



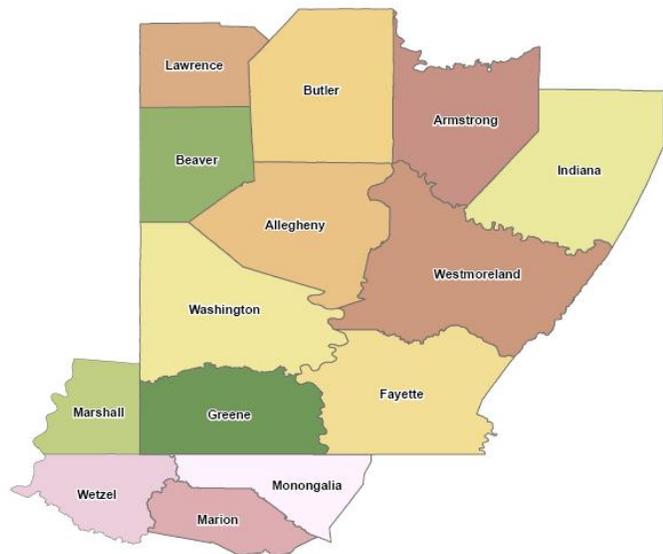
A. Background

The economic development element of a comprehensive plan provides a broad understanding of the forces that give shape to the Greene County economy and an overview of ongoing efforts to attract and retain business development. Using the latest available data, trends in the labor force, household income, where County residents are employed, where County workers are living, and industrial production are addressed. The economic plan element incorporates an analysis of the County's local and regional economy. The local economy includes the economic activity occurring within the County's boundaries. The regional economy for the Comprehensive Plan includes the two "regions" to which Greene County belongs.

Greene County is a member of the Southwestern Pennsylvania Commission (SPC), a political region which serves as the metropolitan planning organization for the City of Pittsburgh and ten counties: Allegheny, Armstrong, Beaver, Butler, Fayette, Greene, Indiana, Lawrence, Washington and Westmoreland.

The other "region" to which Greene County belongs is a geographic region centered on Waynesburg, the county seat. By examining counties in close geographic proximity and commuting patterns, this region was determined to include the contiguous counties in Pennsylvania as well as Marion, Marshall, Monongalia and Wetzel Counties in West Virginia. Thus a "Planning Region" was established for the Greene County Comprehensive Plan analysis that encompasses the following 14 counties: Allegheny, Armstrong, Beaver, Butler, Fayette, Greene, Indiana, Lawrence, Washington and Westmoreland Counties in Pennsylvania; and Marion, Marshall, Monongalia and Wetzel Counties in West Virginia. The Planning Region analysis includes comparisons to Pennsylvania and West Virginia when applicable and available to evaluate the effectiveness of current strategies in place and to determine if trends are local, regional or statewide.

Figure 9-1: Project Study Region



Existing Studies

As a review of the past studies indicates, the economy has continued to be the major issue affecting County residents who desire family-supporting jobs. Previously completed efforts documented the dominant role that coal mining plays in the County's economy, more so than for other counties in the Planning Region. Over the years, County officials have realized that the County economic base must be diversified to attract new high-paying jobs that will encourage young people to return and raise families. To identify new opportunities, the County embarked upon a fact-finding effort to develop a diversified economic development strategy. A review of these efforts follows.

Development Strategy & Action Plan for Greene County (1997) prepared by The Brandow Company

This plan identifies target industries for future investment that will provide the backbone for the County's development strategy. The study examines existing industry clusters and core opportunities that will allow the County to get the most from its constrained resource base, shore up a proven asset base, develop spin-off and marketing opportunities, and utilize any number of retention and expansion services in a strategic manner. Opportunity targets include four manufacturing industries (plastics, powder metals, industrial machinery, and wood products) and three non-manufacturing industry targets (recreation and tourism, data intensive firms and senior care). The plan includes demographic and economic conditions, industrial and export service opportunity targets, commercial trends and opportunities, tourism opportunities, site development priorities and an action plan.

"Overview of Greene County Coal Situation" (2000) prepared by the Resource Technologies Corporation

This study was completed in 2000 by Resource Technologies Corporation, however, due to recent energy advances in Greene County, this report is considered out of date. According to information received from a representative of Resource Technologies Corporation (electronic correspondence, 2/27/06) the price increase of natural gas, which has tripled since 2000; oil, which has quadrupled; and coal; which has more than doubled, has so radically changed the economics of energy that there are no reports that have any real credibility in today's world. Recent technological advances have significantly changed coal mining practices and there is now more economically accessible coal. In addition, a significant market has developed for coal bed methane and the utility industry now has over 200 new coal fired power plants in the planning or permitting stage as compared to the two or three plants in 2000. Since 2000, the utility industry has moth-balled a significant number of gas-fired power plants. Nearly every coal fired power plant within 200 miles of the Greene County is slated for some form of pollution control upgrade -- in 2000 virtually none of them were. Coal, gas, and coal bed methane are major industries of Greene County. Greene County, alone, accounts for nearly 20 percent as much annual production as the entire state of West Virginia (RTC, 2006). Greene County is one of the



primary producers of energy in the United States and will need to commission a study to ascertain the future of its energy production.

Greene County Fiscal Analysis: An Opportunity to Change the Future (2001) prepared by the Pennsylvania Economy League

The purposes of this fiscal analysis were to understand the current fiscal situation at all levels of local government, project the implications for the future, and develop a suggested action plan to ensure the ability of Greene County governments to continue to carry out their mission of public service. The analysis includes demographics, taxation and revenues, expenditure analysis, projected fiscal health, and a summary of findings, recommendations and conclusions. School districts were compared to provide an analysis of different regions of the County and because they represent nearly 70 percent of all local taxes in the County. The study found that the County is more reliant on the coal tax than similar counties and proposes a broad action plan with four objectives for Greene County leaders to accomplish: diversify and expand the economy; control spending; assess the overall approach to tax policies; and pursue new or expanded non-tax revenue sources.

The results of such efforts over the years show the commitment of County Officials to improve the quality of life for residents. The recommendations of each study follow a general theme of diversification of the economy to remove the reliance on coal mining and corresponding tax revenues.

Economic Development Resources

Appalachian Regional Commission (ARC)

The Appalachian Regional Commission is a federal-state partnership that works to create opportunities for self-sustaining economic development and improved quality of life. Appalachia, as defined in the legislation from which the Appalachian Regional Commission derives its authority, is a 200,000-square-mile region that follows the spine of the Appalachian Mountains from southern New York to northern Mississippi. It includes all of West Virginia and parts of 12 other states: Alabama, Georgia, Kentucky, Maryland, Mississippi, New York, North Carolina, Ohio, Pennsylvania, South Carolina, Tennessee, and Virginia. About 23 million people live in the 410 counties of the Appalachian Region; 42 percent of the Region's population is rural, compared with 20 percent of the national population.

The Appalachian Regional Commission implemented a method of classifying counties based upon economic indicators to prioritize areas in need of assistance. The classification has five economic status designations—distressed, at-risk, transitional, competitive, and attainment. These classifications are based on a comparison of county and national averages for three economic indicators—three-year average unemployment rate, per-capita market income, and poverty rate.

Greene County is included within the regional domain of the Appalachian Regional Commission and is classified as Transitional. Transitional defines a county that is worse than the national average for one or more indicator but does not meet the criteria for the distressed or at-risk levels. There are no Pennsylvania counties within the Appalachian Region classified as distressed. Fayette County is the only county within the Planning Region for the Greene County Comprehensive Plan that is classified as At-Risk. Interestingly, the counties of Armstrong, Beaver, Indiana, Lawrence, and Washington are also identified as Transitional. Competitive Counties within the Planning Region include Butler and Westmoreland. Allegheny County is considered an Attainment classification.

The Appalachian Regional Commission directs funding to Local Development Districts to promote economic development projects. The Local Development District is established at the state-level to direct local initiatives. The Southwestern Pennsylvania Commission is the Local Development District to which Greene County belongs.



Southwestern Pennsylvania Commission

The Southwestern Pennsylvania Commission (SPC) is the federally designated Economic Development District (EDD) as authorized by the US Department of Commerce, Economic Development Administration. As such, SPC is responsible for developing and coordinating a comprehensive economic development strategy for the ten county region surrounding Pittsburgh in Southwestern Pennsylvania. This region includes Armstrong, Allegheny, Beaver, Butler, Fayette, Greene, Indiana, Lawrence, Washington and Westmoreland Counties as well as the City of Pittsburgh.

The SPC region is also designated a Local Development District by the Appalachian Regional Commission. As the Local Development District, SPC serves as the lead agency to identify priority needs of communities. SPC provide community and economic development assistance to communities under the jurisdiction of the Appalachian Regional Commission. SPC is also designated the Metropolitan Planning Organization by the Pennsylvania Department of Transportation for funding and planning purposes.

SPC's membership includes at least two members from each county's Board of Commissioners. SPC works with its membership as well as PennDOT to produce a Transportation Improvement Program (TIP) every four years. In addition to the TIP, SPC has developed the 2035 Transportation and Development Plan.

Pittsburgh Regional Alliance (PRA)

PRA's mission is to globally market southwestern Pennsylvania and support existing regional employers to grow jobs and capital investment. The Allegheny Conference on Community Development and its affiliates (PRA, Greater Pittsburgh Chamber of Commerce and Pennsylvania Economy League - Western Division) are working in collaboration to stimulate growth in southwestern Pennsylvania's economy and improve its quality of life (SOURCE: Pittsburgh Regional Alliance web site).

Greene County is in the process of reorganizing and consolidating its approach to economic development. The single most significant factor behind this effort is the partnership between the County Government, the Greene County Industrial Development Authority and the Educational Consortium (21st Century Program). Together this group is working towards changing the philosophy of residents to encourage them to gain the necessary skills desired by employers. The Educational Consortium is comprised of the county's five school districts, vocational-technical school and local college, together this group is pushing curriculum that supports those industries that are dependent on technology skills. This focus on work-force development is fostering an environment to help the County diversify its employment base and become less dependent upon its mineral resources.

