Plan It PIQUA

Preserve the Past — Empower the Future

2007 Comprehensive Plan Update
Appendix

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Prepared For
The City of Piqua, Ohio

Plan It PIQUA

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COMPREHENSIVE PLAN UPDATE

Appendix

COMPREHENSIVE PLAN UPDATE

DECEMBER 14, 2007

PREPARED FOR

CITY OF PIQUA

PREPARED BY

ACP–VISIONING & PLANNING, LTD.

Plan It PIQUA
Preserve the Past — Empower the Future

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Preserve the Past — Empower the Future

I. Plan It Piqua

PUBLIC MEETINGS REPORT

PREPARED FOR
THE CITY OF PIQUA, OHIO

PREPARED BY
ACP–VISIONING & PLANNING, LTD

FEBRUARY 06, 2007

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Public Meeting Summary

Plan It PIQUA

Preserve the Past — Empower the Future

The goal of the Plan It Piqua Comprehensive Plan Update is to prepare a framework to guide growth and development in the City of Piqua

A. Overview

The City of Piqua launched a project to update its Comprehensive Plan to guide growth and development in the City over the next 20 years. The plan will address a variety of issues including land use and development, transportation, parks and recreation, open space, community services, and other issues that may affect the quality of the community. The resulting plan will provide guidelines for the community to develop in a sustainable fashion.

The Comprehensive Plan update is led by a citizen-based Steering Committee and incorporates opportunities for citizen input. The process is open to all citizens and stakeholders and offers an opportunity to develop a common, cooperative future for the City of Piqua. The information and insight gathered from the participant feedback will be utilized by the Steering Committee in the planning process. The purpose of this report is to summarize the structure and results of the public meeting. Included are the results of an exercise to brainstorm ideas for the future of the City of Piqua area, the results of a "Strong Places, Weak Places" exercise, and a summary of exit questionnaire comments. The report will be used by the Steering Committee to develop principles for the Comprehensive Plan. Principles are statements of purpose intended to describe the direction of future development and redevelopment in the City of Piqua.

A summary of the meetings is provided below. More detailed information about the meetings can be found in the appendices.

Public Meeting Dates and Location

01/22/2007 Bennett Intermediate School

01/23/2007 Edison Community College

01/24/2007 A Learning Place

01/25/2007 YWCA

B. Meeting Structure

The four public meetings were held between January 22 –25, 2007 at various locations throughout the community. The table in the sidebar displays the meeting locations and dates. Nearly 100 people participated in the meetings. The meeting agenda is outlined below:

AGENDA

1. Welcome
2. Open Assembly
3. Break into Small Groups
   a. Activity #1: Ideas for the Future
   b. Activity #2: Strong Places, Weak Places
   c. Exit Questionnaire
4. Adjourn

C. Activity 1: Ideas for the Future

After the initial welcome and project overview, the meeting participants were led through a brainstorming exercise to imagine their version of an "ideal" Piqua in the future—and to begin to think about how to turn their vision into reality. The meeting facilitator read a visualization statement to participants and then posed the question "What should be done in the City of Piqua to make the community the best that it can be in the coming years?" The facilitators recorded all responses on a form provided to them.

In total, 291 ideas for the future were generated during the Public Meeting. The ideas were categorized according to the elements of the Comprehensive Plan. Some of these ideas were assigned to more than one category as they could be applied to various elements. These ideas will serve as the basis for the Goals and Strategies of the Comprehensive Plan. Table 1.1 is a summary of the ideas according to the categories of the plan. Please refer to Appendix A for the complete list of ideas from the Public Meetings.

TABLE 1.1 - PUBLIC MEETING IDEAS

Category	% of Total
Community Services and Facilities	38%
Economic Development	21%
Transportation	11%
Implementation	8%
Housing	5%
Natural Environment	5%
Built Environment	5%
Redevelopment Plans	3%
Utilities	2%
Total	**100%**

Source: January Public Meetings 2007

D. Activity 2: Strong Places, Weak Places

Participants also worked in small groups to complete a mapping activity entitled "Strong Places, Weak Places." This section is a summary of the Strong Places, Weak Places activity.

During the mapping activity, each group was asked to identify specific strong and weak places in Piqua. In considering the strong places, participants were asked to consider the concepts discussed during the "Imagining the Future" activity—places that are desirable to visit, represent conditions they would like to see more often in the community, and reflect well on the community. For weak places, participants were asked to consider those places that are undesirable to visit, are eyesores, or that generally reflect poorly on the community.

Among the strong and weak places, the responses recorded with the greatest frequency are displayed in Table 1.2.

TABLE 1.2 - STRONG PLACES AND WEAK PLACES

Strong Places	Weak Places
Parks System	Gateways/Entrances to Piqua
Bike Path	Old Hospital
Downtown Historic District	Vacant Industry
Edison Community College	Road Infrastructure
Northwest Residential Area	South End Rental Properties
Vocational School	Old Fieldhouse Area

Source: January Public Meetings 2007

E. Exit Questionnaire Results Summary

Approximately 100 residents attended one of the public meetings. Nearly all who attended the meetings (95%) completed the exit questionnaire. The questionnaire served as a way to document who attended the meetings to determine if the event was an inclusive community process, and to evaluate if participants reflected the demographic stratification of the City of Piqua based on 2000 Census data.

The questionnaire was also intended to gauge the participants' motivation for attending, level of satsifaction with meetings, and insight on how they learned about the meeting. The complete Exit Questionnaire results are located in Appendix C.

Appendices

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A.	Ideas for the Future Results	A.1
B.	Strong Places, Weak Places Results	B.1
C.	Summary of Exit Questionnaires	C.1

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Appendix A

Ideas for the Future Results

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Appendix A: Ideas for the Future Results

A. Introduction

This appendix includes a summary and complete list of ideas reported by each table leader.

In total, 291 ideas for the future were generated during the public meetings. These ideas will serve as the basis for the recommendations of the Comprehensive Plan. Some of the ideas (60) were given a second category assignment, as they were not specific to one category. The total number of ideas for both categories was 347. Table A.1 is a summary of the ideas according to category.

TABLE A.1 - PUBLIC MEETING COMBINED IDEAS

Category	Ideas	% of Total
Community Services and Facilities	134	39%
Economic Development	75	22%
Transportation	40	12%
Implementation	28	8%
Housing	19	5%
Natural Environment	18	5%
Built Environment	18	5%
Redevelopment Plans	12	3%
Utilities	3	1%
Total	**347**	**100%**

Source: January Public Meetings

B. Idea Data Base

Listed below in this section are the complete results of the Idea Exercise. The table is organized based on the following columns:

Date……Date of the meeting

Group…… Group from the corresponding meeting

Idea……The specific idea transferred from the table leader's form.

Category……. Assignment of the idea.

The legend for the category codes used in the Idea Table is described below:

Categories	**Code**
Built Environment	BE
Transportation	T
Community Services and Facilities	CS
Economic Development	ED
Natural Environment	N
Redevelopment Plans	RP
Utilities	U
Housing	H
Implementation	I

Date	Group #	Idea Text	Category
1/9/2007	1	Maintain a balance of land use w/ expansion with greenspace	BE
1/22/2007	1	Mixed land use	BE
1/22/2007	3	Annexation to protect our space	BE
1/22/2007	3	Grow moderately & wisely, don't lose small town feel	BE
1/22/2007	3	Friendlier citizenship "Know your neighbors"	BE
1/22/2007	2	Vacant structures downtown	BE
1/22/2007	2	Restraints on west side of town	BE
1/22/2007	3	Progressive dynamic thinking: more aggressive approach to growth & development	BE
1/23/2007	1	Tower/arch/sphere- like St. Louis- Landmark	BE
1/25/2007	1	Improve entrances to city-better 1st impressions, more inviting appearance-landscaping	BE
1/9/2007	1	Maintain a balance of land use w/ expansion with greenspace	BE
1/22/2007	1	Mixed land use	BE
1/22/2007	3	Annexation to protect our space	BE
1/22/2007	3	Grow moderately & wisely, don't lose small town feel	BE
1/22/2007	3	Friendlier citizenship "Know your neighbors"	BE
1/22/2007	2	Vacant structures downtown	BE
1/22/2007	2	Restraints on west side of town	BE
1/22/2007	3	Progressive dynamic thinking: more aggressive approach to growth & development	BE
1/9/2007	1	Indoor/outdoor recreational center	CS
1/9/2007	1	Increase community pride (schools, facilities, signs)	CS
1/9/2007	1	More public art	CS
1/9/2007	1	Upgrade existing buildings/focus on aesthetics	CS
1/9/2007	1	Indoor/outdoor recreational center	CS
1/9/2007	1	Increase community pride (schools, facilities, signs)	CS
1/9/2007	1	More public art	CS
1/9/2007	1	Upgrade existing buildings/focus on aesthetics	CS
1/9/2007	1	Invest more in educational institutions	CS
1/9/2007	1	Neighborhood schools	CS
1/9/2007	1	Use resources wisely for public safety	CS
1/9/2007	1	More cultural oppurtunities	CS
1/9/2007	1	New YMCA	CS
1/22/2007	2	Youth what can we do; activities; new schools; Springcreek	CS
1/22/2007	2	Centralized elementary structure; one building; within city	CS
1/22/2007	2	Increase public safety; 10 new ET,Police Officers/Firefighters	CS
1/22/2007	2	Police force increase	CS
1/22/2007	2	Public service/safety; substation; police & fire; Looney Road; ambulance/medic;b/c Edison & businesses	CS
1/22/2007	1	Develop future for our children; by more children involvement	CS
1/22/2007	1	Increase parental involvement in our children's school system	CS
1/22/2007	1	Teach our kids the basics-woodshop, hard work,more hands on training	CS
1/22/2007	1	Get people to lose 10 lbs. each;promote an environment for more healthful lifestyles	CS
1/22/2007	1	Our school system has destroyed the neighborhood school system "Bring them back while maintaining growth & momentum"; neighborhood schools foster a sense of community now that they are gone find another way; neighborhood assets.	CS
1/22/2007	1	Use garbage trucks to plow snow in alley while picking up	CS
1/22/2007	1	Law & Fire Depts.are spread to thin; hire more	CS
1/22/2007	3	Bigger parks & recreation; arts center like Rosewood	CS
1/22/2007	3	Culture that encourages diversity-active role	CS
1/22/2007	3	Improve schools & take better advantage of Edison	CS
1/22/2007	3	Better services for senior citizens; senior citizens center; more senior housing	CS

Date	Group #	Idea Text	Category
1/22/2007	3	Assigning emphasis to our historically important assets like Johnston Farm, Hotel, Rossville & Randolph centers	CS
1/22/2007	3	Get rid of criminals, drugs	CS
1/22/2007	2	Hospital; ice skating; rec center	CS
1/22/2007	2	Rec center	CS
1/22/2007	2	Shawnee; skate board/BMX park	CS
1/22/2007	2	Maintain appropriate ratio of safety services to population	CS
1/22/2007	3	Improve families	CS
1/22/2007	3	Improve community health care in Piqua	CS
1/23/2007	1	Need to make buildings more ADA accessible	CS
1/23/2007	1	Cameras next to bike racks	CS
1/23/2007	1	Improve feeling of self-worth and self-value; feeling of too good for Piqua	CS
1/23/2007	8	City, business & education support for local business	CS
1/23/2007	8	City involved in all sports and youth activities, sports director)	CS
1/23/2007	8	Teen rec center	CS
1/23/2007	8	Allow land to be used for sporting events	CS
1/23/2007	8	Continue to develop Neighborhood Assoc.	CS
1/23/2007	8	Cultural Center	CS
1/23/2007	8	Channel 10 expanded	CS
1/23/2007	1	More youth activities	CS
1/23/2007	1	Education; parent or grandparents from birth;with child to be ready;parent education-raising child	CS
1/23/2007	1	Nice sit-down dining facilities; summer programs; learned reading community; library	CS
1/23/2007	1	Second Fire Department on west side	CS
1/23/2007	1	Newspaper more positive	CS
1/23/2007	1	Back to neighborhood schools	CS
1/23/2007	1	Anger management training	CS
1/23/2007	1	Larger police force	CS
1/23/2007	1	Second police state	CS
1/23/2007	1	Supersize YWCA using apts. To south	CS
1/23/2007	1	More extracirrucular activities for youth and seniors	CS
1/23/2007	8	Emphasis on good education system	CS
1/23/2007	8	Emergency center/urgent care like Hyatt Center	CS
1/23/2007	8	Financially support senior citizen center	CS
1/23/2007	8	Support center for development of teenage children	CS
1/23/2007	8	Develop plan for old hospital site	CS
1/24/2007	1	Better Schools	CS
1/24/2007	1	Community Center for whole population	CS
1/24/2007	2	Better School System for high test scores	CS
1/24/2007	2	Senior and/or Youth Centers	CS
1/24/2007	4	Create a positive learning environment with positive role models	CS
1/24/2007	4	Redevelop old hospital into Senior Citizens/Youth/ Convention Centers with citizens tax money	CS
1/24/2007	4	Health education-disease prevention in schools and community	CS
1/24/2007	4	Community unity-Programs in Parks, Cultural opportunities	CS
1/24/2007	4	Increase respect for Police & Fire Departments (Fund Fire & Police)	CS
1/24/2007	4	Depicted Convention Center	CS
1/24/2007	4	Fire substations & quicker response times	CS
1/9/2007	1	Show neighboring towns commission meetings on TV	CS
1/9/2007	1	Number of safety service employees	CS
1/25/2007	1	Reduce Edison costs to encourage Piqua youth to stay in area	CS
1/25/2007	1	Park include skateboarding, ice skating, min. golf, family orientated activities	CS
1/25/2007	1	School programming for ADHD students	CS

Date	Group #	Idea Text	Category
1/25/2007	1	Redevelop old Piqua Boat & Ski Club for jet skies, power boats, watersking,fishing, Recreational facilities on the river and make handicapped accessible	CS
1/25/2007	1	Plan for additional needs of safety services in the future (police/fire)	CS
1/25/2007	1	Senior Citizens Center	CS
1/25/2007	1	Community based/youth oriented/school based programs for sound financial decision making (especially major purchases)	CS
1/25/2007	1	Caring community-organized response to needs of community residents (I.e. neighborhood associations)	CS
1/25/2007	1	More focus on health/safety- especially youth/elderly, I.e. home fall prevention education, health fair	CS
1/25/2007	3	Increase Fire & Police protection-substation	CS
1/25/2007	3	New elementary schools	CS
1/25/2007	3	Negotiate w/Piqua Minerals to create a State Park	CS
1/25/2007	3	Security	CS
1/25/2007	3	Wi Fi connections	CS
1/25/2007	3	Hospital	CS
1/25/2007	3	Neighborhood Schools	CS
1/25/2007	3	Encourage use of educational resources	CS
1/25/2007	1	Band shell/auditorium on the river	CS
1/25/2007	1	Replace Mote Park building with a modern facility	CS
1/25/2007	1	Use old hospital for affordable assisted living facility	CS
1/25/2007	3	Skateboard Park	CS
1/25/2007	3	Improve parks and recreation	CS
1/24/2007	1	Fire substation on East/West	CS
1/24/2007	1	Hospital in Piqua	CS
1/24/2007	1	More medical faclilites	CS
1/24/2007	2	Improve Mote Park (Lower Area-Equipment-Tables-Swing Set)	CS
1/24/2007	2	Improve personal pride from residents-property appearance and verbal feedback (Increase positive feedback)	CS
1/24/2007	2	Restructure welfare system to encourage return to work force	CS
1/24/2007	4	More Cultural Activities	CS
1/24/2007	4	Provide Parenting/Values - Promotion Classes (Churches-Y'S)	CS
1/24/2007	4	More Opportunities for Young People (Teen to 20)	CS
1/24/2007	4	Proper City Fund Appropriation (Assigned Funds Stay in Departments)	CS
1/9/2007	1	Invest more in educational institutions	CS
1/9/2007	1	Neighborhood schools	CS
1/9/2007	1	Use resources wisely for public safety	CS
1/9/2007	1	More cultural oppurtunities	CS
1/9/2007	1	New YMCA	CS
1/9/2007	1	Show neighboring towns commission meetings on TV	CS
1/9/2007	1	Number of safety service employees	CS
1/22/2007	2	Youth what can we do; activities; new schools; Springcreek	CS
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1/22/2007	2	Police force increase	CS
1/22/2007	2	Public service/safety; substation; police & fire; Looney Road; ambulance/medic;b/c Edison & businesses	CS
1/22/2007	1	Develop future for our children; by more children involvement	CS
1/22/2007	1	Increase parental involvement in our children's school system	CS
1/22/2007	1	Teach our kids the basics-woodshop, hard work,more hands on training	CS
1/22/2007	1	Get people to lose 10lbs. each;promote an environment for more healthful lifestyles	CS

Date	Group #	Idea Text	Category
1/22/2007	1	Our school system has destroyed the neighborhood school system "Bring them back while maintaining growth & momentum"; neighborhood schools foster a sense of community now that they are gone find another way; neighborhood ass.	CS
1/22/2007	1	Use garbage trucks to plow snow in alley while picking up	CS
1/22/2007	1	Law & Fire Depts.are spread to thin; hire more	CS
1/22/2007	3	Bigger parks & recreation; arts center like Rosewood	CS
1/22/2007	3	Culture that encourages diversity-active role	CS
1/22/2007	3	Improve schools & take better advantage of Edison	CS
1/22/2007	3	Better services for senior citizens; senior citizens center; more senior housing	CS
1/22/2007	3	Assigning emphasis to our historically important assets like Johnston Farm, Hotel, Rossville & Randolph centers	CS
1/22/2007	3	Get rid of criminals, drugs	CS
1/9/2007	1	More homeownership	ED
1/9/2007	1	Focus on workforce development	ED
1/9/2007	1	More quality dining facilities	ED
1/9/2007	1	Develop airport for larger aircraft	ED
1/9/2007	1	More local employment for residents wages	ED
1/9/2007	1	Develop more job ready sites	ED
1/9/2007	1	Improve appearance and quality of downtown stores	ED
1/22/2007	2	City spend money on citizens instead of special interests	ED
1/22/2007	2	New high-paying jobs; empty building; hospital	ED
1/22/2007	2	Economic opportunity for youth; high-paying jobs; moving to Columbus	ED
1/22/2007	2	Shopping in inner city;downtown;grocery;mercantile	ED
1/22/2007	2	Program for citizens w/bad credit-little credit to buy home	ED
1/22/2007	2	Make it easier for business; zoning; cost of rebuilding	ED
1/22/2007	1	Better jobs; manufacturing; industry; higher pay & better benefits	ED
1/22/2007	1	Control sprawl-work within our boundaries	ED
1/22/2007	1	Get a 1st class 1st quality restaurant; keep folks here; don't send them to Troy	ED
1/22/2007	1	Schools-Housing-Dining-Arts-Leisure; jobs; opportunity; bring them all up together	ED
1/22/2007	1	Increase opportunity for single family home ownership	ED
1/22/2007	1	Do not use eminent domain for property grab for economic use	ED
1/22/2007	1	Make downtown more appealing; make people want to come downtown	ED
1/22/2007	1	Create a better image outside of our city	ED
1/22/2007	3	Better paying jobs to town	ED
1/22/2007	3	More jobs and better jobs so people can afford to live in Piqua	ED
1/22/2007	2	Tax-financial incentive program for downtown businesses; period of years	ED
1/22/2007	2	More job-no Wal-Mart type	ED
1/22/2007	2	More industry needed to keep for fulltime safety services	ED
1/22/2007	3	Licensed real estate appraisers	ED
1/22/2007	3	better opportunities for our kids to come back to work in Piqua after college	ED
1/23/2007	1	Economic development bringing high tech jobs to city; good paying	ED
1/23/2007	8	More sit-down restaurants especially on west side	ED
1/23/2007	8	Meet needs of business community; good restaurants & hotels in town to entertain	ED
1/23/2007	1	More non-retail jobs	ED
1/23/2007	1	More inviting attitude toward businesses	ED
1/23/2007	1	Downtown; vibrant;café;pedestrian & bicycle friendly;mixed use of commercial/residential	ED

Date	Group #	Idea Text	Category 1
1/23/2007	1	Tie together upper floors of downtown/install elevators	ED
1/23/2007	1	21st Century clean jobs of looking to the future	ED
1/23/2007	1	Shopping & retail	ED
1/23/2007	1	Dining areas	ED
1/23/2007	1	Work with universities to develop new technologies	ED
1/23/2007	8	Good enviromnemt for small industry to come to Piqua	ED
1/23/2007	8	More receptive to businesses and industry; encourage new business coming in	ED
1/23/2007	8	Support of City's departments Street, Park, etc. Financing & staffing	ED
1/23/2007	8	Emphasis on strong downtown business area	ED
1/23/2007	8	Promote technology jobs	ED
1/23/2007	8	Financial grant money for all business-not just downtown businesses	ED
1/24/2007	1	Take tax & regulation burden off of industry	ED
1/24/2007	1	Use more sit down restaurants	ED
1/24/2007	2	Banks encourage resident-home owners, decrease rental properties-absent owners	ED
1/24/2007	2	More industry with higher paying jobs	ED
1/24/2007	2	More sit down restaurants, especially west side	ED
1/24/2007	2	Stabilize taxes for individuals with fixed income and/or special needs residents	ED
1/24/2007	4	Create better jobs (Comp-wage) with Health Insurance	ED
1/24/2007	4	Look at other cities to find a model (Tax abatements)	ED
1/24/2007	4	More "sit down" restaurants (Not fast food)	ED
1/9/2007	1	Make downtown focus of community while maintaining its history	ED
1/25/2007	1	More good jobs-to retain young citizens	ED
1/25/2007	1	Invest in preserving/promoting historical background of Piqua traditions & industry- renovating old buildings vs. destruction i.e. New Bremen	ED
1/25/2007	1	Better publicity for city events/activities	ED
1/25/2007	3	More industry to bring back our best & brightest students	ED
1/25/2007	3	Solve problem of static population	ED
1/25/2007	3	Generate revenue water & electric resources	ED
1/25/2007	3	Nicer restaurants & high end stores	ED
1/25/2007	1	Nice sit down restaurant (not a chain)	ED
1/25/2007	3	Need something to draw young families to Piqua	ED
1/25/2007	3	Eminent Domain	ED
1/24/2007	1	Support City with retail sales tax	ED
1/24/2007	4	Broad Economic Development by Private Sector	ED
1/9/2007	1	More homeownership	ED
1/9/2007	1	Focus on workforce development	ED
1/9/2007	1	More quality dining facilities	ED
1/9/2007	1	Develop airport for larger aircraft	ED
1/9/2007	1	More local employment for residents wages	ED
1/9/2007	1	Develop more job ready sites	ED
1/9/2007	1	Improve appearance and quality of downtown stores	ED
1/9/2007	1	Make downtown focus of community while maintaining its history	ED
1/9/2007	1	Create a place people want to come and raise a family	H
1/22/2007	1	Economical meals for seniors-was here-now in Troy	H
1/23/2007	8	Increase and encourage home ownership	H
1/23/2007	8	More condo (Upper scale) for retires	H
1/23/2007	8	Assist elderly more in maintaining their properties	H
1/24/2007	1	Better housing for people who want to scale down	H
1/24/2007	1	Improve housing building. Interstate landscaping cosmetically	H
1/24/2007	1	Make tenants liable and responsible	H
1/24/2007	4	Clean up parts of town with more landlord responsibility	H

Date	Group #	Idea Text	Category 1
1/25/2007	1	Encourage & assist families with home ownership	H
1/25/2007	1	Advocates for landlords to help with problem tenants	H
1/25/2007	3	Senior citizen housing	H
1/25/2007	3	Less rental properties (Metropolitan)	H
1/25/2007	1	Crackdown on landlord/industrial property owners to enforce code regulations and maintain upkeep of properties	H
1/25/2007	3	registration of properties that have been vacant over 1 year	H
1/25/2007	3	Local bank promote duplex ownership	H
1/24/2007	2	Stronger codes for landlords-up keep of properties	H
1/24/2007	2	Variance to control the number of rentals per block	H
1/9/2007	1	Create a place people want to come and raise a family	H
1/23/2007	1	Ombudsman in city	I
1/9/2007	1	Look at expanding city commission to include at-large members	I
1/22/2007	1	Minimize bureaucracy & maximize customer service	I
1/22/2007	1	Better more open communication between City Commission & citizens; "Do what the citizens want"	I
1/22/2007	2	Set one day a month to meet w/ constituents (Commissioners);walk street;attend neighborhood groups;meeting outside City Hall regularly	I
1/23/2007	8	Better relationship between citizens & local government	I
1/23/2007	8	City staff that lives in city	I
1/23/2007	8	Citizens pride clean up (cleaning by community members)	I
1/23/2007	8	City entity receptive to civic projects-tap into Goodwill	I
1/24/2007	1	Low self esteem of community	I
1/9/2007	1	Community pride	I
1/25/2007	1	City Commission-realize that City of Piqua includes the entire city-not just downtown	I
1/25/2007	1	Safer and cleaner environment-neighborhoods-pride in home	I
1/25/2007	1	More civic projects (more citizen involvement)	I
1/25/2007	1	Continue to encourage communication /cooperation between city government and citizens	I
1/25/2007	3	Get people to think progressively	I
1/25/2007	3	Get students to develop plan	I
1/24/2007	1	Need leadership to stay progressive	I
1/24/2007	1	Commission Meetings-less negative talk in public	I
1/24/2007	2	Stronger government-interagency cooperation (neighboring cities and county/state)	I
1/24/2007	2	Better recognition of city needs by County Commission	I
1/9/2007	1	Look at expanding city commission to include at-large members	I
1/9/2007	1	Community pride	I
1/9/2007	1	Improve participation of local groups/service clubs/youth groups	I
1/9/2007	1	Promote the city assests/look at what we have	I
1/22/2007	2	Increase in community involvement; City Commission; request information	I
1/9/2007	1	Improve participation of local groups/service clubs/youth groups	I
1/9/2007	1	Promote the city assests/look at what we have	I
1/9/2007	1	Improve waterfront paths	NE
1/22/2007	3	Use riverfront for parks and recreation; get rid of derelict housing	NE
1/23/2007	1	Boat access to river; repair ramp ski club; enhance river corridor; fishing	NE
1/23/2007	1	Extend Linear Park to Troy. Covington, etc.	NE
1/23/2007	1	Dog park	NE
1/23/2007	8	Develop river corridor, Linear Park, Lock 9 Park; perhaps amphitheatre	NE
1/23/2007	8	Maintain clean waterways & use viable space for recreational activities	NE

Date	Group #	Idea Text	Category 1
1/9/2007	1	Develop and exploit river corridors	NE
1/25/2007	3	Focus on Natural resources development-water quality	NE
1/25/2007	3	Development around river	NE
1/25/2007	3	Plant more trees (Tree City USA)	NE
1/25/2007	3	Mote Park	NE
1/25/2007	3	Use waterways better (Recreation)	NE
1/25/2007	3	Become environmental leader in State	NE
1/25/2007	3	Improve River Banks	NE
1/9/2007	1	Improve waterfront paths	NE
1/9/2007	1	Develop and exploit river corridors	NE
1/9/2007	1	Re-use existing structures	RP
1/9/2007	1	Re-use existing structures	RP
1/22/2007	2	Clean up of City infrastructure; vacant buildings	RP
1/22/2007	3	Tear down old buildings ; in favor of redevelopment; old hospital redeveloped	RP
1/23/2007	1	Redevelopment south part of downtown Piqua; apartment buildings; parking	RP
1/23/2007	8	Create & maintain database to join owners of vacant commercial property with potential business	RP
1/25/2007	1	Redevelop downtown Piqua-5/3 building to Paul's Bar area-vacant /dilapidated space	RP
1/25/2007	1	Plan for property/land use and consistent enforcement	RP
1/25/2007	1	Fill or demolish vacant buildings	RP
1/24/2007	1	Development of Property North of Hollow Park	RP
1/24/2007	2	South End needs	RP
1/24/2007	2	Redevelop old building (sites)	RP
1/9/2007	1	Infrastructure for walkable community	T
1/9/2007	1	East west thoroughfare	T
1/9/2007	1	Improve city entrances	T
1/22/2007	2	Fix up streets; 25-A	T
1/22/2007	2	Improved sidewalk program	T
1/22/2007	1	More public free transportation	T
1/22/2007	3	Use I-75 to benefit Piqua	T
1/22/2007	3	Take better care of streets and alleys, and better snow removal	T
1/22/2007	3	Route state highways around Piqua; some not all	T
1/22/2007	2	I-75 ramp off to Statler area; Polysource & others; original point	T
1/22/2007	3	Taxi service for Piqua	T
1/23/2007	8	Improve transportation & flow through city	T
1/23/2007	8	Improve US 36 around City-bypass	T
1/23/2007	1	Repair all sidewalks	T
1/23/2007	1	More bicycle racks around businesses	T
1/23/2007	1	Redevelop and improve Main & Water parking lot	T
1/23/2007	8	Dress up entryways into town (especially S. 25-A, E. Ash from Armory to Spring, and Rt 36 & Rt 66	T
1/23/2007	8	Look at future growth for I-75 corridor	T
1/23/2007	8	Dress up 25- N. near Sidney gateway into City	T
1/23/2007	8	More attractive entrance to downtown	T
1/24/2007	1	Interchange at Statler Road	T
1/24/2007	1	Improve 25-A North of Piqua	T
1/24/2007	1	Better mass transit within City	T
1/24/2007	1	Eliminate turns on Rt. 36 / Rt. 185	T
1/24/2007	2	Improve thoroughfares through city-beautification and better directions or more direct route	T
1/24/2007	2	Priority of street clearing after snowfall-why bikeway before streets	T
1/24/2007	4	City needs to be pleasing (street scapes, lighting) A place to come home to. Quality of life	T

Date	Group #	Idea Text	Category 1
1/9/2007	1	Improve curb and sidewalks - Property owners accountable	T
1/25/2007	1	Good public transportation	T
1/25/2007	3	Entrances into Piqua improved, clean, landscape	T
1/25/2007	3	Sidewalks-improve/add	T
1/25/2007	3	Street conditions	T
1/25/2007	3	Traffic Control	T
1/25/2007	3	Clean Bike Path-maintain	T
1/24/2007	2	More direct thoroughfare for semi-large vehicle traffic	T
1/24/2007	2	Continue public transit	T
1/9/2007	1	Infrastructure for walkable community	T
1/9/2007	1	East west thoroughfare	T
1/9/2007	1	Improve city entrances	T
1/9/2007	1	Improve curb and sidewalks - Property owners accountable	T
1/9/2007	1	2nd or 3rd fire station on east and west side (growing residential)	U
1/24/2007	1	Convert utilities to public companies	U
1/25/2007	1	Review placement of power/telephone line to cleanup overhead wire/cables. Eliminate unnecessary wires	U

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Appendix B

Strong Places, Weak Places Results

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Appendix B: Stong Places, Weak Places, Results

A. Introduction

Participants at the Public Meeting worked in small groups to complete a mapping activity entitled "Strong Places, Weak Places." During the mapping activity, each group was asked to identify specific strong and weak places in the study area. In considering the strong places, participants were asked to consider the concepts discussed during the "Imagining the Future" activity—places that are desirable to visit, represent conditions they would like to see more often in the community, and reflect well on the community. For weak places, participants were asked to consider those places that are undesirable to visit, are eyesores, or that generally reflect poorly on the community.

Among the strong and weak places, the responses recorded with the greatest frequency fit into similar groupings. After the group identified its strong and weak places, the participants discussed and recorded why these places were selected.

Copies of the maps used for each table in the exercise and written record of the comments are provided on the following pages. Prior to the maps is a table of the result, which includes the identification of the strong places and weak places.

B. Strong Places/Weak Places Results

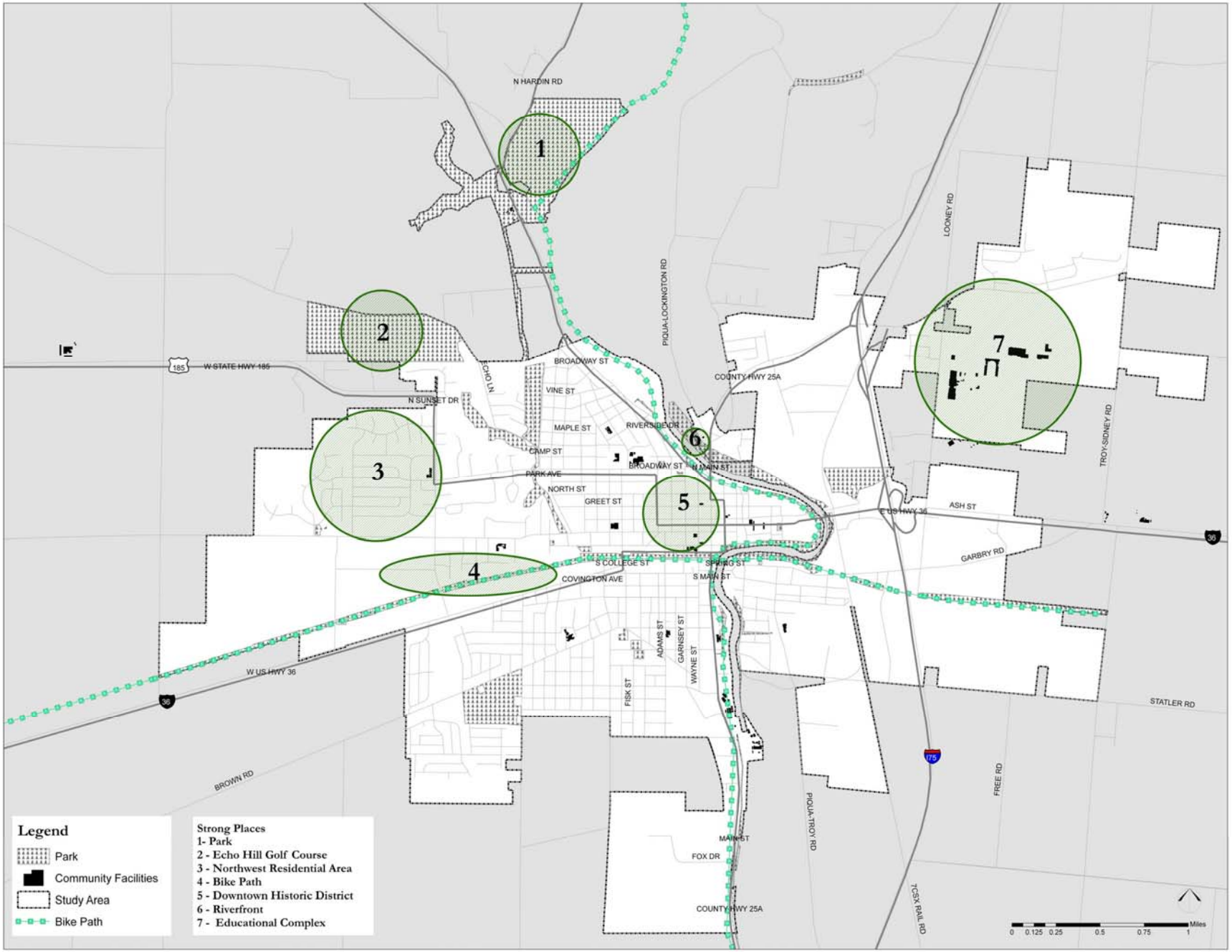
Table B.1 shows the results for the strong and weak places as identified by the public. The strong and weak places described in the table below, were identified as a top three strong place or weak place by a group at least once during the public meetings. Some of the places listed were selected by more than one group as a strong place or weak place. The Old Hospital was identified as a weak place by the majority of the groups, and the Bike Path and Historic Downtown were identified as strong places by the majority of the groups as well. Maps B.1 and B.2. show the strong and weak places in the context of the City.

TABLE B.1 - STRONG PLACES / WEAK PLACES

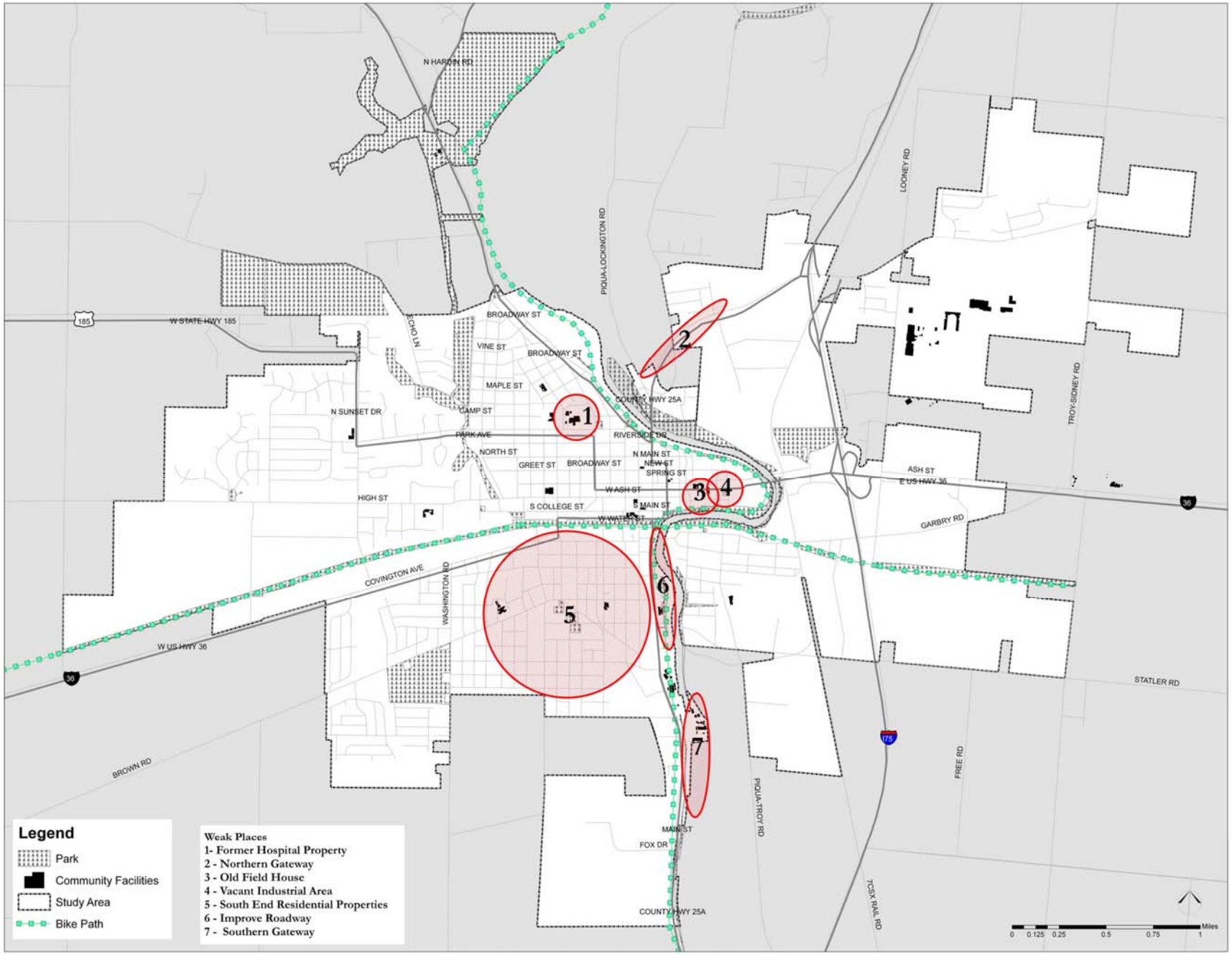
Strong Places	Weak Places
Parks System	North and South Entrances to Piqua
Bike Path	Old Hospital
Downtown Historic District	Vacant Industry (Copperweld/Aerovent)
Edison Community College	Road Infrastructure (S. Main, S. College)
Northwest Residential Areas	South End Rental Properties
Vocational School	Old Fieldhouse Area

Source: January Public Meetings 2007

MAP B.1 - STRONG PLACES



MAP B.2 - WEAK PLACES



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Appendix C

Summary of Exit Questionnaires

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Appendix C: Summary of Exit Questionnaires

A. Introduction

The purpose of Public Meetings between January 22-25, 2007 was to gather ideas from citizens living and working in or nearby the City of Piqua.

Participants were asked to complete an exit questionnaire at the conclusion of the meeting. The questionnaire served as a way to document who attended the meetings to determine if the event was an inclusive community process and to determine if participants reflected the demographic stratification of Piqua based on 2000 Census data. The questionnaires also gave participants the opportunity to evaluate how the meetings were structured and conducted.

The summary of responses generally indicate a consistent demographic cross-section of the population was achieved.

Approximately 100 residents attended one of the public meetings. Nearly all who attended the meetings (95%) completed the exit questionnaire. Not all participants answered every question, resulting in variations among responses. The information included in this section highlights the key findings of the exit questionnaire results. A written record of the comments is provided on the following pages.

