester County)
- Inadequate Open Spaces
- A Workforce that is not adequately Trained in 21st Century Skills
- A Lack of Developed Park and Recreational Opportunity
- Limited Shopping and Retail Venues
- A Lack of Shovel Ready Development Sites
- Too many Brownfields and Vacant or Underused Industrial and Commercial Properties
- A Heavily Suburbanized Development Pattern
- High Taxes and Rental Costs
- A Lack of Funding for Marketing the County's Assets
- Occupational Demand and Workforce Readiness are not aligned
- Downtowns in poor Condition
- A Lack of Tourism and Hospitality Venues
- Other: (Identify) _____
- Other: (Identify) _____

3. What are the major problems facing the Gloucester County economy today? (Check as many as you like.)

- Slow Recovery from the 2008 Recession including plant closings and job layoffs
- An Underskilled or Unqualified Workforce
- Too much Regulation of the workplace and business environment
- No specialization or concentration of industry clusters such as medical, pharmaceutical, or technology industries
- A Lack of infrastructure, including broadband, needed to service new high performing industries and employers
- Inadequate funding – public and private – for the expansion of existing businesses and the development of new ones
- An insufficient number of public/private partnerships devoted to marketing and promoting Gloucester County
- Other: (Identify) _____
- Other: (Identify) _____

4. The following themes were identified in the 2010 Comprehensive Economic Development Strategy as key areas for the County to focus its attention and investments. Of these themes, which ONE do you believe remains the MOST IMPORTANT?

- Providing the support necessary to Retain Existing Businesses
- Investing in Development and Redevelopment Opportunities along the Delaware River Waterfront
- Promoting Good Rail, Port and other Freight Transportation in the County
- Investing in Highway Improvements and Public Transit
- Cleaning up Brownfield and Contaminated Properties to make them Ready for Redevelopment
- Promoting and Investing in Downtown Revitalization

5. In which of the following project areas do you think the County should focus its funding and channel local, State and Federal economic development resources? (Check as many as you like.)

- Public Transit Opportunities
- Road, Highway and other Infrastructure Improvements that serve key Business Clusters

- Construction of New Industrial and Business Parks
- An Ongoing investment in Farmland Preservation and Agribusiness
- A County Marketing Program that promotes Gloucester County as a great place to live and work
- Port and Rail Freight Improvements
- Redevelopment of Downtowns and Commercial Centers
- New Quality of Life Improvements such as parks, recreation facilities, and entertainment
- Recruiting new Industries that Diversify the Employment Base
- Promoting new Tourism, Entertainment and Recreational Opportunities that bring new people and revenue to the County
- Workforce Education and Training
- Other: (Identify) _____
- Other: (Identify) _____

6. The current Economic Development Strategy identifies the following 12 objectives to advance economic development in Gloucester County. Which do you believe are the most important? (Select as many as you believe are appropriate.)

- Develop new business clusters that provide locations for cutting-edge industries and technology
- Expand the County's tourism and agritourism economies
- Reinvest in the County's traditional petrochemical and refinery industries
- Improve access to "shovel ready" (developable) properties through the revitalization of brownfield sites
- Continue to support job training programs that target key industries and emerging employment needs
- Identify innovative partnerships that promote job development
- Promote downtown redevelopment and the revitalization
- Encourage new development to occur in "centers-based" growth patterns
- Encourage a greater investment in public transit
- Enhance road, highway and traffic circulation in the County
- Continue to expand and build on the County's marketing material and programs
- Work with Select Greater Philadelphia and the South Jersey Tourism Corporation to promote Gloucester County's economic development and tourism opportunities

Thank you for your Help and Participation. The results of this survey will be shared with the committee that is assembling the Comprehensive Economic Development Strategy and will be included as part of the final document.

Which
 *of the following do you perceive as significant weaknesses or challenges for
 Gloucester County? (Select as many as you believe are appropriate.)

Answer	0%	100%	Number of Response(s)	Response Ratio
A Declining Manufacturing Base			44	50.0 %
Limited Public Transit Options			45	51.1 %
Traffic and Highway Congestion			32	36.3 %
A Lack of Economic Diversification			10	11.3 %
No Identifiable "Cottage" Industries (ie. Those That Have a Special Niche in Gloucester County)			21	23.8 %
Inadequate Open Spaces			2	2.2 %
A Workforce That is not Adequately Trained in 21st Century Skills			15	17.0 %
A Lack of Developed Park and Recreational Opportunity			7	7.9 %
Limited Shopping and Retail Venues			21	23.8 %
A Lack of Shovel Ready Development Sites			10	11.3 %
Too Many Brownfields and Vacant or Underused Industrial and Commercial Properties			28	31.8 %
A Heavily Suburbanized Development Pattern			13	14.7 %
High Taxes and Rental Costs			53	60.2 %
A Lack of Funding for Marketing the County's Assets			13	14.7 %
Occupational Demand and Workforce Readiness are not Aligned			11	12.5 %
Downtowns in Poor Condition			28	31.8 %
A Lack of Tourism and Hospitality Venues			20	22.7 %
Other			7	7.9 %
Totals			88	100%