Greene County Department of Economic Development

The Department of Economic Development (GCDED) serves as the administrative body for the Greene County Planning Commission, Greene County Conservation District, Solid Waste & Recycling Office, grant services and Industrial Development Authority. The mission of the Department of Economic Development is, "...to provide the appropriate services and develop the leadership necessary to assure that all of Greene County is planning for the future." The GCDED also seeks to coordinate services relating to economic planning and development activities in Greene County. It attempts to accomplish this mission by making sure that developers have the resources and information necessary to make meaningful investments in Greene County.

Greene County Industrial Development Authority

The Greene County Industrial Development Authority (GCIDA) is the lead agency for industrial recruitment and expansion in the County. The GCIDA provides "one-stop shopping" for manufacturing and distribution investors interested in site locations for new or expanding operations. The GCIDA's focus is on the creation, attraction and retention of business, offering financial assistance through bond issues, Pennsylvania Industrial Development Authority (PIDA) loans, Machinery and Equipment Loan Financing (MELF), conventional financing, bridge financing, etc. In addition, the GCIDA office offers grant writing, business plan development and training programs for Greene County businesses.

Greene County Industrial Developments Corporation

Greene County Industrial Developments Corporation (IDC) is a 501(c) 3 private non-profit economic development non-profit charged with management of Pennsylvania Keystone Opportunity Zones (KOZ), and loan programs including Pennsylvania Industrial Development Authority (PIDA) and Small Business Administration (SBA) loans. The IDC is tasked with attracting tenants and promoting economic development throughout the county.

Educational Consortium (21st Century Program)

This is a consortium of the superintendents of the five school districts in Greene County. This group includes the Planning Area districts of Waynesburg Central, Carmichaels, and Southeast Greene, as well as the principal of Vocational Educational Center and representatives from Waynesburg University, and was established to direct a countywide educational agenda and drive certain economic development initiatives. This group is pushing curriculum that supports those industries that are dependent on technology skills. This focus on work-force development is fostering an environment to help the County diversify its employment base and become less dependent upon its mineral resources.



Economic Development Snapshot

Greene County has a predominantly rural landscape, with only 31 percent of its population living in an urban setting in 2000 (U.S. Census, 2000). Using land cover data from Southwestern Pennsylvania Commission (SPC, 1992), land-cover acreage and percent of county coverage was estimated using Geographic Information System (GIS) tools. As Table 9-1: a Land Cover Data show, approximately 96.9 percent of the land cover is agriculture, forest or wetland, while only 2.6 percent was developed, strip mines or disturbed. These numbers are very similar to the estimates from the County's 1979 Comprehensive Plan. The result is that 69 percent of the population lives in a rural environment that is difficult to supply with infrastructure and community facilities or for businesses to serve.

Table 9-1: Land Cover Data		
Land Cover	GIS Acreage	Percent of Total Cover
Agriculture (Cropland; Pasture & Open)	152,336	41.2%
Forest (Coniferous; Deciduous; Mixed)	205,796	55.6%
Hydrography (Lakes, ponds or streams; River)	1,777	0.5%
Developed (Residential; Non-residential - mixed development; Maintained Grass; Transportation)	8,172	2.2%
Strip Mines or Disturbed	1,508	0.4%
Wetland (Forested; Non-forested)	307	0.1%
Total	369,897	100.0%
Source: Southwestern Planning Commission and Mackin GIS Department		

Mining became the County's leading industry when it overtook agriculture in the early 1900's. The mining industry is so large, relative to population in Greene County, that national changes in demand for coal are often followed by direct changes in County population. For example, prior to the completion of the County's Comprehensive Plan in 1979, the energy crisis had reestablished the demand for coal in the 1970's leading the County into an expansion period. This growth period was predicted to continue over the next 25 years, but instead, changes in the demand for coal in the 1980's resulted in the slow decline of the County's population, which has continued to decline ever since.

Regional markets have increased in importance ever since the completion of Interstate 79 in the 1970's. Following the development of this major roadway, Greene County residents could easily access markets to the north in Pennsylvania, like Washington, Pittsburgh and Erie and in West Virginia to the south, including Morgantown, Fairmont, and Charleston. However, Greene County remains fragmented from markets in the west, such as Wheeling, West Virginia and Columbus, Ohio as there are no major transportation routes that offer a higher rate of travel with limited access or stopping points. Even access to Uniontown, Greensburg, and Harrisburg, is considered poor due to the circuitous routes with increased congestion and lower posted vehicle speeds.

Greene County residents have experienced an overall increase in economic prosperity since 1990. Table 9-2 Relative Prosperity Measures provides a socio-economic analysis over a ten year period to assess overall prosperity of County residents to other areas. The factors used to identify the prosperity measures reflect those used by the Appalachian Regional Commission to assess County levels of prosperity, excluding unemployment measures. The prosperity measures were expanded to include Percent of Population Living at or Below the Poverty Level, Median Household Income, Median Housing Value, Median Rent, and Per Capita Income (US Census, 1990 & 2000).

Overall the Relative Prosperity Measures for residents of Greene County indicate an improved quality of life. Greene County experienced dramatic improvement in the decrease of persons living in poverty. Increases in Per Capita Income at face value show that the County is keeping pace with state averages, but once adjustments are made to remove the institutionalized population of the State Correctional Institution in Greene County, the adjusted Per Capita Income actually rises above all others in the Planning Region with a 58.1 percent increase. Median Household Income outpaced the Planning Region as well with Greene County showing a 52.2 percent increase.



Table 9-2: Relative Prosperity Measures, 1990 and 2000

		Individuals in Poverty	Per Capita Income	Median Household Income	Median Housing Value	Median Rent
1990 Census	Greene County	21.4%	\$10,005	\$19,903	\$38,400	\$187
	Armstrong County	12.8%	\$10,565	\$22,554	\$44,300	\$205
	Fayette County	20.9%	\$9,791	\$19,195	\$39,700	\$196
	Washington County	12.8%	\$12,744	\$25,469	\$53,600	\$241
	Pennsylvania	11.0%	\$14,068	\$29,069	\$69,700	\$322
	Marshall County	16.0%	\$10,946	\$22,687	\$42,700	\$182
	Monongalia County	20.6%	\$11,772	\$22,183	\$64,600	\$297
	Wetzell County	20.5%	\$10,454	\$28,122	\$50,200	\$183
	West Virginia	19.7%	\$10,520	\$20,795	\$47,900	221
	United States	13.0%	\$14,420	\$30,056	\$79,100	\$374
	2000 Census	Greene County	15.9%*	\$14,959*	\$30,352	\$56,900
Armstrong County		11.7%	\$15,709	\$31,557	\$64,500	\$395
Fayette County		18.0%	\$15,274	\$27,451	\$63,900	\$367
Washington County		9.8%	\$19,935	\$37,607	\$87,500	\$423
Pennsylvania		11.0%	\$20,880	\$40,106	\$97,000	\$531
Marshall County		16.6%	\$16,472	\$30,989	\$62,600	\$347
Monongalia County		22.8%	\$17,106	\$28,625	\$95,500	\$453
Wetzell County		19.8%	\$16,818	\$30,935	\$66,000	\$335
West Virginia		17.9%	\$16,477	\$29,696	\$72,800	\$401
United States		12.0%	\$21,587	\$41,994	\$119,600	\$602
Percent Change 1990 - 2000		Greene County	-25.5%*	49.5%*	52.5%	48.2%
	Armstrong County	-8.8%	48.7%	39.9%	45.6%	92.7%
	Fayette County	-14.0%	56.0%	43.0%	61.0%	87.2%
	Washington County	-23.2%	56.4%	47.7%	63.2%	75.5%
	Pennsylvania	0.3%	48.4%	38.0%	39.2%	64.9%
	Marshall County	3.8%	50.5%	36.6%	46.6%	90.7%
	Monongalia County	10.7%	45.3%	29.0%	47.8%	52.5%
	Wetzell County	-3.4%	60.9%	10.0%	31.5%	83.1%
	West Virginia	-9.0%	56.6%	42.8%	52.0%	81.4%
	United States	-7.7%	49.7%	39.7%	51.2%	61.0%

Source: US Census, 1990, 2000; Appalachian Regional Commission, 2005

*The 2000 Per Capita Census number includes institutionalized populations. Adjusted the Per Capita Rate is \$15,819 to reflect Per Capita excluding the SCI Greene population. This adjustment changes the percent change from 1990 to 2000 to 58.1% increase in Per Capita incomes.

THIS PAGE INTENTIONALLY LEFT BLANK



B. Data & Analysis

Demographic Data

Table 9-3 gives demographic information for Greene County, including population, race/ethnicity, gender, age, gender, marital status, education, household and income information.

The total population within the County is projected to decrease from an estimated 2007 number of 39,545 to a 2012 projected number of 38,626 for a growth rate of -2.32 percent. The majority (95.29%) of those who reside in Greene County are White, followed by 3.72 percent (1,473) who are Black/African American. Gender within the County is split evenly with 51.42 percent (20,333) being male and 48.58 percent (19,212) being female. In addition, the two largest age categories in the County are between the ages of 25-34 (13.52%) and between the ages of 35-44 (13.73%). A majority (51.79%) of those who live in Greene County are married with a spouse present, followed by 24.26 percent (8,082) who were never married.

Table 9-3 shows that 47.42 percent of those who reside in Greene County are high school graduates, followed by only a few (15.42%) who have some high school education and 12.17% (3,371) who have some college education but no degree. The number of households in the County is expected to decrease from a 2007 estimated number of 14,981 to a 2012 projected number of 14,776 for a -1.37 percent growth rate. The largest category for household income in the County is less than \$15,000 (19.54%) followed by the \$50,000 - \$74,999 income bracket (17.07%). The 2007 average household income in the County is \$46,496. The largest category of households (32.75%) are married without children, followed by 22.69 percent who are married with children. In addition, 33.92 percent of households in Greene County are two person households. And finally, 2007 estimated projections of those in the population category of 16 and above by occupation shows that 46.31 percent of those who work in the County are white collared followed by 34.97 percent (5,289) who are blue collared and 18.72 percent (2,832) who work in service or farm. Lastly, the 2007 estimated tenure of occupied housing units shows that 73.87 percent of households are owner occupied and 26.13 percent are renter occupied.