B. Profile of Meeting Participants

Gender distribution was skewed toward males

While both genders were well represented, 62 percent of attendees were males compared to only 38 percent females. According to the 2000 U.S. Census figures, Piqua is 48 percent male and 52 percent female.

TABLE C.1 - GENDER OF PARTICIPANTS

Gender	Number of Respondents	Percent of Total
Female	37	38%
Male	60	62%
Total	**97**	**100%**

Diverse participation

The purpose of asking participants to indicate their race is to compare the racial diversity of the participants with the actual demographics of the study area. As shown in Table C.2, the majority of participants (over 95 percent) were White, while African-Americans were represented by two percent at the meeting. These numbers are consistent with the Census which reports 94 percent of the City as White, and three percent as African-American.

TABLE C.2 - RACE OF PARTICIPANTS

Race	Number of Respondents	Percent of Total
White	92	95%
African-American	2	2%
Asian	1	1%
Other	2	2%
Total	97	100%

The majority of participants were 45 years of age and older

There was a relatively low turnout of participants of the ages 25-34. The data collected on participant age revealed that only three percent of participants were in this age cohort, while the 2000 U.S. Census reports they make up 20 percent of the total population. There was also an above average number of residents in the age cohorts 35-44 and 45-54 which represented 26 and 24 percent of those who participated. The 2000 U.S. Census reports these cohorts actually make up only 15 and 12 percent.

TABLE C.3 - AGE OF PARTICIPANTS

Age	Number of Respondents	Percent of Total
Under 19	1	1%
25-34	3	3%
35-44	14	14%
45-54	25	26%
55-64	23	24%
65-74	27	28%
75+	4	4%
Total	**97**	100%

Meeting participants were well educated with middle to high income levels

As shown in Tables C.4 and C.5, participants were skewed in terms of educational attainment and income level. Over 40 percent of the participants were either college graduates or had completed post-graduate work. Comparing these numbers to the 2000 U.S. Census figures which reports only 24 percent of the population having a Bachelors degree or higher, indicates the public meeting participants represent an above average sector of the population in terms of educational attainment.

Income levels, as shown in Table C.5, mirror the diversity shown in educational attainment and were distributed across the middle and higher income levels. Over 40 percent of participants reported having annual household incomes greater than $75,000, while only 27 percent of participants reported having annual household incomes lower than $35,000. These figures indicate a larger sector of the population participated which had a higher per capita income than the median income level of $18,000 reported by the Census.

TABLE C.4 - LEVEL OF EDUCATION

Level of Education	Number of Respondents	Percent of Total
> High School	2	2%
High School Diploma	20	21%
Some College	30	31%
College Graduate	21	22%
Post Graduate	23	24%
Total	**96**	100%

TABLE C.5 - INCOME LEVEL

Income	Number of Respondents	Percent of Total
> 15,000	4	4%
15,000-34,999	21	23%
35,000-49,999	10	11%
50,000-74,999	15	17%
75,000-99,999	14	16%
More than 100,000	26	29%
Total	**90**	100%

The vast majority of the participants have lived in the Piqua area for more than twenty years

As shown in Table C.6, more than 75 percent of participants have lived in the community for over 20 years. At the other end of the spectrum, approximately eight percent of participants have lived in the community less than nine years, suggesting an increase in newer residents in the area—and that these residents are also interested in contributing ideas for the future of Piqua.

TABLE C.6 -LENGTH OF RESIDENCE

Length of Residence	Number of Respondents	Percent of Total
0 to 4	3	3%
5 to 9	5	5%
10 to 19	13	14%
20+	24	26%
Life Long Resident	46	51%
Total	91	100%

C. Meeting Quality

Most participants indicated the length of the meeting was 'about right'

Meeting Duration	Percent Total
About right	85.00%
Too long	8.00%
Too short	7.00%

Participants were given the choice to indicate if the Public Meeting was too long, too short, or about right. The majority of respondents (over 85 percent) revealed that the duration of the meeting was about right. Of the total, eight percent felt the meeting was too long, and seven percent thought the meeting was too short.

Most participants were satisfied with the small group exercises

In an attempt to determine the quality of the meeting, participants were questioned about the small group activity. Question 12 asked if they were comfortable working in the small group; Question 13 asked if they had the opportunity to fully express their ideas; Question 14 asked if their ideas were received and recorded appropriately; and Question 15 asked if the process was fair to everyone in the small group. As shown in Table 7 below, respondents were favorable to the small group activity.

TABLE C.7 -SMALL GROUP ACTIVITY COMMENTS

Question	Percent of Total
12	99%
13	98%
14	100%
15	100%

D. Participation Motivators

The factors that motivated people to attend the meeting were noted in order to build even greater public support throughout the remainder of "Plan It Piqua". Table C.8, outlines the channels of communication cited by participants in response to the question: "How did you hear about this meeting"? Word-of-mouth and the newspaper were the dominant forms of publicity. Flyers were also an effective means of getting the community involved.

TABLE C.8 –CHANNELS OF COMMUNICATION

Channel	Number of Respondents	Percent of Total
Newspaper	35	41%
Flyer	17	20%
Website	2	2%
TV	3	4%
World-of-Mouth	27	32%
Radio	1	1%
Total	**85**	100%

Plan It PIQUA

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COMPREHENSIVE PLAN UPDATE

II. Community Choices Report

COMPREHENSIVE PLAN UPDATE

JUNE 3, 2007

PREPARED FOR

CITY OF PIQUA

PREPARED BY

ACP–VISIONING & PLANNING, LTD.

Community Choices

A. Overview

This report describes the structure and results of the Community Choices Meeting and stakeholder interviews conducted on May 22, 2007. ACP-Visioning & Planning facilitated the meeting and interviews. The purpose of the Community Choices Meeting was to continue the conversation about how the City should grow using the input gathered from the public meetings in January 2007 as well as information from the Existing Conditions Report.

Nine goal statements and eleven land use principles were introduced at the meeting. When finalized, the goals and principles will serve as the foundation for the Comprehensive Plan. The stakeholder interviews were conducted to gather input from specific residents, community groups, and business that have roles in shaping the future of Piqua. The information gathered from these interviews complements the information gathered from the Community Meeting, and provides specific insight into the opportunities and challenges facing different residents and the City.

The information in this report includes a summary and results of the activities conducted at the meeting. The report is organized as follows:

A. Overview

B. Public Meeting

C. What We Learned

D. Stakeholder Interviews

The information and insight described in Part C: What We Learned will be used by the Planning Commission to assist in the refinement of the goals and land use principles and the development of the conceptual land use map.

B. Public Meeting

Approximately 30 people participated in the two-hour meeting and provided important input for preparing an update to the land use element of the Comprehensive Plan. The agenda and description of the meeting is provided below, and the full PowerPoint presentation as shared at the public meeting is included in Appendix A.

Agenda

1. Welcome
2. Process update
3. What needs to be done?
    a. Develop land use plan
    b. Create objective and strategies
    c. What have we learned?
4. Review draft goals for the community plan
5. Context area discussion
6. Review land use concept
    a. Review draft land use principles
    b. Apply principles to the map – small group work

Description

The public meeting was conducted in a workshop format. A presentation was given at the beginning of the meeting which described the purpose of the meeting, informed participants about what was learned from the public meetings in January, and introduced the draft goals and draft land use principles. As part of the presentation participants were engaged in worksheet exercises which solicited their feedback on the goals and principles. During the goal exercise the draft goals were presented, and participants were instructed to write general comments on each goal. The land use principle exercise was structured slightly differently. In this case the principles revealed as part of the presentation and were accompanied by graphics that illustrated the principle. Participants used worksheets to rate their level of support for each principle, and provide general feedback.

At the end of the presentation participants worked in small groups on a mapping activity. The mapping activity was designed to get the participants thinking about how the draft land use principles will apply to a land use map. The participants in each small group identified two places where they thought the land use principles could be applied in the community and identified these areas on a large map.

C. What We Learned

This section of the report describes the results of the Community Choices Meeting. It is divided into three parts:

1. Goals Summary
2. Principles Summary
3. Summary of Mapping Exercise

A complete list of the results from the worksheet activities (goals and principles) is included in Appendix B. The results of the mapping activity can be found in Appendix C.

1. Goals Summary

In general there was a strong response of support for the goal statements. In all, twenty-two goal writing worksheets were completed generating 183 comments. The participants' comments are summarized below.

1. Built Environment

Goal: Preserve Piqua's small town feel through well balanced growth that mixes land uses, retains open space, and creates an inviting appearance using landscaping, attractive entrances, and community landmarks.

Summary of Comments:

- History is important as well as the small town character and should be considered part of the goal.
- This goal should not stifle or undermine economic development.

2. Community Services and Facilities

Goal: Support community improvements that build strong family neighborhoods, community pride and maintain high quality community services and facilities, including its school system, public safety, health care, recreational opportunities, cultural activities, technology and youth and senior services.

Summary of Comments:

- General emphasis needs to be placed on senior services.
- Community services that build on and improve pride and sense of place are important.

3. Economic Development

Goal: Enhance Piqua's local economy through policies and programs that attract progressive new industries, increase the number of high paying jobs with benefits, retain existing small businesses, develop a strong workforce, increase the number of quality of life amenities, and contribute to a vibrant downtown.

Summary of Comments:

- Collaboration between the City, businesses, and citizens is critical to this goal.
- Retaining and supporting the expansion of existing businesses is important and should be given greater attention in this goal.

4. Housing

Goal: Promote a diverse and quality housing stock to meet the needs of all residents, and enhance the housing supply through programs and policies that encourage homeownership, promote home maintenance, and support the responsible upkeep of all properties.

Summary of Comments:

- Conversion of rental housing stock to homeownership is important.
- Maintenance and upkeep of the existing housing stock should be emphasized which in turn relates to community pride.

5. Natural Environment

Goal: Celebrate Piqua's natural amenities by developing the waterfront and enhancing public access to the river corridor, and work to create new parks, trails, and tree planting initiatives throughout the City to further contribute to the community's quality of life.

Summary of Comments:

- There is strong support for this goal especially as it relates to developing the riverfront.
- New development and redevelopment along the river with a mix of uses will help connect residents and visitors to the river, and complement economic development efforts.

6. Redevelopment

Goal: Revitalize Piqua through initiatives that encourage redevelopment or reuse of existing structures, and implementation of building codes in an effort to contribute to a reduction in building vacancies.

Summary of Comments:

- Redevelopment and upkeep of the housing stock is strongly supported.
- Building and zoning codes are critical to achieve this goal, but will generate some public resistance.

7. Transportation

Goal: Develop and maintain a convenient, safe and efficient transportation system that effectively accommodates pedestrians, bicyclists, automobiles and public transportation.

Summary of Comments:

- Need to improve the public transportation system and promote pedestrian mobility.
- An east to west bikepath connector through town will improve pedestrian mobility and help to alleviate traffic.

8. Utilities

Goal: Maintain cost effective, customer responsive and reliable municipal utilities with a focus on improving aesthetics and public education while also planning for the future and identifying growth opportunities.

Summary of Comments:

- At the surface level there is some feeling that the City is already efficiently providing services.
- Keeping utility rates low is important to residents and business owners.

9. Implementation

Goal: Support neighborhood associations, widespread civic involvement, good communication between citizens and local government, and encourage strong leadership and effective inter-government cooperation to engender pride among Piqua residents.

Summary of Comments:

- Strong leadership and cooperation at the City level will help to implement the goals and plan.

2. Principles Summary

The principles had an average ranking of 4.0 on a scale of 1 to 5 (one being not important and five being very important). The scores listed below each principle reflect the average of all the scores from the participant worksheets.

Participants at the community meeting were in support of the land use principles. A total of 23 worksheets were completed, and many comments were made regarding the principles. Some selected comments and generalizations are listed with each principle below. These comments will be used to edit/refine the principles.

Principle 1

The small town historic character will be enhanced.

Score - 4.2

Comments:

- The historic character is important to shaping the Piqua Community, especially the downtown.
- The residents of Piqua also make the Community what it is and define the small town character.

Principle 2

The entryways into Piqua will be enhanced through improving the built environment.

Score - 4.2

Comments:

- Copperweld and the South Main Street Trailer Park need to be considered when improving the gateways.

Principle 3

Underutilized industrial, institutional, and manufacturing districts and sites will be strategically redeveloped and incorporated back into the Community fabric.

Score - 4.4

Comments:

- Aerovent and Decker buildings are underutilized and can be redeveloped.

Principle 4

New commercial retail developments will be developed with local architectural elements, pedestrian amenities, greenspaces, and accommodate future redevelopment/reuse of the structure and site.

Score - 3.9

Comments:

- New commercial developments that reflect these qualities are important, but shouldn't discourage growth.

Principle 5

Future industrial development on the edges of the Community will be compatible with the surrounding areas, and not burden the existing transportation infrastructure.

Score - 4.1

Comments:

- The I-75 and 25-A corridor, and the, east and west sides of the City are appropriate areas for industrial development.

Principle 6

The downtown, and new commercial developments, will have a mix of uses that are distinctive and contribute to increasing the City's overall identity.

Score - 4.1

Comments:

- Being progressive in future planning is important, but this approach shouldn't stifle growth.

Principle 7

Residential areas will have strong neighborhood qualities.

Score - 4.1

Comments:

- The feeling of neighborliness was somewhat lost in the past but can be regained.
- New residential developments that resemble "traditional neighborhood" developments will help to build community ties and values.

Principle 8

A broad range of housing types and price levels within neighborhoods will strengthen the community identity, and create new opportunities for residents to find housing.

Score - 4.0

Comments:

- A broad range of housing choices is important, and quality housing opportunities for all socioeconomic groups should be made available in all areas of Piqua.
- Poorly maintained housing does not reflect well on the community and needs to be addressed.

Principle 9

Streets will create an attractive public realm and be exceptional places for people.

Score - 4.0

Comments:

- Proper screening in strategic locations will help with creating an attractive street realm.
- Houses that face the street help to define the streetscape.

Principle 10

Places will be better connected, to improve the function of the street network and facilitate pedestrian mobility; better opportunities will be created to walk and bike to and from the Miami Valley Trails.

Score - 4.1

Comments:

- A feeder network to the bikepath will add value to the pedestrian network.

Principle 11

Better opportunities will be created to connect people to the Great Miami River.

Score - 3.9

Comments:

- There is strong support from the community to enhance the riverfront and build on it as a community asset.

- The redesign of South Main Street in a mixed-use development with strong neighborhood components will help to revitalize the riverfront.

3. Summary of Mapping Exercise

The final activity of the Community Choices Meeting was a mapping exercise. Participants were asked to consider the land use principles introduced at the meeting and apply them to a base map. Their comments will help to develop the conceptual land use map which will be part of the final plan.

Participants were instructed to pick two land use principles and indicate on the map where the principles should be applied. A total of six maps were created as part of this exercise. The maps were scanned into a digital format; all of the maps are included in Appendix C.

C. Stakeholder Interviews

Stakeholder interviews were conducted as part of the Community Choices Workshop. These interviews were small group meetings focusing on land use and growth issues. Stakeholder groups included:

- Business Industrial Focus Group
- Government Focus Group
- Downtown Focus Group
- Education Focus Group

ACP conducted a number of stakeholder interviews in conjunction with the Community Choices Meeting. The purpose of these interviews was to gain input from specific residents and groups that have roles in shaping the future of Piqua. The information gathered from these interviews complements the information gathered from the public meeting, and provides specific insight into how to further develop the land use principles.

The recurring themes from the stakeholder interview focused on economic development and the built environment. Key themes identified from these interviews are as follows:

- The community is oriented to the south for employment and shopping.
- Walkability is very important.
- Maintaining small town feeling is critical.
- State of Ohio school facilities program is influencing school location.
- Economic incentives need to encourage building within Piqua rather than outside.
- Housing within several neighborhoods is in poor condition.
- Planning efforts are sending strong signal that Piqua is thoughtful and progressive.
- Developers and builders of industrial space are not doing business in Piqua.
- Economy needs improvement.
- Create standards (e.g. housing) that do not stifle development.

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COMPREHENSIVE PLAN UPDATE

Attachments

A.	PowerPoint	A.1
B.	Worksheet Results	B.1
C.	Participant Maps	C.1

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COMPREHENSIVE PLAN UPDATE

Attachment A: PowerPoint

This section of the Appendices includes the PowerPoint slides presented at the Public Meeting on May 22, 2007.

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Preserve the Past — Empower the Future

Comprehensive Plan

City of Piqua

Community Choices Workshop
May 22nd, 2007

Comprehensive Plan City of Piqua

Community Choices Agenda

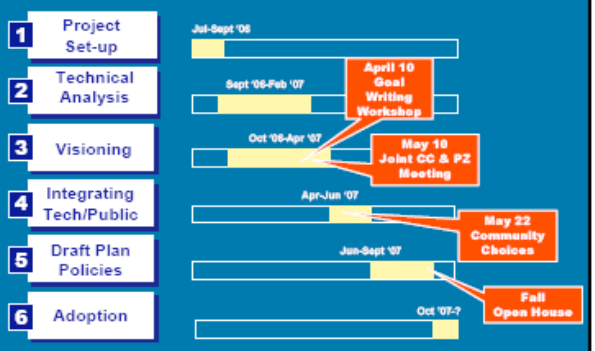
1. Welcome
2. Process update
3. What needs to be done?
   - Develop land use plan
   - Create objectives and strategies
4. What have we learned?
5. Review draft goals for the community plan
6. Context Area Discussion
7. Review Land Use Concepts
   - Review draft land use principles
   - Apply principles to the map – small group work

Comprehensive Plan City of Piqua

Process Update

Comprehensive Plan City of Piqua

Major Phases and Timing



Comprehensive Plan City of Piqua

Planning Activities Completed

- Launched project web site
- Conducted five (6) idea gathering meetings
- Completed Public Meeting Report
- Completed Existing Conditions and Technical Memorandums Report
- Prepared DRAFT goals
- Conducted a joint meeting of the City Council and Township Trustees

Comprehensive Plan City of Piqua

Process Update

Comprehensive Plan City of Piqua

Planning Activities – To Be Completed

- Prepare conceptual land use direction
  - Principle statements
  - Land use map
- Prepare objectives and strategies for each element
- Public open house
- Draft report
- Adoption

Comprehensive Plan City of Piqua

What have we learned?

Public Meeting Input

Comprehensive Plan City of Piqua

Overview

- Approximately 120 residents attended and participated in six public meetings held between January 2007
  - 4 Public Meetings
  - 1 Leadership Piqua
  - 1 Teen Leadership Piqua
- Activities
  - Ideas For the Future Exercise
  - Strong and Weak Places Mapping Exercise
- Exit questionnaires were completed by nearly every participant

Comprehensive Plan City of Piqua

Ideas for the Future

- The Ideas for the Future exercise allowed participants to visualize their ideal vision of Piqua
- The facilitators posed the following question:

"What should be done to make Piqua the best that it can be in the coming years?"

Comprehensive Plan City of Piqua

Ideas for the Future

- The Ideas for the Future exercise generated 291 ideas
- The ideas were categorized according to the elements of the Comprehensive Plan
- Some ideas were placed in more than one category
- The total category count of ideas was 349
- These ideas will serve as the basis for creating goals and strategies in the Comprehensive Plan

Comprehensive Plan City of Piqua

Ideas for the Future

- The Ideas for the Future results are categorized in the table below

Category	% of Total
Community Services and Facilities	38%
Economic Development	21%
Transportation	11%
Implementation	8%
Housing	5%
Natural Environment	5%
Built Environment	5%
Redevelopment Plans	3%
Utilities	2%
Total	100%

Comprehensive Plan City of Piqua

Strong Places, Weak Places

- Participants were asked to identify specific strong and weak places within Piqua
- Strong places are those considered to be desirable, reflecting well on the community, or conditions residents would like to see more of
- Weak places are those considered undesirable, eyesores, or reflecting poorly on the community

Comprehensive Plan City of Piqua

Strong Places, Weak Places

- The following table shows the results for the strong places, weak places exercise
- The places listed appeared in a group's top three strong places or weak places at least once

Strong Places	Weak Places
Parks System	North and South Entrances to Piqua
Bike Path	Old Hospital
Downtown Historic District	Vacant Industry (Copperweld/Aerovent)
Edison Community College	Road Infrastructure (S. Main, S. College)
Northwest Residential Areas	South End Rental Properties
Vocational School	Old Fieldhouse Area

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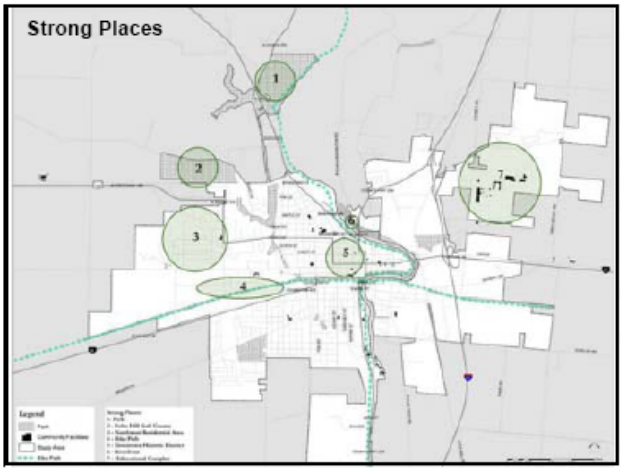

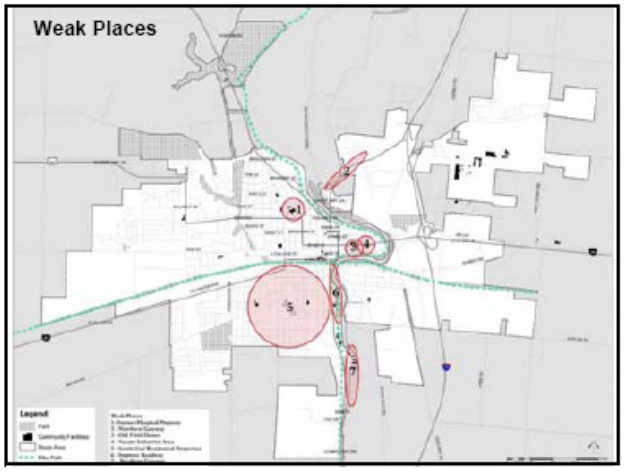

What have we learned?

Existing Conditions Summary

Comprehensive Plan City of Piqua

Existing Conditions Topics

1. Population and Demographics
2. Land Use and Built Environment
3. Transportation
4. Community Services and Facilities
5. Economic Development
6. Housing
7. Fiscal Impacts

Comprehensive Plan City of Piqua

Existing Conditions Key Findings

1. Population and Demographics
2. Land Use and Built Environment
3. Housing
4. Economic Development
5. Fiscal Impacts

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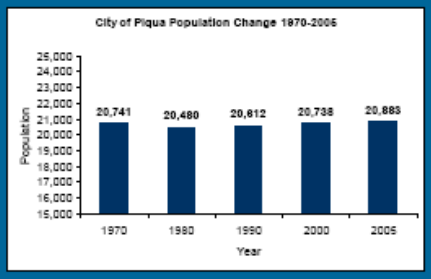
Population

- The population of the City of Piqua has held stable from 1970-2005



Comprehensive Plan City of Piqua

Land Use

Land Use Development Patterns

- The City of Piqua contains 7,238.9 acres (11.31 square miles) of land
- Single family residential comprises 21.8 percent of the land area within the City of Piqua
- The City of Piqua has annexed 3,897.4 acres since 1970 (population has remained stable)

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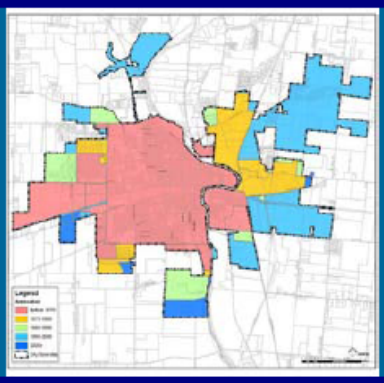
Annexation



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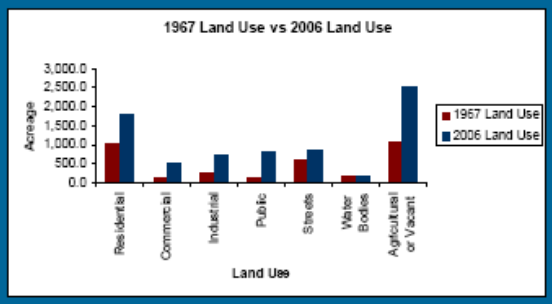
Land Use



Comprehensive Plan City of Piqua

Land Use

Undevelopable Land: Preserve and Reserve

- Agricultural and vacant land covers 1,449.7 acres, or 20.0 percent of the total land area within the City of Piqua
- Preserve and reserve land make up over 21.3 percent of the City of Piqua's total land area

Preserve lands - land permanently protected by government regulation, parks, and water bodies

Reserve Lands – Land that due to their environmentally sensitive constraints and limitations should be considered for future development (floodplains, hydric soils, steep slopes, wetlands).

Comprehensive Plan City of Piqua

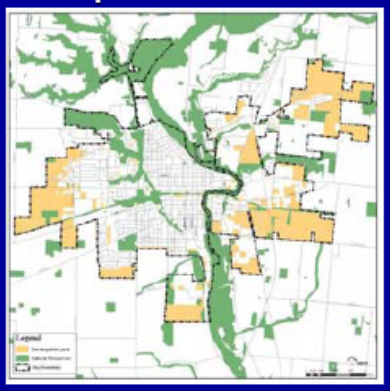
Land Use

Developable Land

- The amount of developable land was calculated by adding the total amount of agricultural land and vacant land within the City, and subtracting the natural resource areas (preserve and reserve) in those areas
- The amount of total developable land within the City equates to approximately 2,060 acres or 28.5 percent of the total land area
- It is estimated 233 new housing units will be needed by 2011

Comprehensive Plan City of Piqua

Developable Land



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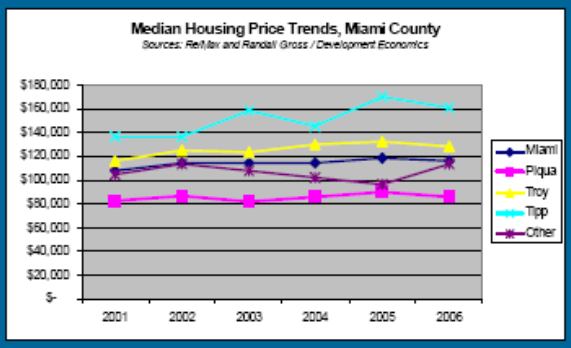
Housing



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Housing

- Older housing stock - Piqua has a relatively old housing stock, with nearly 40 percent of its housing built prior to 1939 (some in great condition)
- Higher vacancy rate - At 7.2%, Piqua's vacancy rate exceeds that of Sidney, Troy, and Tipp City

Comprehensive Plan City of Piqua

Housing

- Intra-City moves dominate market - The local market is being driven primarily by move-ups and move-downs among existing residents, rather than relocations
- Housing demand - Piqua can expect demand for approximately 230 housing units by 2011, including 180 for-sale units and 50 to 60 rental units
- Significant amount already subdivided

Comprehensive Plan City of Piqua

Economic Development

- Declining regional manufacturing base
- Dependency on manufacturing
- Competition with neighboring communities
- Negative perceptions
- Vacant & aging industrial buildings
- Slow absorption of industrial land
- Lack of targeted marketing strategy
- Impact on residential market

Comprehensive Plan City of Piqua

Economic Development

Decline in employment and payroll

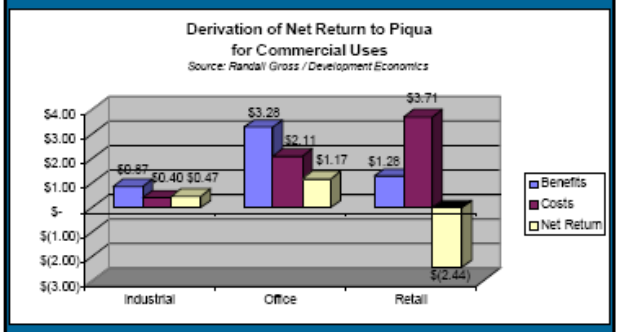
- Piqua's employment fell by 1,700 or 15.6 percent between 1998 and 2004
- Local payroll declined from about $287.6 million to $269.5 million (a decrease of 6.3%) over the same time period

High industrial vacancy rate

- Piqua has roughly 4.5 to 5.5 million square feet of industrial and service building space
- Of this space, about 970,000 square feet is vacant, yielding a vacancy rate in the range of about 18 to 21 percent (potential)

Comprehensive Plan City of Piqua

Fiscal Impacts for Commercial / Industrial Uses



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Economic Development

Low cost of doing business

- Key economic strengths in Piqua include its labor force, low cost power, low cost real estate, and location near major interstates

Comprehensive Plan City of Piqua

Goals for Community Plan

Comprehensive Plan City of Piqua

Policy Hierarchy

Each element of the community plan will have:

- Goal
- Objectives
- Strategies

Goal

- A goal expresses the aspirations of the community
- Goal is the broadest statement:

"A desired outcome expressed in simple terms."

Comprehensive Plan City of Piqua

Policy Hierarchy

- The Comprehensive Plan Technical Committees participated in a two hour goal writing workshop
- Identified themes from ideas generated at the public meetings
- Created nine draft goals
- Identified 40 strategies to support/implement the draft goals

Comprehensive Plan City of Piqua

Draft Goals Exercise

Review Draft Goals

Comprehensive Plan City of Piqua

Draft Goals – Exercise Instructions

- Review each draft goal
- Make comments on the worksheet provided.
- These goals are drafts, we will use your feedback to refine these goals as necessary

Comprehensive Plan City of Piqua

Built Environment

Preserve Piqua's small town feel through well balanced growth that mixes land uses, retains open space, and creates an inviting appearance using landscaping, attractive entrances, and community landmarks.

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Community Services and Facilities

Support community improvements that build strong family neighborhoods, community pride and maintain high quality community services and facilities, including its school system, public safety, health care, recreational opportunities, cultural activities, technology and youth and senior services.

Comprehensive Plan City of Piqua

Economic Development

Enhance Piqua's local economy through policies and programs that attract progressive new industries, increase the number of high paying jobs with benefits, retain existing small businesses, develop a strong workforce, increase the number of quality of life amenities, and contribute to a vibrant downtown.

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Housing

Promote a diverse and quality housing stock to meet the needs of all residents, and enhance the housing supply through programs and policies that encourage homeownership, promote home maintenance, and support the responsible upkeep of all properties.

Comprehensive Plan City of Piqua

Natural Environment

Celebrate Piqua's natural amenities by developing the waterfront and enhancing public access to the river corridor, and work to create new parks, trails, and tree planting initiatives throughout the City to further contribute to the community's quality of life.

Comprehensive Plan City of Piqua

Redevelopment

Revitalize Piqua through initiatives that encourage redevelopment or reuse of existing structures, and implementation of building codes in an effort to contribute to a reduction in building vacancies.

Comprehensive Plan City of Piqua

Transportation

Develop and maintain a convenient, safe and efficient transportation system that effectively accommodates pedestrians, bicyclists, automobiles and public transportation.

Comprehensive Plan City of Piqua

Utilities

Maintain cost effective, customer responsive and reliable municipal utilities with a focus on improving aesthetics and public education while also planning for the future and identifying growth opportunities.

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Implementation

Support neighborhood associations, widespread civic involvement, good communication between citizens and local government, and encourage strong leadership and effective inter-government cooperation to engender pride among Piqua residents.

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Developing A Conceptual Land Use Map

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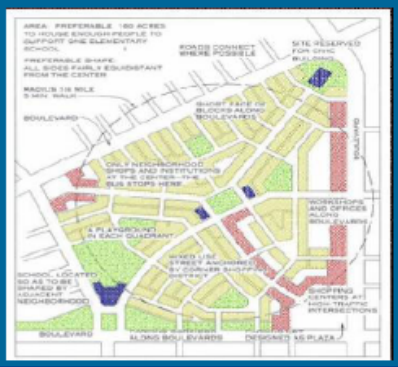
What History Tells Us



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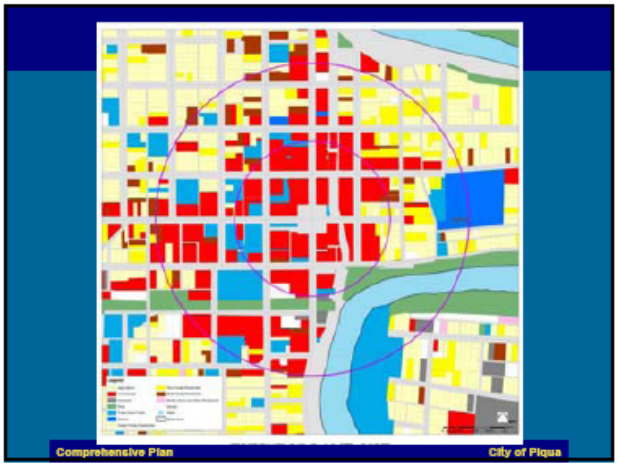


Existing Geography

Land Use and Zoning
- Use Emphasis

Use

Form

Management

Comprehensive Plan City of Piqua

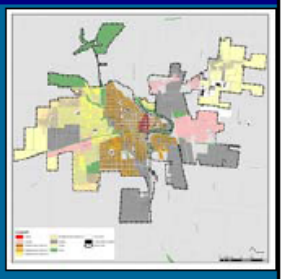
Optional Geography

Land Use and Zoning
- Form Emphasis

Use

Form

Management



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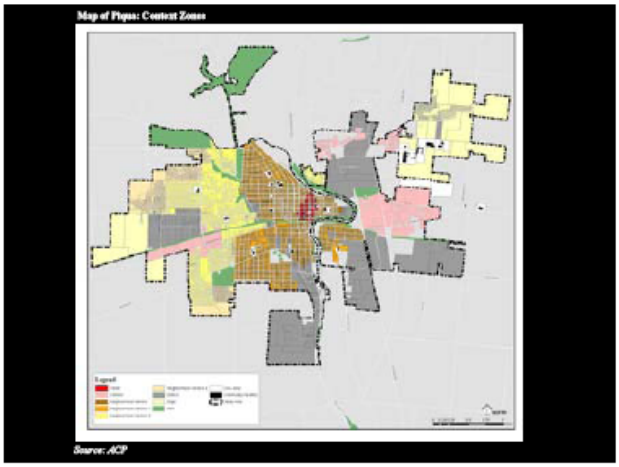

Context Zone Site Examples

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Center

- The center zone is highly walkable
- Contains a mix of uses
- Short block length
- Access from streets and alleys
- Historic continuity

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Neighborhood General

- Traditional urban development area
- Consists of a mix of uses
- Access from streets and alleys
- Includes detached single family homes
- Discernable center and edge with civic uses

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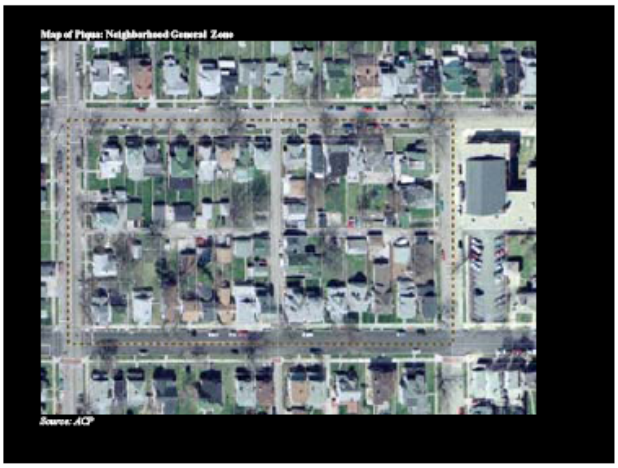

Neighborhood General 1

- Access from streets and alleys
- Includes detached single family homes
- Consists primarily of residential uses
- Lots are slightly larger than those found in Neighborhood General

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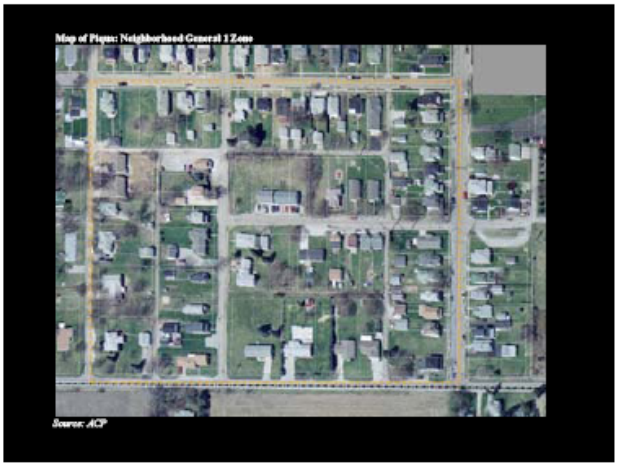

Neighborhood General 2

- Larger Lots
- Block length is longer thus reducing walkability
- Street pattern begins to change from grid
- Consists primarily of single family residential

Comprehensive Plan City of Piqua

Neighborhood General 3

- Curvilinear suburban street pattern
- Reduced connectivity and walkability
- Consists primarily of single family residential
- Civic uses not as proximate to residential as in other Neighborhood General areas

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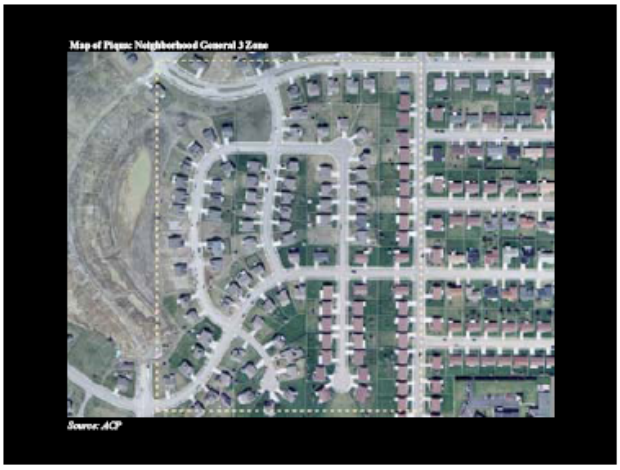

Edge

- Found at the edge of town
- Mostly detached single family residential
- Larger lots relative to other neighborhoods
- Access from the street

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Corridor

- Found along arterial streets
- Mostly non-residential uses
- Not as pedestrian/bicycle friendly as the other context zones
- Access from the street

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Choices for how we grow

Review Draft Land Use Principles

Comprehensive Plan City of Piqua

Draft Land Use Principles

- Listed on the following pages are the draft land use principles for the Built Environment Chapter of the Comprehensive Plan
- The principles are statements of intent that describe the direction of future development and redevelopment in the Community
- They will be used as a framework to shape the built environment and develop a conceptual land use map

Comprehensive Plan City of Piqua

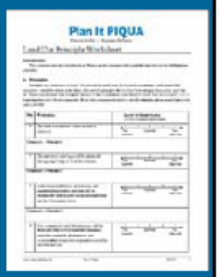
Draft Land Use Principles

- The principles are based in part on the input provided at the Public Meetings in January, and the technical information contained in the Existing Conditions Report
- Your role is to review the principles and provide general feedback
- Your input will be used to refine the draft principles

Comprehensive Plan City of Piqua

Land Use Principles

- Use the worksheet provided to make comments on the Land Use principles
- How important is each principle on a scale of 1 to 5
  - Very Important: If you believe a concept is very important you would circle "5."
  - Not important at all: If it is not important at all you would circle "1."
- General Comments - tell us if we have missed any important principles



Comprehensive Plan City of Piqua

1
The small town historic character will be enhanced.
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City of Piqua

2
The entryways into Piqua will be enhanced through improving the built environment.

3
Underutilized industrial, institutional, and manufacturing districts and sites will be strategically redeveloped and incorporated back into the Community fabric.
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City of Piqua

4
New commercial retail developments will be developed with local architectural elements, pedestrian amenities, greenspaces, and accommodate future redevelopment/reuse of the structure and site.
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City of Piqua

5
Future industrial development on the edges of the Community will be compatible with the surrounding areas, and not burden the existing transportation infrastructure.
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City of Piqua

6
The downtown, and new commercial developments, will have a mix of uses that are distinctive and contribute to increasing the City's overall identity.
Comprehensive Plan
City of Piqua

7

Residential areas will have strong neighborhood qualities.

Comprehensive Plan City of Piqua

8

A broad range of housing types and price levels within neighborhoods will strengthen the community identity, and create new opportunities for residents to find housing.

Comprehensive Plan City of Piqua

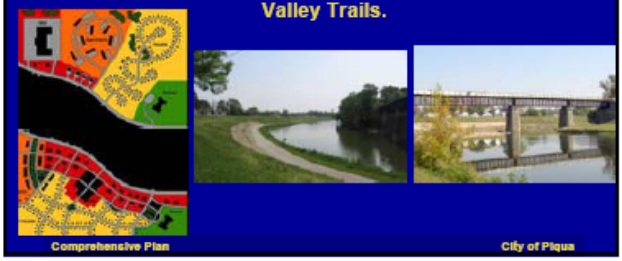
9

Streets will create an attractive public realm and be exceptional places for people.