*** What are the major problems facing the Gloucester County economy today? (Check as many as you like.)**

Answer	0%	100%	Number of Response(s)	Response Ratio
Slow Recovery from the 2008 Recession Including Plant Closings and Job Layoffs			59	67.8 %
An Underskilled or Unqualified Workforce			13	14.9 %
Too Much Regulation of the Workplace and Business Environment			36	41.3 %
A Lack of Land on Which to Construct New Plants, Factories, or Commercial Facilities			1	1.1 %
No Specialization or Concentration of Industry Clusters Such as Medical, Pharmaceutical, or Technology Industries			30	34.4 %
A Lack of Infrastructure, Including Broadband, Needed to Service New High Performing Industries and Employers			22	25.2 %
Inadequate Funding - Public and Private - For the Expansion of Existing Businesses and the Development of New Ones			29	33.3 %
An Insufficient Number of Public/Private Partnerships Devoted to Marketing and Promoting Gloucester County			28	32.1 %
Other			10	11.4 %
Totals			87	100%

*** What are the major problems facing the Gloucester County economy today? (Check as many as you like.)**

Answer	0%	100%	Number of Response(s)	Response Ratio
Slow Recovery from the 2008 Recession Including Plant Closings and Job Layoffs			59	67.8 %
An Underskilled or Unqualified Workforce			13	14.9 %
Too Much Regulation of the Workplace and Business Environment			36	41.3 %
A Lack of Land on Which to Construct New Plants, Factories, or Commercial Facilities			1	1.1 %
No Specialization or Concentration of Industry Clusters Such as Medical, Pharmaceutical, or Technology Industries			30	34.4 %
A Lack of Infrastructure, Including Broadband, Needed to Service New High Performing Industries and Employers			22	25.2 %
Inadequate Funding - Public and Private - For the Expansion of Existing Businesses and the Development of New Ones			29	33.3 %
An Insufficient Number of Public/Private Partnerships Devoted to Marketing and Promoting Gloucester County			28	32.1 %
Other			10	11.4 %
Totals			87	100%

The following themes were identified in the 2010 Comprehensive Economic Development Strategy as key areas for the County to focus its attention and investments. Of these themes, which ONE do you believe remains the MOST IMPORTANT?

Answer	0%	100%	Number of Response(s)	Response Ratio
Providing the Support Necessary to Retain Existing Businesses			23	26.1 %
Continuing to Support the County's Recovery from the 2008 Recession			19	21.5 %
Investing in Development and Redevelopment Opportunities Along the Delaware River Waterfront			12	13.6 %
Promoting Good Rail, Port and Other Freight Transportation in the County			9	10.2 %
Investing in Highway Improvements and Public Transit			12	13.6 %
Cleaning up Brownfield and Contaminated Properties to Make them Ready for Redevelopment			5	5.6 %
Promoting and Investing in Downtown Revitalization			7	7.9 %
No Response(s)			1	1.1 %
Totals			88	100%

The current Economic Development Strategy identifies the following 12 objectives to advance economic development in *Gloucester County. Which do you believe are the most important? (Select as many as you believe are appropriate.)

Answer	0%	100%	Number of Response(s)	Response Ratio
Develop New Business Clusters that Provide Locations for Cutting-Edge Industries and Technology			49	56.3 %
Expand the County's Tourism and Agritourism Economies			20	22.9 %
Reinvest in the County's Traditional Petrochemical and Refinery Industries			26	29.8 %
Improve Access to "Shovel Ready" (Developable) Properties Through the Revitalization of Brownfield Sites			29	33.3 %
Continue to Support Job Training Programs that Target Key Industries and Emerging Employment Needs			33	37.9 %
Identify Innovative Partnerships that Promote Job Development			33	37.9 %
Promote Downtown Redevelopment and the Revitalization of the County's "Main Street" Communities			30	34.4 %
Encourage New Development to Occur in "Centers-Based" Growth Patterns			29	33.3 %
Encourage a Greater Investment in Public Transit			26	29.8 %
Enhance Road, Highway and Traffic Circulation in the County			35	40.2 %
Continue to Expand and Build on the County's Marketing Material and Programs			13	14.9 %
Work with "Select Philadelphia," the Delaware River Tourism Council, and the South Jersey Tourism Corporation to promote Gloucester County's Economic Development and Tourism Opportunities			23	26.4 %
Totals			87	100%



GLOUCESTER COUNTY COMPREHENSIVE DEVELOPMENT STRATEGY ADDENDUM TO THE 2008 (CEDDS)

**The Gloucester County Board of Chosen Freeholder
Robert M. Damminger, Freeholder Director
Heather Simmons, Freeholder Liaison**

**DRAFT
8/8/2014**