Table 9-3: Demographic Data		
	#	%
POPULATION		
2012 Projected	38,626	
2007 Estimated	39,545	
2000 Census	40,672	
1990 Census	39,550	
Growth 2007-2012	-2.32%	
Growth 2000-2007	-2.77%	
Growth 1990-2000	2.84%	
RACE/ETHNICITY		
White	37,683	95.29
Black/African American	1,473	3.72

Table 9-3: Demographic Data		
	#	%
American Indian or Alaskan Native	55	0.14
Asian	101	0.26
Native Hawaiian and Other Pacific Islander	8	0.02
Some Other Race (alone)	22	0.06
2 or More Races	203	0.51
Hispanic/Latino	382	0.97
GENDER		
Male	20,333	51.42
Female	19,212	48.58
Male/Female Ratio	1.06	
AGE		
Age 0-4	1,865	4.72
Age 5-9	1,984	5.02
Age 10-14	2,385	6.03
Age 15-17	1,605	4.06
Age 18-20	1,715	4.34
Age 21-24	2,291	5.79
Age 25-34	5,347	13.52
Age 35-44	5,429	13.73
Age 45-49	3,033	7.67
Age 50-54	3,133	7.92
Age 55-59	2,767	7.00
Age 60-64	2,074	5.24
Age 65-74	2,707	6.85
Age 75-84	2,195	5.55
Age 85 and Over	1,015	2.57
Age 16 and Over	32,782	82.90
Age 18 and Over	31,706	80.18
Age 21 and Over	29,991	75.84
Age 65 and Over	5,917	14.96
2007 Median Age	39.75	
Male	37.74	
Female	42.18	
2007 Average Age	40.24	
Male	38.50	
Female	42.08	
MARITAL STATUS, 15+		
Never Married	8,082	24.26
Married Spouse Present	17,252	51.79
Married Spouse Absent	2,474	7.43
Widowed	2,657	7.98
Divorced	2,846	8.54
Males, Never Married	4,962	14.90
Previously Married	2,263	6.79
Females, Never Married	3,120	9.37
Previously Married	3,897	11.70



Table 9-3: Demographic Data

	#	%
EDUCATION, 25+	27,700	
Less Than 9th Grade	2,401	8.67
Some High School (no diploma)	4,271	15.42
High School Graduate (or GED)	13,136	47.42
Some College, no degree	3,371	12.17
Associate Degree	1,088	3.93
Bachelor's Degree	2,222	8.02
Master's Degree	836	3.02
Professional School Degree	245	0.88
Doctorate Degree	130	0.47
HOUSEHOLDS		
2012 Projected	14,776	
2007 Estimated	14,981	
2000 Census	15,060	
1990 Census	14,624	
Growth 2007-2012	-1.37%	
Growth 2000-2007	-0.52%	
Growth 1990-2000	2.98%	
HOUSEHOLD INCOME	14,981	
Less than \$15,000	2,928	19.54
\$15,000-\$24,999	2,331	15.56
\$25,000-\$34,999	2,083	13.90
\$35,000-\$49,999	2,440	16.29
\$50,000-\$74,999	2,558	17.07
\$75,000-\$99,999	1,407	9.39
\$100,000-\$149,999	960	6.41
\$150,000-\$249,999	209	1.40
\$250,000-\$499,999	55	0.37
\$500,000 or more	10	0.07
2007 AVERAGE HOUSEHOLD INCOME	\$46,496	
2007 EST. MEDIAN HOUSEHOLD INCOME	\$35,916	
2007 EST. PER CAPITA INCOME	\$18,165	
2007 AVG. HOUSEHOLD TYPE	14,981	
Family Households	10,532	70.30
Non-Family Households	4,449	29.70
HOUSEHOLD TYPE/ OWN CHILDREN	14,981	
Single Male Householder	1,666	11.12
Single Female Householder	2,417	16.13
Married Couple Family/Own Children	3,399	22.69
Married Couple Family/No Own Children	4,907	32.75
Male Householder, own children	331	2.21
Male Householder, no own children	275	1.84
Female Householder, own children	851	5.68
Female Householder, no own children	769	5.13

Table 9-3: Demographic Data		
	#	%
Non-family, Male Householder	242	1.62
Non-family, Female Householder	124	0.83
HOUSEHOLDS BY HOUSEHOLD SIZE	14,981	
1 Person	4,083	27.25
2 Person	5,082	33.92
3 Person	2,685	17.92
4 Person	2,046	13.66
5 Person	785	5.24
6 Person	229	1.53
7 or more Person	71	0.47
2007 AVERAGE HOUSEHOLD SIZE	2.43	
2007 EST. POP 16+ BY OCCUPATION	15,125	
Blue Collar	5,289	34.97
White Collar	7,004	46.31
Service and Farm	2,832	18.72
2007 EST. TENURE OF OCCUPIED HOUSING UNITS	14,981	
Owner Occupied	11,067	73.87
Renter Occupied	3,914	26.13
MEDIAN, ALL OWNER-OCCUPIED, HOUSING VALUE	\$82,311	
MEDIAN YEAR BUILT	1958	



Industry

The North American Industrial Classification System (NAICS), which replaced the Standard Industrial Classification (SIC) system in 1997, was developed by Canada, Mexico and United States to provide new comparability in statistics about business activity across North America. Similar to the SIC, NAICS utilizes a hierarchical system to group industries using similar production processes using a 6-digit system in place of the 4-digit SIC system. NAICS recognizes the new range of services and technological changes that have occurred since the most recent SIC update, by dividing the economy into 20 major sectors and recognizing 1,170 industries. Of the 20 sectors, five are largely goods-producing, while the other 15 are entirely services-producing.

Some caveats of the NAICS system are: individual establishments are assigned an industry according to their primary economic activity; employment figures represent an industry and not an occupation in which employees are engaged; and for confidentiality reasons, data are often not made publicly available when it will identify individual businesses, which happens often in smaller economic regions, such as rural counties like Greene County (www.census.gov 2006).

As shown in Table 9-4: Goods-Producing Industry and Service-Producing Industry (2004), Greene County ranks higher in comparison with the United States for industries which are Goods-Producing. Such industries include manufacturing, construction, and natural resources and mining. The Service-Producing Industry includes trade, transportation, and utilities; information; financial activities; professional and business services; education and health services; leisure and hospitality; other services.

To identify the level from which Greene County produces more goods or services in an economic industry than other geographic areas is completed by determining regional export activity, which involves determining Location Quotients. The location quotient determines the levels of exporting or importing taking place for a particular industry in Greene County as compared to a reference region. The location quotient tells economic development agencies which industry exceeds the local demand for its products and exports the product or service outside of the community itself. When the location quotient of an industry is at 1.25 it is considered an exporting industry, a location quotient of 1.0 reflects a self-sustaining industry, and anything less than 0.75 indicates an importing industry (Shields, 2003).

Table 9-4: Goods-Producing Industry and Service-Producing Industry, 2004

Industry	Greene County		United States		Location Quotient (compared with U.S.)
	Employees	Percent of Total	Employees	Percent of Total	
Total, all industries	9,041	100.0%	108,505,333	100.0%	1.00
Goods-Producing	3,281	36.3%	22,847,530	21.1%	1.72
Service-Providing	5,760	63.7%	85,657,803	78.9%	0.81

Source: U.S. Department of Labor, Bureau of Labor Statistics

Mining

The major economic industry in Greene County continues to be mining, which is an export industry reliant on national markets. In 2004, the mining industry employed 2,441 of the 9,041 workers in the County, roughly 27 percent (U.S. Department of Labor, Bureau of Labor Statistics). The majority of these (68%) are employed in bituminous coal underground mining. As late as 1980, about 20 percent of Pennsylvania’s minable bituminous coal reserves were beneath Greene County. The Greene County Comprehensive Plan from 1979 noted that the County had 8.9 billion tons of coal reserves, of which 5.9 billion tons were considered recoverable. Most of these reserves are located in the western portion of the County and require deep mining. Many industry officials considered this to be one of the last major deposits of high-quality, high-Btu coal left in the United States.

Table 9-5: Industry Size, Greene County (2004) provides a comparison to the national average for specific industries. Again, data reflects the dominance of mining in Greene County. Also ranking high as compared to the national average is the Utility Industry, which reflects a location quotient of 5.17. Other industries that are, at a minimum self-sustaining and may be exporting services, include Other Services Except Public Administration, Transportation and Warehousing, and Retail Trade. Importing industries include Arts, entertainment, and recreation, Professional and technical services, Real estate and rental and leasing, Construction, and Manufacturing. It is significant to note that Construction and Manufacturing, which are traditionally higher paying job-types that do not require employees to be college educated, are importing industries. Also, Real estate and rental and leasing and Construction are related to the housing market, which as shown in Table 9-2, the Greene County housing stock is struggling with low values. As demonstrated in Chapter 7: Housing, the housing market and demand in Greene County cannot support these industries, causing them to become import industries.