Comprehensive Plan

10

Places will be better connected, to improve the function of the street network and facilitate pedestrian mobility; better opportunities will be created to walk and bike to and from the Miami Valley Trails.



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11

Better opportunities will be created to connect people to the Great Miami River.

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Land Use Principles

Mapping Exercise

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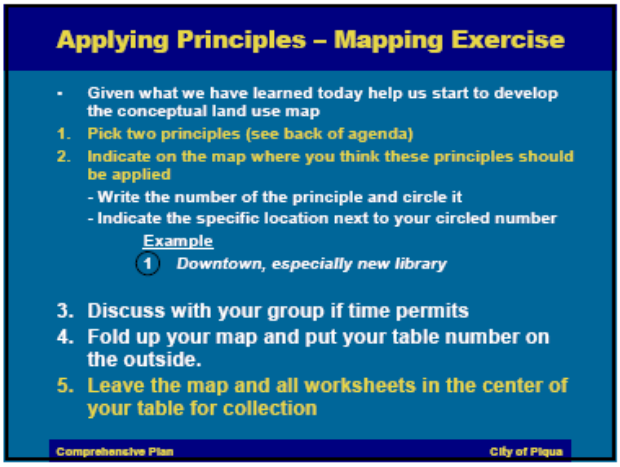

Applying Principles – Mapping Exercise
Given what we have learned today help us start to develop the conceptual land use map
1. Pick two principles (see back of agenda)
2. Indicate on the map where you think these principles should be applied
- Write the number of the principle and circle it
- Indicate the specific location next to your circled number
Example
1 Downtown, especially new library
3. Discuss with your group if time permits
4. Fold up your map and put your table number on the outside.
5. Leave the map and all worksheets in the center of your table for collection
Comprehensive Plan
City of Piqua

Plan It PIQUA
Preserve the Past — Empower the Future
Comprehensive Plan
City of Piqua

Plan It PIQUA

Preserve the Past — Empower the Future

COMPREHENSIVE PLAN UPDATE

Attachment B:Worksheet Results

The results of the goal writing and land use principle worksheet activities are included in this section of the appendices. All of the information contained in the participant's worksheets was entered verbatim into a digital format. The result of these activities is listed on the following pages.

Goal Worksheet Results

Goal	Comment
1	Good - need to preserve history also
1	And preserving historic structures
1	Support this goal
1	Consideration is that those "Built Environment" properties will be kept up and improved - not allowed to deteriorate in any way
1	I agree, but also we should have an above average and outstanding parks system which includes the Miami River Corridor.
1	Certain people within the community wanting the small town feel is what's keeping the city from growing
1	Sounds good. Promote Johnston Farm and hotel once completed
1	Piqua should work towards an inviting appearance and not focus on small town
1	Identify old historic landmarks focus on them if in entrances or on main thoroughfares in city
1	Build something concerning theme design areas re: German Village (Columbus); also design restrictions
1	Very well stated!
1	Also marketing, positive attitude and promoting ourselves
1	Creating inviting appearance is fine as not to put a binder on the actual use of land and not being restrictive so we need to keep small town feel and we need to change having a different feel progressive is one, there are others
1	Stop and look at what hardship is created to people made to make some improvements until some economic growth is more positively happening
1	Market Piqua on TV
1	Agree
1	Agree - plant trees along streets to add to "small town feel" - future housing developments focus on building neighborhoods (like at Swift Run)
1	The goal is basic vanilla. The point that should be made is that deep changes need to occur to Piqua's physical appearance. These changes must be purposeful and willful.
1	The "small town feel" is not as important as retaining the historic sense of Piqua enhanced by creating a good first impression with attractive entranceways into the city
1	Could improve, how and don’t know at this point. Garden Club does a good job
1	We need to remove abandoned and vacant properties and have a plan for this also survey our housing how much is rental and possibly stop any new rentals being built
2	And promote good health
2	Organizations (i.e.: YWCA, YMCA, SA)
2	Support this goal
2	Need to take demographics into account - senior housing and services and activities need to be stressed
2	Senior Center is a must. If we expect to pull all neighborhoods together for a really a strong community i.e.: N.I.T. zoning enhancements etc we will need to get moving on this, it’s the only way to touch every neighborhood! And have total involvement
2	Need to find some way to provide a build strong neighborhood. Neighborhood school used to do it, but now since no longer community schools there needs to be something else. Possibly turn the old library into a cultural center, like Haymen in Troy well stated
2	Piqua lacks in community services. Look at what resources they put into the Bethany Center, maybe a United Way/Church group, but is this how Piqua wants to be known for its support
2	Sounds good
2	OK
2	OK

2	Pride in ones own home, pride in ownership and rental properties making them good examples of community spirit
2	Piqua needs to work on safety services to create a less stressed safety services, need more police and fire personnel and less overhead personnel in other departments
2	Create employment and training programs to utilize student knowledge and skills to stay local
2	Stronger job market
2	We need improve citizens attitudes about our city
2	Agree - how can one be against motherhood and apple pie? Support school system and vice versa, to help economic development wok to overcome Piqua people's negative self-perceptions, thru internal marketing of Piqua's strengths on-going development efforts
2	Goal is way too broad to be useful as an action goal. Focus in simple narrower terms would be much more helpful
2	With Edison and the JVS, education is a key attractor. The next step is to provide and/or improve the cultural and recreational opportunities. "Build it and they will come"
2	We had a great hospital, but we let it get away! We need a trauma center for emergencies the hospital is 6 miles away. The Upper Valley Hospital has the market cornered and did not expand to Piqua
2	What is Piqua doing for our youth today? We're working on a senior activities like Troy has, what I go to, its good too
2	The city needs to actively figure out how to buy and fund a senior citizen center
3	And historic neighboring community
3	And high end service providers (i.e.: insurance exams)
3	Support this goal
3	The Main Key, Good economic development is the answer to all future planning needs
3	This again requires total involvement of all citizens all age groups
3	Need better communications between city and citizen in order to improve attitudes, when a business leader asks a citizen on the street, positive feedback can be given
3	Piqua should focus on how to support and increase the industry it currently has as well as new industry
3	Look at business good and bad. Get it started to bank a selling point to more industry
3	Provide for "incubator" type business opportunities in "economic zones"
3	OK
3	Promote our industrial buildings that are available and show how they may be used for small and large business. Better downtown parking and facilities, more cultural activities.
3	Piqua needs to strive to get a reputation for working with business and be compliant on ordinances to help retail and industry and have good working relationship with them
3	Let business promote more with signage and impose ideas and set a model attitude to want to be in, or start a business in Piqua
3	All the above
3	Sure! Grow Piqua Now is/should help, as does city's increased emphasis on economic development hotel project will also help
3	Again this is way too broad to be useful. Programs and policies to attract new industries is good start. Developing workforce training is vital, as is maintaining and expanding existing companies
3	These all dovetail, I like the idea of retention and expansion. Keep what you have while pursuing new business, which will then support more amenities (i.e., nice restaurants and café on the river, etc.)
3	We have a great downtown area, however there are a number of businesses that have irregular hours some days they are open and some days they are closed then why complain about losing money
3	None, don’t know how to answer this at this point because what's said is good
3	I agree that we need to attract more small businesses
4	Including historic homes
4	Develop pride in older/historic homes in south end (Historic District)
4	Support this goal
4	Promote turnover of rental vacant housing stock to private homeownership

4	We will need to make it possible for a number of low income families to purchase through local bank loans (low interest) support
4	I agree
4	Home ownership a good point, but maybe not necessary
4	Piqua needs to make sure it does not self divide into west housing and east retail
4	City to work more closely with problem properties not so much strong arm tactics. Do it now without much exposure today it is reflected in visionary communities
4	Part of the value of a community is its appearance to visitors
4	OK
4	Better maintenance of rental properties
4	The city also needs to help to find the assistance that will help them to fix and bring housing up to code
4	Do it allowing urban area housing without a plan for existing properties (diverse) means all price ranges to fit all citizens or street people will happen…
4	Work with people to improve property
4	Need to decrease the stock of homes
4	Continue and even strengthen efforts to improve housing stock and demographics, devise efforts to convert the unusually high number of rental houses back into owner occupied houses. Discourage low-income housing
4	Good goal
4	Demand and developers will meet the first criteria, and increased pride should help support the attractiveness of property
4	We have a great number of rentals in Piqua quite a few of them are substandard the owners say they can't afford to fix them up. What can we do with this problem?
4	Good
4	Our community need to convert many two-family homes into single family homes, many are not the correct zoning
5	And continue to attempt to connect trails to other cities in the future
5	Provide green space around all parking lots
5	Support this goal
5	Encourage residents to appreciate and respect natural areas, vandalism and littering problems are too prevalent
5	I support this a must have for a vibrant community
5	Need to hire additional city employees before you create more work for current employees
5	Sounds really good, stated well more P.A.T.H. trail extending through Miami County will help
5	Troy developed their riverfront over 30 years ago. Piqua still needs it
5	Connect all parts or sections to bike path or walking path. Use proper screening along roads or streets to hide rear of housing developments. (Indian Ridge west development rear of housing could be hidden with proper screening)
5	Create a riverfront south of the new Shawnee bridge and an entertainment food district north of the bridge extending into part of the downtown area
5	OK
5	Keep them clean
5	More riverfront use by citizens being allowed to have more input on use grants to restore some buildings
5	Improve and add to entering parks and trails
5	City should own land along river behind homes on Broadway
5	Much better use of the river see if can bring back water skiing contests, other events even fun ones, like a floating bed race or a canoe race. Plant more trees along city streets especially at the entrances to the city
5	The dam system ruined the GMR locally. The Great Miami River is slow flowing shallow water. It does not invite development. The only people who use it regularly is the ski team. Piqua has enough parks and trees with the neighborhoods it has. Parks and trees should be part of future development

5	This (to date) has been a vastly underused resource. The river is a strength; maximize that strength. An upscale café on the rive scene is something I for one would visit frequently
5	Good - Don't understand "public access to the river corridor"
5	Would like to see South Main Street area housing taken down and new condos and parks in that area
6	Maybe start focus on downtown
6	And direct incentive (tax breaks/cash)
6	Building codes could be more user friendly. Support this goal
6	People with ideas and deep pockets are key
6	We could where a property is just above saving, put low interest loans in for first time home owners
6	Condos within the downtown area
6	If needed do not be afraid to demolish structure, hospital on top of list
6	City has to identify most codes and have user create an update plan to bring building code while maintaining a profitable business
6	Promote land reapportionment/development and permit demolition of dilapidated housing and business
6	OK
6	Downtown redevelopment of sidewalks
6	Use common sense when it comes to codes to not go overboard in trying to make this a coated community or have that kind of ordinances
6	Some building codes are abused stopping progress, condemning and claiming needs more supervision from state authorities
6	Back off on unnecessary codes
6	There must be an expectation of use before investment
6	Revise zoning code in some areas of town to allow multi-person/family use, such as "mother-in-law" apartments
6	The goal has a sharper point on it than the preceding goals
6	I would not relax codes but I would surely endorse financial (or other) means to facilitate adaptation of a facility to fit the new owner's needs
6	Subdivide large buildings to accommodate smaller shops
6	Zoning comments good. Do something with them, what?
6	Again I say get a plan for abandoned and vacant properties, we need to know what is happening in our housing stock
7	Runners
7	And connect east to west along river bridges
7	Support this goal
7	Street and sidewalk conditions need to be addressed, underused public transportation, may change with the rise in gas prices
7	Signage, reduced speed limits and some wider residential streets
7	City transportation back (taxi service) City needs to maintain the current bike path which is currently unsafe
7	Continue working on roadways, 25-A will help fulfill this goal
7	Need more focus to where growth is going to be and where growth should be. Then develop transportation system
7	Look for a south business loop to the west
7	Develop an automated transportation system for the public utilizing computerized transportation (bus/trolley)
7	Take back our public transportation it has gone downhill since the County took it over
7	Try to add the bike path for a secondary system for transportation thru the city to alleviate traffic and try to get people to use bikes for transportation
7	Where is a cab service 24hrs 7 days a business opportunity not a city government opportunity shuttles - buses to hospital
7	Improve what we have

7	Don’t forget that we have an airport! Industrial airport brings jobs and services
7	Design bike paths to connect more areas of city, including to stores, banks, etc. Can we get better public transportation? Design new housing areas to be more pedestrian friendly
7	Transportation and safety have been addressed already
7	In my opinion the car and truck traffic is a major detriment at this point. Improvements here would greatly enhance Piqua's "user friendliness"
7	We're doing ok I guess
7	Piqua needs a better stop light system, ours does not give a good flow of traffic in the downtown area
8	Financial assistance
8	Continue to plan and implement underground utilities
8	All utilities should be investor owned business. Support this goal except as noted
8	Piqua's utilities have historically been affordable and efficient, governmental issues hard to deal with
8	We have reliable utilities
8	Covers everything, Keep the utilities owned by City
8	Major oversight on our utilities, water plant prime experience
8	Look forward into future for proper updates in streets and alleys over build for lasting qualities
8	Set up a replenishment schedule for sewer, water purification, and power
8	Too Lofty! Wordy!
8	Infrastructure should be up to date
8	Not a major problem in Piqua except will it handle future growth if it happens
8	Keep utilities to the lowest rates to add growth
8	Bury as many power lines as possible especially at city entrances and along main thoroughfares, put other lines in alleys
8	Cost efficient utilities are important, whether water gas, or electricity. Good goal
8	As a major user of Piqua Power I'm in a position to give major kudos to PMPS. From a manufacturing stand point this is another strength that should be touted for interested industrial growth
8	We have one of the best power supply systems in the area our rates are lower than most. We do this with good management however the cost of power will increase 50 percent in the next ten years if the price of fuel keeps going up.
8	Don’t know to answer this
8	I think our city does well in maintaining our utilities, but our natural gas is too high
9	And organizations like YWCA
9	And public organizations (Y's library, schools, civic clubs, chamber, etc.)
9	Support this goal
9	Neighborhood Associations being formed will bring more needed citizen participation
9	Neighborhood meeting, neighborhoods helping neighbors etc neighborhood activities to involve all ages
9	Pride among Piqua residents needs to take place first
9	Stress communication, neighborhood associations are a wonderful idea
9	Need to push back residents to take ownership for neighborhoods
9	Looks good
9	Reapportion the city into 7 or 9 wards with each ward having its own neighborhood association and smaller groups = more involvement
9	Too wordy!
9	OK
9	Stop only supporting groups that are city friendly listen to all other groups and get both sides of story to better implement solutions and progress
9	Support all parts of the city
9	Motherhood and apple pie again. Encourage most qualified, smartest people to run for city commission, some have good leadership with vision

9	This goal will not engender pride among Piqua residents. It might keep the peace. Most citizens don't care much for local government except those who cannot miss council meetings on TV. Residents will feel pride when Piqua looks prideful, and that will take more than a refurbished hotel. The hotel will look like a golden thimble on a messy desk
9	This is a self-fulfilling prophecy a snowball effect. The more positives the city shows, I predict more interest from the citizens
9	Support our commissioners and go to the meetings and participants, what else?
9	I feel we need more cooperation between dept heads. I think there is conflict between then particularly Health and Police

Land Use Worksheet Results

Principle	Score	Comment
1	5	
1	5	
1	5	
1	4	Walking component needs to be stressed
1	5	
1	5	
1	5	Downtown specifically
1	5	
1	3	
1	5	
1	4	
1	5	But also be a progressive community and dare to be different think outside the box
1	3	People make a community not just buildings visual is necessary but the degree is not just one sided
1	5	
1	3	
1	4	
1	3	Not necessarily the "small town" part but emphasize the historic character and without which there wouldn't be a Heritage Festival!
1	3	
1	3	
1	5	
1	3	
1	5	Restore buildings on Main Street to preserve or replicate late 1800's - early 1900's design "flavor"
1	3	
2	3	
2	4	
2	3	
2	3	
2	4	
2	5	
2	5	Copperweld improvement, South Main Street Trailer Park
2	5	
2	4	
2	5	
2	5	
2	5	
2	4	Not enough thru streets only one that goes all the way thru town (Main Street)
2	3	
2	4	
2	3	
2	5	That first impression is just that and very important to the initial opinion of Piqua
2	2	
2	5	
2	5	Worn out housing needs to be removed
2	5	Extremely important - first impression is everything
2	5	More trees and flowers, especially at edges and first 1/4 mile

2	5	
3	3	
3	3	
3	5	
3	5	
3	3	
3	5	Hospital
3	5	Be sure redevelopment is appropriate, make sure community seems alive
3	5	Remove Aerovent and Deckere building, rebuild as gate condos overlooking the river with greenspace along Ash Street. Remove Copperweld to put in new industrial park in the approx 75 acres there to do it
3	4	
3	4	
3	5	
3	5	If need be demolish and sell or rebuild
3	4	By utilizing existing buildings puts the neighborhood history and character
3	5	
3	5	
3	5	
3	5	A "ghost town" look is extremely draining on the community
3	3	
3	5	
3	5	Would like to see some of the buildings made into small offices such as wood shovel office bldg.
3	5	Important for city's "face lift"
3	4	
3	4	
4	4	
4	4	
4	4	
4	3	
4	5	
4	3	
4	5	Redevelop and use current establishments
4	5	Use old style architecture in new buildings, Victorian, colonial, etc.
4	4	
4	4	
4	3	
4	4	Should depend on the development and its intent
4	4	As long as its cost doesn’t discourage growth
4	3	
4	3	
4	5	
4	3	I don’t believe "reuse" is as important as creating the architectural element
4	3	
4	5	
4	5	Would like to see the theory of Smart Growth in our community live and work in the same building
4	3	
4	4	Pattern after the Green in east Dayton area
4	4	

5	3	
5	3	
5	5	
5	4	We have great opportunities with buildings available around I-75
5	4	
5	5	
5	5	
5	4	Keep to south, east, west side of City for access to south 25A exit
5	4	
5	2	
5	4	
5	5	
5	4	
5	5	
5	4	
5	5	
5	5	The expansion on Troy's west side is an abomination. Who wants to look out their windows and see a factory? Truck traffic is a challenge through Piqua
5	3	
5	5	
5	5	This needs to look and maneuver through like larger industrial parks
5	4	
5	4	Need more roads on east side of Piqua for Wyndham Industrial Park and others
5	3	
6	4	
6	5	
6	4	
6	4	
6	3	
6	5	
6	5	Small town character
6	5	Keep old look in new construction
6	3	
6	4	
6	5	
6	5	
6	4	Small business is the backbone to a city to support local citizens and service for expansion
6	3	
6	4	
6	5	
6	2	I predict growth will find its own diverse mix of uses without trying to steer it that way. The key is to impart the concept that Piqua is embracing progressive controlled growth.
6	3	
6	5	
6	5	
6	3	We just need to concentrate on bringing in many uses
6	5	

6	3	
7	5	
7	5	
7	4	
7	5	Safe neighborhoods vitally important
7	4	
7	5	
7	5	
7	3	
7	5	
7	4	
7	5	
7	4	All diverse housing for all age groups
7	3	
7	4	
7	2	In today's busy world and mobile society, more and more people are "waving neighbors", not as close knit as in the past.
7	3	
7	5	
7	5	
7	5	Essential for community pride
7	3	Pattern after "traditional neighborhood" developments, with alleys (for garages, etc.), such as Plum Creek outside Austin, TX and others.
7	3	
8	3	
8	3	
8	5	
8	5	
8	4	
8	5	
8	5	Spread the wealth over the community, no rich northside, lower class southside
8	4	Remove houses in some blocks for more space in south side
8	3	No rental slums!
8	4	
8	4	
8	5	
8	5	
8	5	
8	3	
8	3	
8	2	I believe demand and developers find this level on their own.
8	3	
8	5	
8	4	
8	4	Poorly maintained substandard housing is not acceptable!
8	4	
8	4	
9	4	
9	4	
9	5	
9	5	

9	3	
9	5	
9	5	
9	5	Use proper screening to enhance roadway more housing built facing major roadway instead of rear of housing that's seen from roadway
9	4	
9	5	
9	4	
9	4	
9	3	
9	3	
9	4	
9	3	
9	2	Streets should be aesthetically pleasing but I have trouble with the phrase "exceptional places". I wouldn't want the priority on the minority.
9	2	
9	5	
9	5	
9	3	
9	4	Goes with #1. Easy to walk, bike, outdoor dining and more trees.
9	4	
10	4	
10	4	Walk/bike trail over Miami river bridges
10	5	
10	3	
10	5	
10	5	
10	5	
10	5	
10	2	
10	3	
10	5	
10	5	
10	4	
10	5	
10	3	
10	3	
10	4	Pedestrian mobility is already pretty good, getting through town without catching every light is a challenge in a car.
10	3	
10	5	
10	5	Feeder network for bike path is vital for moving people safely
10	4	What, specifically, are the "Miami Valley Trails"? Is there a hidden agenda here?
10	3	
11	4	
11	3	
11	5	
11	4	Many opportunities associated with river corridor
11	4	
11	5	
11	5	Bike path - try to have one connector within 1/2 mile of everybody

11	5	Redesign Ash Street entrance and South Main along river into condo and/or upper class housing, enhance with trails
11	4	
11	2	
11	4	
11	5	
11	3	
11	5	
11	4	
11	2	
11	5	The concept of using the river as a drawing card is a great idea, a waste of natural resource and great Piqua asset if not utilized.
11	2	
11	5	
11	3	Absolutely necessary to enhance our City would like to see housing removed on S Main Street and condos built
11	5	This will draw people into the park system and will allow us to utilize a great natural resource
11	5	Yes! Try to get a canoe rental livery north of town. Use wide area behind Old Decher's building as "a beach", with portable shelters, food concessions, volley-ball and sun-bathing, maybe swimming
11	1	

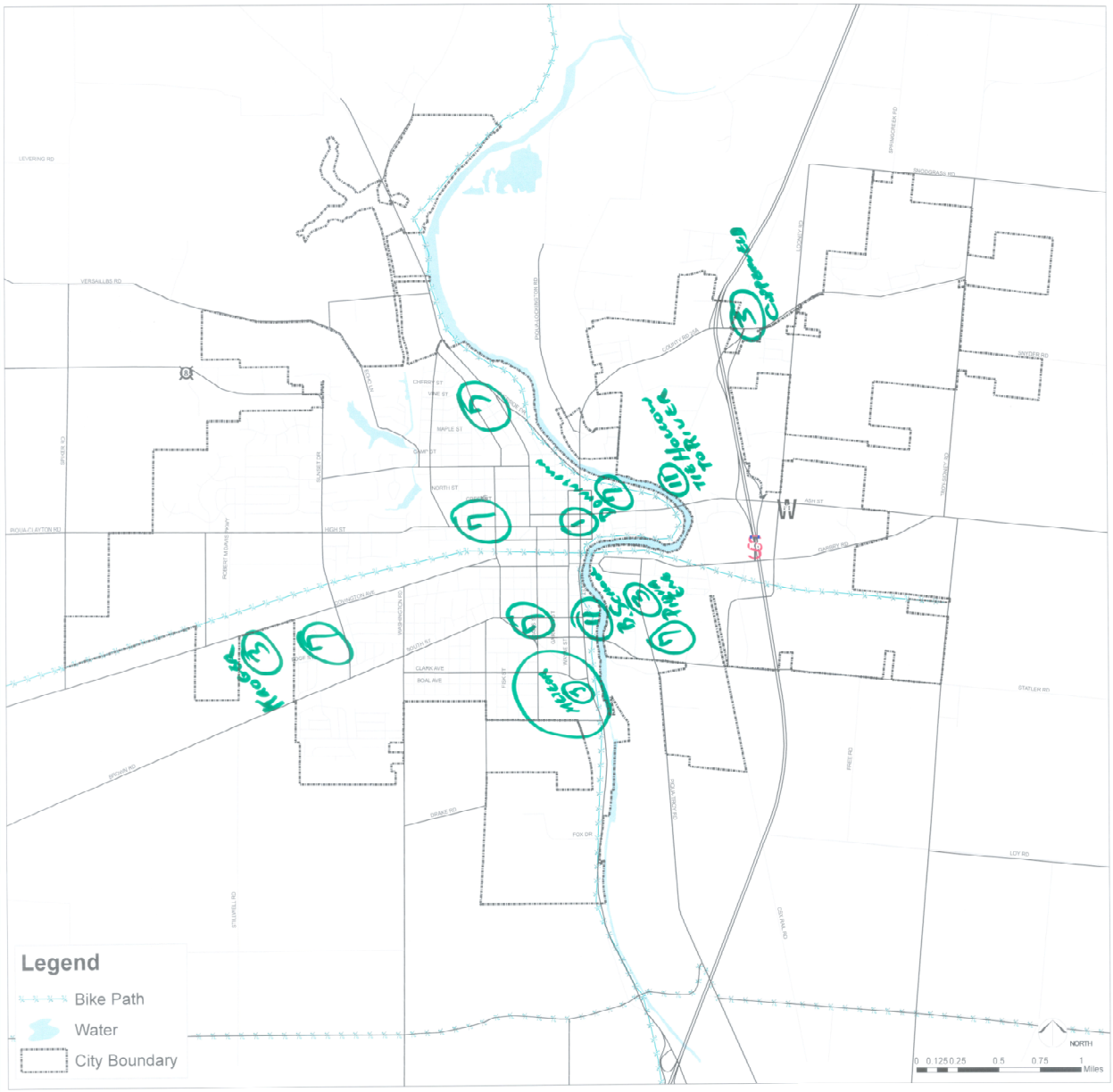
Plan It PIQUA

Preserve the Past — Empower the Future

COMPREHENSIVE PLAN UPDATE

Attachment C: Participant Maps

The maps completed as part of the Community Choice Meeting were scanned and are included in the section of the Appendices.



STREET MAP

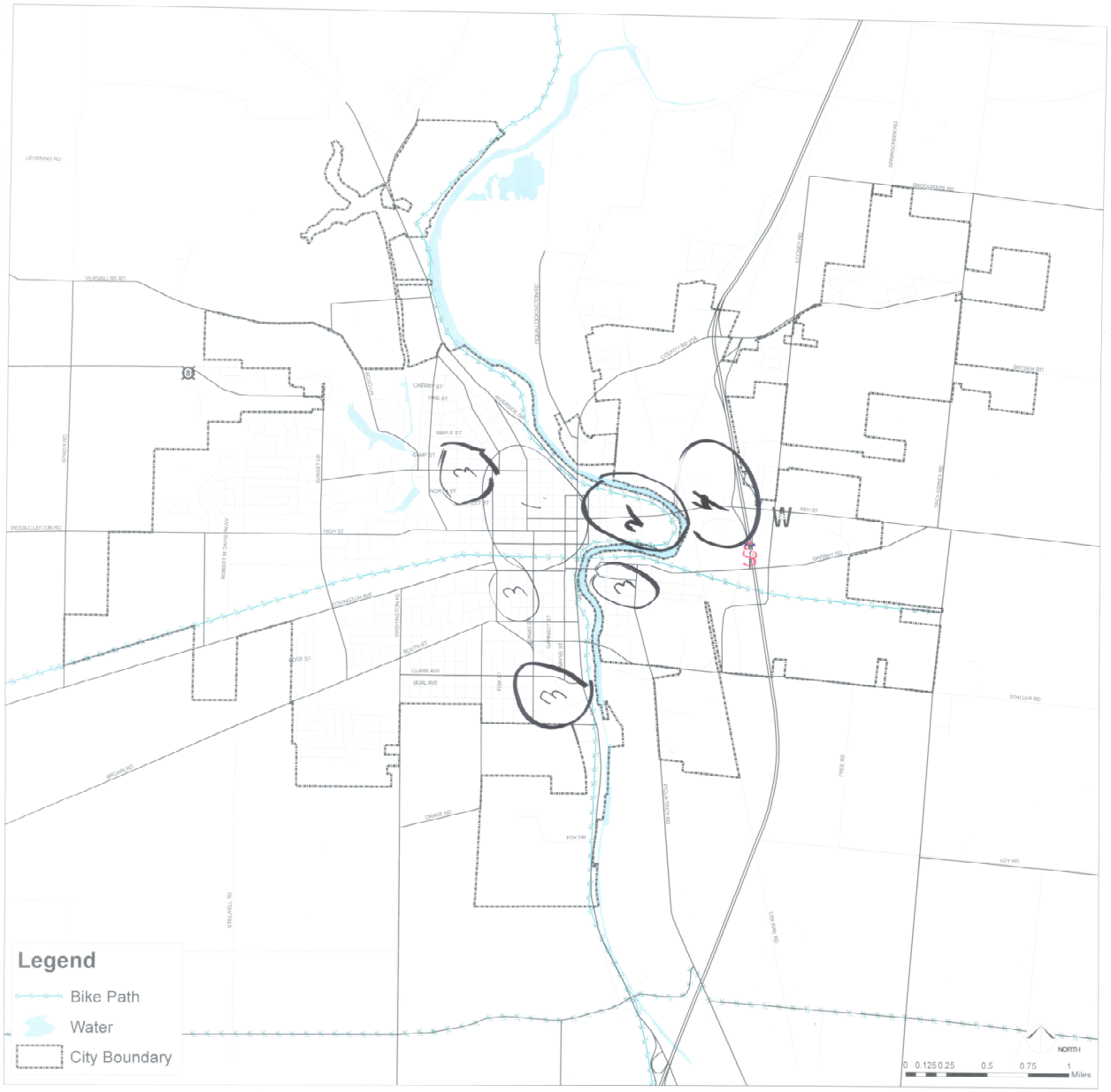
PLAN IT PIQUA

PIQUA, OH MAY, 2007 ACP-VISIONING & PLANNING, LTD.

STREET MAP

PLAN IT PIQUA

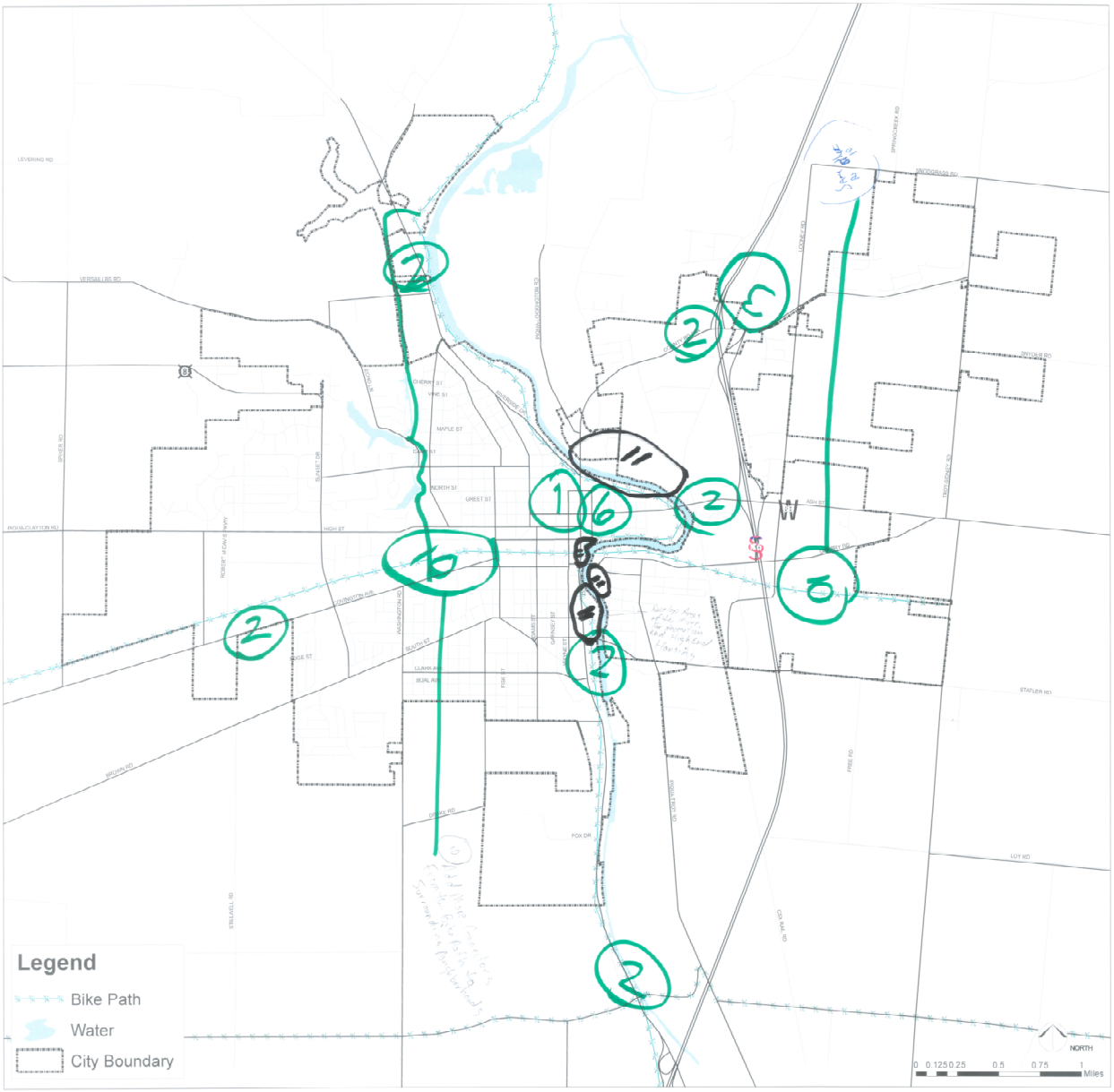
PIQUA, OH MAY, 2007 ACP VISIONING & PLANNING, LTD.



STREET MAP

PLAN IT PIQUA

PIQUA, OH MAY, 2007 ACP- VISIONING & PLANNING, LTD.



STREET MAP

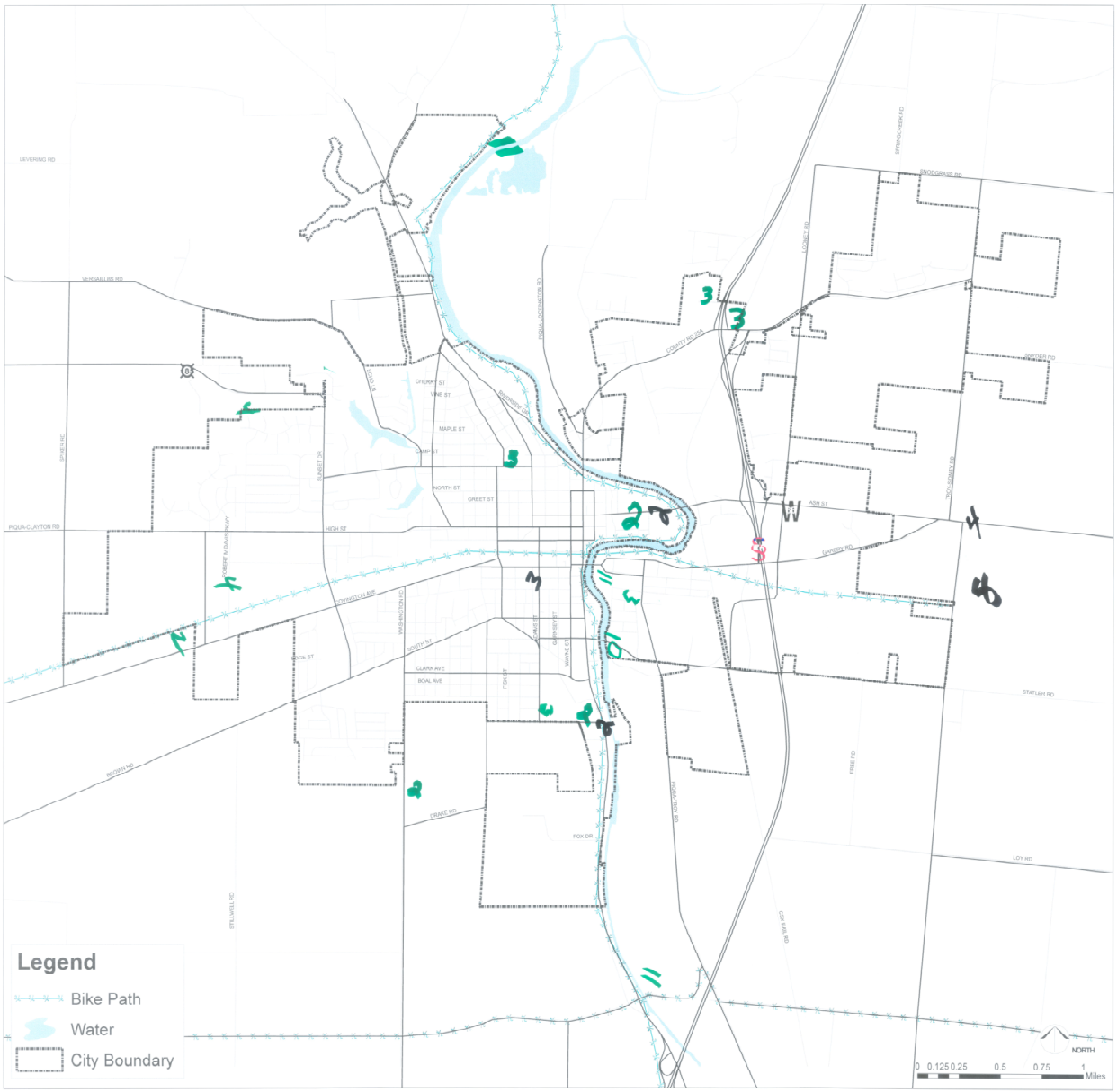
PLAN IT PIQUA

PIQUA, OH MAY, 2007 ACP VISIONING & PLANNING, LTD.

STREET MAP

PLAN IT PIQUA

PIQUA, OH MAY, 2007 ΔCP· VISIONING & PLANNING, LTD.



STREET MAP

PLAN IT PIQUA

PIQUA, OH MAY, 2007 ACP·VISIONING & PLANNING, LTD.

Plan It PIQUA

Preserve the Past — Empower the Future

III. Plan It Piqua

Existing Conditions and Technical Memorandums

PREPARED FOR
THE CITY OF PIQUA

PREPARED BY
ACP–VISIONING & PLANNING, LTD

APRIL 11, 2007

Plan It PIQUA

Preserve the Past — Empower the Future

Table of Contents

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5. Economic Development
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9. Attachments

Plan It PIQUA
Preserve the Past — Empower the Future

1. Introduction

COMPREHENSIVE PLAN UPDATE

Plan It PIQUA
Preserve the Past — Empower the Future

1. Introduction

A community's existing conditions and trends provides an important foundation for making policy recommendations. This report includes key indicators that illustrate the existing conditions and trends for the City of Piqua. This information will be used to build a foundation for the Comprehensive Plan, which the community can use to examine the current conditions of the City and surrounding regions. As the Comprehensive Plan is implemented, the indicators can be used as a tool to guide the community into the future and help measure its successes.

This report is based primarily on information from the Piqua Planning and Zoning Department, Miami Valley Regional Planning Commission, and the US Census Bureau, as well as information gathered from local industries and businesses. Data for 2000 is provided, as well as the most recent data available (e.g. 2005) whenever possible, however, the US Census has not computed 2005 estimates for the City of Piqua. Additional data from peer communities, the county, and the state are also provided wherever practical.

This report is divided into seven chapters. Each of the chapters will use the following structure:

- Overview - The overview provides a brief look at the information contained in the chapter and the sources used.
- Key Findings – The key findings represent a summary of important conclusions drawn by the Consulting Team based on research, as well as discussions with the Steering Committee and City Staff.

- Detailed Information – This section includes the background documentation for the key findings. How the information is compiled and presented may differ from subject to subject.

Each section will include appropriate tables, charts, and/or maps, depending on the most valuable tool for illustrating the key trends and conditions. These figures will be developed in conjunction with City and County staff using existing data and ACP's GIS services.

Plan It PIQUA
Preserve the Past — Empower the Future

2. Demographics

COMPREHENSIVE PLAN UPDATE

Plan It PIQUA
Preserve the Past — Empower the Future

2. Demographics

Overview

This narrative presents a summary of the general demographic characteristics for the City of Piqua. The primary demographic characteristics examined in this chapter are population and housing. These two indicators provide a snapshot of the city's population composition, and provide insight into housing trends that may affect the town in the future.

The primary sources of information used to prepare this analysis include the 2000 US Census and data gathered from the Piqua Planning and Zoning Department.

Key Findings

- The population of the City of Piqua has remained constant from 1970-2000.
- Miami County has seen a 17 percent increase in population from 1970-2000, while the Miami Valley region has remained constant.
- As of the 2000 US Census, there were 20,738 people, 7,903 households, and 5,227 families residing in the City.
- In 2000 the population density was 1,939.2 per square mile. There were 8,886 housing units at an average density of 830.9 per square mile.
- In terms of age, Piqua's population is spread out with 26.5 percent under the age of 18, nine percent from 18 to 24, 28.9 percent from 25 to 44, 21.3 percent from 45 to 64, and 14.3 percent age 65 and up..

Detailed Information

Population

The population of Piqua has not grown over the last thirty years. The population of the Miami Valley Region has remained constant as well. However, Miami County has experienced a 20 percent increase in population since 1970. Tables 2.1 and 2.2 show the population growth figures and percentage growth of Piqua compared to the region.

TABLE 2.1- HISTORIC POPULATION GROWTH 1970-2005

Historic Population Growth 1970-2005					
Area	**1970**	**1980**	**1990**	**2000**	**2005**
City of Piqua	20,741	20,480	20,612	20,738	20,883
Miami County	84,342	90,381	93,182	98,868	101,619
Miami Valley Region	899,407	885,166	867,454	901,456	897,008

Source: 2000 U.S. Census

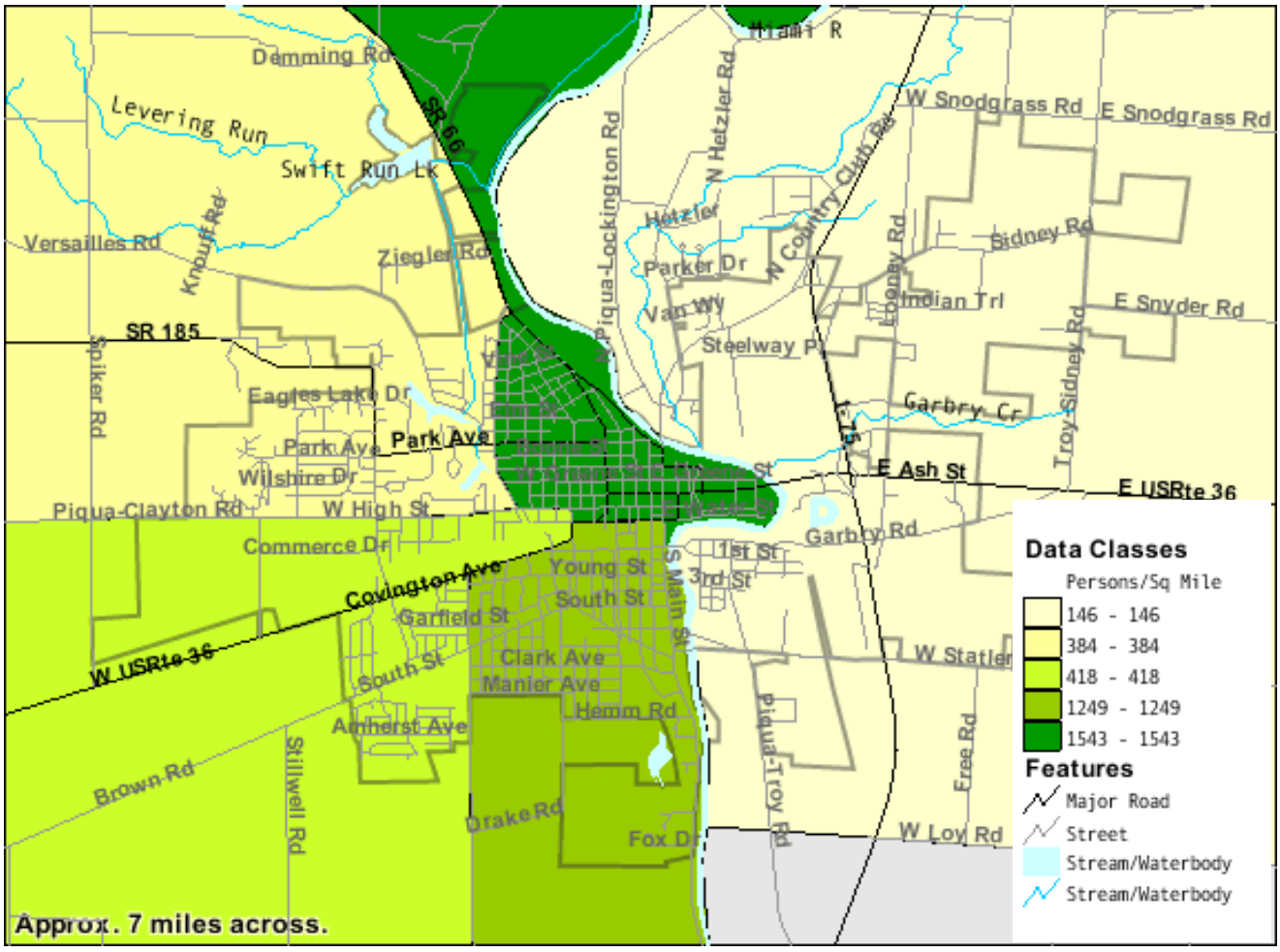
TABLE 2.2– PERCENT POPULATION CHANGE 1970-2005

Historic Population Growth - Percent Change				
Area	**1970-1980**	**1980-1990**	**1990-2000**	**2000-2005**
City of Piqua	-1.30%	0.64%	0.61%	0.70%
Miami County	7.16%	3.10%	6.10%	2.80%
Miami Valley Region	-1.60%	-2.10%	3.90%	-0.50%

Source: 2000 U.S. Census

In 2000, the population density was 1,939.2 persons per square mile. There were 8,886 housing units at an average density of 830.9 units per square mile. This density is illustrated by Map 2.1, which was produced by the US Census based on the year 2000 population data. The City is predominately built out. Densities may increase if infill growth is encouraged by the City. However, if growth trends remain consistent with the density of new areas growing on the fringe of the City, Piqua is likely to become larger and less dense.

MAP 2.1 – PIQUA POPULATION DENSITY



Source: 2000 U.S. Census

Education

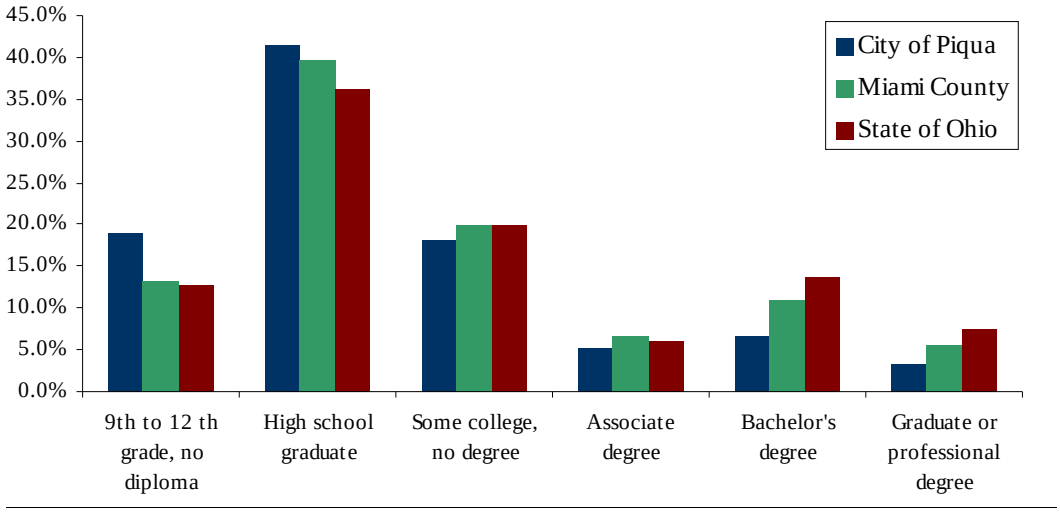
Piqua has a significant number of residents, 25 years and older, with a high school degree or higher. However, when compared to the region the City has a considerably lower number of residents with a bachelor's degree or higher. Approximately 10 percent of Piqua residents, 25 years and older, hold a bachelor's degree or higher, while approximately 16 percent of residents in Miami County and 21 percent of residents in the State of Ohio have a higher education degree. (See Table 2.3 and Chart 2.1.) The national average for residents with a bachelor's degree or higher was 26 percent of the 25 and older population in 2000.

TABLE 2.3 – EDUCATIONAL ATTAINMENT

Educational Attainment	City of Piqua		Miami County		State of Ohio	
	2000 Pop.	% of Total	2000 Pop.	% of Total	2000 Pop.	% of Total
Total Population Over 25 Years of Age	13,499	100.0%	65,765	100.0%	7,411,740	100.0%
Less than 9th grade	854	6.3%	2,748	4.2%	331,801	4.5%
9th to 12 th grade, no diploma	2,570	19.0%	8,649	13.2%	930,284	12.6%
High school graduate	5,593	41.4%	26,183	39.8%	2,674,551	36.1%
Some college, no degree	2,451	18.2%	13,032	19.8%	1,471,964	19.9%
Associate degree	699	5.2%	4,438	6.7%	439,608	5.9%
Bachelor's degree	887	6.6%	7,174	10.9%	1,016,256	13.7%
Graduate or professional degree	445	3.3%	3,541	5.4%	547,276	7.4%

Source: 2000 U.S. Census

CHART 2.1 – EDUCATIONAL ATTAINMENT COMPARISON



Source: 2000 U.S. Census

Household Makeup

According to the 2000 US Census there are 8,263 households in Piqua, out of which 32.7 percent have children under the age of 18, 50.4 percent are married couples living together, 12.9 percent have a female householder with no husband present, and 32.4 percent are non-families. Approximately 27.3 percent of all households are made up of individuals and 11.4 percent have someone living alone who is 65 years of age or older. The average household size is 2.47 and the average family size is 2.99.

As indicated, Piqua's households are comprised of a significant proportion of married couple families (50.4%). This number is lower than the proportion of married couple families in the region (62%), but higher than the state (48%). According to the 2000 Census approximately 12.9 percent of households in Piqua are single parent households. This figure is higher than the county average (10.0%), but lower than the state (21.0%). Table 2.4 shows the household makeup for Piqua, the county, and the State.

TABLE 2.4– HOUSEHOLD MAKEUP COMPARISON

Household Type	City of Piqua		Miami County		State of Ohio	
	2000 Pop.	Pct. of Total	2000 Pop.	Pct. of Total	2000 Pop.	Pct. of Total
Total Households	8,263	100.0%	37,064	100.0%	4,734,590	100.0%
Married-Couple Families	4,161	50.4%	22,852	61.7%	2,285,798	48.3%
Other Family, Single Parent	1,066	12.9%	3,718	10.0%	996,042	21.0%
Householder Living Alone	2,676	32.4%	10,494	28.3%	1,452,750	30.7%

Source: 2000 U.S. Census

Age

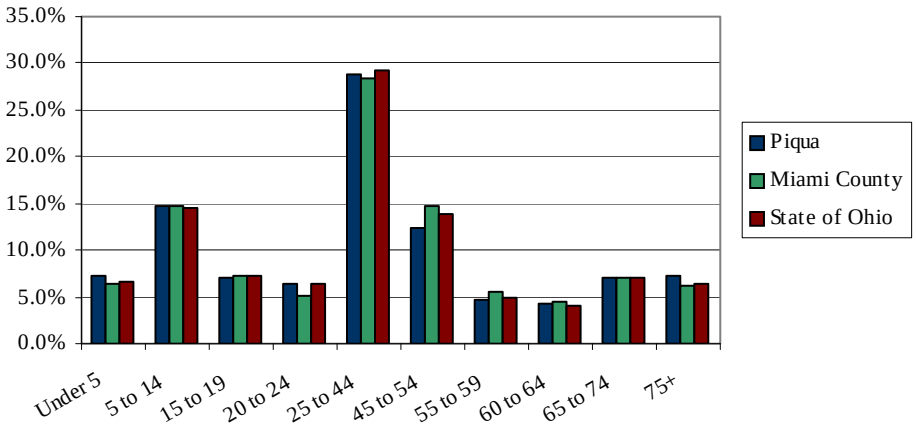
The two largest age cohorts in Piqua are the 5-14 age group (15% of the total population) and the 25-44 age group (approximately 30% of the total population.) The City has a relatively small number of residents ages 60 and over, however this cohort will increase as the baby boomers continue to age. Table 2.5 shows the age cohort makeup of the City of Piqua. Chart 2.2 shows the age cohort makeup of Piqua compared the to region.

TABLE 2.5 – AGE OF RESIDENTS IN PIQUA

Age Bracket	City of Piqua	
	2000 Population	Percent of Total
Total Population	20,738	100.0%
Under 5	1,508	7.3%
5 to 14	3,063	14.8%
15 to 19	1,465	7.1%
20 to 24	1,321	6.4%
25 to 44	5,990	28.9%
45 to 54	2,581	12.4%
55 to 59	954	4.6%
60 to 64	887	4.3%
65 to 74	1,447	7.0%
75+	1,522	7.3%

Source: 2000 U.S. Census

CHART 2.2 – AGE GROUP COMPARISON



Source: 2000 U.S. Census

Between 1990 and 2000 there were some significant changes in the age cohorts in the City of Piqua. (See Table 2.6.). The age cohorts for years 44 and under showed a decrease in total population, while the age cohorts 45 to 59 showed a considerable jump in the total share of the population. Piqua's aging population will have an impact on public service demands in the coming years.

TABLE 2.6 – CHANGE IN AGE COHORTS 1990-2000

Age Bracket	City of Piqua
	1990 - 2000 Percentage Change
Under 5 years	-9.40%
5 to 24	-6.45%
25 to 44 years	-2.60%
45 to 54 years	28.40%
55 to 59 years	14.80%
60 to 64 years	3.10%
65 to 74 years	-9.00%
75 years and over	21.60%

Source: 2000 U.S. Census

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3. Transportation

3. Transportation

Overview

This chapter describes Piqua in terms of its transportation system – with a focus on roadways, public transit, and alternative transportation infrastructure such as sidewalks, trails, and bikeways.

The information contained in this section was gathered from the 2000 U.S. Census, the Ohio Department of Transportation, Miami Valley Trails, and the Floyd Browne Group.

Key Findings

- The majority of residents in Piqua (82%) make their commute to work alone in a car, truck, or van.
- Approximately eleven percent of the population carpools to work.
- On average it takes commuters using a car, truck, or van approximately seventeen minutes to get to work
- Many blocks that have been created in the City over the last twenty years are considerably longer than those found in the original plat of Piqua.
- The street width standards for new local, collector, and arterial streets are wider than those set forth by the Ohio Fire Code (OFC).
- Traffic bottlenecks primarily involve semi truck traffic trying to maneuver through tight turns on city streets. Complaints about truck traffic are heard in the residential neighborhoods.

- State Route 66 and 185 are the main problems. SR 185 would function better if it were realigned.
- I-75 access is considered good but some pockets of land near the Interstate are isolated. Proposed industrial and commercial development could overwhelm the local street network in the future if transportation improvements do not keep pace.
- There are some capacity issues with US 36, especially at the two lane segments near the soccer stadium on East Ash Street.
- The City maintains local 101 and 103 funds established for major street projects and maintenance work.
- Problems exist with regard to bus maneuverability and drop off and pick up areas on the older school sites.
- Between 1968 and 2006 the federal and state routes serving Piqua saw a 30 to 35 percent increase in car traffic, but a marked decline (55-60%) in semi-truck traffic.
- There are three primary bike paths in Piqua: the River's Edge Trail which extends 3.5 miles, the P.A.T.H running east to west for 5.5 miles, and the Canal Run trail which runs north to south for 2.3 miles along the west side of town.

Detailed Information

Background

The average resident and business owner of Piqua appreciates the canal history of the area, but over the last fifty years the residents have become focused on efficient travel across town and to other more distant destinations. Today, the City totals approximately 150 miles of streets and 28 miles of alleys. Essentially, the transportation focus is on cars and semi-trucks.

The City of Piqua is planned around a typical grid street system that has grown over the years in response to population increases and economic stimuli. Around 1950 this pattern was lost as Piqua responded to new housing development and economic realities supported by a boom in industry and manufacturing.

Piqua first developed as an outpost along the Miami-Erie Canal and later as a cross-roads of the north/south and east/west railroad lines. In recent times, Piqua continues the tradition as an important transportation location along the Interstate 75 corridor. In addition, Piqua is well within the economic influence of I-70, another seminal link of the national transportation infrastructure. These highways have significance throughout North America as a conduit for the movement of vast quantities of goods, commodities and people.

Piqua is also served by a local airport, Hartzell Field, and is located within a one hour drive of the Dayton International Airport. The area is served by Miami County Transit which provides dial up service, and Class A

rail service provided by national carriers. Piqua also features a well-developed, maintained, and connected bike and recreational trail system.

Piqua is part of the Dayton MSA (Metropolitan Statistical Area), a three plus county region of southwest Ohio administrated by the Miami Valley Regional Planning Commission (MVRPC). This organization serves as a clearing house for macro transportation matters in the Piqua area. MVRPC historically has had a significant influence on the improvements made to the regionally transportation system in and around Piqua.

Transportation & Market Access

Piqua has excellent transportation access from points north and south along Interstate 75, from Canada to Florida. I-75 links Piqua to important markets including Detroit, Cincinnati-Dayton, Atlanta, Tampa-St. Petersburg, and Miami-Fort Lauderdale. I-75 provides direct access for business and commuters from Dayton, the closest large city. Piqua is part of the Dayton-Springfield Metropolitan Area and I-75 provides direct access to Piqua from other points in the metro area. Interstate 70 provides Piqua important east-west access, just 21 miles to the south where I-75 meets I-70.

Interstate 70 connects the Dayton region with large markets east and west, including Columbus, the Pittsburgh area, and Baltimore (to the east) as well as Indianapolis, St. Louis, Kansas City, and Denver (to the west). Piqua also has good local and regional east-west access via U.S. Highway 36. All of these roads provide very good visibility for the city and some of its available industrial property. However, several of Piqua's larger industrial areas are located away from I-75 and trucks must travel through the city to reach the interstate. Piqua is within a ½-hour drive of Dayton International Airport, at Exit 32 off of I-70. Dayton provides passenger and air cargo service via 12 commercial carriers. Finally, freight rail services are available on the north-south line connecting Toledo to Dayton and Cincinnati.

Mode of Transportation/Commute

The vast majority of residents in Piqua make their commute to work alone in a car, truck, or van (see Table 3.1). This number accounts for approximately eighty two percent (82%) of the population. Approximately eleven percent of the population carpools to work. On average it takes commuters using a car, truck, or van approximately seventeen minutes to get to work, compared to the state average of twenty-two minutes and the national average of twenty-five minutes. This indicates that a large percentage of residents live and work in Piqua.

TABLE 3.1 – RESIDENT MODE OF TRANSPORTATION

Means of Transportation	Number of Workers	Percent of Workers
Workers 16 years and over	**9,985**	**100**
Car, truck, or van -- drove alone	8,200	82.1
Car, truck, or van -- carpooled	1,095	11
Public transportation (including taxicab)	131	1.3
Walked	251	2.5
Other means	92	0.9
Worked at home	216	2.2
Mean travel time to work (minutes)	17.2	(X)

Source: 2000 U.S. Census

Roadway Pattern

Roadway patterns are determined by two primary attributes: connectivity and block length. These two elements define how cars, pedestrians, and bicyclists move throughout the community. They also are fundamental in defining the character of a neighborhood, district, or corridor.

Blocks

The City has set forth provisions in the Subdivision Code that regulate block length. The City regulates block length in §151.57 of the Subdivision Regulations. The code indicates blocks shall not exceed 1,600 feet in length, but does not mention a minimum.

Many blocks that have been created in the City over the last twenty years are considerably longer than those found in the original plat of Piqua. This has made both pedestrian and vehicular mobility increasingly more difficult. Long block lengths together with dead end cul-de-sac streets in new subdivisions create a lack of connectivity in the roadway network. As a result, pedestrians, bicyclists, and automobiles are forced to follow a street pattern which can be inefficient, difficult to navigate, and unsafe for access.

Street Standards

Street standards and lot standards define the character of a neighborhood or corridor. To achieve the most efficient land use pattern and roadway function, site planning and street standards need to be evaluated together to ensure a safe and attractive built environment. Lot standards are defined in the Piqua Zoning Code and street standards are defined in the Subdivision Code §151.51 and are listed in Table 3.2. These standards are applied to new and existing streets depending on the average daily trips (ADT) the roadway generates. Evaluating the ADT for a roadway determines the

functional classification of the roads, and helps to identify the most important corridors and local streets that provide access in neighborhoods.

TABLE 3.2 – PIQUA STREET STANDARDS

Street Type	Right-of-Way	Pavement Back-Back Curb	Sidewalk (each side)	Tree Lawn (each side)
Arterial	80 feet	59 feet	4 feet	6 feet
Collector	60 feet	37 feet	4 feet	6 feet
Minor	50 feet	31 feet	4 feet	5 feet

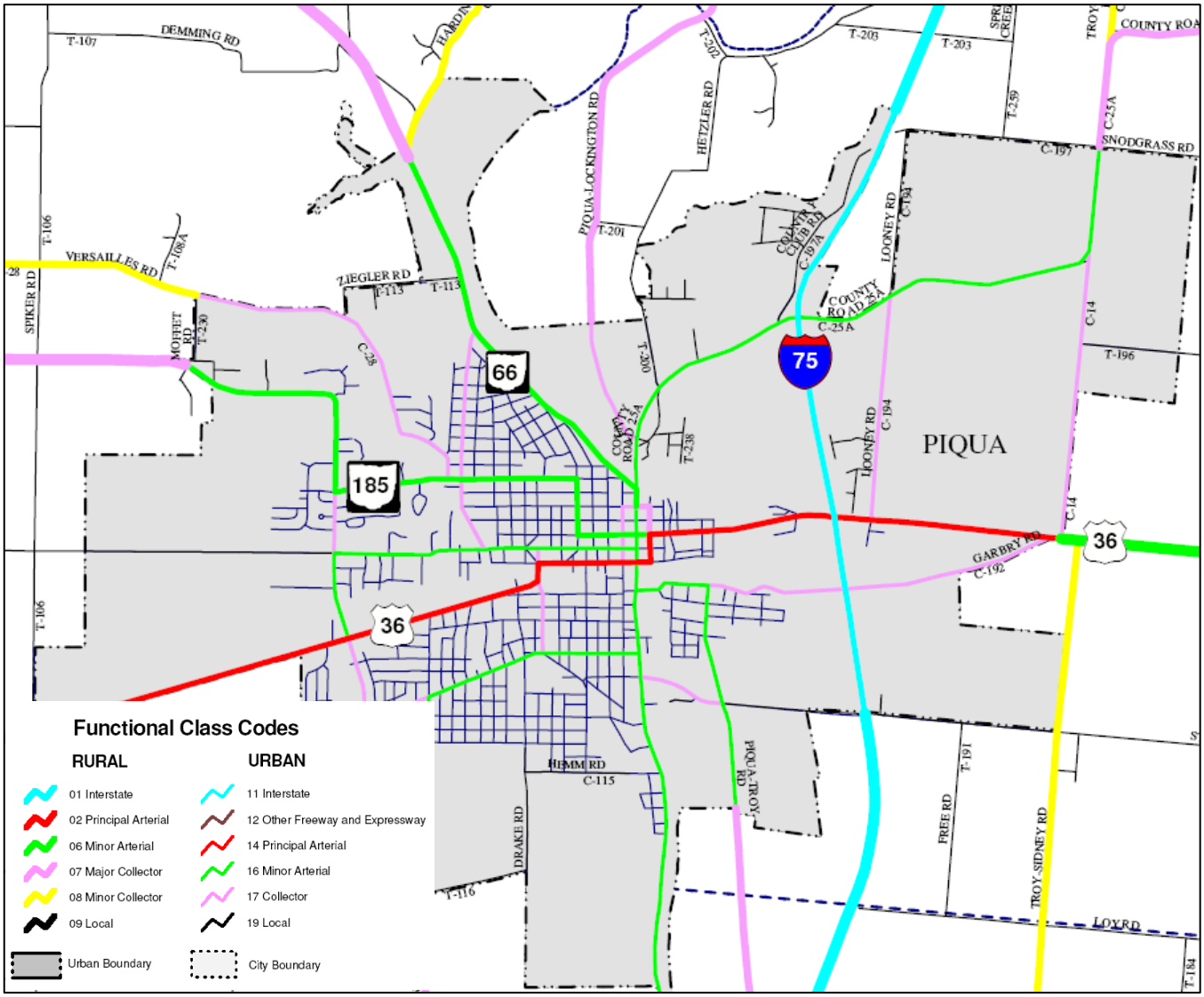
Source: City of Piqua

The street widths requirements of local streets are wider than those set forth by the Ohio Fire Code (OFC). The OFC requires streets where a fire hydrant exists to be a minimum of 26 feet. Street width standards exceeding this width increase the scale of the street to buildings.

Functional Classification

Creating a functional classification of streets and highways is the basis for city and neighborhood planning and design. To meet existing and future traffic demand, each street must serve a specific role in the overall transportation network. The concept of Functional Classification is an intuitive understanding that streets, roads, and highways serve different functions. Different roads have certain characteristics that serve different purposes, and planners and engineers classify streets according to these characteristics. In general, streets are classified as arterials, collectors, and local streets. This report identified the classification of roadways in and around Piqua based on the ODOT street classification standards, as well as input from City staff. The street classifications listed here are also listed in Map 3.1.

MAP 3.1 - PIQUA ROADWAY CLASSIFICATION



Source: Ohio Department of Transportation

Arterial System

Arterials include those classes of highways and streets emphasizing a high level of mobility for the through movement of traffic. Land access is subordinate to this primary function. Generally, travel speeds and distances are greater on these facilities compared to the other classes. The highest class of arterials – interstates and freeways – are limited access to allow the free flow of traffic. Several arterial roads pass through the City of Piqua, and work together with the interstate highways to further enhance the City's regional transportation connections. The primary arterials serving the City of Piqua are: State Routes 185 and 66, U.S Route 36, County Road 25 A, Troy-Sidney Road, and Washington Road. Piqua also has excellent regional access being served by I-75.

Collector Streets

Collector streets collect traffic from local streets and distribute it to major and minor arterials. Collectors provide for both mobility and land access to other neighborhoods and districts. Generally, trip lengths, speeds, and volumes are moderate. Primary Collectors in the City are Versailles Road, Piqua-Troy Road and Piqua Lockington Road. Minor Collectors include State Route 185, Washington Avenue, College Street, N. and S. Wayne Street, Garbry Road, Statler Road, S. and N. Sunset, High Street, College Street, South Street, McKinley, Broadway/Riverside Drive, Park Avenue, Forest Avenue, and Looney.

Local Streets

The primary function of a local street is to provide access to and from neighborhoods and districts. Travel speeds, distances, and volumes are generally low, and through traffic is usually discouraged.

The Ohio Department of Transportation (ODOT) has classified the street network in Piqua and Miami County. Map 3.1 from ODOT illustrates the roadway classification system as classified by ODOT. Those streets, which are not classified, are determined to be local streets. Examining the classification system and the street standards set forth by the City, a clear pattern develops for how the built environment takes shape as a result of the roadways and their classification.

Traffic Counts

A number of traffic counts were done as part of the existing conditions analysis. The data for this analysis was obtained from the Ohio Department of Transportation (ODOT) for state and federal routes in the Piqua area. Representative data was selected by decade from the 1960s through the year 2000. The data shows mixed results relative to transportation trends.

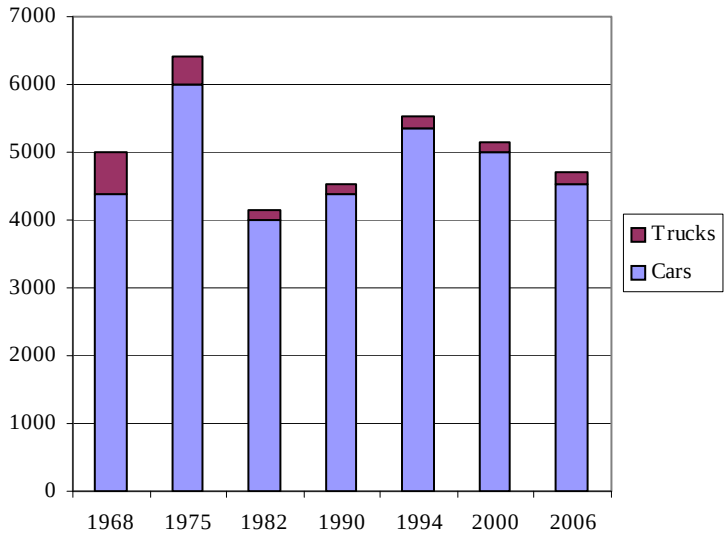
The traffic counts suggest the federal and state routes serving Piqua (36, 66, 185) have handled 30-35% more car traffic over the five decade period. Corresponding semi-truck traffic on the same routes over the same time period display a marked decline in volume (55-60%) when compared to the car traffic (see Charts 3.1 and 3.2.). Table 3.3 shows the change in ADT for cars and trucks on the indicated routes from 1968-2006. Detailed tables of these traffic counts are included in full in Attachment A.

TABLE 3.3 -ADT TRENDS FOR CARS AND TRUCKS 1968-2006

Route	Cars	Trucks
US 36	75%	-22%
SR 66	3%	-69%
I-75	1029%	11%
SR 185	25%	-76%

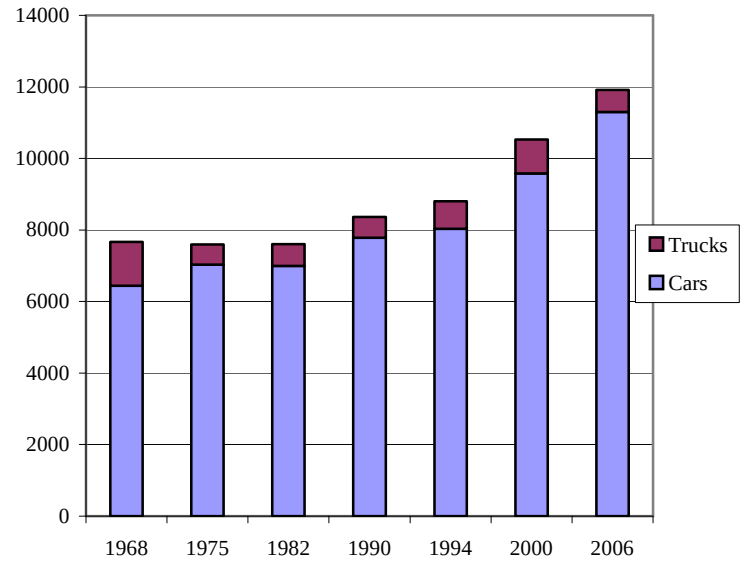
Source: ODOT 2007

CHART 3.1 -ADT S.R. 66 THROUGH PIQUA 1968-2006



Source: Floyd Browne

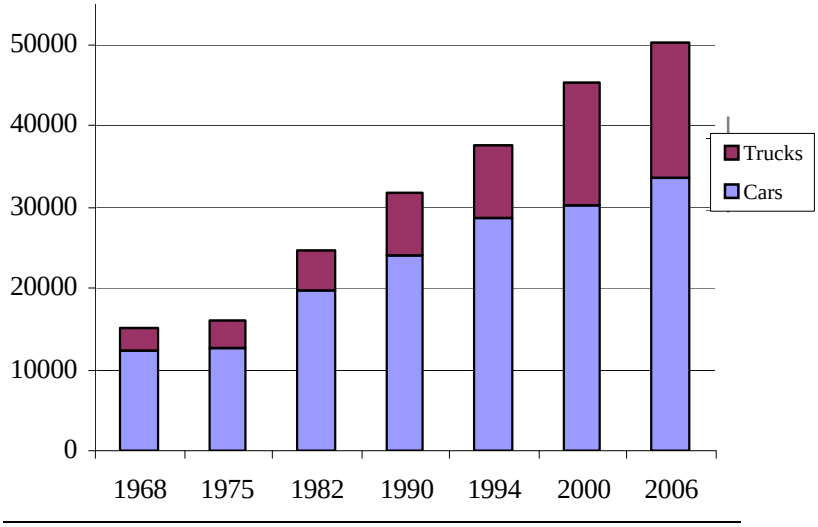
CHART 3.2 -ADT U.S. 36 THROUGH PIQUA 1968-2006



Source: Floyd Browne

While truck traffic on federal and state routes has declined, truck opposite direction (see Chart 3.3), with a nearly five-fold increase. Car traffic is has also been increasing on Interstate 75 with an increase of approximately 200 percent during the analysis period.

CHART 3.3 -ADT I-75 THROUGH PIQUA 1968-2006



Source: Floyd Browne

County Road 25A was also looked at in terms of traffic generation. This route was once designated as US 25, and traced a route closely aligned to present 1-75 through Ohio. US 25 is now gone but "old 25" still exists and is used as a "business route" within the 1-75 corridor. Relative to Piqua, 25A joins 1-75 at Exits 75 and 83 and is designated as Main Street through town. ODOT does not monitor traffic trends on 25A but limited data from the Miami County Engineering Department is available. No semi-truck figures are available with the county data – only ADT or average daily traffic which includes both cars and trucks. The county data is spread-out over a 4-5 year period in various county locations so only general comparisons with ODOT numbers is available. Still, the ADT numbers on 25A are comparatively heavy through Piqua in the range of 10,000 to 13,000. Figures north and south of the 1-75 exits (75 AND 83) significantly drop off, indicating that 25A is currently functioning as a service road to Piqua in association in association with 1-75.

Transportation Forecast

The Institute of Transportation Engineers (ITE) has developed guidelines for traffic generation per land use. Actual traffic generation could vary widely for a specific site and/or use, but ITE figures are commonly accepted data for traffic projections. ITE uses the term "trip generation" based on nationwide surveys for a range of land use types. These figures account for employee as well as delivery traffic. They do not necessarily account for vehicle type, and cases such as a truck terminal require special consideration.

To forecast future trips in and around Piqua a number of potential developable sites were selected and analyzed. The sites selected were areas along the I-75 corridor which were zoned industrial. They were selected based on their zoning due to the community's concern for truck traffic in and around the City. These sites are listed in Table 3.4.

TABLE 3.4 –DEVELOPMENT SITES ALONG PIQUA I-75 CORRIDOR

Name	Zoning	Acres
GMS	Industrial	5
Cromes	Industrial	85
Innovation Parkway	Industrial	62
JEB Development	Industrial	101
Lavy Industrial	Industrial	25
Wyndham Ind. Park	Industrial	108
Enos/Pautsch	Industrial	312
PIC-114-SCR	Industrial	25
PIC-100-JD	Industrial	7
Total Acres		**730**

Source: Floyd Browne Group 2007

The ITE has published threshold levels for the following data relative to industrial types. The data provides information on the number of trips generated by different types of industrial uses. Table 3.5 highlights the trip generation per industrial land-use type by acre typically found in Piqua.

Applying the ITE averages to the total industrial acreage listed in Table 3.4, the following theoretical site-generated traffic volumes are derived: 7,300 peak hour trips and 47,000 ADT. Clearly, development will occur over a period of time so these figures are somewhat academic but nevertheless can serve to stimulate adequate transportation planning.

These two figures should be further refined by "pass-by", "internal trips", and other traffic analysis factors. The final figures may be 20-40 percent lower depending on the specific land use resulting in approximately 5,000 peak hour trips and 30,000 ADT. However, the final numbers are still significant compared to existing traffic volumes.

TABLE 3.5 – DATA GERMANE PER INDUSTRIAL TYPE

Land Use	100 Peak Hour Trips (per acre)	750 Daily Trips (pere acre)
Research & Development	4.5	4
Light Industrial	8.0	11.5
Manufacturing	17.5	19.5
Averages	**10.0**	**11.7**

Source: The Institute of Transportation Engineers (ITE) 2007

Traffic Signals

The City is believed to have at least a dozen non-warranted traffic signals in town, especially in the older residential areas. The Ohio Manual of Uniform Traffic Control Devices (OMUTCD) outlines criteria for the installation of traffic control signs, equipment, pavement marking, etc. for all public roads in the State; this includes traffic signals. In addition to an increase in accident frequency, unjustified traffic signals can also cause excessive delay, disobedience of signals, and diversion of traffic to inadequate alternate residential routes around Piqua. On top of this, there is a perpetual cost in operating a signalized intersection 24 hours a day. This averages at least $1,500 per year depending on location and the number of signal heads involved. Some of these signals may have undoubtedly been warranted at one time but shifting traffic patterns, and school relocations for example, have reduced their usefulness. ODOT has grant programs that seek to study the signals in a given community and identify those that have outlived their legitimate value. It would not be prudent to speculate on signal locations at this time due to public perceptions. A formal technical study should be conducted.

On a closely related front, traffic signal timing should also be examined in terms of the OMUTCD. The busier routes through town, 36, 66, and 185, all have at least four (4) 90 degree turns. This challenges signal timing and coordination as all the routes converge in the center of the CBD along with heavily traveled Main Street (County Road 25A). As was discussed above, excessive delays will encourage motorists to seek alternative residential streets with its safety ramifications. For example, parallel streets with US 36 such as Wood, Young and Greene Streets may see spill-over traffic. Signal timing also relates to adequate turning lane capacity and intersection geometrics. For example, the intersections of Ash & Spring and Ash & Water have substandard maneuvering area which hinders signal timing and efficient traffic movement during the AM and PM peak traffic periods. Signal timing and coordination work should be tied to improvements to selected intersection geometrics as well. Again, a technical study should be conducted to prioritize this effort.

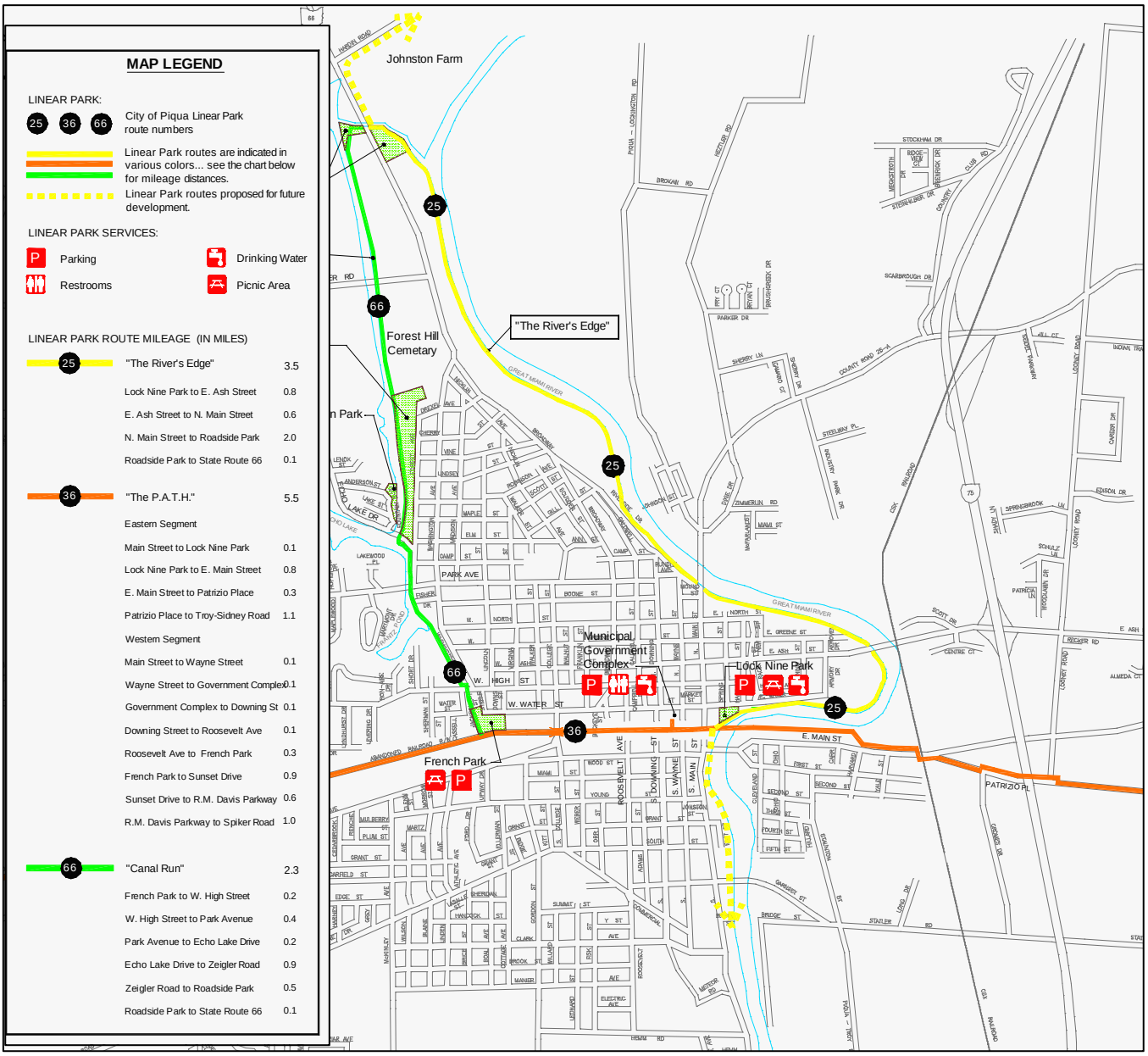
Images of the Piqua's bikepath system (source: www.miamivalleytrails.org)

Pedestrian and Bicycle Facilities and Routes

The City of Piqua has a well established bicycle pathway, and a number of defined neighborhoods and districts with sidewalks and pedestrian amenities. The City of Piqua's subdivision code § 151.71 states "sidewalks shall be required on both sides of every street in all new subdivisions". This policy has led to the creation of a comprehensive sidewalk system that enables local residents to move in and around the City. Some improvements are needed to the existing system to connect neighborhoods and districts to each other, and improve the physical condition of some pathways that have deteriorated over the years.