Table 9-5: Industry Size; Greene County Compared with United States, 2004

Industry	Greene County		United States		Location Quotient (compared with U.S.)
	Employees	Percent of Total	Employees	Percent of Total	
Total, all industries	9,069	100.00%	108,490,066	100.00%	1
NAICS 11 Agriculture, forestry, fishing and hunting	10	0.11%	1,155,106	1.06%	0.1
NAICS 21 Mining	2,441	26.92%	519,931	0.48%	56.16
NAICS 22 Utilities	243	2.68%	563,931	0.52%	5.15
NAICS 23 Construction	241	2.66%	6,916,398	6.38%	0.42
NAICS 31-33 Manufacturing	622	6.86%	14,257,380	13.14%	0.52
NAICS 42 Wholesale trade	323	3.56%	5,642,537	5.20%	0.68
NAICS 44-45 Retail trade	1,310	14.44%	15,060,686	13.88%	1.04
NAICS 48-49 Transportation and warehousing	375	4.13%	4,009,165	3.70%	1.12
NAICS 51 Information	81	0.89%	3,099,633	2.86%	0.31
NAICS 52 Finance and insurance	286	3.15%	5,813,299	5.36%	0.59
NAICS 53 Real estate and rental and leasing	48	0.53%	2,077,487	1.91%	0.28
NAICS 54 Professional and technical services	145	1.60%	6,768,868	6.24%	0.26
NAICS 55 Management of companies and enterprises	NC	NC	1,696,537	1.56%	NC
NAICS 56 Administrative and waste services	424	4.68%	7,829,371	7.22%	0.65
NAICS 61 Education services	ND	ND	2,079,232	1.92%	ND
NAICS 62 Health care and social assistance	ND	ND	14,005,731	12.91%	ND
NAICS 71 Arts, entertainment, and recreation	44	0.49%	1,852,920	1.71%	0.28
NAICS 72 Accommodation and food services	527	5.81%	10,614,677	9.78%	0.59
NAICS 81 Other services, except public administration	440	4.85%	4,287,999	3.95%	1.23
NAICS 99 Unclassified	NC	NC	239,179	0.22%	NC

Source: U.S. Department of Labor, Bureau of Labor Statistics

*(NC) Not Calculable, the data does not exist or it is zero; (ND) Not Disclosable

The Greene County Fiscal Analysis: An Opportunity to Change the Future (2001), found that the County is more reliant on coal tax revenues than similar counties. The Fiscal Analysis includes the recommendation that, as coal is a depletable resource, the County must have a plan for a new tax structure. The analysis suggested that real estate taxes would be unlikely to produce the revenue necessary to match the spending because of low market values (Pennsylvania Economy League, 2001).

The Fiscal Analysis (2001) documents the taxing structure of Greene County assesses coal as real property, thus separately taxable to the owner of said coal estate. The study also documents the excessive rate that Greene County assesses coal for property tax purposes. However, when coal tax revenues are removed from the assessment, the tax rates of the County equalize out to reflect comparison municipalities and school districts. Unfortunately, the Analysis predicts a drop in coal revenues as the existing coal resources are depleted. The most severe consequence of the loss of tax revenues from coal will be to the West Greene and Central Greene School Districts, which will lose 50 to 70 percent of coal tax revenues; and, the County, which will experience a loss of 60 percent.

An externality of the coal mining industry is the detrimental impact on water quality in Greene County. In 1987, a study by the United States Geological Survey, Water Resources Division in cooperation with the Pennsylvania Geological Survey and the Greene County Board of Commissioners was undertaken in response to the concern for the potential effects on water resources from coal mining, especially in the western part of the County (Stoner et al., 1987). According to the Pennsylvania Department of Environmental Protection (PA DEP), "(t)he environmental legacy of hundreds of years of coal mining in Pennsylvania is over 2,400 miles of Pennsylvania's 54,000 miles of streams polluted by Abandoned Mine Drainage (AMD) from old mining operations. AMD is the single largest source of water pollution by far in the state." The study by Stoner (1987) found that AMD affected many of the sampled streams in eastern Greene County.

Table 9-5: Greene County Major Employers (2005) further supports the premise that coal mining plays the largest role in the economic picture of Greene County. The top two employers are coal companies that employed a total of 2,274 people, which is almost double that of the remaining top employers listed. When the coal in Greene County is depleted, the County will need to have other high paying jobs available in order to retain their workforce and decrease their unemployment rate.



Rank	Employer	Product	Employees
1	Consol Energy	Coal Mining	1,537
2	Foundation Coal Corp.	Coal Mining	1,187
3	Greene County Memorial Hospital	Health Care	300
4	Waynesburg College	Higher Education	265
5	Allegheny Power Service Corp.	Electric Utility	211
6	Kyowa America Corporation	Manufacturing	170
7	Community Bank	Financial Services	135
8	Rolling Meadows Nursing Home	Nursing Home	134
9	Fechheimer Brothers Co.	Clothing Manufacturing	130
10	Beverly Health Care	Health Care	106

Source: Greene County Industrial Development Authority
Last Updated: January 26, 2005

Industrial Development

Tax-exempt land is part of the Keystone Opportunity Zone (KOZ) program, which provides state and local tax abatement to businesses and residents locating in a designated zone. Through credits, waivers and broad-based abatements, total taxes on economic activity in these zones are reduced to nearly zero. Keystone Opportunity Zones are defined-parcel-specific areas with greatly reduced or no tax burden for property owners, residents and businesses. KOZ's are designated by local communities and approved by the state. The KOZ sites in Greene County are shown on *Figure 9-1: Commercial & Industrial*.

The Greene County Industrial Development Corporation (IDC) owns two industrial parks. Through the IDC, Greene County has 600-acres of tax-free land available for development through 2010.

EverGreene Technology Park

Owner: Greene County IDC
Municipality: Franklin Township
Type of Business Use
Industrial: No
Commercial: No
Mixed-Use: No
Residential: No
School District: Central Greene
Acreage of Site: 248
Subzone: KOZ - Greene Industrial Parks
Expiration Date: December 31, 2010



EverGreene Technology Park (Mackin, 2006)

EverGreene Technology Park encompasses 248 acres of land adjacent to Greene County Airport located off State Route 21 in Franklin Township. Funding for the road, water and sewer lines to the site include a \$700,000 grant from the state Department of Community and Economic Development and a \$479,000 grant from the Appalachian Regional Commission. Greene County also contributed \$450,000 to the project to install a high-bandwidth fiber optic line to the site. The first phase will consist of the development of four building sites on about 25 acres. The anchor tenant for the first building will be RJ Lee Group Inc., who was awarded a contract from the U.S. Air Force and plans to develop a data storage center at the site. Westmoreland County Community College also is expected to lease space in the building. In addition, the fiscal year 2007 Military Quality of Life and Veterans Affairs spending bill includes \$8 million for a Pennsylvania National Guard readiness center at EverGreene Technology Park in Waynesburg, Greene County. (<http://www.co.greene.pa.us/secured/gc/depts/pd/ida/egp.htm>).

Paisley Industrial Park

Owner: Greene County IDC
Municipality: Cumberland Township
Type of Business Use
Industrial: No
Commercial: No
Mixed-Use: No
Residential: No
School District: Carmichaels
Acreage of Site: 72
Subzone: KOZ - Greene Industrial Parks
Expiration Date: December 31, 2010



Paisley Industrial Park (Mackin, 2006)

Paisley is a 72-acre industrial park that is located at the intersection of Routes 21 and 88 in Cumberland Township. Businesses located in the park as of January 2006 include T-Tygart Industries, Inc, Charles Walker North America, Stahls Hotronix Universal Belting Resource, EMS Ambulance Service, and Fresenius Dialysis Center. Paisley Park has full public utilities and is located in Cumberland Township. The Greene County Industrial Development Authority (IDA) owns three KOZ sites in Greene County.

Meadowridge Business Park

Owner: Greene County IDA
Municipality: Perry Township
Type of Business Use
Industrial: No
Commercial: No
Mixed-Use: No
Residential: No
School District: Central Greene
Acreage of Site: 108
Subzone: KOZ - Greene Industrial Parks
Expiration Date: December 31, 2010

Meadowridge is a 90 acre business park located in Mt. Morris in Greene County just off Exit 1 of Interstate 79. As of January 2006, three companies are located at this business park—Bell's Wholesale Grocery, Morgantown Technical Services and ARO Mining.

Mt. Morris / Consol Industrial Park

Owner: Greene County IDA / Private
Municipality: Perry Township
Type of Business Use
Industrial: No
Commercial: No
Mixed-Use: No
Residential: No
School District: Central Greene
Acreage of Site: 25
Subzone: KOZ - Greene Industrial Parks
Expiration Date: December 31, 2010

The Mt. Morris Industrial Park is 23 acres and is located in Mt. Morris in Greene County just off Exit 1 of Interstate 79.

Mather Redevelopment Site

Owner: Greene County IDA
Municipality: Morgan Township
Type of Business Use
Industrial: No
Commercial: No
Mixed-Use: No
Residential: No
School District: Jefferson / Morgan
Acreage of Site: 49
Subzone: KOZ - Coal Site Remediation
Expiration Date: December 31, 2010

Two additional KOZ sites are located in Greene County that are not owned by either the IDC or IDA.

Northern Greene KOZ Site

Owner: Greene ARC
Municipality: Washington Township
Type of Business Use
Industrial: No
Commercial: No
Mixed-Use: No
Residential: No
School District: Central Greene
Acreage of Site: 65



Subzone: KOZ
Expiration Date: December 31, 2010

Eastern Greene / Shannopin Mines

Owner: Private
Municipality: Monongahela Township
Type of Business Use
Industrial: No
Commercial: No
Mixed-Use: No
Residential: No
School District: Southeastern Greene
Acreage of Site: 57
Subzone: KOZ - Coal Site Remediation
Expiration Date: December 31, 2010

Eastern Greene/Shannonpin Mines is a 55-acre coal remediation site abutting the Monongahela River in Monongahela Township. Access to public utilities has been an issue at the site. There is currently no public sewerage on site, which seriously hampers the size and intensity of potential tenants, and there are no plans to bring public sewerage to the site. In addition, there is also a sufficient amount of environmental remediation required before businesses can be accommodated at the site.

Labor Force

The state of the economy in Greene County is not represented by one number, but relies on insight provided by using several measures. As defined in the *Chapter 2: Demographics* of this Plan, Greene County's peers consist of 13 counties: Allegheny, Armstrong, Beaver, Butler, Fayette, Indiana, Lawrence, Washington and Westmoreland in Pennsylvania; and Marion, Marshall, Monongalia and Wetzel Counties in West Virginia. Performing a cross-sectional analysis of comparing Greene County with its peers, the SPC Region, the Greene County Region, and the states of Pennsylvania and West Virginia allows for the identification of statewide, regional and local impacts.