The bicycle network in Piqua is part of the Miami Valley Trails Network. There are three primary bike paths in Piqua. These paths are the River's Edge Trail, which extends 3.5 miles, the P.A.T.H running east to west for 5.5 miles, and the Canal Run trail which runs north to south for 2.3 miles along the west side of town. Map 3.2 shows these trails in relation to the rest of Piqua.

MAP 3.2 - BIKE PATHS IN AND AROUND PIQUA



Source: http://www.miamivalleytrails.org/piqua.htm

Miami County Bike Path Task Force Chairman Bob Shook recently announced A Clean Ohio Grant Application for the completion of the Bike Path section from Piqua's Lock Nine Park through The Piqua Material Inc.

property along the Miami River to Peterson Road. The grant application for $450,000, is a joint partnership between The City of Piqua and The Miami County Park District. This trail section is called Section 6 by the Miami County Bike Path Task Force. This bike path section will provide Piqua citizens with a future connection to The Miami County and all the Southern Ohio Bike Paths. This connector will be a beautiful and vital addition to the Miami County Bike Trails program.

The Piqua Bike Path section will connect with the proposed path coming from Troy to Eldean Road. It will then follow the Miami River west bank through the Twin Arches Park, then run North under the I-75 bridges to Peterson Road crossing the river onto Piqua Material land.

The section from Troy to Eldean Road is currently in the planning stages as a joint project by the City of Troy and the Miami County Engineers. It is funded by a TEA grant through Miami Valley Regional Planning Commission with a projected completion date in 2008/2009.

The completion of the Piqua to Troy sections will leave only the Piqua to Shelby County section to be planned and grants applied for to provide 22 miles of Miami County bike path from Shelby County to Montgomery County's Five Rivers MetroParks trails (Miami Valley Rail Trails Newsletter February 2006).

Public Transportation And Regional Transportation Network

As of January 1, 2007, the Miami County Transit Service provides all public transit services to Piqua as well as the county. The City of Piqua owned and provided a curb-to-curb, demand responsive public transit service from 1981-2006. The federal and state public transit grant programs that make it financially possible to provide public transit decided both the Piqua and Miami County Transit systems would have to consolidated and that Miami County would deliver all of Piqua's public transit services. The City of Piqua still contributes to the County's funding of public transit from the City's general fund.

Piqua and Tipp City Managers and Troy Safety and Services Director all serve on a new (2007) public transit steering committee to advise the Miami County Commissioners on the issue of long-term funding of public transit in Miami County. The City of Piqua also has membership on the Miami County Transit Advisory Committee (Source: http://www.piquaoh.org/taxi.htm).

Realistic Transportation Expectations and Forecast

There have been significant changes in Ohio’s and the Nations’ overall societal, cultural and public transportation patterns since the last Comprehensive Plan Update in 1971 – 36 years ago. This section highlights relative trends and behaviors of Americans over that time period relative to the transportation trends for Piqua and the region outlined in this chapter.

This summary creates a foundation from which the City can examine the present conditions and make goals for the future.

State and National Trends

1. Social values and individual family attitudes, suburban lifestyles, smaller family units all influence personal mobility habits.
2. Work and leisure activities are increasingly less bounded by home location. Mobility is expected.
3. Just in time deliveries and industrial production is increasingly more fluid and transportation dependent.
4. Roadway transportation efficiency (speed) has encouraged more and longer trips to work, school, leisure and shopping.
5. Typical family home sites are increasingly larger in size and neighborhoods less dense than a generation or two ago.
6. The automobile continues to widen its lead as the preferred transportation mode of travel over transit or bus.
7. The personal miles traveled in the US are increasing at rates 2-3 times the corresponding population growth rates for a given period of time.
8. The increase in fuel costs, especially since the start of the millennium, have had only a minor damping influence on the rate of personal miles traveled.

Miami County and City of Piqua Trends

1. The City of Piqua has exhibited a flat total population picture over the past three plus decades.
2. Miami County & Piqua reflect the national trends relative to the dominate Interstate 75 corridor but connecting state routes appear to be following a much less robust traffic movement pattern.
3. Meanwhile, car and semi-truck traffic volumes have increased dramatically in I-75 but not on the state arterial routes in Piqua (36, 66, & 185) where only a moderate increase is noted. Corresponding truck traffic counts have declined according to some measurement methodology on the state arterial routes over the past 35-40 years. Meanwhile, other communities in the area display higher figures.
4. Growth is trending towards the Interstate 75 corridor, a sign that transportation availability is an important precursor shaping local land use decisions.
5. Truck traffic on I-75 has increased nearly five-fold since 1968 although nearly all of this increase is primarily driven by multi-state regional demand as opposed to Piqua/Miami County destinations.
6. Transportation in the Piqua community will continue to be dominated by vehicular travel and economic activity will be closely aligned to cars and semi-trucks. Home office working arrangements will not be a significant factor in the prevailing manufacturing sector.

7. The Piqua community will continue to follow the state, regional, and national template relative to transportation factors: population and the economy will drive transportation projects and programs. Piqua does not have the population, labor force, housing base, and industrial, retail, office floor area to influence macro transportation discussions such as carbon emissions, urban sprawl, and other socio-environmental topics on the more national agenda.

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4. Community

Plan It PIQUA
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COMPREHENSIVE PLAN UPDATE

4. Community

Overview

This chapter includes an analysis of Piqua's community services, facilities, and utilities. This assessment includes the location of existing facilities and infrastructure, and the current capability of the City to serve existing and future populations.

The primary sources of information used to prepare this analysis include the 2000 US Census, and data gathered from the City of Piqua (Police and Fire Annual Reports), and information produced by Camp Dresser & McKee Inc. for this report.

Key Findings

Public Safety

- In 2006, the police department employed 34 sworn officers and six full-time civilian employees.
- Residents in Piqua perceive a lingering crime problem in the City, which is linked to their perceptions of low-income housing.
- Piqua has had a comparatively higher overall *reported* crime rate than neighboring communities. In 2002 Piqua's overall uniform crime reporting (UCR) rate was 47 percent higher than that of Troy and 104 percent higher than that of Tipp City.
- Piqua's violent crime rate is only 45 percent of the national average and only 22 percent of Dayton's.

Parks

- The National Recreation and Park Association (NRPA) sets a "target of excellence" of 6.25 to 10.5 acres of park land per 1,000 persons in urban areas. In 2006 the City of Piqua provided approximately 12.5 acres of parkland per 1,000 persons, meeting the “target of excellence” standard.

Utilities

- The Water System is municipally owned and operated by City staff and serves approximately 8,748 customers.
- There are leaks in the system that have not been located. Approximately 25 to 29 percent of water pumped from 2003 to 2006 was estimated to be unaccounted-for water.
- Overall, the Water System is in stable condition. The water distribution system is adequate and in good condition while the Water Treatment Plant is in poor condition.
- The City of Piqua owns and operates the Wastewater System. The System serves the entire City, including 8,300-8,400 customers. Overall, the wastewater and sewer systems are in good condition and well maintained.
- The Storm Water System is operated as part of the City’s Street Department. The Storm Water System is aged an in poor condition. The City would like to develop a Storm Water Master Plan and Storm Water Utility.
- The City owns and operates the electrical power system. The electrical power distribution system has a total capacity of 106 mva. It is in excellent condition and is designed and operated to have significant redundancy, so that customers are minimally impacted by power outages.
- Vectren Corporation is the primary service provider for Piqua’s gas utility needs. Overall, Vectren’s distribution system is in excellent condition. The system is well maintained and gas rates are adequate to maintain the system.
- Time Warner Cable is an investor-owned utility that serves the Piqua area with cable television, digital phone, and internet services.
- Verizon Wireless and Sprint/Nextel are the two major wireless providers for the Piqua area.

Detailed Information

Public Safety

Police

The Piqua Police Department is a full-time municipal police agency that provides comprehensive law enforcement services and programs for the City of Piqua. Piqua has a Council-Manager form of local government and the Police Chief reports to the City Manager. Community policing and problem solving are core philosophies of the department.

Piqua police cruisers outside of City Hall (Source: City of Piqua).

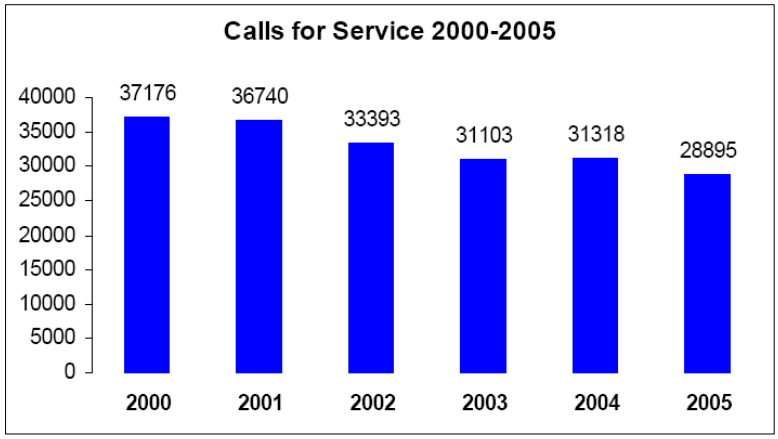
In 2006, the department employed 34 sworn officers and six full-time civilian employees. This includes the Chief, two Deputy Chiefs (Bureau Commanders), six Lieutenants, 18 Patrol Officers, three investigators, and three school resource officers. The civilian staff includes an Administrative Assistant to the Chief, four Records Clerks/Secretaries, and one Public Service Officer. The department's communications is provided by a regional consolidated Police/Fire/EMS Communications Center. The department is divided into three major components and each has a specific responsibility for functions of the department. The three bureaus include the Office of the Chief of Police, the Patrol Bureau, and the Services Bureau.

The department obtained its initial law enforcement accreditation in July 1994 by the Commission on Accreditation for Law Enforcement Agencies, Inc. (CALEA). The department was re-accredited in 1999, 2002 and 2005 (Source: http://www.piquaoh.org/police.htm).

Residents in Piqua perceive a lingering crime problem in the City, which is linked to their perceptions of low-income housing. In fact, Piqua has had a comparatively higher overall *reported* crime rate than neighboring communities. In 2002 Piqua's uniform crime reporting rate (UCR) was 47 percent higher than that of Troy and 104 percent higher than that of Tipp City. By 2005 Piqua's UCR had increased by 25.9 percent, so that its overall reported crime rate was significantly higher than the national average. However, it is important to note that Piqua's crime is characterized by strong enforcement of property crimes, rather than a large number of reported violent crimes. Piqua's violent crime rate is only 45 percent of the national average and only 22 percent of Dayton's. There was only one murder in Piqua in 2004, and none for several years before that.

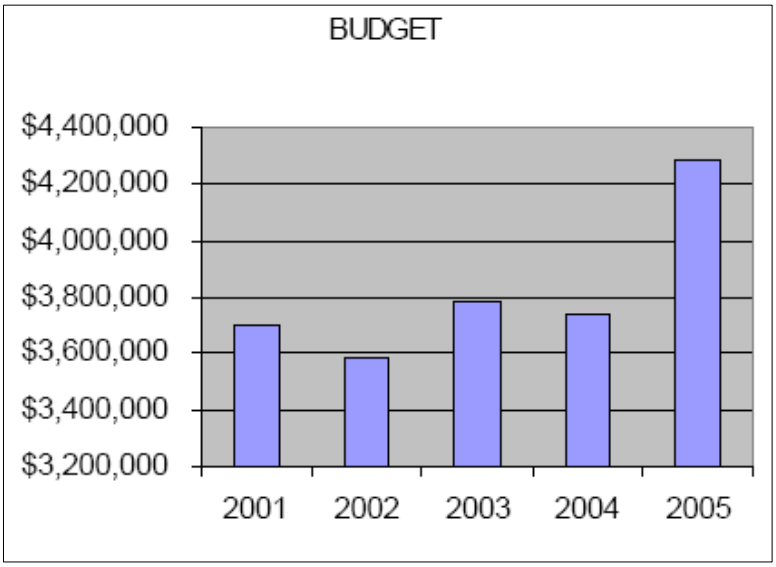
The number of calls for police and emergency service has been decreasing for the last several years, going from 37,176 calls in 2000 and steadily declining to 28,895 calls in 2005 (see Chart 4.1). At the same time the City's Police department's budget grew by approximately $600,000, increasing the amount and quality of service available to residents (see Chart 4.2). While the City's budget has increased and the number of calls has been declining, the City still has a lower ratio of police officers to population as compared to neighboring communities. Piqua had approximately 1.63 sworn officers per 1,000 residents in 2005 (see Chart 4.3).

CHART 4.1 – PIQUA POLICE DEPARTMENT CALLS 2000 - 2005



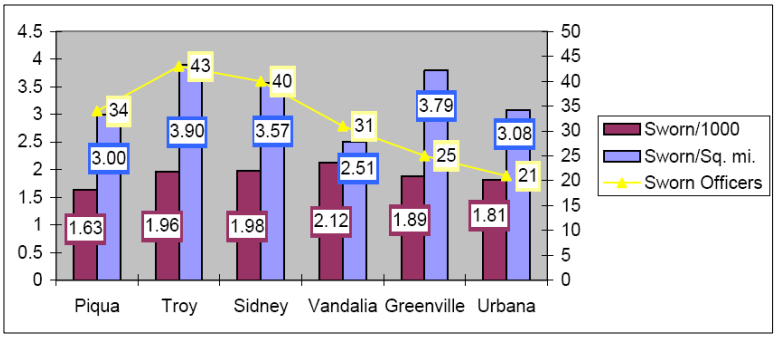
Source: 2005 Piqua Annual Police Report

CHART 4.2 – PIQUA POLICE DEPARTMENT BUDGET



Source: 2005 Piqua Annual Police Report

CHART 4.3 –POLICE COVERAGE 2005



Source: 2005 Piqua Annual Police Report

The Piqua Fire Department has had long history of serving the local community (Source: Piqua Fire Department Annual Report).

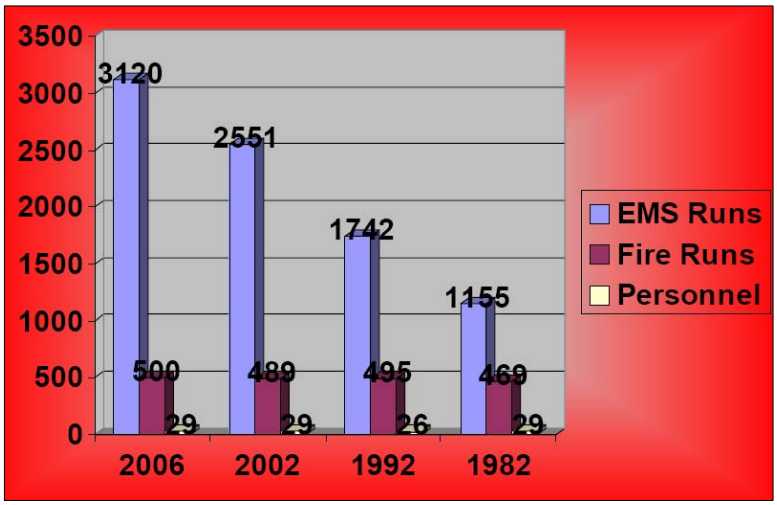
Fire

The Piqua Fire Department currently has 29 professionally certified and trained firefighter/ paramedics.

There has been a significant increase in the number of EMS runs (170 percent), and a slight increase in fire runs (9 percent) over the last 25 years, while personnel has remained unchanged, see Chart 4.4.

New businesses looking to locate in the region will consider adequate fire and EMS protection essential to finding a new location, along with other essential city services. The level of service provided by the Piqua Fire Department will play a role in economic development and the quality of life of Piqua residents.

CHART 4.4 – EMERGENCY RUNS AND PERSONNEL



Source: 2006 Piqua Annual Fire Department Report

Heritage Green Park is located on the corner of North Downing Street and Riverside Drive, the site of the former Medalist Industries (Source: Piqua Chamber of Commerce).

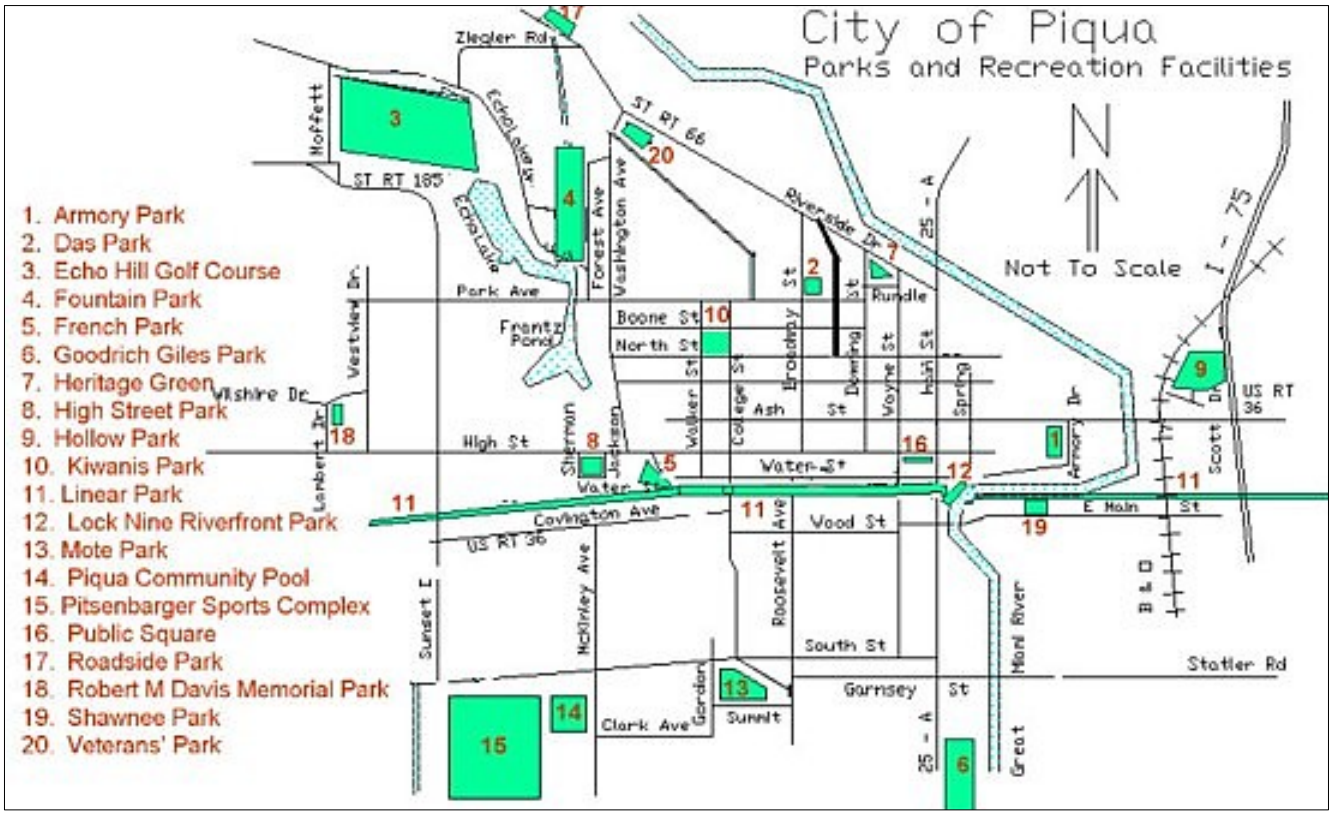
Parks

The city of Piqua has significant recreational amenities, with more than 260 acres of parkland and popular bike paths. Mote Park offers a year-round community center with an auditorium and stage, 2 tennis courts, and other facilities. Pitsenberger Park has 40 acres with ball fields, 4 tennis courts, and a swimming pool. The City also operates Echo Hills Golf Course and other facilities. The YMCA has significant recreation programming and facilities. Piqua also offers cultural activities such as the Piqua Players, the ballet program, and the planned new library. In general, however, the city lacks a state-of-the-art entertainment or cultural arts facility.

In addition to the City owned parkland, the Miami Conservation District (MCD) holds a significant amount of land along the Great Miami River Recreation Trail. MCD is currently managing approximately 80 acres of land along the Great Miami River in the City of Piqua. This area is considered public property and is available for permitted public uses.

The National Recreation and Park Association (NRPA) sets a "target of excellence" of 6.25 to 10.5 acres of park land per 1,000 persons in urban areas. In 2006 the City of Piqua provided approximately 12.5 acres of parkland per 1,000 persons, meeting the “target of excellence” standard. Map 4.1 shows the location of twenty different parks and recreational facilities in the City of Piqua.

MAP 4.1 – CITY OF PIQUA PARKS AND RECREATION FACILITIES



Source: City of Piqua

Educational Facilities

Flesh Public Library

The Flesh Public Library has been serving the community since 1890, when Jacob Schmidlapp donated his family store and home to the Piqua Board of Education. The Flesh Public Library & Museum serves as a community-based organization to provide free informational, educational, and recreational materials to its patrons. The Library is also dedicated to providing an environment that fosters and promotes the philosophy of life-long learning.

The Flesh Public Library is currently involved in the Fort Piqua Hotel project that will result in an expanded and modern facility in addition to putting a historical landmark back into active use.

Schools

The Piqua City School District has been awarded an effective rating by the State of Ohio and has seen a continuous improvement in student test scores. The school system enrolls 3,827 students and operates nine schools. Piqua Catholic School is a private catholic school located in the community, and enrolls approximately 420 students in grades kindergarten through eighth grade.

The school district offers a wide range of academic, arts and athletic opportunities for students. According to the district, the Piqua Schools exist to accept the responsibility to provide students with the best possible opportunities for the intellectual, moral and physical development necessary to become informed, ethical and responsible citizens.

Students attending the Piqua City School District also have the opportunity to attend the Upper Valley Joint Vocational School (JVS). The JVS gives students the opportunity to receive training in high-quality career and technical courses for students in the eleventh and twelfth grade. The JVS also provides a variety of educational options for the adult population. The High School, Jr. High School, and JVS buildings are still relatively new buildings that have been well maintained and serve the district well. However, the kindergarten, primary, and intermediate buildings are quite aged, expensive to operate, and functionally obsolete by modern educational building standards.

Piqua is home to Edison State Community College which provides residents with a local opportunity for college education. In addition to college course work Edison State Community College provides continuing education and job services to residents of the community.

Health and Human Services

Piqua Community Foundation

The Piqua Community Foundation was founded in 1993 to establish a fund to make grants to community organizations. The mission of the Community Foundation is to provide opportunities for any donor to be generous to benefit the citizens of Piqua. The Community Foundation began making grants to the Community in 1995. As of June 2007, the Foundation has granted over $320,000 to local organizations that have an ability to impact the lives of Piqua residents. Currently, the Piqua Community Foundation offers a variety of funding types including donor designated to unrestricted.

Miami County Foundation

The Miami County Foundation was founded in 1985 with the mission to effectively assist, encourage and promote the health, education and welfare of the citizens of Miami County by soliciting, receiving and administrating assets exclusively for their charitable needs. The Foundation serves as a catalyst for innovative programs in the arts, community development,

education, health and human services. The foundation provides scholarship funds for County residents pursuing post-high-school education in any accredited college, trade/vocational, nursing or health related facility.

Piqua United Way

Piqua is home to a local branch of the United Way. The United Way is a national network of locally governed organizations that work to create positive changes in communities and people's lives. The United Way engages the community to identify the underlying causes of the most significant local issues, develops strategies and pulls together financial and human resources to address them, and measures the results. The local Piqua United Way organization is dedicated to focusing on the needs of the Piqua community including helping children and youth, improving access to healthcare, promoting self-sufficiency, and strengthening families.

Upper Valley Medical Center

The Upper Valley Medical Center is located south of Piqua on Dixie Highway State Route 25. The facility provides Piqua residents with access to quality health care, as the facility was designed for optimum accessibility and flexibility to serve the residents of Miami County. The facility is approximately 222,000 square feet and was opened in July of 1998.

The City of Piqua is also home to the Upper Valley Medical Outpatient Care Center. The facility is located on Looney Road and provides convenient access to outpatient care for Piqua residents. Services available at the Outpatient Center include physical and occupational therapy, laboratory and radiology services, and medical professional offices.

Utilities

Water System

Piqua's Water System is municipally owned and operated by City staff and serves approximately 8,748 customers. Customers range geographically from those located in the City to customers in outlying areas of Miami County such as Farmington Meadows, Mullen Estates, and the Village of Spring Creek (see Map 4.2)

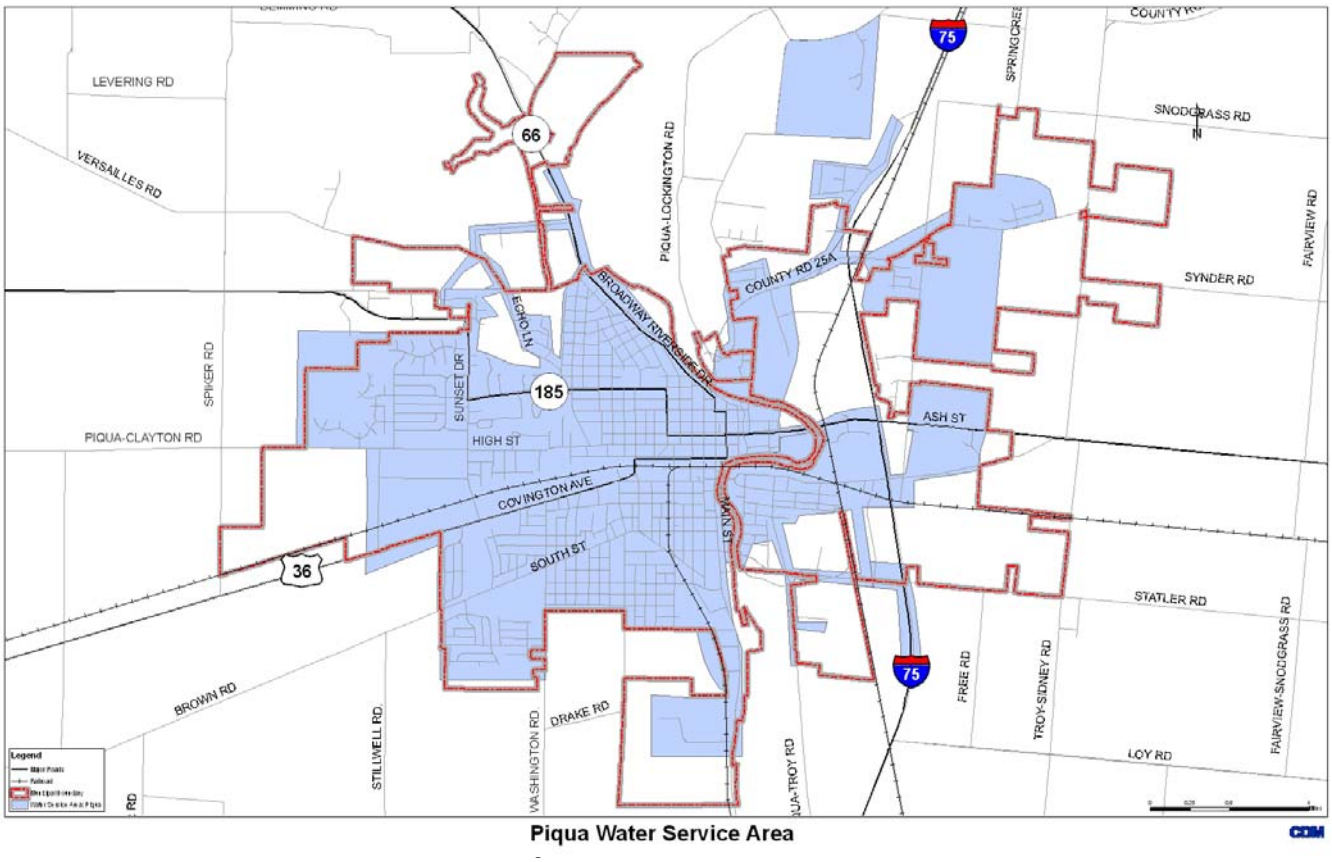
The Water System's distribution system is in need of some repair. Piping and transmission mains range in size from 4 inches for distribution piping to 24 inch transmission mains. Average daily and peak day flows pumped into the system from the Water Treatment Plant (WTP) are shown in Table 4.1.

TABLE 4.1 – PIQUA WATER TREATMENT FLOWS

Flow	2003	2004	2005	2006
Average Daily Flow (mgd)	2.59	2.59	2.62	2.95
Peak Day Flow (mgd)	3.74	3.75	3.65	4.2

Source: Camp Dresser & McKee Inc. 2007

MAP 4.2 – PIQUA WATER DISTRIBUTION SERVICES



Source: Camp Dresser & McKee Inc. 2007

The Water Treatment Plant (WTP) is located on State Route 66 North and has a capacity of 7.0 million gallons per day (mgd). Surface water is the plant's raw water source and is drawn from Swift Run Lake, Franz Pond, the Great Miami River, and the gravel quarry located on the east side of the River. The plant's overall condition is generally poor with needs that have yet to be identified.

Current water rates are not adequate to maintain the WTP or distribution system. A six percent rate increase will take effect in 2007. Generally, revenue bonds are used to finance most capital improvements.

Capital improvements due to expansion of the distribution system are primarily driven by new development. Aside from a few isolated areas, the Water System's most recent water master plan (2000) did not foresee much future growth through 2025. However, the Water System anticipates new growth occurring north of the WTP along State Route 66. There are some areas in the current distribution system that are underutilized and can accommodate growth without much expansion. One such area is along Piqua-Troy Road on the south side of the City.

In addition to a water audit, the Water System would like to perform a series of studies to better monitor and maintain the system. An aggressive flushing program is something that the Water System desires to enhance maintenance on the distribution system. The Water System would also like to perform a study to determine how long the system can operate off of

elevated tanks if the plant were to shut down. Most future studies, however, would focus around the WTP since it is generally in poor condition. The future needs of the WTP were not included in the water master plan of 2000 and therefore have not been evaluated in recent years. There is concern about the plant's ability to meet regulations regarding disinfection by-products (DBPs). The Ohio Department of Natural Resources (ODNR) also has concern about a maximum probable flood topping of the dam that creates Echo Lake, Swift Run Lake, and Franz Pond. There is an ongoing study to determine the risk associated.

There is also discussion about implementing a surface water protection plan, although the Water System has mentioned the possibility of looking for an alternate source of water.

Overall, the Water System is in stable condition. The water distribution system is adequate and in good condition while the WTP is in poor condition. The Water System has several studies on the horizon that it hopes to perform in an effort to improve the condition of the utility.

Wastewater System

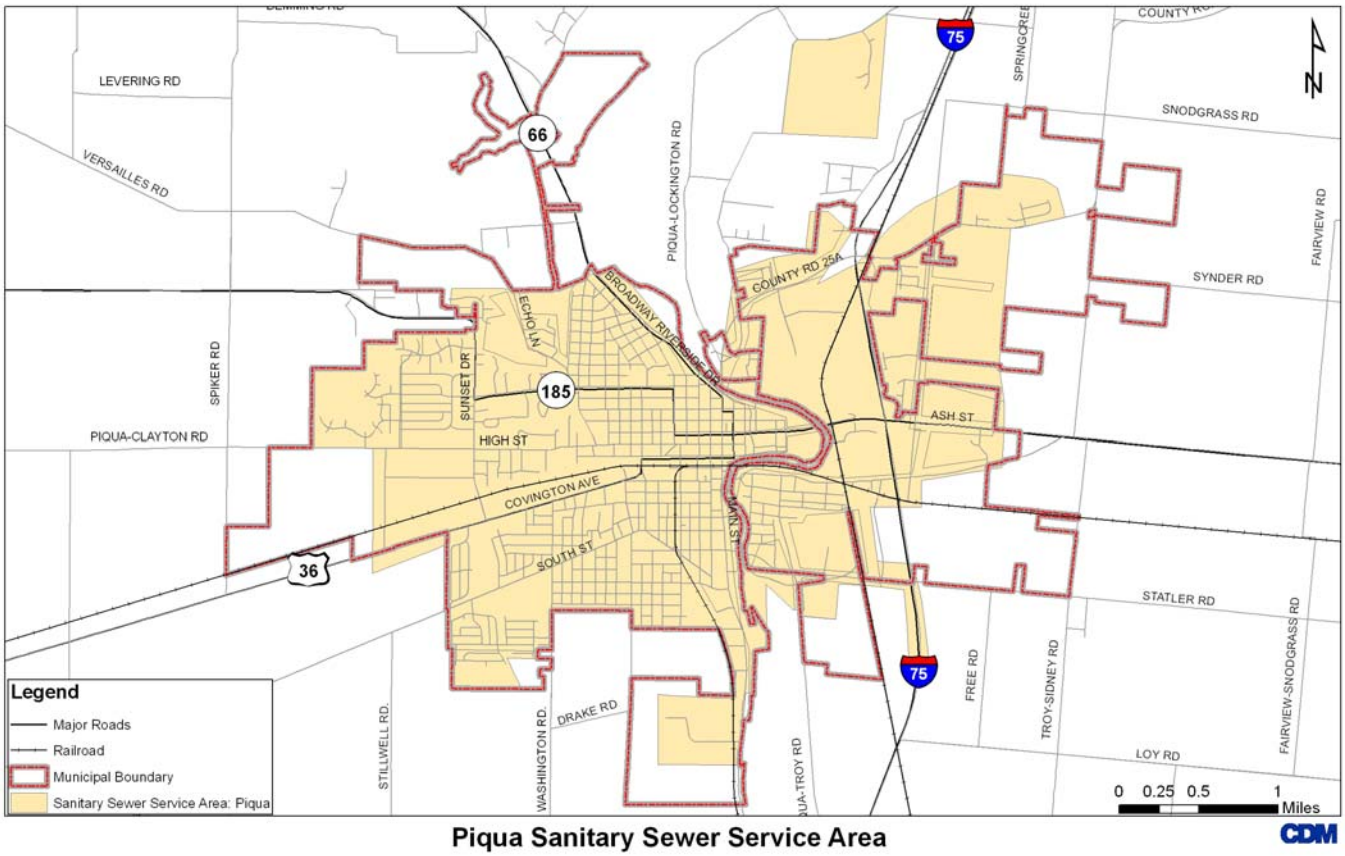
The City of Piqua owns and operates the Wastewater System. The System serves the entire City, including 8,300-8,400 customers. The System also treats sewage from areas outside of Piqua in Miami County, including the Greens of Spring Creek, Farmington Meadows, and Mullen Estates. The City bills the County for treating sewage from these areas (see Map 4.3).

The Wastewater System consists of conveyance piping, the Wastewater Treatment Plant (WWTP), and seven pump stations. The average daily flow conveyed by the System is approximately 3.91 million gallons per day (mgd). Table 4.3 lists average daily flows and peak month flows throughout the past four years.

The sewer system is in relatively good condition. There are approximately 150 miles of sewers that range in size from 8 inches to 42 inches. There are some portions of the sewer system that operate at full capacity during rain events due to inflow and infiltration (I/I). Sources of I/I are primarily groundwater and direct storm water connections. Approximately 0.5 to 1.0 mgd of flow to the WWTP is estimated to be from I/I. The sewer system does not experience any basement backups during these events. The sewer system does, however, experience sanitary sewer overflows (SSOs) and is obligated to eliminate all SSOs according to the Ohio Environmental Protection Agency (EPA). Rain events aside, there are no portions of the system that operate at or exceed full capacity on a daily basis.

Pump stations are strategically placed throughout the conveyance system to maintain the flow of sewage. There are a total of seven pump stations: three pneumatic ejectors, two drypit pumps, and two submersibles. Each of the pump stations are rather old but are still capable of meeting current demands.

MAP 4.3 – PIQUA SANITARY SEWER SERVICE AREA



Source: Camp Dresser & McKee Inc. 2007

TABLE 4.3 – WASTEWATER TREATMENT FLOWS

Flow	2003	2004	2005	2006
Average Daily Flow (mgd)	4.33	3.43	3.89	3.91
Peak Month Flow (mgd)	5.61	5.23	6.25	5.06

Source: Camp Dresser & McKee Inc. 2007

The conveyance system transports sewage to a central WWTP located on Bridge Street. The WWTP is in relatively good condition. The plant was originally constructed in 1955 and has received various upgrades with the most recent improvements occurring in 1991. The rated design capacity of the WWTP is 4.5 mgd with a peak hydraulic capacity of 8.5 mgd.

The sanitary sewer system has had a thorough preventative maintenance program in place since 1977. The System spends approximately $150 thousand each year on preventative maintenance such as replacing and/or lining pipes. Maintenance is coordinated with road reconstruction to avoid disturbing a newly constructed street surface early in the street's lifespan.

While the sewer system is well maintained, current sewer rates are not adequate to maintain the entire system. The last rate increase was in 1994 due to expansion of the WWTP. A new six percent rate increase is scheduled to take effect in 2007. Generally, capital improvements are financed with revenue bonds.

Expansion of the sewer system is primarily driven by development. There are currently areas in the sewer system that have capacity to accommodate growth while other areas would require significant capital improvements. Areas that can accommodate growth are on the east side of the City as well as an industrial park along Piqua-Troy Road and the industrial park in the area of Fox Drive. Should growth occur north or west of the City, each area would require a new interceptor or pump station to serve those customers. Any future industrial facility of significant size that would locate in Piqua is likely to consume the WWTP's remaining capacity.

The WWTP has future needs associated with the quantity of flow treated and the condition of the plant, and ability to accommodate growth. Quantity issues to be addressed include reduction and/or treatment of I/I as part of a program to control SSOs. The Wastewater System plans to install equalization storage at the WWTP as another measure to control SSOs. The Wastewater System also desires to perform an updated wastewater master plan. The WWTP's biosolids process needs to be examined and evaluated to enhance the plant's capabilities of proper disposal.

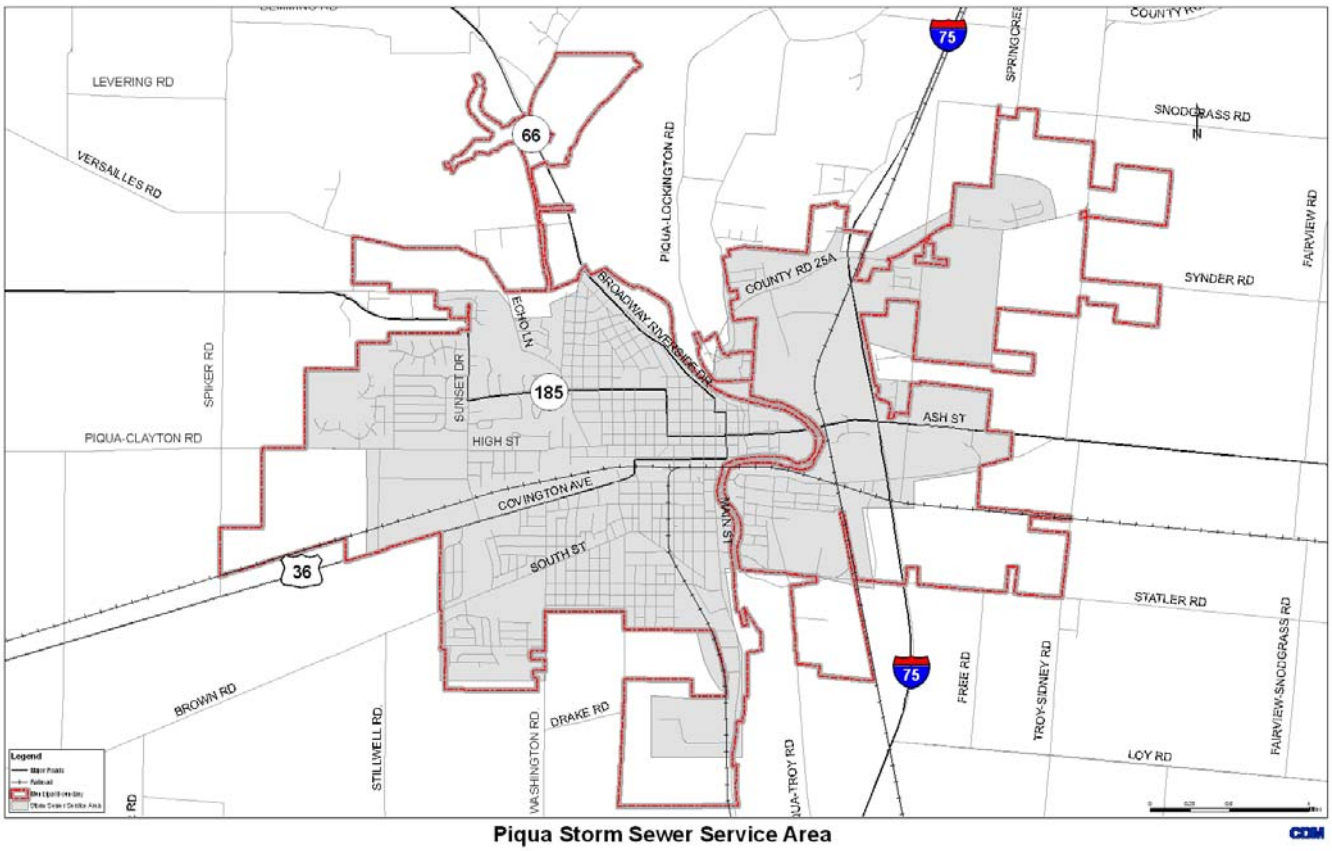
Overall, the Wastewater System is in good condition. The sewer system is in good condition and is well maintained. The WWTP has adequate capacity to serve the current average daily flows and also has some capacity to accommodate future growth depending on the location and scale of future developments.