In addition, trend analysis is utilized to examine performance over time, which helps communities identify "shocks" to important local indicators. Shocks are when data show some quick, dramatic change, and the key is analyzing why it happened. For example, a high local unemployment rate may be a historic local problem, suggesting that job creation is imperative, or an increase in unemployment may just mirror national business cycle trends. Recognizing the economic factors that influence local industries can strengthen the local ability to prevent shocks, or at least quickly respond to them. Trend analysis is also useful for identifying growth opportunities, by recognizing if some sectors have recently increased in importance.

One tool useful for analyzing trends is an index of growth, which provides a cumulative measure of change over time and is a useful way to investigate local economic behavior relative to other economies. The resulting index allows for a comparison of the level of a particular economic variable to its level at the beginning of the time period. Three useful advantages of this approach are: placing all regional data on an index basis allows a direct comparison between regions; changes in the value of the index from one year to the next can be interpreted as a growth rate, so fast growth and slow growth can be identified; and by examining the index over a period of time, you can establish the relative stability of the local economy. An index of growth is calculated using the following formula:

$$\text{Index}_{r,t} = (Y_{r,t} / Y_{r,\text{base}}) \times 100$$

where Y = an economic variable (employment, population, etc.)
r = region
t = year
base = base year.

Combining cross-sectional analysis with trend analysis of the County's local economic indicators allows for indicators that have shown strength over time or are declining to be evaluated relative to peers, the SPC Region, the Commonwealth of Pennsylvania, three counties in West Virginia, and the state of West Virginia (Penn State, 2003). The following economic indicators offer a more specific examination of Greene County's economy, particularly over the last five-to-ten years, when data are available.



The index of growth for the labor force from 1995 to 2004 is shown in Table 9-7. Greene County with a 2004 index of growth of 110.4 has had one of the faster growing labor forces in the Planning Region, behind only Indiana (119.5), Fayette (115.3), Butler (114.5), Monongalia, WV (113.9) and Lawrence (111.9). The data show that despite Greene County's population losses, the labor force has been increasing incrementally since 1995.

Table 9-7: Index of Growth for Labor Force: 1995-2004

County / Region	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Allegheny	100.0	100.8	101.9	101.2	101.0	97.6	98.7	99.4	98.4	98.9
Armstrong	100.0	99.7	99.8	99.4	98.4	102.5	104.2	104.3	103.4	104.7
Beaver	100.0	101.0	102.7	102.6	102.4	104.5	106.0	106.8	105.9	106.4
Butler	100.0	103.4	106.4	107.7	109.6	107.8	110.7	113.0	113.6	114.5
Fayette	100.0	100.6	102.6	101.6	101.7	112.9	114.0	114.8	114.2	115.3
Greene	100.0	102.8	107.3	106.3	104.3	106.4	108.5	110.7	108.3	110.4
Indiana	100.0	101.0	102.4	100.5	98.4	109.3	114.5	117.0	115.7	119.5
Lawrence	100.0	101.6	103.5	103.4	103.3	112.4	111.3	112.0	111.0	111.9
Marion, WV	100.0	100.4	100.6	98.9	100.3	107.4	108.1	105.8	104.9	103.8
Marshall, WV	100.0	100.0	102.3	100.5	101.5	98.9	98.0	95.9	93.8	93.2
Monongalia, WV	100.0	101.6	101.0	100.5	102.5	108.3	109.2	109.4	112.6	113.9
Washington	100.0	101.0	102.7	102.9	103.3	103.8	106.0	107.3	106.7	107.5
Westmoreland	100.0	101.3	102.8	102.7	102.8	100.6	102.2	102.9	102.2	103.2
Wetzel, WV	100.0	101.1	99.4	99.1	104.5	94.7	91.0	90.8	88.8	88.5
Greene Region	100.0	100.9	102.1	101.5	101.6	100.1	101.3	102.0	101.2	101.8
SPC Region	100.0	101.1	102.5	102.1	102.1	101.3	102.8	103.7	102.9	103.7
Pennsylvania	100.0	101.1	101.5	96.9	94.2	98.4	99.7	98.1	98.3	98.4
West Virginia	100.0	101.1	101.9	102.7	103.5	103.0	102.3	101.9	101.2	100.3

*Base year is 1995

Source: U.S. Department of Labor, Bureau of Statistics

Economic Markets

A major force that will impact a county's local economy is the proximity to markets. Waynesburg, the county seat, is approximately 25 miles from Washington, PA; Morgantown, WV; and Uniontown, PA. These three cities are large enough and close enough to serve as market influences to Greene County. However, the transportation corridors connecting these areas to Greene County dictate the time and ease of travel. For instance, State Route 21 connects Uniontown to Waynesburg while Interstate 79 connects to Morgantown, WV and Washington PA. The Interstate is a limited access thoroughfare that offers travelers an accelerated ability to access these two potential employment centers while State Route 21 is a rural arterial that is posted for lower speed limits and restricted travel lanes.

Pittsburgh, PA; New Martinsville, WV; and Wheeling, WV are all within about 50 miles of Waynesburg, as shown in Table 9-8: Distance from Waynesburg to County Seats. Table 9-7 also shows the populations of these markets. With over 300,000 people, Pittsburgh is considerably

larger than Wheeling (31,419) or New Martinsville (5,984). Despite being about an hours commute, Pittsburgh has a much larger regional impact on Greene County, providing jobs for residents, while Wheeling and New Martinsville do not (see Table 9-11: Workers Living in Greene County by County of Work). Again, the cause and effect of major transportation routes on economic markets is shown in Table 9-7 as Wheeling and New Martinsville are not easily accessible from Greene County by a major transportation corridor. As such, despite being the second largest county seat within 100 miles of Greene County, Wheeling located in Ohio County, WV was not included in the study area.

Table 9-8: Distance from Waynesburg to County Seats

City	County	Population	Miles
Waynesburg, PA	Greene	4,184	-
Washington, PA	Washington	15,268	22.7
Morgantown, WV	Monongalia	26,809	26.8
Uniontown, PA	Fayette	12,422	27.8
Moundsville, WV	Marshall	9,998	42.0
Fairmont, WV	Marion	19,097	42.4
Pittsburgh, PA	Allegheny	334,563	52.0
New Martinsville, WV	Wetzel	5,984	53.5
Wheeling, WV	Ohio	31,419	55.7
Greensburg, PA	Westmoreland	15,889	63.5
Beaver, PA	Beaver	4,775	72.7
Butler, PA	Butler	15,121	86.7
Kittanning, PA	Armstrong	4,787	93.0
Somerset, PA	Somerset	6,762	94.2
New Castle, PA	Lawrence	26,309	98.3
Indiana, PA	Indiana	14,895	105.8

Distance to Markets

The data shows how regional economies will continue to affect the economic prosperity of Greene County residents. Therefore, it is essential to determine which regional markets are most likely to improve a county's local economy and direct economic development efforts to support those particular market advantages. The data represented in Table 9-9 shows the spatial distance from Waynesburg to surrounding county seats, including all peer counties and Ohio County, West Virginia and Somerset County, Pennsylvania. MSN Maps & Directions data used in this analysis were obtained by recording the distance and time output from the source point of Waynesburg to each peer county. MSN Maps & Directions also gives time data which can be used to calculate speed. General trends from this data are that shorter trips are often slower, i.e. a lower miles per hour, while longer trips are quicker.



Table 9-9: Distance from Waynesburg to Surrounding Markets

City	County	2000 Population	'As the Crow Flies' Distance Using GIS Miles	Data from MSN Maps and Directions		
				Miles	Minutes	MPH
Waynesburg, PA	Greene	4,184	-	-	-	-
Washington, PA	Washington	15,268	19	22.7	27	50.4
Morgantown, WV	Monongalia	26,809	22	26.8	31	51.9
Uniontown, PA	Fayette	12,422	24	27.8	37	45.1
Moundsville, WV	Marshall	9,998	30	42.0	52	48.5
Fairmont, WV	Marion	19,097	29	42.4	44	57.8
Pittsburgh, PA	Allegheny	334,563	39	52.0	57	54.7
New Martinsville, WV	Wetzel	5,984	40	53.5	82	39.1
Wheeling, WV	Ohio	31,419	31	55.7	58	57.6
Greensburg, PA	Westmoreland	15,889	44	63.5	67	56.9
Beaver, PA	Beaver	4,775	56	72.7	78	55.9
Butler, PA	Butler	15,121	68	86.7	96	54.2
Kittanning, PA	Armstrong	4,787	72	93.0	101	55.2
Somerset, PA	Somerset	6,762	59	94.2	97	58.3
New Castle, PA	Lawrence	26,309	77	98.3	101	58.4
Indiana, PA	Indiana	14,895	74	105.8	114	55.7

Source: MSN Maps & Directions, Mackin Engineering Company GIS Dept.

In addition, time data can be used to approximate the quality of the roads connecting Waynesburg with other county seats. Distances are approximate and vary depending on actual origin and destination. Census 2000 population includes only the population living within the city limits, not a regional measure of market size. For example, Morgantown, WV and Uniontown, PA are 26.8 and 27.8 miles from Waynesburg, respectively. However, it takes about 6 more minutes to get to Uniontown. This can be largely attributed to Morgantown be accessible from I-79, while Uniontown is accessed using State Route 21. Another example shows that Beaver (78 minutes) and New Martinsville, WV (82 minutes) are both approximately 80 minutes from Waynesburg. However, to get to Martinsville would require an additional 19.2 miles. Again, Beaver is located near I-79, while Martinsville is not.

Although I-79 has made Pittsburgh more accessible, this major market remains 52 miles away regardless of speed. In comparison, some areas with closer proximity to Pittsburgh, such as Cranberry Township, Butler County (22.2 miles) and Peters Township, Washington County (19.6 miles) have been growing at a rate much faster than Greene County.

Employment

County of Residence for Persons Employed in Greene County

Table 9-10 shows the number and percentage of workers employed in Greene County by the county in which they reside for 1970, 1980, 1990 and 2000. The percentage of Greene County workers that live in Greene County has remained steadily around 70 to 75 percent. However, the distribution of the remaining 25 to 30 percent of the employees has changed significantly.

Table 9-10: Workers Employed in Greene County by County of Residence

County of Residence	Total Employees				Percentage of Employees			
	1970	1980	1990	2000	1970	1980	1990	2000
Allegheny, PA	0	210	73	144	0.0%	1.6%	0.7%	1.1%
Fayette, PA	1,997	2,543	1,214	1,205	20.4%	19.3%	10.8%	9.3%
Greene, PA	7,073	9,141	8,553	9,330	72.3%	69.2%	76.2%	72.0%
Indiana, PA	0	0	0	8	0.0%	0.0%	0.0%	0.1%
Lawrence, PA	0	0	0	14	0.0%	0.0%	0.0%	0.1%
Washington, PA	384	778	839	925	3.9%	5.9%	7.5%	7.1%
Westmoreland, PA	0	71	100	228	0.0%	0.5%	0.9%	1.8%
Marion, WV	13	27	31	204	0.1%	0.2%	0.3%	1.6%
Marshall, WV	27	20	74	185	0.3%	0.2%	0.7%	1.4%
Monongalia, WV	283	411	336	408	2.9%	3.1%	3.0%	3.1%
Wetzel, WV	6	0	0	76	0.1%	0.0%	0.0%	0.6%
Elsewhere	16	108	122	232	0.2%	0.8%	1.1%	1.8%
Total Employees:	9,783	13,201	11,220	12,959	100.0%	100.0%	100.0%	100.0%

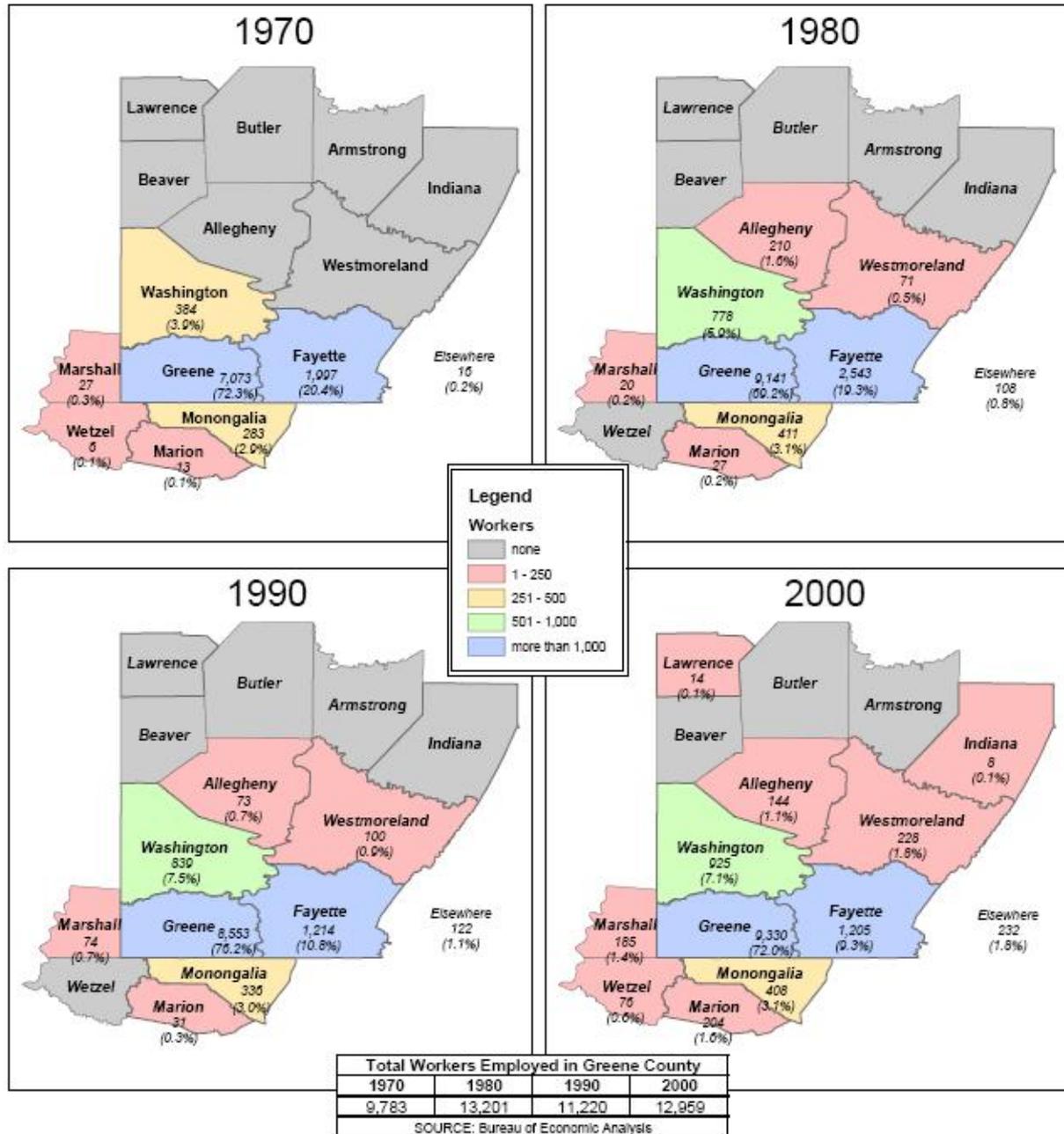
Source: Bureau of Economic Analysis

The most notable decline has been in Fayette County, which was home to 20.4 percent of Greene County employees in 1970, but had fallen under ten percent in 2000. This is probably due to two major factors. The first is the decline in employment of the mining industry, which has been the dominant economic sector in Greene County for the last thirty years. The increase of workers who reside in Fayette County in 1980 followed by the steep drop-off in 1990 correlates to the prospering and then declining mining industry in the preceding decades, respectively. The second factor is an improving national highway and road infrastructure that has given residents of Allegheny, Washington, and Monongalia, WV, all counties with cities along Interstate 79, better access to jobs in Greene County. The improved road network allows residents of other counties to live farther from the employment available in Greene County, although approximately the same percentage of workers continues to live in the County.

Figure 9-2 displays a graphic representation of the data explained in Table 9-9: Workers employed in Greene County by County of Residence.



Figure 9-2: Workers Employed in Greene County by County of Residence



Industry Employment by County of Residence

Examining county of residence data by industry gives a more detailed picture of the commuting patterns of county workers by industry. Table 9-11 shows the number of jobs by industry sector that are available in Greene County, and the number and percentage of those jobs worked by Greene County residents. The sectors employing the most people are services (3,188); state and local government (2,253); and forestry, fishing, agricultural support, farms and mining (2,063). The sectors with the largest percentage of Greene County workers living in Greene County are information, finance and insurance, and real estate (88.7 %); and services (82.5 %), while the lowest percentage of Greene County workers living in Greene County are forestry, fishing, agricultural support, farms and mining (40.5 %), and construction (66.2 %).

Table 9-11: Workers Employed in Greene County by County of Residence by Industry

County of Residence	Industry	Workers	Average Wages	Percentage
Greene County	Construction	390	\$23,994	66.2%
Total	Construction	589		100.0%
Greene County	Federal civilian + Military	195	\$26,402	70.7%
Total	Federal civilian + Military	276		100.0%
Greene County	Forestry + Fishing + Ag support + Farms + Mining	835	\$53,663	40.5%
Total	Forestry + Fishing + Ag support + Farms + Mining	2,063		100.0%
Greene County	Information + Finance and Insurance + Real Estate	455	\$27,569	88.7%
Total	Information + Finance and Insurance + Real Estate	513		100.0%
Greene County	Manufacturing	585	\$22,163	71.1%
Total	Manufacturing	823		100.0%
Greene County	Services (except private households)	2,630	\$19,352	82.5%
Total	Services (except private households)	3,188		100.0%
Greene County	State and local government	1,635	\$29,758	72.6%
Total	State and local government	2,253		100.0%
Greene County	Utilities + Transportation and Warehousing	525	\$34,422	70.8%
Total	Utilities + Transportation and Warehousing	742		100.0%
Greene County	Wholesale Trade + Retail Trade	1,120	\$20,829	75.2%
Total	Wholesale Trade + Retail Trade	1,489		100.0%
Greene County	Total	9,330		72.0%
Total	Total	12,959		100.0%

Source: US Census, 2000

The remaining industries are similar to the County's average of between 70 and 75 percent of Greene County's workers living in the County. The higher wage jobs, such as forestry, fishing, agricultural support, farms and mining are worked by a majority of residents from other counties. In general, Greene County residents tend to earn less than residents of other counties working in the same industries. This data indicates that workers are either leaving Greene County when they earn more money or choosing to commute rather than move to Greene County when they accept high paying jobs.



Place of Work

Although the number of Greene County residents finding employment grew by about 2,300 from 1970 to 2000, the percentage of these workers finding work in Greene County has decreased by about five percent from 68.2 percent to 63.5 percent as shown in Table 9-12: Workers Living in Greene County by County of Work. According to the 1979 County Comprehensive Plan, in 1960, 83.6 percent of residents were employed at jobs located within the County which results in a 20 percent decrease in the last forty years. By contrast, the number of Greene County workers employed in Allegheny, Fayette, Washington, and Monongalia counties has increased. This is largely related to improvements to highway and road infrastructure that has allowed people to live longer distances from their work without an equally longer commute time.