Storm Water System

The City of Piqua has a storm water system that is municipally owned and operated by City staff. The Storm Water System is not a separate enterprise fund utility; instead it is operated as part of the City's Street Department. Aside from a few streets within the City that do not have storm sewers, Piqua's Storm Water System serves the entire City. The storm water infrastructure does not extend beyond the City limits. However, the storm sewer system receives significant sheet flow from neighboring agricultural areas on the west side of town (see Map 4.4).

In conjunction with the City's Storm Water System, the Miami Conservancy District (MCD) provides flood protection for the City from flooding by the Great Miami River. MCD owns and maintains 2.8 miles of levee system and 3 miles of river channel through Piqua. MCD also maintains and operates eight floodgates while the City maintains and operates only one floodgate.

MAP 4.4 – STORM SEWER SERVICE AREA



Source: Camp Dresser & McKee Inc. 2007

The Storm Water System has two pump stations, the Race Street and Shawnee Pump Stations, to help maintain the flow of storm water during high river stages. Both pump stations serve older portions of the City and have adequate capacity to meet current demands. The Race Street Pump Station is located along the levee on Water Street, opposite Race Street, and serves the areas between Water Street and North Street and between Spring Street and the Great Miami River. The Race Street Pump Station was constructed in 1961 and is owned and operated by MCD.

The Race Street Pump Station has three pumps with equal capacities of 11,000 gallons per minute (gpm) each. A Field Study Report was prepared for MCD by Krebs Consulting Service in January 1996 that documented its condition. The report noted several items, some of which are: the pump station has adequate capacity to handle major rain events; MCD and the City should consider installing standby power at the pump station; the pump motors are exposed to the weather and not inside a building; a permanent connection should be provided for installation of a temporary engine-driven pump during a power outage; Piqua should authorize a study of the pump station service area to determine the maximum flow rate that can be delivered to the pump station based on a major rain event; MCD should continue its excellent care of the pump station; and, the pump station has

only been operated three times since its commissioning, other than regular exercising of the pumps. MCD also performs regular preventive maintenance and testing of the pumps' motors.

The Shawnee Pump Station serves the Shawnee area east of the Great Miami River and is located along the levee on First Street south of the East Main Street Bridge. The Shawnee Pump Station has two pumps of different capacities. One pump has a capacity of 5,000 gpm, while the second pump has a capacity of 10,000 gpm. The Shawnee Pump Station is owned and operated by the City and is in poor condition. The City desires to renovate or replace the pump station in the near future. The pump station dates back to the 1920s when the system was originally constructed.

The City desires to develop a storm water master plan and storm water utility. The storm water master plan will help the City identify future needs and maintenance issues that need to be addressed. Current maintenance of the storm water system is minimal. Storm sewers are generally filled with debris and in poor condition. Current sources of revenue for maintenance include the City's General Fund, which is insufficient. Sources of revenue for capital improvements include the City's General Fund and Ohio Issue 2 grants. Installation and/or expansion of infrastructure in new development areas are directly paid for by developers.

A future storm water utility could generate a source of revenue that will enable the City to provide proper maintenance. Revenue generated from the storm water utility will also assist with implementing a storm water management plan. Piqua must submit a storm water management plan to the Ohio Environmental Protection Agency by May of 2007 in accordance with Phase 2 storm water regulations under the NPDES program.

Overall, the Storm Water System is aged and in poor condition. Maintenance replacements are minimal and correlate with street reconstruction. The system is expanded as development occurs.

Electric Power System

The City of Piqua owns and operates an electric power system. The system primarily serves the area within the corporation limits, which includes 10,680 customers. Originally, the City generated its power needs from its own coal-fired plant. Favorable wholesale prices and load growth caused the City to later purchase a portion of its power needs from DP&L, CG&E and then PSI (the latter two later merged to become Cinergy). Plant age and inefficiencies as well as increased environmental compliance costs coupled with low-cost wholesale power caused the City's coal-fired plant to be shut down in 1997. The City's latest full requirements power purchase agreement with Cinergy (now Duke Energy) expired at the end of 2006. Currently, the City purchases electric power from AMP Ohio and distributes it on its municipally-owned infrastructure.

The distribution system has a total capacity of 106 mva. It is in excellent condition and is designed and operated to have significant redundancy. The

system has three 69/13 kV substations with multiple 69 kV lines feeding each substation. Power is distributed from the substations to customers on 13,200 and 4,160 Volt distribution circuits. Circuits normally operate at less than 50% of their capacity. This operating approach allows for a high level of service reliability. Equipment can be removed from service without risk of damage to other components, even during peak summer and winter loading conditions.

Capital improvements are influenced by capacity, system loading and circuit reliability. The power system regularly monitors peak loading verses available capacity, as well as continuously tracking reliability of Power System equipment. The Power System utilizes this information to identify necessary capital improvements. Capital improvements are then budgeted and completed according to plan. Improvements which require heavy capital investment are typically addressed over multiple year periods.

Current work plans have identified two 13/4 kV substations that are scheduled for retirement within the next five years. These retirements are part of the Power System's plan to replace aging facilities, reduce system losses and standardize to a single distribution voltage. Piqua's electric load has grown at approximately 2.5 percent each year. The Power System anticipates the need to provide expanded electric service in the southeastern portion of the City. Development of an industrial area south of the City could expedite the need for a new 69/13 kV substation to serve this area.

Normal levels of annual capital improvements are funded by revenues generated by the Power System. Large expenditures, such as a new substation, would be financed. Expiration of the Cinergy agreement at the end of 2006 coupled with significant increases in the wholesale power market triggered the need for rate adjustments. Thus, a 3-year plan to phase-in increased power costs was developed and is currently being implemented. The rate plan was developed by Sawvel & Associates, an Ohio firm specializing in electric municipal rate work.

Overall, the Power System is in excellent condition. The system has significant redundancy to minimize the impact of a power outage on its customers. The system is monitored regularly and capital improvements scheduled to maintain the system. The three-year rate plan is projected to provide adequate revenues to maintain the system through at least 2010.

Gas System – Vectren Corporation

Vectren Corporation is the primary service provider for Piqua's gas utility needs. Vectren Corporation is an investor-owned utility that purchases and redistributes gas to its customers. Vectren serves the entire City and surrounding areas in Miami County. Customers in the Piqua vicinity have the option of purchasing gas from Vectren or another service provider; most customers chose Vectren.

Vectren distributes gas from a large transmission main that runs south to north through the State of Ohio. The transmission main does not run

through downtown Piqua; instead, it skirts around the western side of the City. Vectren's distribution system taps into this transmission main while distribution lines radiate from these taps to serve customers.

The distribution system is maintained on a regular basis; thus, the system is in excellent condition. Vectren closely monitors the system for any corrosion and pressure issues that might arise. Maintenance is influenced by issues identified during monitoring as well as the age of the system. Leak surveys are also performed regularly. Maintenance issues are then incorporated into 2-, 3-, or 5-year work plans.

Improvements to the system are driven by low pressure issues that may be revealed in daily monitoring activities. Currently, the system does not have any pressure or capacity issues that need to be addressed. The transmission main has more than adequate capacity to meet current and future demand. There are no areas in the distribution system that are under-utilized. The system is only expanded to meet customer needs and as development occurs.

Expansion of the system to accommodate demand is financed through tap fees and other charges. The base rate pays for maintenance and operation while new customers/developers pay for expansion of the system through separate charges. Current gas rates are adequate to maintain the system. Gas rates fluctuate monthly with the cost of natural gas; however, Vectren tries to purchase gas from the cheapest provider to maintain low rates for its customers. Aside from minor fluctuations, Vectren does not have any plans to increase rates in the near future. Should Vectren need to adjust rates, a rate case must be brought before the Public Utilities Commission of Ohio (PUCO) for justification and approval.

Overall, Vectren's distribution system is in excellent condition. The system is well maintained and gas rates are adequate to maintain the system. There are no capacity issues to be addressed. The system has adequate capacity to accommodate any future growth. The system is expanded to meet customer demand while tap fees and other charges finance the expansion.

Internet, Phone and TV

Time Warner

Time Warner Cable is an investor-owned utility that serves the Piqua area with cable television, digital phone, and internet services. The area surrounding Piqua where services are provided includes Washington Township, Spring Creek Township, Newberry Township, and portions of Staunton Township. Customers have the option of choosing other competitive services such as satellite TV or AT&T for internet and telephone services, though a majority chose Time Warner Cable for television and internet services.

Time Warner's network is based around a central station located near downtown Piqua. The central station transmits signals to service nodes

scattered throughout the network; signals are then transferred from nodes to customers. If a service node is reaching full capacity, Time Warner will split the node to accommodate more traffic, thus making the network highly expandable. Time Warner monitors node capacity regularly to maintain the network's excellent condition. Time Warner's network is also designed for redundancy to minimize the impact of service outages. Outages are minimal since the network is well maintained and does not have areas that exceed capacity.

Issues that need addressing are incorporated into maintenance plans that are developed every budget year. Maintenance plans incorporate all anticipated issues for the next four years. In addition to maintenance plans, Time Warner Cable also prepares master plans in anticipation of future growth. However, master plans are prepared once every four years while maintenance plans are prepared each budget year. Masters plans help Time Warner to ensure that there will be enough node capacity and fiber cable to accommodate future developments and annexations in anticipated areas of growth. Growth is currently anticipated in the northern part of the City around Hetzler Road and County Club Road. Time Warner has also been marketing their services more to the business industry, encouraging businesses to utilize their internet and phone services.

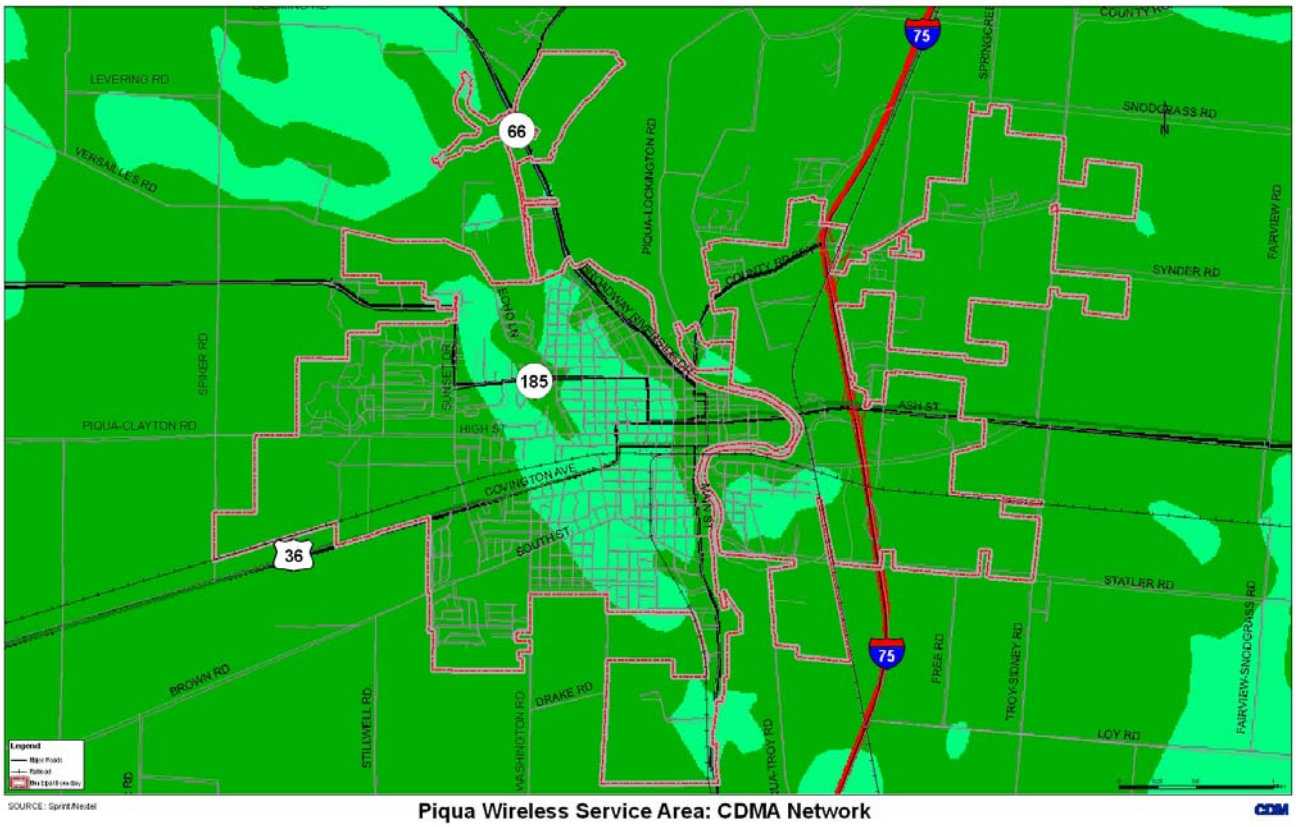
Overall, Time Warner's network is in excellent condition. The network is able to meet current demands and is highly expandable. Time Warner's network follows development and/or customer demand, making it very accommodating to future growth.

Wireless – Verizon Wireless & Sprint/Nextel

Verizon Wireless and Sprint/Nextel are the two major wireless providers for the Piqua area. Verizon Wireless and Sprint/Nextel are each investor-owned and provide both voice and data services. Verizon Wireless provides voice and data services on a single network while Sprint/Nextel utilizes two different technologies for data and voice services. Sprint's former CDMA network serves both voice and data services while Nextel's former IDEN network supports only voice. Both networks provide sufficient coverage for the City and surrounding area. Verizon Wireless' network has the same coverage as Sprint/Nextel's service area.

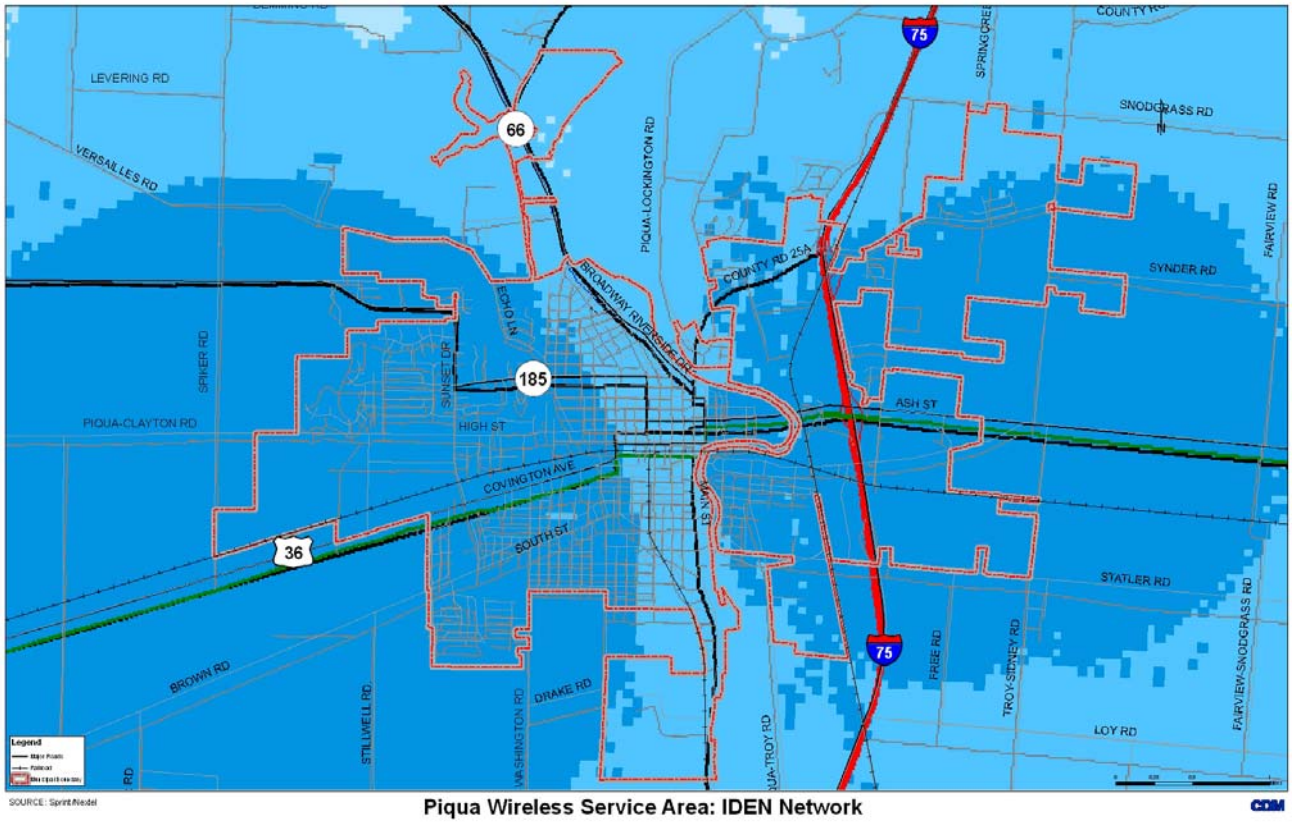
Verizon Wireless and Sprint/Nextel both maintain their networks regularly and keep them in excellent condition. Both providers perform daily analyses of network traffic to ensure adequate capacity. As a result, neither provider experiences capacity issues or other general deficiencies. Both providers have adequate capacity to accommodate future demand. (See the Sprint and Nextel Wireless Service Area maps below.)

MAP 4.5 – PIQUA WIRELESS SERVICE AREA CDMA NETWORK



Source: Camp Dresser & McKee Inc. 2007

MAP 4.6 – PIQUA WIRELESS SERVICE AREA IDEN NETWORK



Source: Camp Dresser & McKee Inc. 2007

Telephone – AT&T

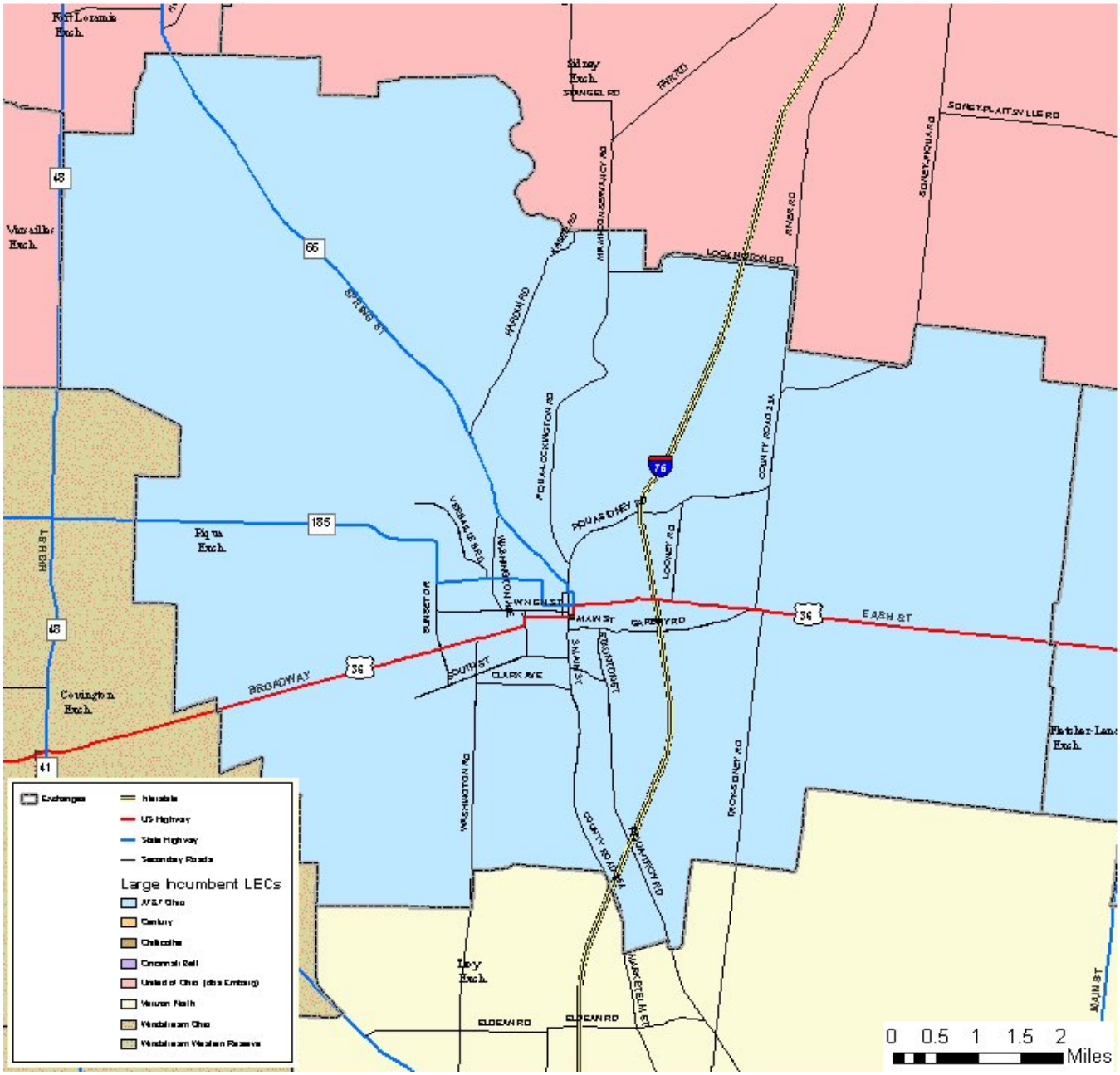
AT&T is a publicly-traded company that provides various telecommunication services to the City of Piqua. AT&T's services cover all of the City as well as surrounding areas. Residents have the option of choosing AT&T or one of AT&T's competitors (i.e., resellers, wireless, cable and VOIP providers) for their communication needs, though a majority of customers choose AT&T. Services provided by AT&T include high speed internet (DSL/digital subscriber line service), data services, AT&T Dish TV, cellular service, local and long distance services.

AT&T's network is based around a central office that distributes service to the entire City of Piqua. It is connected to other central offices and to switches that handle toll traffic. The landline telephone network crosses City boundaries at a number of locations; according to AT&T, there is no single "entrance point" for these services. Map 4.7 is the extent of AT&T's service area, this area is highlighted in blue.

AT&T monitors the network and performs capacity analyses on a regular basis. As a result, AT&T's network meets or exceeds all applicable industry-developed standards. The network is a redundant system with different paths or routes to ensure service quality during outages. Redundancy is powered via a digital switch that is reinforced by dual path

fiber trunks. Additional redundancy is available for business customers who desire that particular service. AT&T also adds redundancy to complement critical infrastructure elements. The power system supporting AT&T's digital switch has both battery and diesel powered generator back up, further enhancing the system's redundancy capabilities.

MAP 4.7 – TELEPHONE SERVICE AREAS AND EXCHANGES IN OHIO



Source: Camp Dresser & McKee Inc. 2007/Public Ohio Utilities Commission 2007

Plan It PIQUA
Preserve the Past — Empower the Future

5. Economic Development

COMPREHENSIVE PLAN UPDATE

Plan It PIQUA
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5. Economic Development

Overview

This chapter provides a summary of findings from a target industrial assessment for Piqua. The purpose of the analysis is to identify economic sectors and specific industries which offer growth opportunities for which Piqua has a distinct competitive advantage as a location. However, this chapter also provides broader recommendations for economic development as it relates to the overall comprehensive planning process.

The information from this analysis may be used to help refine the City's targeted economic development, marketing, and long-term planning and recruitment efforts. Piqua's competitive position must be understood in the regional context, since many business decisions affecting Piqua are made from within the Dayton region. Overall trends in Dayton's economic base impact on the health of Piqua's economy and that of other satellite communities in the Dayton Metro Area. Thus, the analysis focuses to an extent on Piqua's role within Miami County's and the region's economy.

Much of this chapter summarizes the full Industrial Assessment report prepared by Development Economics which can be found in Attachment B. The sources used in this chapter are listed in the full report.

Key Findings

Economic Base Assessment

- Piqua's economic base has traditionally depended on manufacturing activities. The city was once known as a center for textiles and apparel, particularly for the manufacture of undergarments. Today, several of the city's largest private sector employers are manufacturers.
- Piqua's employment fell by 1,700 or 15.6 percent between 1998 and 2004. Local payroll declined from about $287.6 million to $269.5 million (a decrease of 6.3%) over the same time period.
- The number of manufacturing businesses in Piqua fell by three between 1998 and 2004.

Target Industrial Assessment

- An analysis of the manufacturing sector in the four cities in the I-75 Corridor north of Dayton (Piqua, Troy, Sidney, and Tipp City), reveals they have strikingly similar dependencies on several individual industries, particularly metal fabrication.
- Looking at these four corridor cities, Piqua has a relatively large share of the overall furniture manufacturing industry base. It has a somewhat larger share of the textile, metals, and plastics manufacturing base than its sibling corridor cities. Piqua has a relatively small share of the overall base of food, mineral, and electronics manufacturing in this corridor.
- Piqua has only a handful of planned industrial parks, with many of the city's industrial uses located in older mixed-use neighborhoods or along city streets.
- Piqua has roughly 4.5 to 5.5 million square feet of industrial and service building space. Of this space, about 970,000 square feet is vacant, yielding a vacancy rate in the range of about 18 to 21 percent.

Business Resources and Climate

- Overall, Piqua offers a competitive incentive package that places it in line with its neighboring jurisdictions. Many of the city's current businesses recognize and appreciate the City's efforts to assist them.
- Piqua nevertheless must still counteract its past image as a no-growth community with relatively low school performance, poor housing standards, and lack of government assistance.
- Key strengths in Piqua include its labor force, low cost power, low cost real estate, location near major interstates, metals industry, and local government assistance.
- Weaknesses include a lack of qualified engineers, lack of amenities, "parochial" attitudes, and negative perceptions of the school system and the community's socio-economic strata. These factors hinder Piqua's ability to attract professional staff.

Key Target Opportunities

- Key industries have been identified as targets for marketing in Piqua. These include a variety of manufacturing industries related to plastics, dyes and inks, metals, computers, and woodworking. Non-manufacturing targets include tourism and travel services, back office uses, and emerging fuel technologies.

Detailed Information

Economic Base Assessment

Introduction

An Economic Base Assessment was conducted in order to identify trends in the regional economy and to determine Piqua's role within the region. A key component of this analysis is to identify relative strengths in the regional economy which suggest opportunities for Piqua.

This section examines the employment and business base for Piqua. The full report, which can be found in Attachment B, includes economic base assessments at three levels: Metropolitan Dayton, Miami County, and the city of Piqua.

Historical Context

Piqua has a long history as a manufacturing and industrial center for southwestern Ohio. Much of that history is tied to the apparel and textiles industries, where Piqua was a leader in the production of undergarments, shirts, blankets, and related products. Atlas Underwear and Superior Clothing were two of the better-known companies that once called Piqua home. Thanks to its location near the birthplace of aviation, Piqua was (and remains) home to several aviation equipment manufacturers, including Lear Avia, Robbins & Myers, Meteor Motor Car, and Hartzell Propellers. Products that have been manufactured in Piqua include stoves, shovels and tools, hearses, and printed publications, among others. The City's industrial history points to Piqua's competitive position for attracting and growing manufacturing firms.

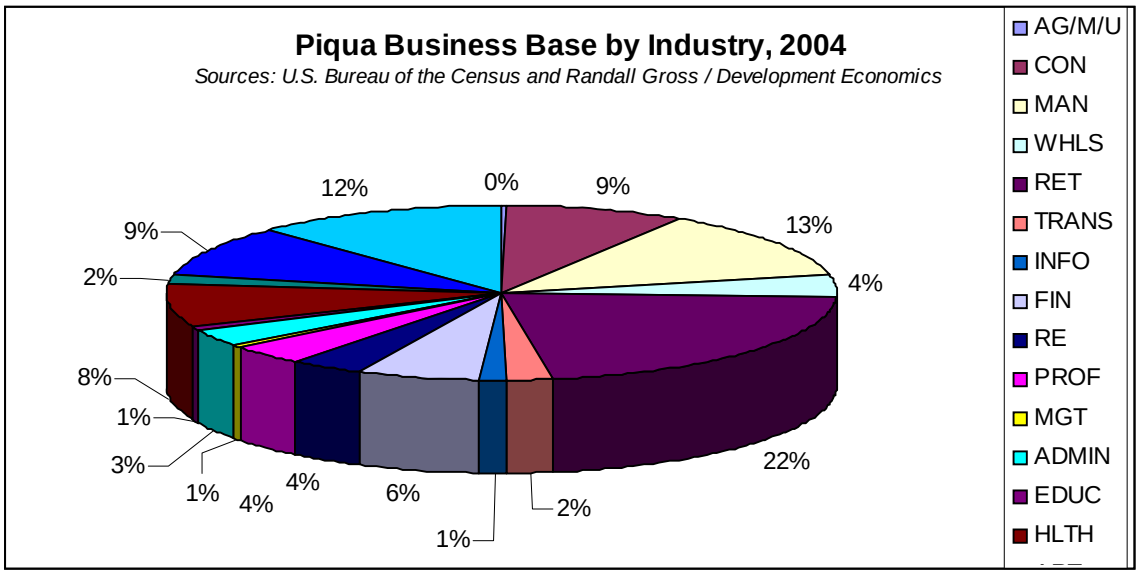
Current Business Base

Manufacturing is still the most important private employer in Piqua. Major employers include Hartzell Propellers, Crayex Corporation, Miami Valley Steel, Evenflo, Retterbush Fiberglass, Jackson Tube and others. Old name companies like Hartzell Industries, Hobart Corporation, Orr Felt Company, and French Oil Mill Machinery have been joined by relative newcomers like B&L Labels.

Retail is the leading sector in terms of the number of businesses (22% of the total), but retail has not generated significant employment. Other large numbers of businesses are found in manufacturing (13%), administration services (12%), construction (9%), real estate (9%), health care (8%), and

finance (6%). Chart 5.1 illustrates the industries that comprised Piqua's business base in 2004.

CHART 5.1 – PIQUA BUSINESS BASE BY INDUSTRY - 2004



Source: U.S. Census

Employment and Business

Piqua's employment has fallen by 1,700 or 15.6% since 1998. Employment expanded by about 330 from 1998 to 2000 before it fell by about 2,000 by 2004. In 2004, Piqua's employment totaled 9,366 according to US Census numbers. The decrease in employment has been met by a parallel decrease in overall payroll. Local payroll declined from about $287.6 million to $269.5 million, a decrease of over $18 million or 6.3% over the six-year period. This decrease in income in turn impacted on local retail sales, real estate purchases, and bank holdings.

The number of business establishments in Piqua fell by 50 (7.3%) between 1998 and 2004, according to the U.S. Census. Almost every sector of the local economy weakened during this period, with a reduced number of businesses operating. The greatest losses in establishments were in real estate, administrative services, professional & technical services, and wholesale trade.

The city did see an increase in the number of information service, management, arts/entertainment/recreation, and other service firms. Altogether, Piqua gained about 10 businesses in these sectors, but not enough to overcome the loss of 60 in other sectors. Table 5.1 below summarizes overall trends in business establishments in Piqua, from 1998 to 2004.

TABLE 5.1 – AT PLACE BUSINESS ESTABLISHMENT TRENDS 1998-2004

Industry	1998			1998-2004 Change	
		2000	2004	Number	Percent
Agriculture	-				
Mining	-	-	-	-	0.0%
Utilities	1	-	-	-	0.0%
Construction	57	1	1	-	0.0%
Manufacturing	85	50	56	(1)	-1.8%
Wholesale Trade	34	86	81	(4)	-4.7%
Retail Trade	147	33	25	(9)	-26.5%
Transport	15	143	138	(9)	-6.1%
Information	6	14	14	(1)	-6.7%
Finance/Insurance	36	5	9	3	50.0%
Real Estate	33	38	36	-	0.0%
Prof/Tech Svcs	32	26	23	(10)	-30.3%
Management	2	27	23	(9)	-28.1%
Admin Svcs	31	2	4	2	100.0%
Education	5	33	20	(11)	-35.5%
Health Care	54	5	5	-	0.0%
Arts/Entertain	7	49	51	(3)	-5.6%
Accomodation	61	9	10	3	42.9%
Other/ Services	76	57	60	(1)	-1.6%
Auxiliaries	1	74	77	1	1.3%
		1	N/A	N/A	N/A
TOTAL	**683**				
Employment	***11,100***	**653**	**633**	**(50)**	**-7.3%**
Payroll ($1,000)	***287,637***	***11,431***	***9,366***	***(1,734)***	***-15.6%***
M		***298,258***	***269,545***	***(18,092)***	***-6.3%***

Source: U.S. Census

Manufacturing

Piqua's manufacturing base includes a mix of industries as summarized in full in Attachment B. The number of manufacturing businesses in Piqua fell by 3 between 1998 and 2004. The city, like Miami County and the region as a whole, lost a higher number of businesses fabricating industrial machinery & equipment. Piqua also lost two of its four food manufacturers. At the same time, the city gained textile, fabricated metal, electronics, and transportation equipment manufacturing firms, contrasting with regional trends. Overall manufacturing business establishment trends in Piqua are summarized for the 1998 to 2004 period in Table 5.2.

TABLE 5.2 – MANUFACTURING BUSINESS TRENDS IN PIQUA 1998-2004

Industry	1998	2004	1998-2004 Change Number	Percent
Food 1/	4	2	(2)	-50.0%
Textiles/Apparel 2/	2	3	1	50.0%
Wood & Paper 3/	7	6	(1)	-14.3%
Printing 4/	6	5	(1)	-16.7%
Plast/Chem/Rbr 5/	11	10	(1)	-9.1%
Mineral Prods 6/	2	2	-	0.0%
Steel, Metals 7/	7	6	(1)	-14.3%
Fabricated Metal 8/	23	24	1	4.3%
Machinery/Equip 9/	13	11	(2)	-15.4%
Electronic/ical 10/	1	2	1	100.0%
Transport Equip 11/	1	3	2	200.0%
Furniture 12/	3	3	-	0.0%
Misc Mfg 13/	5	5	-	0.0%
TOTAL	**85**	**82**	**(3)**	**-3.5%**

Source: U.S. Census

Target Industrial Assessment

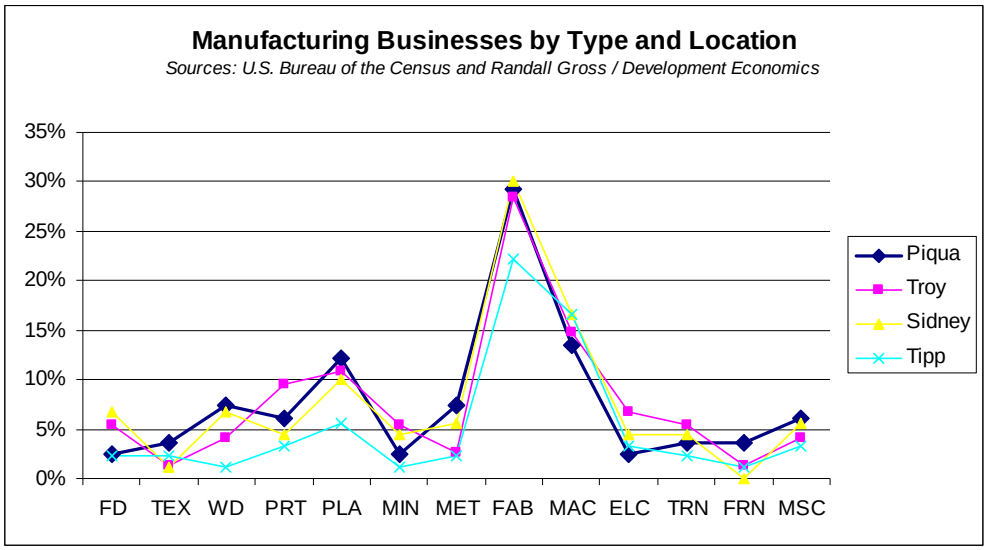
Introduction

This section summarizes findings from a target industrial analysis for Piqua. The purpose of this analysis is to identify key industries for which Piqua has competitive advantages and opportunities for further development. The analysis draws from an assessment of local and regional existing industrial clusters, local industrial supply chain dynamics, Piqua's comparative strengths and weaknesses as an industrial location, and growth trends among regional and national manufacturing industries.

Corridor Cities' Manufacturing Base

An analysis of the manufacturing sector in the four cities in the I-75 Corridor north of Dayton (Piqua, Troy, Sidney, and Tipp City), reveals they have strikingly similar dependencies on several individual industries (see Chart 5.2). The largest share (about 30%) of manufacturing business in each of the four cities is in metal fabrication.

CHART 5.2 – MANUFACTURING BUSINESS BY TYPE AND LOCATION



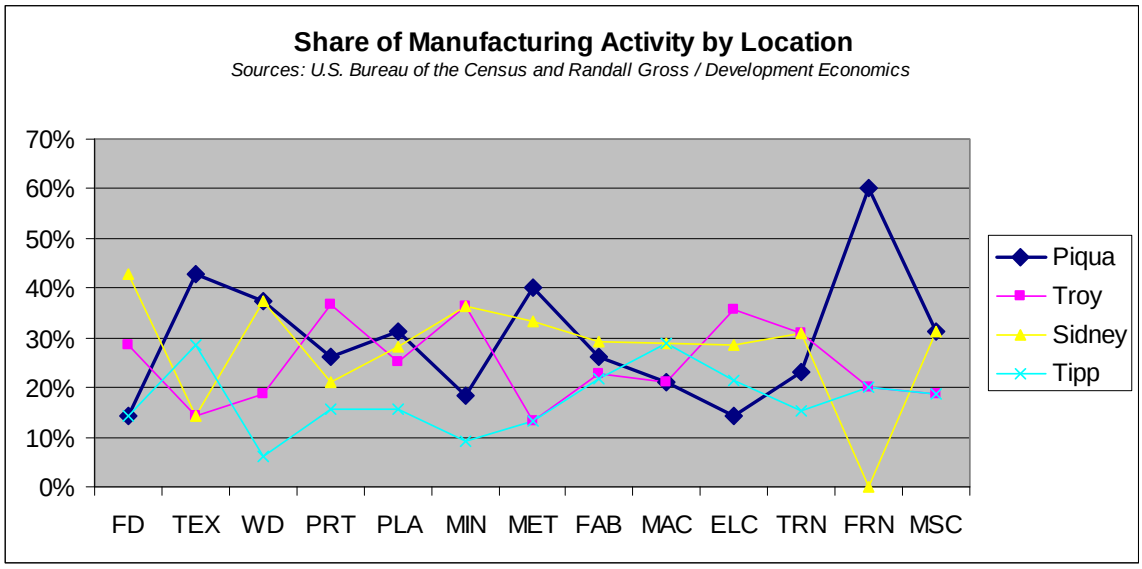
Source: U.S. Census

The four cities also share a similar dependency on machinery manufacturing, at around 15% of the total manufacturing base in each city. The only significant difference in the manufacturing base of the four cities is that Tipp City has a somewhat smaller share in plastics, wood products, and several other industries. These data suggest that the four cities, being equally dependent on the same manufacturing industries, are more likely to compete with one another for the same industrial base. If there was more diversity between the cities with respect to their industrial base, then they would be less likely to compete directly.

Share of Total Corridor Manufacturing

In assessing each city's overall share of the business base in each industry, several interesting trends emerge. First, Piqua has a relatively large share of the overall furniture manufacturing industry base, especially when compared with Sidney. Piqua also has a somewhat larger share of the textile, metals, and plastics manufacturing base than its sibling corridor cities. At the same time, Piqua has a relatively small share of the overall base of food, mineral, and electronics manufacturing in this corridor. Chart 5.3 shows the share of business based industries for the corridor cities.

CHART 5.3 – SHARE OF MANUFACTURING ACTIVITY BY LOCATION



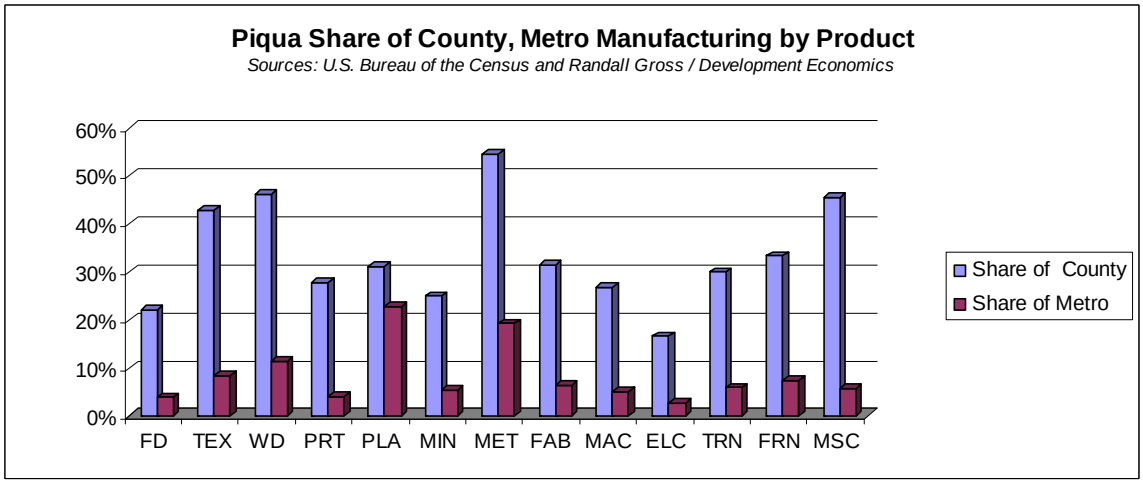
Source: U.S. Census

Troy has a relatively high share of electronics, minerals, and printing. Sidney has a fairly consistent share of most industries (at around 30% of the total), indicating a relatively diverse base, but also has the highest share of food and wood product manufacturers. Tipp City has a relatively low share of most of the corridor's manufacturing base, with the exception of machinery and textiles.

Share of County & Metro Manufacturing

A similar analysis was conducted comparing Piqua's share of the overall Miami County and Metro Dayton manufacturing base by type of industry. This analysis reveals Piqua has a relatively high share of the plastics and metals manufacturing base in the region, but a low share of electronics, food, printing, and other industries (see Chart 5.4). At the county level, Piqua has a high share of metals, textiles, wood products, and miscellaneous manufacturing.

CHART 5.4 – SHARE OF COUNTY, METRO MANUFACTURING



Source: U.S. Census

Industrial Real Estate

For the purposes of this analysis, a Site Analysis was completed of industrial properties in Piqua and surrounding areas. All industrial areas in the city were visited and information was collected on available property. Key industrial areas included:

- Commerce Drive Area - 75% Built out (estimated).
  - One of the city's primary industrial areas.
  - Large/formal industrial area, some new buildings, office/industrial mix
  - Key Uses: Hartzell Propellers, Evenflo, Crayax, Piqua Steel
- Paul Sherry Industrial Park – 80% Built out (estimated).
  - Formal industrial park, full utilities
  - Key Uses: Miami Valley Steel Service, Piqua Technologies, DHL
- Meteor Road/Commercial Street Area – 100% Built out.
  - Informal industrial area, older building stock, poor definition
  - Key Uses: Hartzell Fan, Aesthetic Finishers, KB Machine & Tool
- West High Street Area – 100% Built out.
  - Small, Informal industrial area, older building stock, transitional
  - Key Uses: Piqua Paper Box, French Oil Mill Machine, Hartzell
- Southeast Piqua – 95% Built out.
  - Older, informal industrial neighborhood, residential/industrial mix
  - Key Uses: Riverside Doors, Piqua Electric, Rois Aluminum Foundry
- Wyndham Industrial Park – 15% Built out (estimated).
  - New, undeveloped industrial area. Lacks available buildings
  - Good visibility from I-75, but indirect access.
  - Key Uses: American Wood Shop, Westcom
- Industry Park Drive Area - 90% Built out (estimated).
  - Informal suburban industrial area, industrial services
  - Key Uses: ITW Food Equipment, Piqua Concrete, Berwick Steel, Jackson Tube
- Other
  - Individual/stand-alone facilities in Piqua neighborhoods.
  - Key Uses: Cap Industries, Cummins Filtration, Retterbush Fiberglass

Piqua has only a handful of planned industrial parks, with many of the city's industrial uses located in older mixed-use neighborhoods or along city streets. The Commerce Drive area has a significant share of the city's industrial activity, but land is mostly built-out and the area is located on the opposite side of the city from I-75. As there is no east-west bypass, truck traffic must flow along city streets.

A very rough estimate of total industrial & service building space in Piqua has been calculated at approximately 4.5 to 5.5 million square feet. Of

this number, about 970,000 square feet is vacant, yielding a vacancy rate in the range of about 18 to 21%. However, the 416,000 square-foot LTV Copperweld building accounts for almost one-half of this available space. Another 175,000 square feet of vacant space is located in the Aerovent building, at the gateway to downtown Piqua. If these two buildings are removed from the inventory, then there is a total of about 379,000 square feet of available industrial space in dozens of buildings scattered throughout the city.

Business Resources and Climate

Piqua offers tax abatements of up to 75% on personal property and on real property for a period of up to 10 years. The City also offers a community reinvestment tax incentive (100%) for up to 15 years. All of the city's industrial sites are apparently located within CRAs and/or Enterprise Zones. Overall, Piqua offers a competitive incentive package that places it in line with its neighboring jurisdictions. Many of the city's current businesses recognize and appreciate the City's efforts to assist them.

Piqua nevertheless must still counteract its past image as a no-growth community with relatively low school performance, poor housing standards, and lack of government assistance. This past image still impacts on the minds of real estate professionals and others in the region that are in a position to help attract business to Piqua.

Business Survey

A survey of industrial businesses in Piqua was conduced in order to collect information on key area strengths and weaknesses, as well as other factors that are impacting on these companies' location and operations in the Piqua market. The survey was conducted by e-mail and consolidated with information from additional companies collected through in-person interviews. Findings from this survey are summarized below.

Key Strengths

Labor Force. Some of the area's industrial employers emphasized the labor force as a key strength for Piqua.

- ***Work Ethic*.** Many area employers specifically mentioned the strong work ethic of the local labor force as a key selling point for Piqua. Whereas employers in other parts of the country have difficulty in finding hard-working employees for basic low- and moderate-skilled jobs, some of Piqua's employers seem to have more success in locating such workers. On the other hand, some employers complain about the lack of available workers.
- ***Availability.*** A weak regional economy has actually helped existing employers find available, highly qualified and skilled workers. Again, some companies are starting to complain about

the lack of available workers. So, there are differences on opinion on this.

- ***Relevant Skills & Low-Cost Labor.*** Many area workers have the relevant skills for manufacturing jobs, particularly in the metals industry, tool & die, and related businesses. Some companies note that the cost of labor is relatively low.
- ***Lack of Competition.*** Again, because of the relatively weak economy, local employers find a lack of competition for the best workers. They therefore share a natural apprehension of Piqua attracting large, high-wage industry that would create competition for their labor supply.

Low-Cost Power. Piqua has had an ample supply of relatively cheap power due to its long-term supply contracts which locked in electricity at relatively low rates. However, this situation is changing.

Low-Cost Real Estate. Some companies note that real estate costs are relatively low in Piqua. However, competitive industrial buildings are hard to find.

Central Location. Clearly, Piqua's location near the intersection of major cross-country interstate highways (I-75 and I-70) helps propel its appeal to those companies that require inputs or service markets that are regional and national in scope. Up to 70% of the U.S. population is located within a day's drive of Piqua.

Metals Industry. Ohio is a hub for the metals industry and, even with its declining employment, the state (and the Cleveland area in particular) still has a significant share of the major supply base. Proximity to this supply base as well as a labor force trained in this industry is very important to firms in metals or related industries.

Local Government. Many local firms offered that the local government has been increasingly sympathetic to their needs in recent years and they are grateful for the assistance that Piqua has provided. This assistance includes tax incentives, but also other work on behalf of companies.

Weaknesses

Lack of Qualified Engineers. Some area businesses noted the difficulty in recruiting qualified engineers and other white-collar professionals to the region. Similarly, there was a sense that local kids with college degrees do not return home after graduation. There was also a sense that the area has a shortage of qualified machinists, given the demand for that skill in many of the area's manufacturing concerns.

Lack of Amenities. Some made the connection between a lack of amenities (e.g., restaurants, nightlife, cultural & entertainment amenities, shopping) to the challenges in recruiting professional staff.

"Parochial" Attitudes. There was a feeling that some in Piqua are living in the past and not thinking pro-actively about the city's potential. Alternatively, some feel that there is too much emphasis on the city's position vis-à-vis Troy, Tipp City, etc.

Negative Perceptions of School System & Underclass. Some businesses noted that negative perceptions of the local schools (regardless of the improving realities) had impacted on their ability to attract professional workers to live in Piqua or northern Miami County. A few business people commented negatively on the city's "welfare class."

Key Target Opportunities

Based on an analysis of the regional economic base, industrial cluster patterns, key location factors, input-output, industrial growth, and business requirements, key industries have been identified as targets for marketing in Piqua. These industries are summarized below.

Manufacturing

This analysis has focused on manufacturing industries due largely to the nature of the Miami Valley economy. Key industries identified for which Piqua may have a competitive advantage and where there are regional and national growth opportunities include:

- Plastic Packaging Materials
- Plastic Pipe & Plumbing Fixtures
- Specialty Plastic Components (e.g., medical, transportation equipment)
- Dyes, Inks (specialty chemicals)
- Metal Stampings, Fittings & Hardware
- Computer Hardware
- Wood Cabinets, Doors, & Furnishings

Non-Manufacturing

While the analysis focused on manufacturing industries, it is imperative that Piqua consider every opportunity to diversify its economy away from an over-reliance on manufacturing. In a sense, every effort to attract or expand manufacturing businesses should also be met with an effort to grow other economic sectors within Piqua's economy. Diversity helps a local economy to overcome shocks from downturns in any one sector.

The following industries were identified based on overall regional and national growth prospects and on opportunities for further development of the Piqua base within these sectors.

Tourism & Travel Services. Tourism is among the world's largest and fastest growing industry clusters. Piqua has significant resources, such as historic buildings and downtown, on which to build additional tourism interest. More importantly, Piqua is located in a major travel corridor frequented by "snow birds" en route from Canada, Michigan

and other cold climates to Florida and back. There is also the opportunity, given Piqua's hard-working labor force to attract "pink collar" jobs in travel-related services. The tourism market potential in Piqua should be explored further.

Back Office. Piqua is well-located to benefit companies that require large facilities and labor force for back office uses. Such uses can include credit card or check processing, other financial services, client support, billing/invoicing, etc. While much of the customer service component of back-office use has been "off-shored" to India and other locations in south Asia, there are still functions which require centrally-located processing and distribution services to serve a regional or national market.

Emerging Fuel Technologies. The President and others have called for increased funding for emerging fuel technologies that hold out the promise of energy independence. Ethanol and other bio-fuels generated from corn, soy, and bio-waste have received a boost not only from federal tax incentives and growing awareness of global warming but also from the high price of oil, which has made bio-fuels more competitive in the market despite their significant capital development requirements. Unfortunately, a drop in oil prices will also reduce the opportunities for such fuels to compete. Nevertheless, Piqua's location in the heart of the Midwest farm belt and near a major interstate crossroads does provide it with certain advantages as a location for bio-fuel development. The risk of such development must account for the growing number of competitors that have joined the bio-fuel "rush" and invested in large capital facilities throughout the Midwest. Thus, every effort should be made to assess the long-term economic viability of bio-fuel facilities in the area.

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6. Built Environment

COMPREHENSIVE PLAN UPDATE

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6. Built Environment

Overview

Understanding the characteristics of the land and the how the land within Piqua is currently being used is a key element of the plan. Land is an exhaustible resource that, once developed and converted to a use, is often difficult to change. Land will continue to be developed, but the pattern, rate, timing and location of that development are up to the city. The question is not whether the community will grow and change, but how it will grow and change.

This chapter of the Existing Conditions report provides a description of growth within the city, the current pattern of development, and the amount of remaining land that is suitable for development is identified. This narrative also provides a summary of the urban form characteristics of Piqua, as they relate to the context zone within which development occurs. The community will be defined according to the following primary elements of place: neighborhoods, districts, and corridors. The characteristics impacting urban form are described and analyzed within this chapter. Further, the historical and cultural resources within the community will be discussed.

The primary sources of information used to prepare this analysis are Geographic Information System data provided by Miami Valley Regional Planning Commission (MVRPC), City of Piqua, and 2000 U.S. Census Data.

Key Findings

Land Use Development Patterns

- The City of Piqua contains 7,238.9 acres (11.31 square miles) of land.
- Single family residential comprises 21.8 percent of the land area within the city.
- Piqua has annexed 3,897 acres since 1970.
- From 1970 to 2005 the population of the City of Piqua increased from 20,741 to 20,883; a population increase of 0.7 percent.

Undevelopable Land: Preserve and Reserve

- Agricultural land covers 1,449.7 acres or 20.0 percent of the total land area within the city.
- Preserve and reserve land make up over 21.3 percent of the city's total land area.

Developable Land

- The amount of total developable land within the City equates to approximately 2,003 acres or 28.5 percent of the total land area.

Urban Form

- Piqua is classified into eight context zones.
- The context zones identified in Piqua include: Center, Corridor, Neighborhood General, Neighborhood General 1, Neighborhood General 2, Neighborhood General 3, District, and Edge.
- Each context zone has unique characteristics making it identifiable.
- Block length, block depth, lot width, and access are important in shaping an area's urban form. These characteristics contribute to making the context zone successful in terms of accessibility, walkability, streetwall continuity, connectivity, and overall appearance.

Historic and Cultural Resources

- Piqua was originally laid out in 1807. In 1823 the village was incorporated.
- The National Register of Historic Places recorded the Piqua-Caldwell Historic District in 1985.
- The Downtown Design District was created to preserve, protect and enhance the distinctive historical character of commercial buildings in the Downtown Design (Historic) District.

Detailed Information

Land Use Development Patterns

Existing Land Use

This section summarizes the existing land use within the corporate boundaries of the city. The land uses have been grouped into different classifications. Each classification represents how the land is currently being used, not the land's current zoning classification.

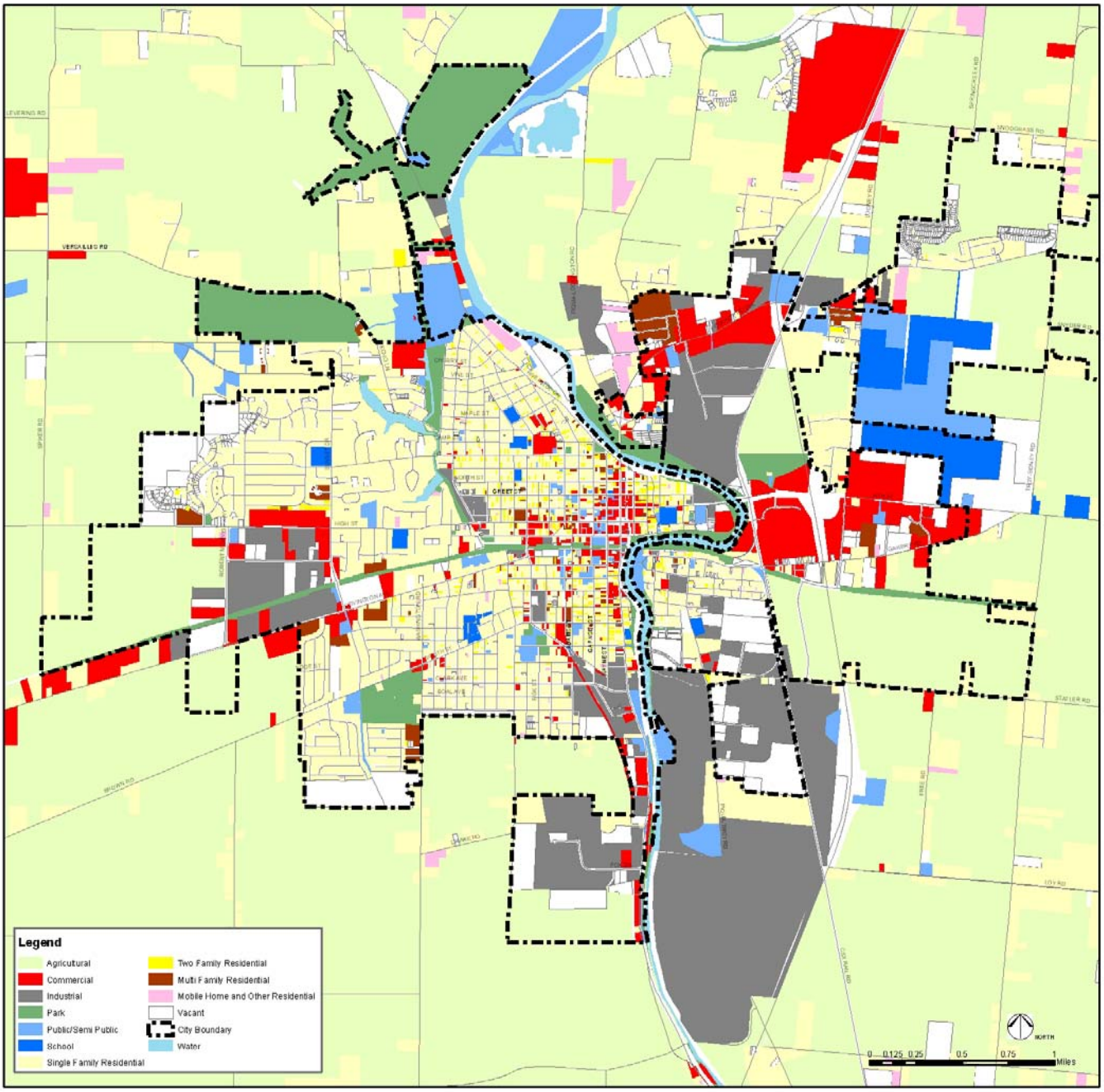
The city contains 7,238.9 acres (11.31 square miles). These acreages were derived from the land use maps generated using Geographical Information System (GIS) technology and the data provided by the City of Piqua and the Miami Valley Regional Planning Commission (MVRPC). Detailed land use data for the city can be found in Table 6.1 and Map 6.1. The predominant land use within the city is residential. Residential uses comprise 24.7 percent of the land area within the city, while agricultural uses account for 20 percent of the city's total land area. Single family accounts for the majority of residential uses within the city by comprising 21.8 percent of the total land area.

TABLE 6.1 - PIQUA EXISTING LAND USE

Land Use Category	Acres	Percentage
Agriculture	1,449.7	20.0%
Commercial	532.3	7.4%
Industrial	697.7	9.6%
Mobile Homes and Other Residential Uses	28.5	0.4%
Multi Family Residential	111.5	1.5%
Park	668.1	9.2%
Public/Semi Public	273.0	3.8%
School	145.7	2.0%
Single Family Residential	1,579.7	21.8%
Two Family Residential	72.5	1.0%
Streets	840.0	11.6%
Vacant	840.3	11.6%
Total	**7,238.9**	**100.0%**

Source: ACP

MAP 6.1 - PIQUA EXISTING LAND USE



Source: ACP

Annexation

The city has annexed 3,897.4 acres since 1970. Map 6.2 on the following page shows the land area annexed by the city since 1970. The annexation growth in acres can be found in Table 6.2 for each 10-year period beginning at 1970 to the present. Table 6.3 juxtaposes the growth in acres with population growth rates. From 1970 to 2005 the population of the city increased from 20,741 to 20,883. The purpose of this comparison is to

show that while the land area of Piqua more than doubled from 1970 to present, the City's population increased by 0.7 percent. The total amount of developed land has also increased since 1970, leading to a higher per person land consumption ratio.

TABLE 6.2 - PIQUA ANNEXATION

Time Period	Acreage
Before 1970	3341.53
1970-1980	927.14
1980-1990	558.59
1990-2000	2146.4
2000+	265.3

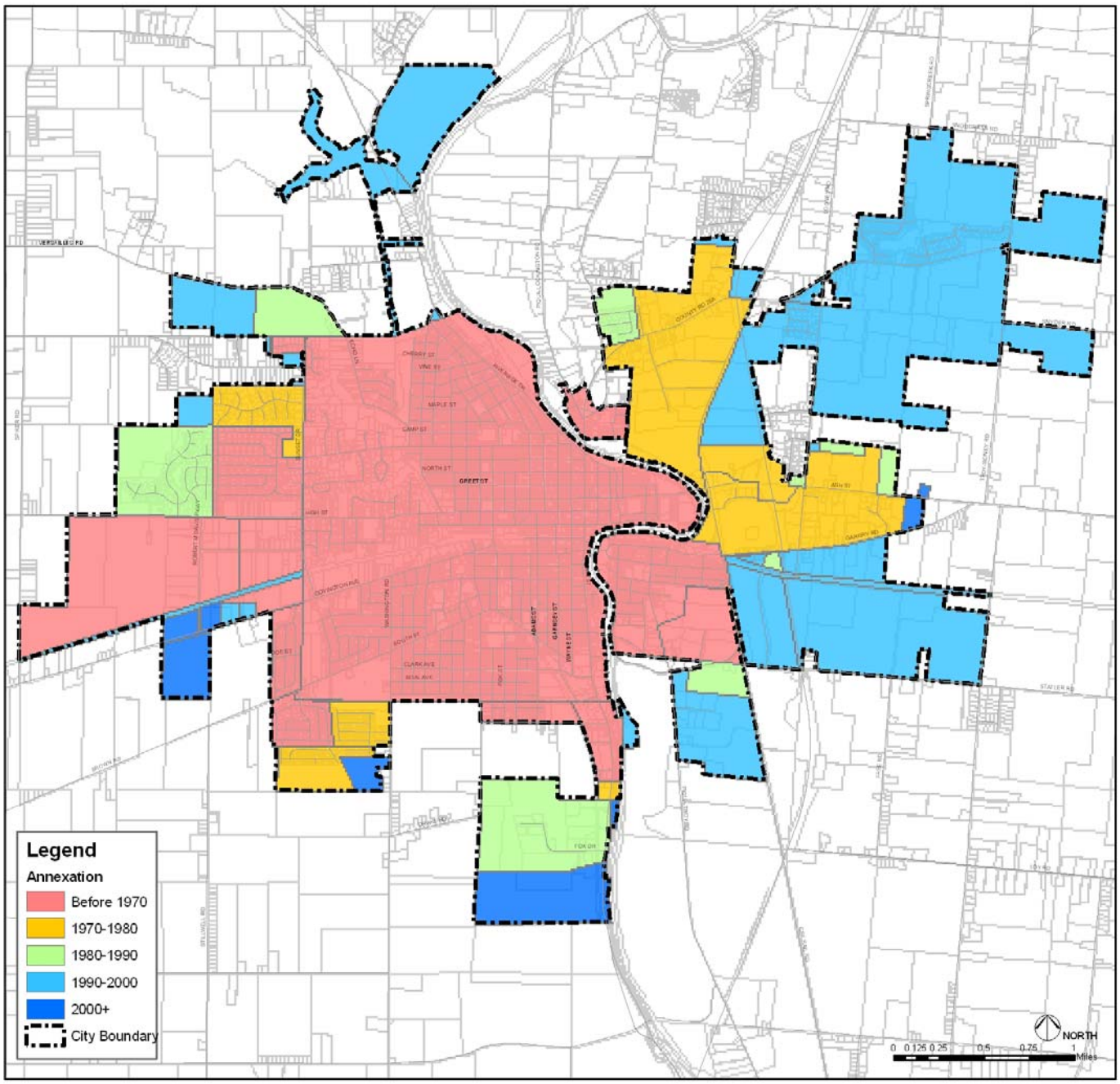
Source: ACP

TABLE 6.3 - PIQUA ANNEXATION AND POPULATION GROWTH COMPARISON

Time Period	Acreage Pecentage Increase	Population Percentage Increase
1970-1980	27.7%	-1.3%
1980-1990	13.1%	0.6%
1990-2000	44.5%	0.6%

Source: ACP

MAP 6.2 - PIQUA ANNEXATION BOUNDARIES



Source: ACP

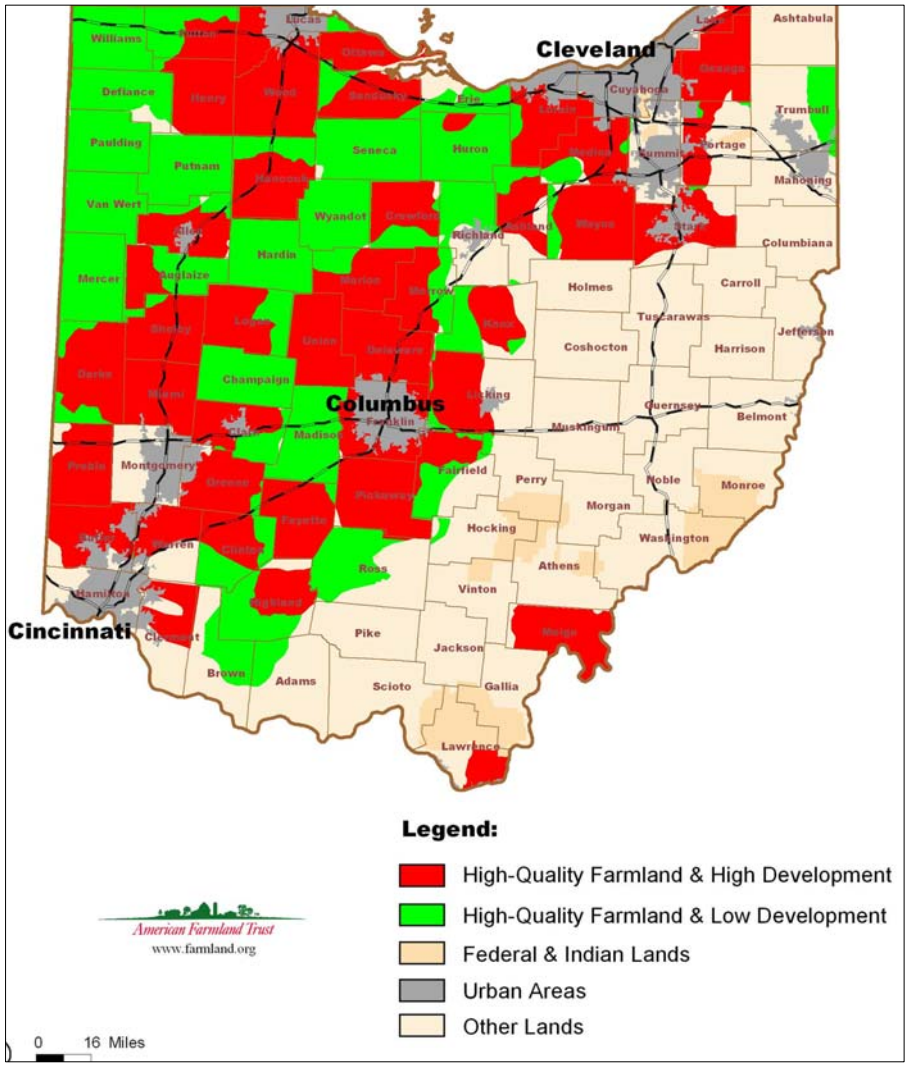
Undeveloped Land: Agriculture, Preserve, and Reserve

Agriculture

Much of the undeveloped land within the City is currently used for agriculture or is designated as vacant. Agricultural and vacant lands comprise 2,289 acres or 31.6 percent of the total land area within the City. Agricultural land accounts for 1,449.7 acres or 20.0 percent of the total land area within the City. According to the American Farmland Trust (AFT), between 1987 and 1997 the State of Ohio lost 363,100 acres of prime

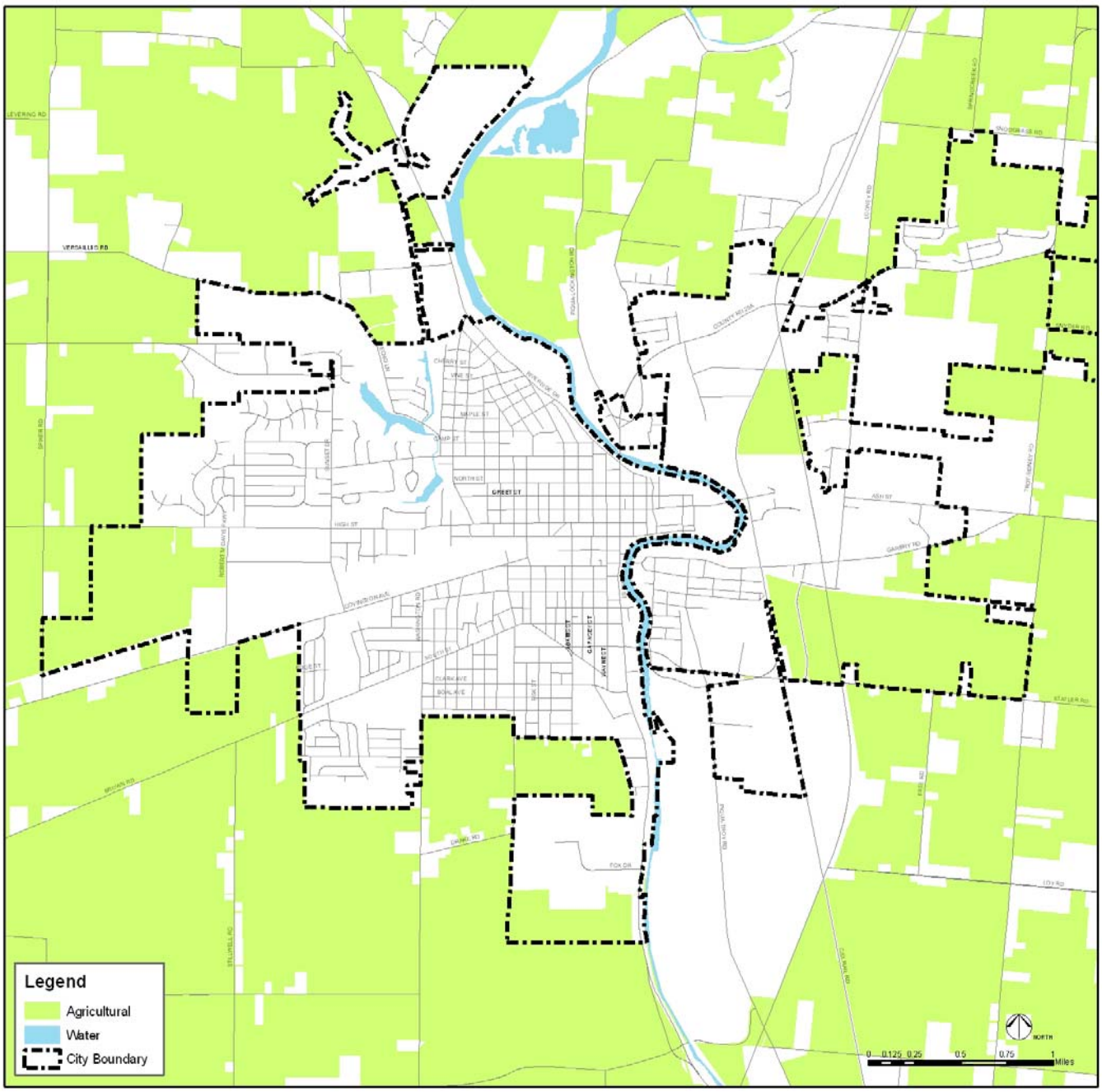
farmland to development. (See Map 6.3) The State of Ohio ranked second in the nation in the loss of prime agricultural land during this period. Although there is no data that describes the loss of prime farmland during this time within Piqua, the present patterns of development dictated by current zoning would result in the loss of more agricultural land. Map 6.4 on the following page shows agricultural lands in Piqua.

MAP 6.3 - LOSS OF HIGH QUALITY FARMLAND - OHIO



Source: American Farmland Trust

MAP 6.4 - PIQUA AGRICULTURAL LAND



Source: ACP

Preserve and Reserve Lands

For the purpose of this analysis, the remaining undeveloped land (excluding agricultural land) has been classified into two groups: preserve lands and reserve lands. Preserve or reserve areas account for 1,542 or 21.3 percent of the total land area within the City of Piqua.

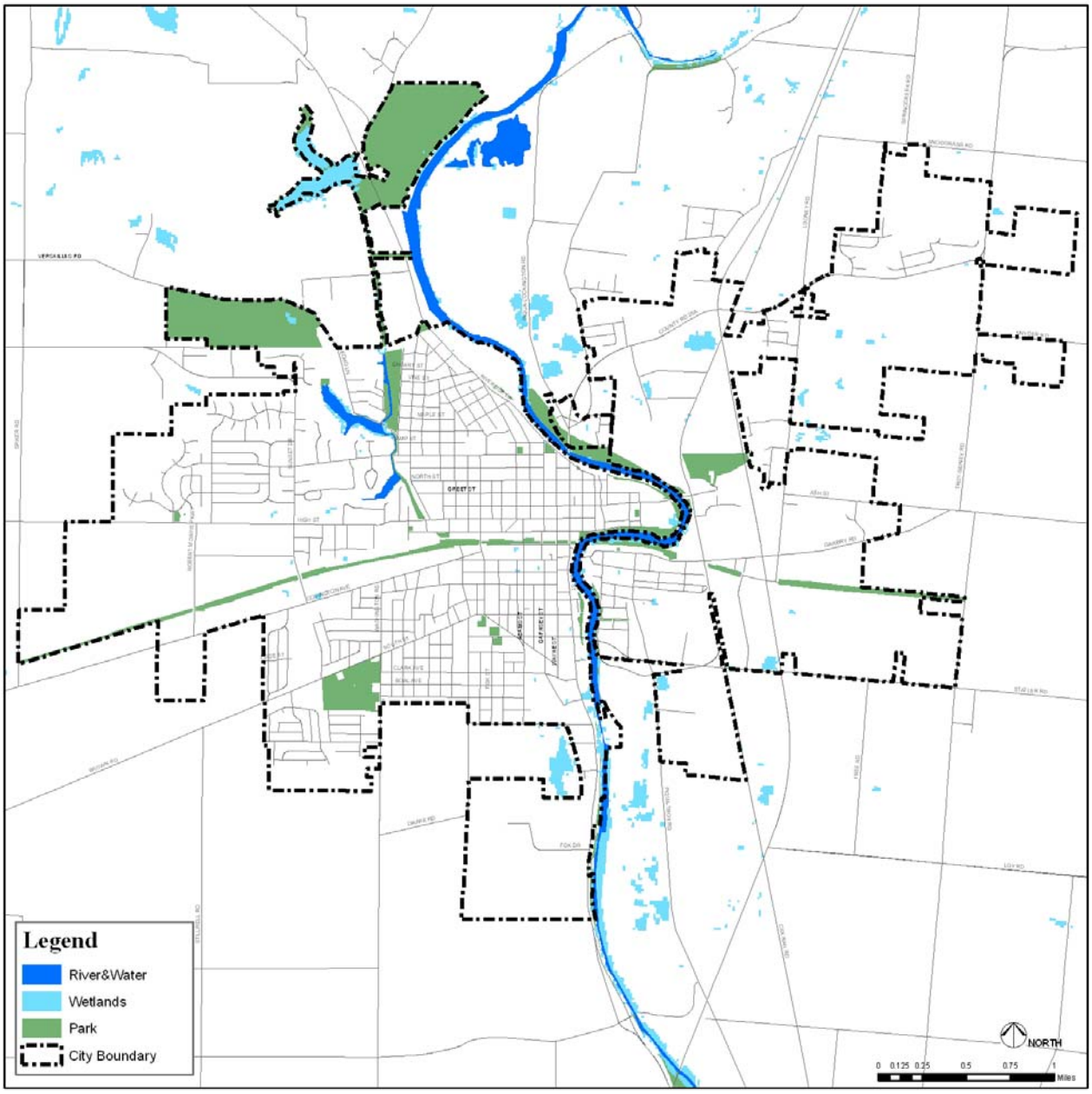
Not all agricultural and vacant land, or that land which is available for development, is entirely suitable for being built upon. Preserve lands are permanently protected by federal, state, and local regulations. These lands include nature preserves, parks, and outdoor recreation areas. Preserve lands

amount to 731 acres or 10.1 percent of the total land area within the City of Piqua.

Reserve lands are defined as lands that are not part of the preserve, but due to their environmental constraints and limitations their development potential should be considered for future preservation. These include floodplain areas, hydric soils with steep slopes (over 12 percent) and wetlands, all of which could be developed, but not without additional effort or cost. The amount of land in reserve status amounts to 811 acres or 11.2 percent of the total land area within the City.

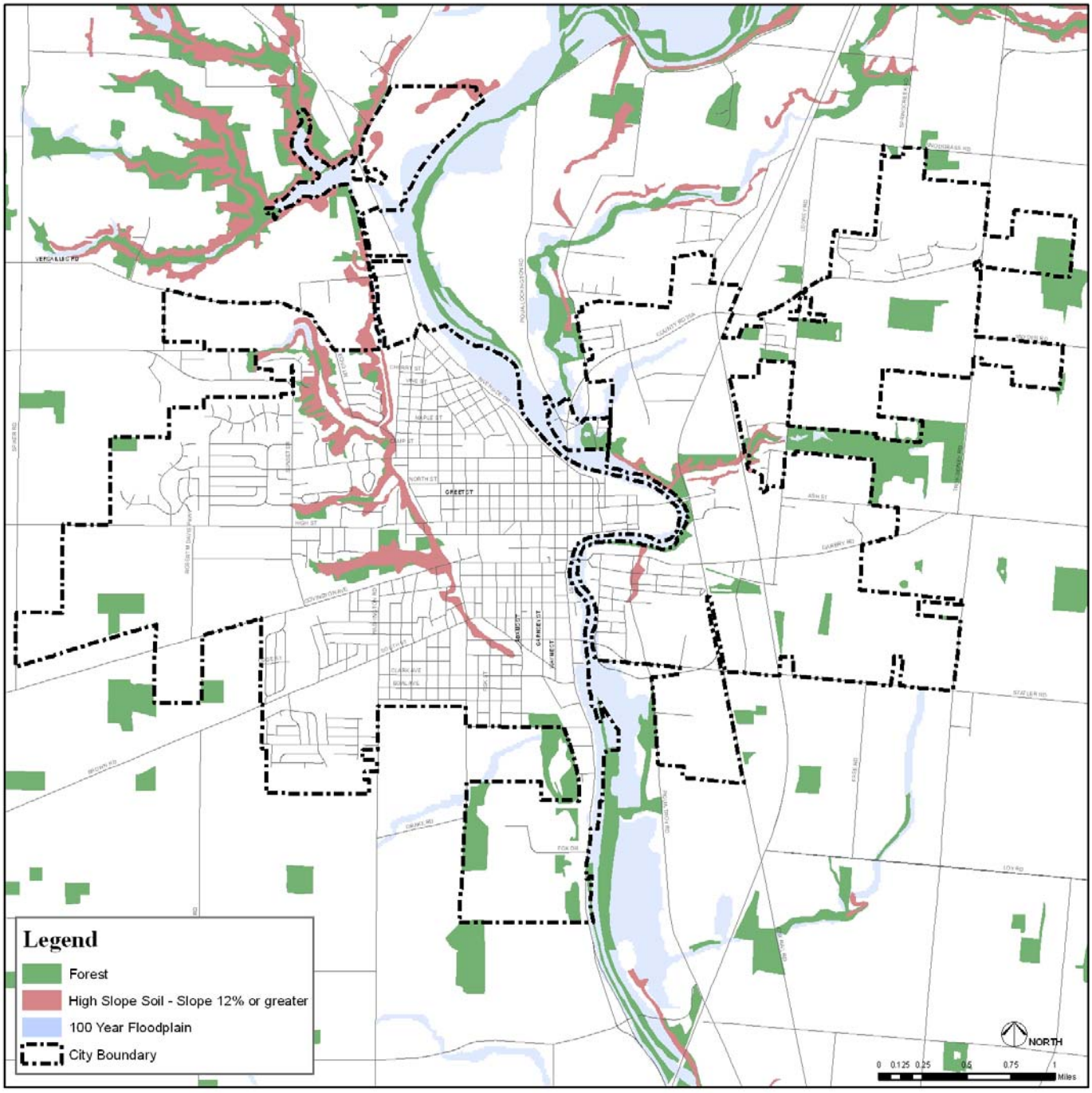
Maps 6.5 and 6.6 illustrate the areas designated within the preserve and reserve categories.