Table 9-12: Workers Living in Greene County by County of Work

County of Work	Total Employees				Percentage of Employees			
	1970	1980	1990	2000	1970	1980	1990	2000
Allegheny, PA	285	372	475	704	2.7%	2.9%	3.6%	4.8%
Beaver, PA	13	36	81	37	0.1%	0.3%	0.6%	0.3%
Butler, PA			20	22			0.2%	0.1%
Fayette, PA	448	605	697	774	4.3%	4.7%	5.2%	5.3%
Greene, PA	7,073	9,141	8,553	9,330	68.2%	71.6%	64.4%	63.5%
Washington, PA	866	1,064	1,358	1,949	8.4%	8.3%	10.2%	13.3%
Westmoreland, PA	31	83	40	123	0.3%	0.7%	0.3%	0.8%
Marion, WV		76	79	57		0.6%	0.6%	0.4%
Marshall, WV	44	84	75	75	0.4%	0.7%	0.6%	0.5%
Monongalia, WV	517	1,038	1,424	1,439	5.0%	8.1%	10.7%	9.8%
Wetzel, WV	14	14	29		0.1%	0.1%	0.2%	
Elsewhere	261	256	446	177	2.5%	2.0%	3.4%	1.2%
Not Reported	817				7.9%			
Total Employees:	10,369	12,769	13,277	14,687	100.0%	100.0%	100.0%	100.0%

Source: US Census, 2000

Industry Employees by Place of Work and Place of Residence

Table 9-13 displays the number of County residents working in a given industry sector and the number of employees of a given sector who are employed in Greene County. A comparison of these numbers indicates whether residents of the County work in similar industries as what the employers in the County offer. For example, over 2000 employees work in the forestry, fishing, agricultural support, farms and mining industries, while only 1,000 residents are employed in this sector. On the other hand, only 589 employees work in the construction industry, while there are 966 residents employed in this sector.

When more residents are employed in an industry than jobs available in the area of residence can indicate that the skill level of County residents suffers in a particular area. This situation occurs in the Greene County employment sectors of forestry, fishing, agricultural support, farms and mining industries and state and local government. If there are more jobs in a given industrial sector than residents working in that sector coupled with a high unemployment rate, a situation may exist where the job skills of the residents do not meet the requirements of employers of that given industry sector. For Greene County the suspect industries where job skills of residents may be lacking include forestry, fishing, agricultural support, farms and mining; and state and local government.

Table 9-13: Industry Employees by Place of Work and Place of Residence		
Industry	Employees Working in Sector Living in Greene County	Employees Working in Sector Working in Greene County
Construction	966	589
Federal civilian + Military	331	276
Forestry + Fishing + Ag support + Farms + Mining	1,032	2,063
Information + Finance and Insurance + Real Estate	738	513
Manufacturing	1,268	823
Private households	38	30
Self-employed (part) + Unpaid family workers	1,086	993
Services (except private households)	4,287	3,188
State and local government	2,075	2,253
Utilities + Transportation and Warehousing	923	742
Wholesale Trade + Retail Trade	1,943	1,489
Total	14,687	12,959
Source: US Census, 2000		



Regional Unemployment Rate

In the last ten years, the unemployment rate has decreased for most of the counties in the region as shown in Table 9-14: Unemployment Rate Planning Region. However, most of this decrease occurred between 1995 and 2000. Since 2000, unemployment rates have begun to increase, although at a much slower rate for most counties. The States of Pennsylvania and West Virginia, and Marion and Monongalia Counties are the only areas where the unemployment continued to decrease. Pennsylvania's unemployment rate decreased more from 2000 to 2004 (1.0 percent) than from 1995 to 2000 (0.6 percent). West Virginia, on the other hand, had a much larger decrease between 1995 and 2000 (2.7 percent), and only a 0.2 percent increase between 2000 and 2004. Marion decreased 3.1 percent between 1995 and 2000, and then another 0.8 percent between 2000 and 2004. Monongalia increased between 1995 and 2000 (0.1 percent) and then decreased by 1.0 percent between 2000 and 2004. This data suggests that variances in the County's unemployment rate are more related to changes in the regional economy than the state or national economies, but are related to industry sectors that are thriving nationally.

Table 9-14: Unemployment Rate: Planning Region, 1995, 2000-2004

County / Region	1995	2000	2001	2002	2003	2004
Allegheny	5.3	4.0	4.3	5.3	5.7	5.4
Armstrong	9.4	5.7	6.4	6.7	6.8	7.2
Beaver	6.0	4.3	5.0	6.1	6.2	5.9
Butler	5.5	4.1	4.5	5.3	5.5	5.6
Fayette	9.6	5.7	6.2	7.1	7.7	7.8
Greene	10.4	5.9	5.7	6.2	6.8	6.7
Indiana	9.2	5.8	5.2	6.1	6.1	6.3
Lawrence	7.0	4.9	5.5	6.2	6.2	6.4
Marion, WV	8.8	5.7	5.1	5.9	5.6	4.9
Marshall, WV	7.6	5.7	6.0	6.6	6.4	6.0
Monongalia, WV	4.3	4.4	3.7	4.0	3.9	3.4
Washington	6.7	4.6	5.1	6.0	6.0	5.9
Westmoreland	6.7	4.6	5.1	5.8	6.0	6.1
Wetzel, WV	11.3	8.0	8.2	8.1	8.3	8.7
Greene Region	6.0	4.4	4.7	5.6	5.9	5.7
SPC Region	6.2	4.4	4.8	5.7	5.9	5.8
Pennsylvania	6.0	5.4	5.0	4.9	4.6	4.4
West Virginia	7.9	5.5	5.2	5.9	6.0	5.3

Source: U.S. Department of Labor, Bureau of Statistics

Retail Gap Analysis

The retail gap analysis offers information on where in terms of retail establishments there is a "gap" in the supply and demand for that particular product. This "gap" offers an opportunity for new retail stores to capture the demand that is not being met. The RMP Opportunity Gap – Retail Store Types report provides a comparison between both business sales and household expenditure estimates for a variety of retail outlets. The retail stores contained in this report are derived from the North American Industry Classification System (NAICS). The household expenditure estimates constitute the demand column of the report and the business sales estimates constitute the supply column. The difference between demand and supply represent the opportunity or surplus available for each retail outlet in the specified reporting geography. When the demand is greater than the supply, there is an opportunity for the retail outlet. For purposes of this analysis, Waynesburg was chosen as the central location of the county and a 30 mile radius was used to include retail activities not only within the entire county but also into all the surrounding counties.

Table 9-15 illustrates Greene County's opportunities for retail growth.

Table 9-15: Retail Gap Analysis

RETAIL GAP ANALYSIS	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales Includes Eating and Drinking Places	8,921,020,633	7,903,546,464	1,017,474,169
Motor Vehicle and Parts Dealers	1,834,664,620	1,671,953,766	162,710,854
Furniture and Home Furnishings Stores	217,780,701	153,097,295	64,683,406
Electronics and Appliance Stores	193,962,295	91,055,556	102,906,739
Building Material, Garden Equip Stores	978,787,945	1,026,105,111	(47,317,166)
Food and Beverage Stores	1,108,296,396	819,538,789	288,757,607
Health and Personal Care Stores	441,133,610	524,917,368	(83,783,758)
Gasoline Stations	955,606,341	1,102,636,904	(147,030,563)
Clothing and Clothing Accessories Stores	372,887,237	172,340,715	200,546,522
Sporting Goods, Hobby, Book, Music Stores	151,707,432	113,249,464	38,457,968
General Merchandise Stores	1,065,245,147	891,230,759	174,014,388
Miscellaneous Store Retailers	232,357,093	177,548,751	54,808,342
Non-Store Retailers	581,728,415	491,662,385	90,066,030
Foodservice and Drinking Places	786,863,400	668,209,599	118,653,801
GAFO*	2,092,757,647	1,499,857,699	592,899,948
*GAFO (General merchandise, Apparel, Furniture and Other) represents sales at stores that sell merchandise normally sold in department stores. This category is not included in Total Retail Sales Including Eating and Drinking Places.			



Tourism

Tourism information for Greene County was derived from a report for 2005 commissioned by and available from the Pennsylvania Department of Commerce and Economic Development (DCED). The most recent report published by DCED is for 2005.

Visitor Spending

Table 9-16: Visitor Spending							
Year	Transportation	Food & Beverage	Lodging	Shopping	Entertainment	Other	Total
2005	5.95	6.34	3.11	3.49	0.65	2.17	21.70
2004	6.36	6.91	3.58	3.35	0.60	1.73	22.53
2003	5.99	5.94	3.36	3.15	0.54	1.61	20.59

Source: PA DCED, Global Insight, Inc. in partnership with D.K. Shifflet and Associates, Ltd.

Total visitor spending in Greene County increased by \$1.11 million from 2003 to 2005.

Tourism Wages

Table 9-17: Tourism Wages				
Year	Direct	Indirect	Induced	Total
2005	8,400,328	2,881,381	3,587,021	14,868,730
2004	8,724,665	2,988,232	3,719,399	15,432,296
2003	8,124,007	2,759,124	3,434,233	14,317,364

Source: PA DCED, Global Insight, Inc. in partnership with D.K. Shifflet and Associates, Ltd.

There was a 3.7 percent increase in tourism wages from 2003 to 2005.

Tax Revenues

Table 9-18: Tax Revenues			
Year	Federal	State and Local	Total
2005	3,427,629	2,203,212	5,630,840
2004	3,501,839	2,250,912	5,752,751
2003	3,254,734	2,092,078	5,346,812

Source: PA DCED, Global Insight, Inc. in partnership with D.K. Shifflet and Associates, Ltd.

Tax revenues for Greene County have decreased slightly between 2004 and 2005, from 5,752,751 to 5,630,840.

Tourism Employment

Table 9-19: Tourism Employment				
Year	Direct	Indirect	Induced	Total
2005	330	74	99	503
2004	343	77	103	522
2003	326	72	96	494
Source: PA DCED, Global Insight, Inc. in partnership with D.K. Shifflet and Associates, Ltd.				

The number of persons whose employment was directly or in part the result of tourism increased from 494 to 503 between 2003 and 2005, which follows the increase in visitor spending between 2003 and 2005.

Tourism Gross State Product

Table 9-20: Gross State Product				
Year	Direct	Indirect	Induced	Total
2005	10,240,078	4,371,567	5,727,589	20,339,234
2004	10,619,763	4,530,203	5,901,192	21,051,158
2003	9,669,251	4,142,651	5,396,354	19,208,255
Source: PA DCED, Global Insight, Inc. in partnership with D.K. Shifflet and Associates, Ltd.				

The increase of over \$11 million in Gross State Product between 2003 and 2005 corresponds to the increase in visitor spending.

Agritourism

Greene County has begun to look at agritourism efforts in order to promote their tourism efforts. Agritourism is a style of vacation in which hospitality is offered on farms. This may include the opportunity to assist with farming tasks during the visit. Agritourism is wide-spread and includes any farm open to the public at least part of the year. Tourists can pick fruits and vegetables, ride horses, taste honey, learn about wine, shop in gift shops and farm stands for local and regional produce or hand-crafted gifts, and much more. Each farm generally offers a unique and memorable experience suitable for the entire family.

Agritourism is being developed as a valuable component of a business model to support many agricultural entities when the farm products they produce are no longer economically competitive otherwise. To help promote the single agritourism operations, some farms get together to form festivals, tours or other events. People are more interested in how their food is produced and want to meet the producers and talk with them about what goes into food production. Children who visit the farms often have not seen a live duck, or goat, and have not picked an apple right off the tree. This form of expanded agritourism has given birth to what are often called "entertainment farms." These farms cater to the pick-your-own crowd, offering not only regular farm products, but also food, mazes, open-pen animals, train rides, picnic facilities and pick-your-own produce (definition of agritourism from www.citydata.com).



C. Development Strategies

Overall, the goal of the County's Economic Development Plan must be to diversify and expand the economy; control spending; assess the overall approach to tax policies; and pursue new or expanded non-tax revenue sources. Opportunity targets include four manufacturing industries (plastics, powder metals, industrial machinery, and wood products) and three non-manufacturing industry targets (recreation and tourism, data intensive firms and senior care). Those interested specifically in recreational development within Greene County should fully research possible impacts related to coal mining, other resource extraction activities, or utility infrastructure early on in the process.

Greene County has the following Capital Budget Projects scheduled for the 2008 / 2008 fiscal year:

- Carmichaels Clinic Expansion
- Tire Recycling in Paisley
- Site Preparation- Cornerstone Health Care Center
- Community Aquatic Center
- Expansion/Addition of Southwest Regional Medical Center
- Mather Gob Pile Reclamation
- Jefferson Township manufacturing facility
- Meadow Ridge Business Park
- Downtown Waynesburg Streetscape
- Greene County ARC Project
- Downtown Waynesburg Revitalization Mixed-Use Impact Project

Encourage Mining-Related Industries

The mining industry is currently the major economic driver in Greene County and this trend is not going to change given that many industry officials believe Greene County to be one of the last major deposits of high-quality, high-Btu coal left in the United States. The mining industry has a very high location quotient for Greene County (as seen in Table 9-4: Industry Size; Greene County Compared with United States, 2004). As seen in Table B in the appendix, data suggests that the industry as a whole in southwest Pennsylvania is experiencing negative growth however, the sub sector "support activities for mining" is projected to have an increase over the next seven years. Support activities for mining can create another industry in the County and working down the supply chain can not only help create economies of scale for local employers, but additional jobs at a variety of wage levels. The available KOZ sites offer potential locations for expanding this support industry.

Coal mining specifically plays the largest role in the economic picture of Green County. The top two employers are coal companies that employ a total of 2,274 people, which is almost double that of the remaining top employers listed. Greene County needs to consider other high paying jobs available in order to retain their workforce so as to not completely depend on the coal as a natural resource to maintain the majority of their economy.

Promote Healthcare Opportunities

Healthcare has a distinct career ladder/lattice and there are a wide variety of growing occupational vacancies at all skill levels. Promoting these opportunities and aligning educational offerings to fill these gaps will have a significant positive impact on the emerging, existing and transitional workforce available to Greene County. In southwest Pennsylvania, community care facilities for the elderly are projected to increase by an astounding 46.2 percent over a seven year period. Waynesburg College and other surrounding educational institutions should promote entry into this growing field and continued training. Waynesburg College's nursing program, including the graduate nursing degree and the nursing doctoral program is an excellent local resource to capitalize on for future growth in this industry.

Expand the Transportation / Warehousing Industry

Transportation has a high location quotient in Greene County (as seen in Table 9-4: Industry Size; Greene County Compared with United States, 2004). There is projected growth within the industry specifically in support activities for transportation, especially support activities for air and road transportation. There is a large amount of workforce and economy that is derived from the manufacturing industry. While the industry is on a decline, there could be the opportunity to create a transportation corridor or offer warehousing specifically outside of Waynesburg. Proximity to cities such as Pittsburgh, Morgantown, even Youngstown and Harrisburg make Greene County a feasible location for the transportation/warehousing industry. Although the data suggests that manufacturing as an industry as a whole is seeing a decline, new industries, such as supporting the mining industry, could bring additional need for this transportation and storage.

Promote Tourism as Economic Development

The strategic vision for Greene County tourism should be to enhance the County's position among Pittsburgh and its Countryside counties. These counties include Allegheny, Armstrong, Beaver, Butler, Fayette, Indiana, Lawrence, Somerset, Washington, and Westmoreland County. Currently, Greene County has the lowest percentage of share in the region in visitor spending with only 0.4 percent. Allegheny County has the highest percentage with 56.1 percent followed by Westmoreland County with 12.2 percent. Indiana and Lawrence Counties have the second and third lowest shares with 2.4 and 2.2 respectively. These percentages are based on a four year average, from 2002-2005.

With 41.2 percent of the land in Greene County being agricultural land, agritourism is an area where Greene County could promote their tourism initiatives in order to achieve growth. The County has numerous farms, several wineries scheduled to be opened in 2008, a blueberry farm scheduled to be open in 2009, and unusual livestock in the area, including alpacas, lamas, buffalos, Scottish highlander beef, limousine cattle, rodeo bulls, short horn cattle, and elk to capitalize on. The County has just begun to expand their agritourism efforts by working with the local alpaca farm and the Scottish highlander beef farm in scheduling tourist group's visits, by having a "Pick Your Own Blueberry" festival and by continuing to identify individuals who might be



interested in promoting items made within Greene County outside of the County or the state. However, this is an area that could be utilized to increase tourism to the area.

Additionally, Greene County could look to the “creative arts” as a strategy for increasing tourism. With proximity to larger cities, Greene County could be a great weekend or day-trip destination for travelers. Data suggests that the growth in accommodations and food services could support the increase in tourism and there is also the opportunity to expand on retail offerings. A variety of creative arts strategies could be pursued, from theater, to art museums, to antique stores, all attracting interested tourists with disposable income. Encouraging local “theme” festivals around the arts and group tours to the region could further expand the tourism industry.

Improve Information Technology

Focusing on this growing industry would involve the need to recruit and retain skilled workers to the area. Several strategies for capitalizing on growth in this sector exist. For instance, a collaborative strategy with local education and training providers should be explored. This industry typically has higher starting wages, which would have a direct effect on all aspects of the economy (for instance, increased retail spending). This industry is innovative and so attracting entrepreneurs to the area with the available KOZ sites should be a priority. These sites could be the site of a “Center For Excellence” or house Research and Development (R & D) companies or companies that feed the information technology industry supply chain. As seen in Table 9-4: Industry Size; Greene County Compared with the United States, Greene County has a low location quotient for information technology, indicating that there is not a significant cluster in the area and so there is the opportunity to create all aspects of the supply chain within the County and improve the regional workforce to create a growing cluster. Supporting this sector also includes supporting internal information technology development across all sectors within existing organizations. Improving internal technology systems will help Greene County employers stay competitive in regional and national markets.

Encourage Retail Expansion

Retail services is an opportunity for growth in Greene County. As seen in Table 9-10: Retail Gap Analysis, retail opportunities exist for Greene County in motor vehicles and parts dealers, furniture and home furnishing stores, electronics and appliance stores, food and beverage stores, clothing and clothing accessory stores, sporting goods, hobby, book and music stores, general merchandise stores, foodservice and drinking places, and finally, non-store retailers. Retail establishments that Greene County should not invest further in include gasoline stations, health and personal care stores, and building material and garden/equipment stores. New retail establishments could be tied into the tourism strategy. In addition, adding retail stores in areas where there is an opportunity for growth will create numerous jobs especially for entry-level or lower skilled workers.

Enhance the Economic Development "System" to Support Key Industry/Cluster Development

Best practice research of economic development systems in rural areas across the country suggests that in order to focus on and enhance economic growth within a region, a deliberate, intentional strategy should be orchestrated through a collaborative, coordinated public/private partnership effort. This effort should be directed toward implementing the key economic development projects and priorities. Ideally, the system would include coordinated efforts toward business recruitment, business retention, workforce development, intelligence/data gathering, sources of funding, marketing, community development, and technology deployment. Greene County would benefit from a dedicated effort to define the ideal model for economic development for the county. From that the county can then develop a specific implementation action plan with specific roles for individual organizations, both private and public, in order to address and achieve the other recommendations in this plan.

Greene County has partnered with local school districts and the Career and Technology Center to develop a workforce development brochure to inform students and parents about existing jobs in technical fields. School superintendents and representatives from the Girl Scouts of America have developed a mentoring program where local high school students can work with current college students to prepare them for interviewing, job performance, as well as life skills.



GOAL: Diversify the Economy

Strategy: Conduct an Economic Development Study that would define the ideal model for economic development for the county with a specific implementation action plan to identify private and public partnerships and responsibilities.

Strategy: Prioritize Greene County KOZ and industrial sites for development for the subsector "support activities for mining."

Strategy: Promote healthcare opportunities and work to align educational offerings to fill the gaps in demand for healthcare positions. Validate the data with local employers, consider primary forecasting, and consider mapping ladder/lattice opportunities.

Strategy: Establish I-79 as a transportation corridor and develop the Mt. Morris Interchange Area to support shipping, freight, and warehousing activities.

Strategy: Conduct a Tourism Development Study that would define aspects such as agritourism and creative arts initiatives in order to grow the tourism industry and create uniqueness to Greene County.

Strategy: Establish a collaborative strategy with local education and training providers to recruit and retain skilled information technology workers.

Strategy: Ensure that educational providers (high school, career and technology center, and colleges / universities) collaborate with workforce and employment sectors to enhance the preparedness of local students for the workforce.

Strategy: Promote the Waynesburg KIZ to foster business innovation and create entrepreneurial opportunities within the Waynesburg / I-79 region.

Strategy: Identify small business development opportunities that would encourage the start-up of new retail establishments and facilitate connections to the tourism economic development strategy.