MAP 6.5 - PIQUA PRESERVE LAND



Source: ACP

MAP 6.6 - PIQUA RESERVE LAND



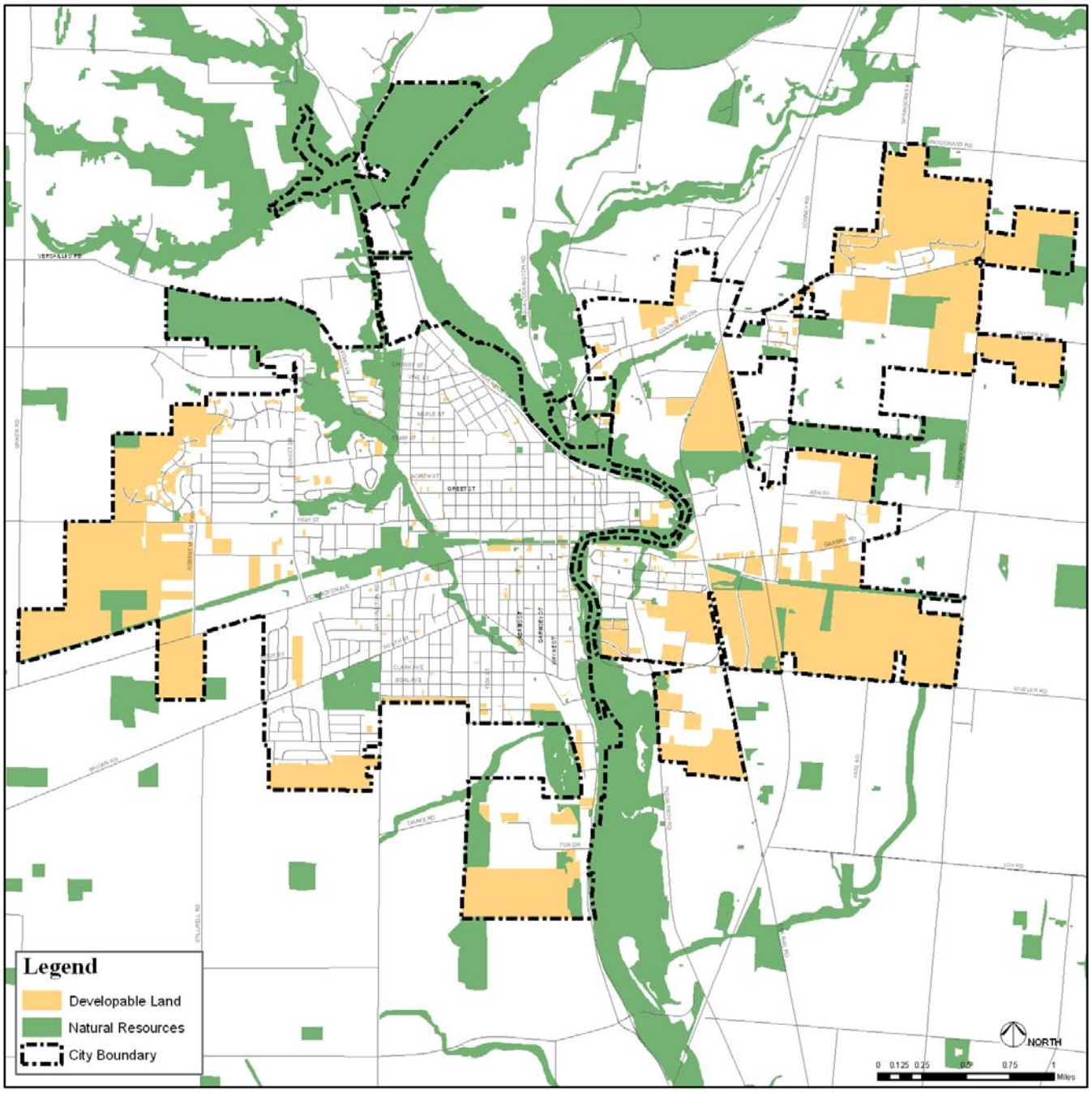
Source: ACP

Developable Land

The total amount of developable land within the City of Piqua amounts to 2,060 acres or 28.5 percent of the total land area within the City. The amount of developable land is calculated by adding the total amount of agricultural land and vacant land within the City, and then subtracting the natural resource areas (preserve and reserve) found within the agricultural and vacant land areas. Map 6.7 on the following page shows the developable land within the City of Piqua. The majority of this land is found at the edges of the City. These are areas that have been annexed into the City over the past 30 years.

Areas for future greenfield, infill or refill development, and redevelopment will be identified in the Comprehensive Plan, based on the availability of infrastructure, current zoning entitlements, and location within a particular Context Area (see Urban Form page 6.12).

MAP 6.7 - PIQUA DEVELOPABLE LAND



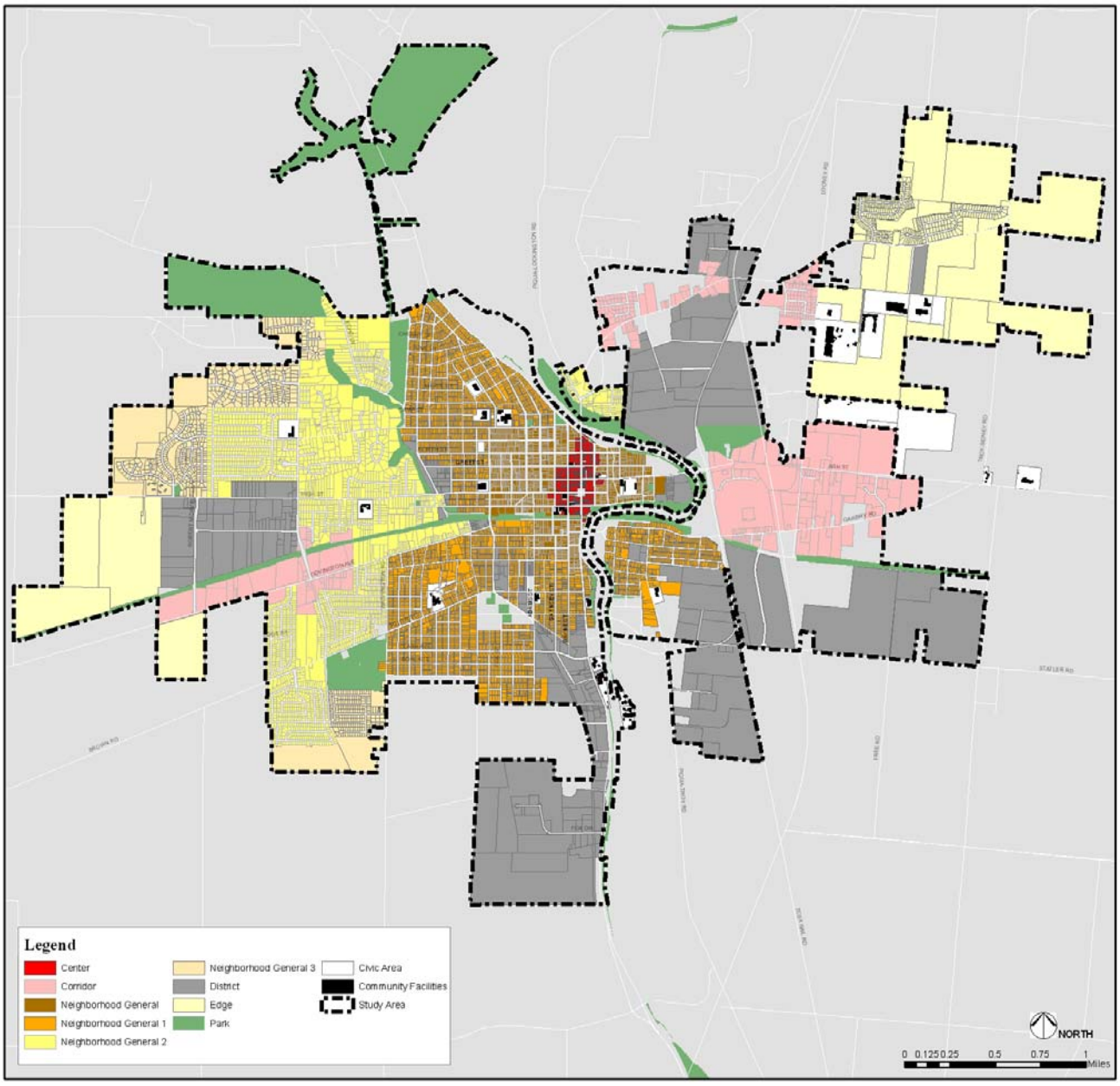
Source: ACP

Urban Form

This section summarizes the urban form and characteristics of the context zones within the City of Piqua. Context zones are areas of the city with a combination of elements that create a specific character. The characteristics used in defining the context zones include: lot size and coverage, land use, density, street pattern and connectivity, and building design. The identification of context zones illustrates how the City has developed over time, and how the development pattern has changed.

The City of Piqua was generally categorized into eight context zones based on the previously stated characteristics. Map 6.8 shows the context zones within the City of Piqua. One sample site from seven of the eight context zones was selected for further analysis. The District zone was not analyzed in this section. Further, this analysis will show how continued development of the City's neighborhoods has changed over time, as well as the neighborhood characteristics unique to each context zone. Map 6.9 depicts the selected sites within each context zone. The neighborhood scale characteristics analyzed in this section include: block length, block depth, lot width, and access.

MAP 6.8 – PIQUA CONTEXT ZONES



Source: ACP

MAP 6.9 – PIQUA CONTEXT ZONE EXAMPLES

Source: ACP

Neighborhood Characteristics

Block Length

Block length can play an important role in creating an area's form/character. The walkability of a neighborhood is directly related to block size. Blocks that are too long can create neighborhoods that feel unwalkable, and may deter people from walking. The existing range of block length was noted in Table 6.4.

Block Depth

Block depth also plays a part in creating an area's form/character. The block depth can work to make neighborhoods walkable as well. Block depth tends to be shorter than block length, except in the case of square blocks, and can play and important role in defining the block's lot depths. Blocks with a large depth can deter walkability much like block length.

Lot Width

Although lot width is a site characteristic it can also impact the scale of a neighborhood. Lot width helps to mold a neighborhood's appearance through its impact on building width, sideyard setback, and street wall creation. Lot widths vary throughout the community, depending on the context zone.

Lot Access

Lot access impacts the number of conflicts between pedestrians and vehicles, and is important in strengthening or weakening an area's walkability. The use of alleys helps to minimize the number of conflict zones for vehicles and pedestrians, and can create a more walkable neighborhood. Driveways, which use the street front for access, create a vehicle/pedestrian conflict at every lot.

Tables 6.4 and 6.5 show the block length, block depth, lot width, and lot access characteristics found in sample neighborhoods from each of Piqua's context zones.

TABLE 6.4– PIQUA NEIGHBORHOOD SCALE MEASUREMENTS

Context Zone	Block Length	Block Depth
Center - Block	325	325
Neighborhood General - Block	600	332
Neighborhood General -SubBlock	315	162
Neighborhood General 1 - Block	582	403
Neighborhood General 2 - Block	1695	255
Neighborhood General 3 - Block	690	255
Edge - Block	921	321
Corridor - Block	2932	1974

Source: ACP

TABLE 6.5 – PIQUA NEIGHBORHOOD SCALE MEASUREMENTS

Context Zone	Lot Width		Access
Center - Block	15/115	15/20	Alley, Street
Neighborhood General - Block	30/60	30	Alley, Street
Neighborhood General -SubBlock	30/60	30	Alley, Street
Neighborhood General 1 - Block	131/42	45	Alley, Street
Neighborhood General 2 - Block	80	80	Street
Neighborhood General 3 - Block	66/100	66	Street
Edge - Block	95/135	95	Street
Corridor - Block	82-924	-	Street

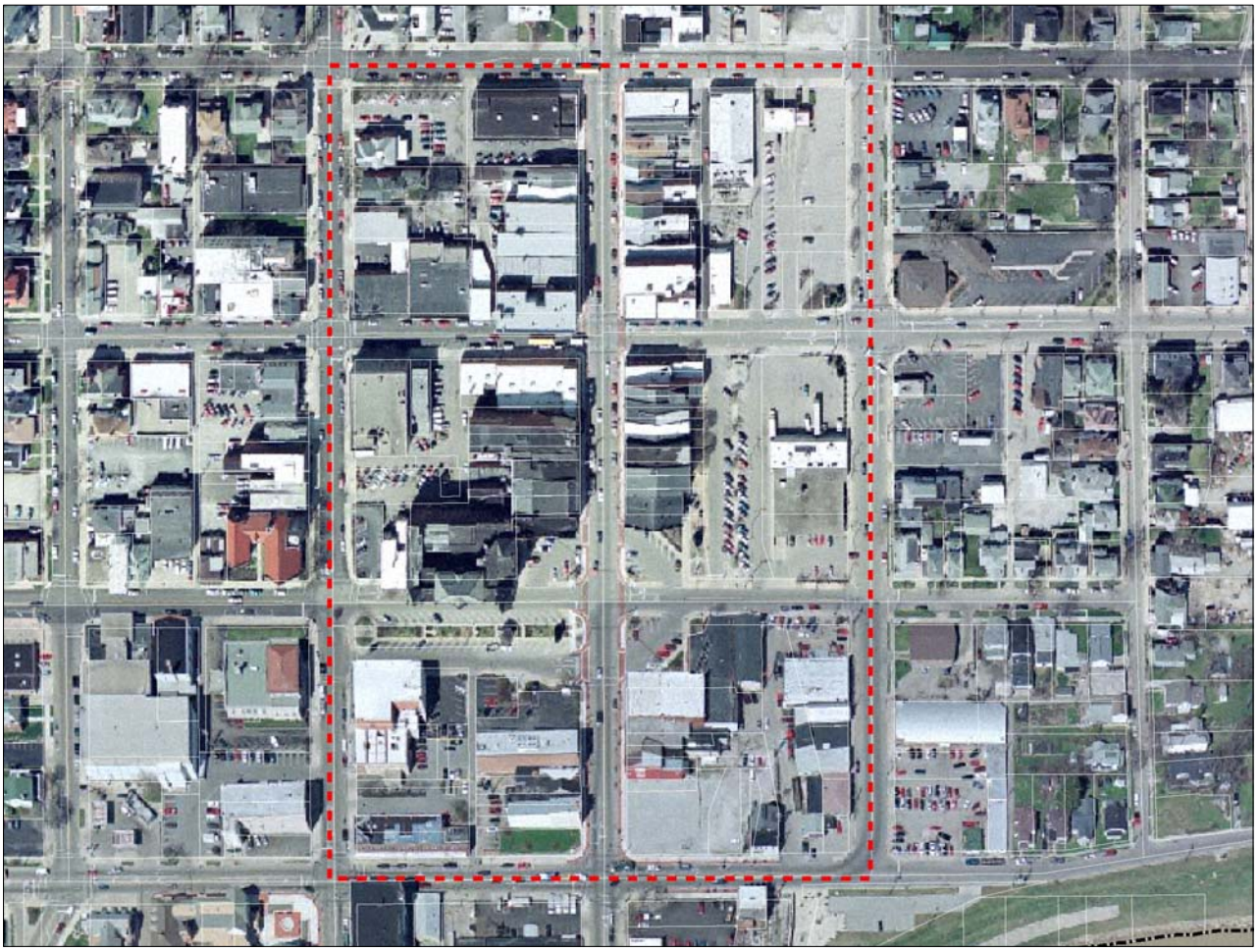
Source: ACP

Context Zones

Center

Among all the context zones in Piqua, the Center is the zone with the most compact development. This area offers a mix of uses including employment, commercial, and residential areas. The selected site within the Center zone is bounded by Greene Street to the north, Water Street to the south, Wayne Street to the west, and Spring Street to the east. The area is highly walkable due to block size and a good level of accessibility. The walkability is created through block length and depth, as well as the use of alleys. The blocks in the center zone tend to be square and form a strong grid pattern. The block length for the Center zone is 325 feet and the block depth is also approximately 325 feet. Lot width is smaller within this zone, ranging from 15 to 115 feet, with the most common lots between 15 and 20 feet in order to facilitate compact development. This zone contains many of the historic buildings within Piqua and offers a sense of historic continuity (See Map 6.10).

MAP 6.10 – PIQUA CENTER ZONE



Source: ACP

Neighborhood General

The Neighborhood General zone is typified by traditional urban development consisting of detached smaller lot single-family areas, which may also include some multiple-family and mixed-use development. These areas are often walkable and include a range of housing types. These neighborhoods include alleys, consistent block size, and a range of housing styles.

The selected site within the Neighborhood General zone is bounded by W. North Street to the north, West Greene Street to the south, College Street to the west, and Franklin Street to the east (See Map 6.11). Measurements were taken at the block scale as well as the sub block scale for this site. (The sub blocks are those created through the use of alleys.) The block length is 600 feet and the depth is approximately 330 feet, which gives the block a walkable feel. The sub block length is approximately 315 feet and the depth is 162 feet. The lot width within the selected site is most commonly 30 feet. The use of alleys within this zone increases accessibility, while also making the streets more pedestrian friendly. The Neighborhood General zone is further characterized by having a discernable center and an edge with civic uses.

MAP 6.11 – PIQUA NEIGHBORHOOD GENERAL ZONE

Source: ACP

Neighborhood General 1

The Neighborhood General 1 zone is typified by single-family homes on lots larger than those found in Neighborhood General. The block size varies within this zone, as the pattern begins to change slightly. This zone does integrate the use of alleys, and is a walkable area much like the Neighborhood General zone. The Neighborhood General 1 zone within Piqua can be found adjacent to the Neighborhood General zone. This area can easily be distinguished due to the slight change in pattern. In Neighborhood General 1, the grid develops into an irregular pattern in portions of the zone. The block length is varied within this zone. Also, lot size tends to increase slightly within this zone.

The selected example site within this zone is bounded by Manier Avenue to the north, Hemm Road to the south, Leonard Street to the west, and Roosevelt Avenue to the east (See Map 6.12). The block length is 582 feet and the depth is 403 feet. Lot width ranges from 42 to 131 feet, although the most common width is approximately 45 feet. Overall, the lot width is slightly larger than that found in the Neighborhood General zone.

MAP 6.12 –PIQUA NEIGHBORHOOD GENERAL 1 ZONE

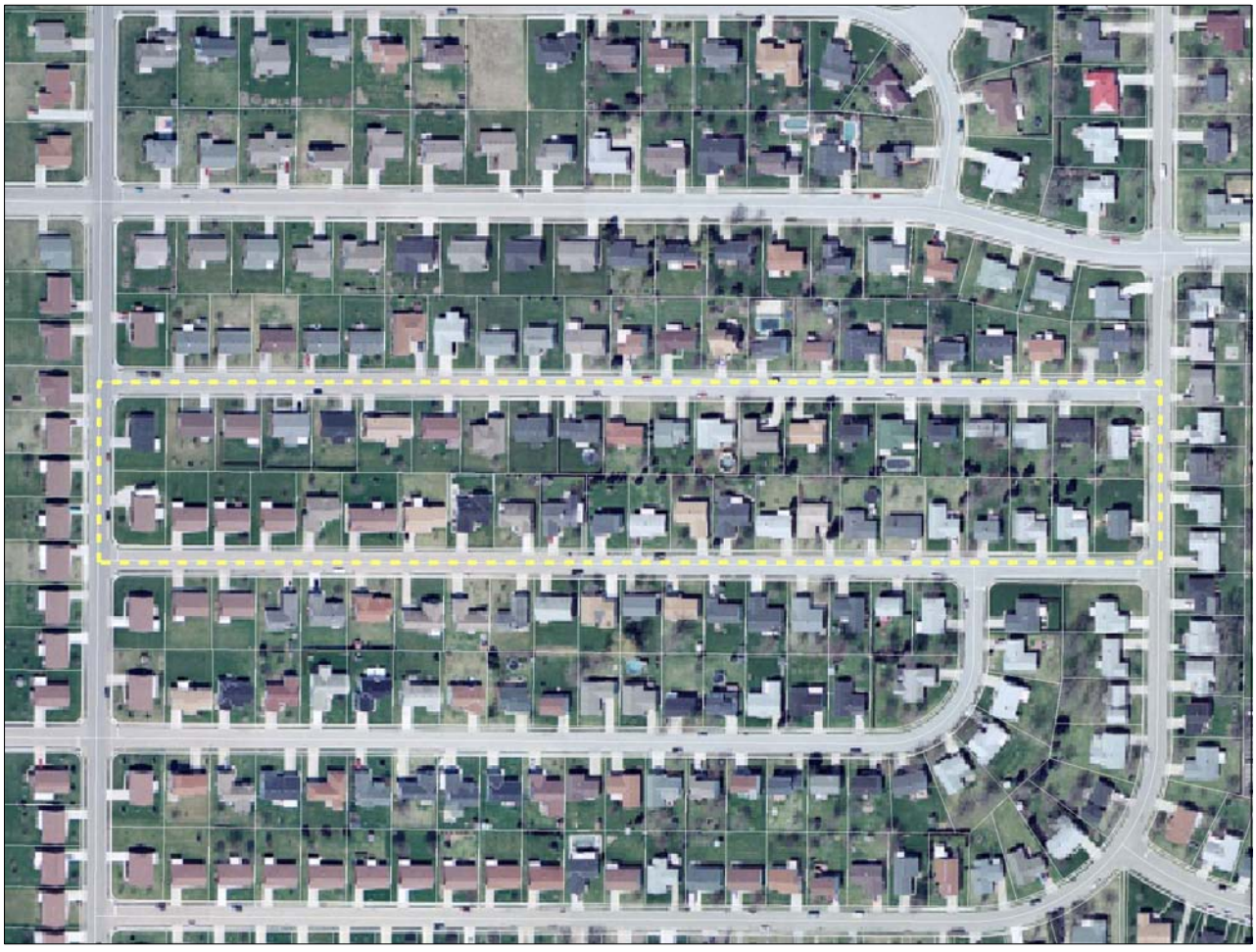
Source: ACP

Neighborhood General 2

The Neighborhood General 2 zone is typified by single family homes with lots that are generally larger than those found in Neighborhood General and Neighborhood General 1. The pattern sees a significant change within this district, moving from a linear grid pattern to a curvilinear pattern. The change in pattern reduces the connectivity and accessibility of the road network. Neighborhood General 2 is less walkable than the Neighborhood General and General 1 zones due to the block length and lack of connectivity. The Neighborhood General 2 zone is adjacent to the Neighborhood General 1 zone, and consists primarily of single family residential.

The Neighborhood General 2 site selected for analysis is bounded by Carol Drive to the north, Britton Drive to the south, Westview Drive to the west, and North Parkway Drive to the east (See Map 6.13). The block length is approximately 1,695 feet and the block depth is 255 feet. The significant increase in block length decreases the walkability and connectivity of the neighborhood. The lot width is most commonly 80 feet within this zone. Driveway access within this zone is from the streets, as there are no alleys within this zone.

MAP 6.13 – PIQUA NEIGHBORHOOD GENERAL 2 ZONE



Source: ACP

Neighborhood General 3

The Neighborhood General 3 zone is typified by single family homes with lots that are generally larger than those found in Neighborhood General and Neighborhood General 1. The lot size within this zone is less consistent and may contain irregular lots. The pattern within this zone is curvilinear and incorporates the use of cul-de-sacs. Neighborhood General 3 furthers the shift from the grid pattern that began in the Center zone. There are no civic areas within this zone. Neighborhood General 3 is low in walkability due to a lack of connectivity. The Neighborhood General 3 can be found adjacent to the Neighborhood General 2 zone.

The Neighborhood General 3 site selected for analysis is bounded by Park Avenue to the north, Wilshire Drive to the south, Bear Run to the west, and West View Drive to the east (See Map 6.14). The block length is approximately 690 feet and the block depth is approximately 255 feet. The lots range in width from 66 to 100 feet. Lot access is by way of the streets, as there are no alleys integrated into this zone.

MAP 6.14 – PIQUA NEIGHBORHOOD GENERAL 3 ZONE

Source: ACP

Edge

The Edge zone is typified by the largest lots of any of the residential context zones. Since it is still developing it has an incomplete sidewalk network, which decreases the walkability of the area. The street network lacks sufficient connectivity and may also deter walking. The pattern of development is similar to Neighborhood General 3 with curvilinear streets and cul-de-sacs. Edge zones can be found on the northeast and far west portions of the community at the edge of the City.

In Piqua, the example edge zone can be found in the City's northeast. The selected site is bounded by Cherokee Drive to the north, Sioux Drive to the south and east, and Indian Ridge to the west. This development consists of large homes with a development pattern similar to that described above (See Map 6.15). The block length for the selected site is 921 feet, while the block depth is approximately 320 feet. Lot width within this zone ranges from 95 to 135 feet and is most commonly 95 feet.

MAP 6.15 – PIQUA EDGE ZONE

Source: ACP

Corridor

The Corridor zones can be found along arterials or major collectors. These zones include all the parcels that front the roadway. Corridors are generally made up of non-residential uses (e.g., commercial or office). Corridor zones are often not pedestrian friendly, although they may include sidewalks. The auto-oriented nature of the corridor zones and the amount of traffic may create conflict zones for pedestrians. In Piqua, Corridor zones can be found where commercial development exists.

The Corridor zone selected for analysis is the East Ash St. commercial corridor (See Map 6.16). The block length for the selected Corridor zone site is 2,932 feet and the block depth is approximately 1,974 feet. The lot width within this zone varies from 82 to 924 feet. Primary access to this area is provided by East Ash Street.

MAP 6.16 – PIQUA CORRIDOR ZONE

Source: ACP

Historic and Cultural Resources

This section describes how the City of Piqua was created, with particular attention to its historic and cultural resources. The primary sources of information used to prepare this analysis include the City of Piqua, Miami County Convention and Visitors Bureau, and the Ohio Historical Society, and the National Registrar of Historic Places.

Historical Context

The history of Piqua begins over 2,000 years ago with the Adena and Hopewell cultures that lived in the area. The Adena and Hopewell cultures are responsible for the creation of mounds, including the mound at the Johnston farm.

Native Americans moved into the Miami Valley region sometime in the seventeenth century. The Twigtwees established a town three miles north of the present day City of Piqua. The town grew to become a significant trading post and in 1749 Fort Pickawillainy was established there. The Fort was destroyed three years later on June 21, 1752.

The next settlement came to the area in 1780 with the Shawnee. The Shawnee established two villages named Upper and Lower Piqua. The name Piqua is said to come from the Shawnee phrase Otaht-he-wagh-Pe-Qua meaning he has come out of the ashes.

In 1793 General Anthony Wayne created Fort Piqua at Upper Piqua. Soldiers were stationed at the fort until 1795, when the signing of the Treaty of Greenville opened the western and southern portions of the state to settlers. In 1796 the first structure was built on the present site of the City of Piqua.

The village of Washington, now present day Piqua, was laid out in 1807. In 1816 the State Legislature was petitioned to restore the town to its original name, Piqua. In 1823 the village was incorporated and by this time had established a post office, several mills, and a newspaper. In 1835 the village incorporated again and elected Colonel John Johnston as its first mayor.

Colonel Johnston was an important figure in the settlement and early growth of Ohio and the City of Piqua. He was the United States Indian Agent for western Ohio from 1812 to 1829. Col. Johnston owned the Johnston Farm, which is now a popular destination for residents and tourist in Piqua.

The Miami-Erie Canal reached Piqua in 1837 and was highly active until the 1860's. The Canal remained in operation until 1912 to support the movement of coal, lumber, and stone through the region. In 1858 the Columbus, Piqua, and Indiana Railroad became the first railroad to reach town. The Dayton and Michigan Railroad was the second line to reach the city and continues operation today as part of the CSX railroad.

Piqua voted to change the structure of city government in 1929, moving from a mayor/city council government to a city manager/city commission.

Historical and Cultural Facilities and Structures

This section provides detailed information about the three major historical landmarks within the City of Piqua, the Johnston Farm, the Piqua-Caldwell Historic District, and the Fort Piqua Hotel. These sites as well as other National Register of Historic Places sites within the City have been identified and mapped (See Map 6.17).

Piqua-Caldwell Historic District

The National Register of Historic Places recorded the Piqua-Caldwell Historic District in 1985. The District boundaries are defined by the National Register to include portions of North St., Greene St., Ash St., High St., Water St., N. Main St., N. Downing St., N. Wayne St., and Spring St.

The predominant architectural styles found within the district are Late Victorian and other late nineteenth and twentieth century Revival styles. The district includes significant structures and architectural styles from 1800 to 1949. The historic functions of the district include commerce and trade, domestic services, industry and manufacturing, and single-family dwellings.

The district encompasses many of the City's historic structures and is located within close proximity to the Downtown Design District. The Downtown Design District standards do not apply to the Piqua-Caldwell Historic District, but the City would like to expand these standards to include residential properties in the Piqua-Caldwell Historic District in the future.

Fort Piqua Hotel

The construction of the Fort Piqua Hotel was completed in 1891.The five-story structure was constructed of sandstone in the Richardsonian Romanesque style. The hotel has been the host of many significant politicians and other persons of prominence. Theodore Roosevelt addressed a crowd of supporters from the second floor balcony during his campaign in 1912.

The hotel was the site of the local chapter of the Women's Christian Temperance Union, as well as the site of the City's first post-prohibition bar. The hotel was the site for an African-American sit-in protesting the whites-only service policy in 1947. The sit-in led to the ending of segregation within the City. The structure was added to the National Register of Historic Places in 1974. The Fort Piqua Hotel is currently in the beginning phases of a planned renovation project. The Flesh Public Library will occupy the hotel after the renovation is complete.

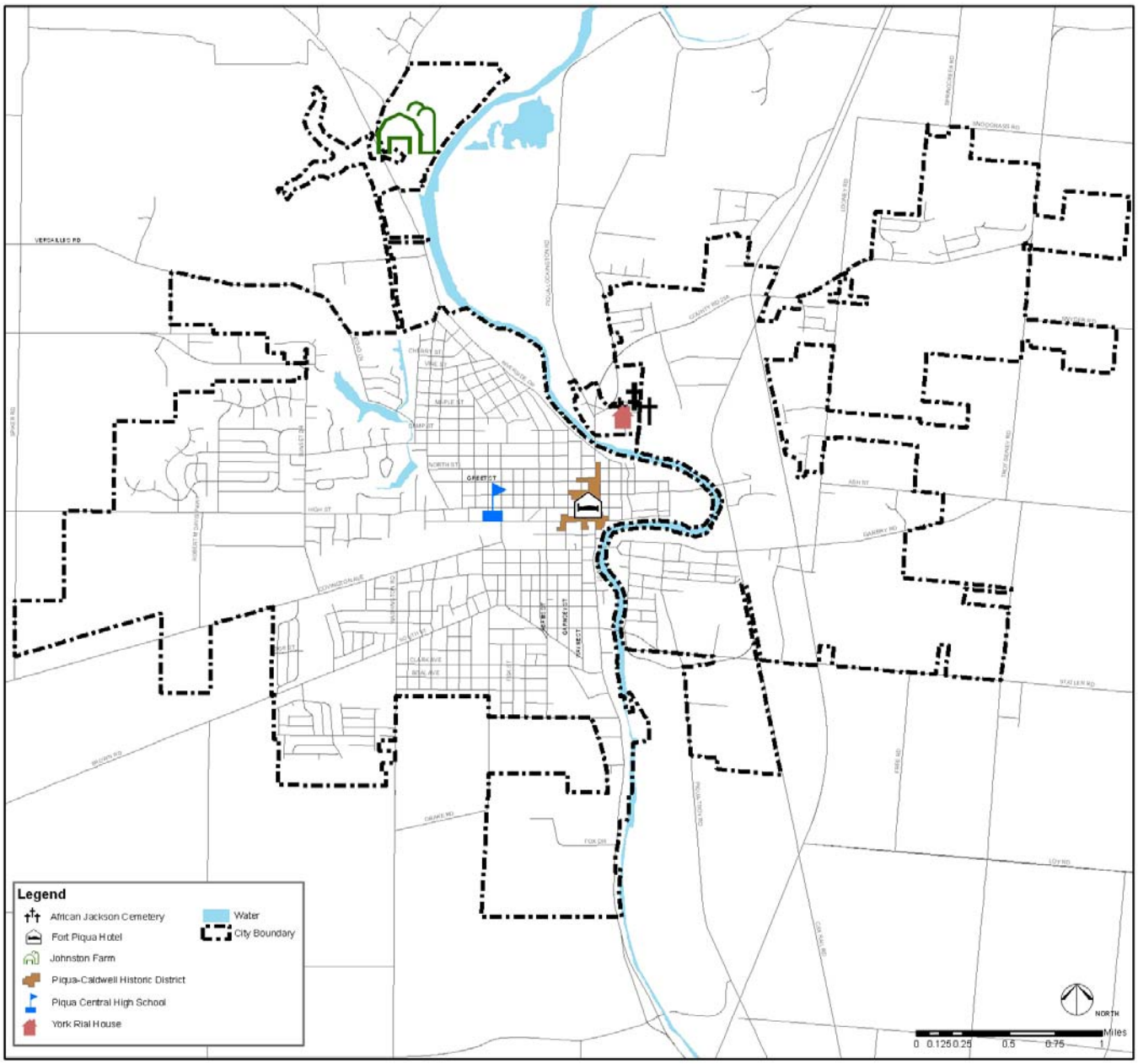
Johnston Farm

The Johnston Farm is a 200-acre park and historical site in the City of Piqua. The farm is the former homestead of Colonel John Johnston, a prominent citizen of Piqua in the 1800s. The site includes many well-preserved structures such as Johnston's farmhouse, springhouse, and cider

house. A large double-penned log barn was constructed on the site in 1808. The grounds are home to a ring shaped mound constructed by the Adena over 2,000 years ago.

Today the farm is a destination for residents and tourists. Visitors are able to enjoy the home and farm, as well as take a ride aboard the General Harrison, which is a replica canal boat that travels along a one-mile section of the canal.

MAP 6.17 – PIQUA HISTORIC SITES



Source: ACP

Plan It PIQUA
Preserve the Past — Empower the Future

7. Housing

COMPREHENSIVE PLAN UPDATE

Plan It PIQUA
Preserve the Past — Empower the Future

7. Housing

Overview

A Housing Market Assessment was completed as part of the comprehensive planning process for Piqua. Critical issues have been identified that relate to the quality of Piqua's housing stock and the ability of Piqua to capture its "fair share" of regional housing. The ability of Piqua to offer higher-end housing is important if the city is to attract industry and to attract and retain young professionals including its own graduates. Piqua's image has sometimes been impacted by the perception that the city has a high percentage of affordable and low-income housing. In reality, Piqua does have a higher poverty rate than in surrounding cities. Some have wondered whether the availability of low-income housing resources in Piqua has helped attract low-income residents from other parts of the region, thus creating a cycle that further concentrates low-income housing in Piqua.

Some of these questions cannot be answered within the scope of this market assessment. However, this study can provide information on housing demand and opportunities to strengthen and diversify Piqua's housing stock.

This chapter summarizes the full report prepared by Development Economics which is referenced in Attachment C. The sources used in this chapter are listed in the full report.

Key Findings

- Piqua has a relatively old housing stock, and a significant share of its single-family housing has been converted to rentals. The combination of these to factors has impacted the overall quality, value, and image of the City's housing stock.
- The city lags behind its neighbors in new housing construction, with fewer opportunities for diversification.
- Piqua has captured an increasing share of housing sales in the region, but its prices have remained relatively stagnant as compared with neighboring communities.
- The flat median sale prices in Piqua are cause for concern, especially in light of the national and regional ramp-up in housing prices since 2000.
- The pace of new residential construction is slow, but there are several high-quality developments with new houses available.
- The local market is being driven primarily by move-ups and move-downs among existing residents, rather than relocations.
- Piqua can expect demand for more than 230 housing units by 2011, including 180 for-sale units and 50 to 60 rental units.
- Vacancies in older housing should be addressed, with a target vacancy rate of 5.0 percent in older housing that has been used or marketed for rentals.
- For Piqua to expand its share of the area's executive housing market, new housing would have to compete with developments in Troy and Sidney. To differentiate its product, Piqua would need to create more amenity value associated with its housing stock but also influence perceptions about the quality of life in the City. This is explored further in the next section.

Detailed Information

Housing Stock & Tenure

As of 2000, Piqua had 8,238 housing units or 20.3 percent of the housing stock in Miami County. Homeownership was at 63.5 percent, slightly higher than in both Sidney and Troy, but lower than Tipp City. The fact that Piqua has a relatively high homeownership rate for this area is a positive signal. However, the Miami-Shelby area's homeownership rate lags behind that of the United States in general (67.2% in 2000) and more specifically, that of the Midwest region (72.2%, the highest of all regions).

Rental in Single-Family Units

Piqua has several apartment complexes, primarily located in its western suburbs. However, a substantial share of Piqua's rental housing (35%) is located in older, single-family detached homes in blue-collar neighborhoods. The share of rental housing in these homes is particularly striking when compared with nearby jurisdictions. For example, about 25% of rental occupancy is in single family homes in Sidney and Troy, and only 18% in

Tipp City. According to Piqua City staff, the large number of rental units in aging single-family housing has led to code-enforcement issues and may have contributed to a concentration of poverty. These issues are not at all unusual where rentals occur in aging, single-family housing. A primary concern is often the management and maintenance of those properties, which do not benefit from centralized management as is found in multi-family properties. Management of single-family rentals is inefficient, from an economic perspective, and often less profitable for the landlord than multi-family apartments.

Vacancy

The housing vacancy rate in Piqua exceeded that of neighboring communities in 2000, at 7.2% (versus 6.9% in Sidney, 6.3% in Troy, and 4.0% in Tipp City). About one-half of the vacant housing is available for rent, a somewhat higher share than in Sidney and Troy, but lower than Tipp City. If non-marketed housing is included, then nearly 70% of vacant units were rentals versus for-sale housing. That share is about 10% higher than in Piqua's neighboring communities and suggests that there are a number of vacant rental housing units that are not being actively marketed in Piqua. Overall, Piqua's vacancy rate was 12.8% for rental housing, versus 3.7% for for-sale housing (see Table 7.1).

TABLE 7.1 –HOUSING UNITS BY OCCUPANCY AND TENURE 2000

Table 1. HOUSING UNITS BY OCCUPANCY & TENURE, PIQUA MARKET AREAS, 2000

Tenure	Piqua	Troy	Sidney	Total	Share
Occupied	8,238	8,940	7,973	25,151	**93.2%**
Owner	5,232	5,378	5,003	15,613	**57.9%**
Renter	3,006	3,562	2,970	9,538	**35.4%**
Vacant	637	598	586	1,821	**6.8%**
For Sale	194	234	285	713	**2.6%**
For Rent	443	364	301	1,108	**4.1%**
Total	**8,875**	**9,538**	**8,559**	**26,972**	**100.0%**

Sources: U.S. Bureau of the Census, and Randall Gross / Development Economics.

Source: Development Economics

Age of Stock

Among the factors that may account for Piqua's higher vacancy rate is the age of its housing stock. Nearly 40% of Piqua's housing was built prior to 1939, with the median age of 50 years. This compares with only 26% of Sidney's housing built before 1939 and a median age of 38 years. The

median age for Tipp City housing was 27 years in 2000. But the fact that a substantial share of the city's rental housing is in single-family homes may also account for the higher vacancy rate, since these homes are more difficult to market and manage. Thus, some homes remain vacant and un-marketed. Age and other existing housing factors are highlighted in Table 7.2.

TABLE 7.2 –HOUSING FACTORS MIAMI VALLEY CITIES 2000

Table 2. EXISTING HOUSING FACTORS, MIAMI VALLEY CITIES, 2000

Factor	Piqua	Sidney	Troy	Tipp City
Vacancy Rate	7.2%	6.9%	6.3%	4.0%
Vacant for Rent	49.0%	32.4%	39.1%	70.8%
Homeownership	63.5%	62.8%	60.2%	66.3%
Built Pre-1939	**38.1%**	26.4%	21.3%	20.6%
Rentals	**35.0%**	27.0%	21.0%	15.0%
Median	**1951**	1962	1963	1973
Median Rent	$ 415.00	$ 378.00	$ 435.00	$ 436.00
Return-on-Value	**92%**	80%	82%	63%
Median Value	$ 84,000	$ 87,600	$ 98,700	$ 129,400
Mortgage	69.1%	70.2%	71.2%	71.6%
Rental in SF	**34.7%**	25.3%	25.6%	18.2%
Poverty Rate	***12.2%***	*11.5%*	*8.2%*	*5.2%*

Sources: U.S. Bureau of the Census and Randall Gross / Development Economics.

Source:Development Economics

Rents & Housing Values

Housing values in Piqua were lower than in nearby communities in 2000. The median home value in Piqua was $84,000, or about 96% of Sidney's, 85% of Troy's, and just 65% of Tipp City's median housing value. Again, the age of the housing stock accounts for some of this cost differential. However, it maintained the older housing stock can add significantly to the value of the house. Historic structures often sell for a premium in communities where the homes in a designated historic district are well maintained.

Interestingly, slightly fewer Piqua homes retain a mortgage (69%) than in nearby communities. Piqua has older homes and a slightly higher share of people who have lived in them long enough to pay off their mortgage. This is a positive sign, from the standpoint that people have slightly less debt to service on their homes in Piqua. It does not necessarily mean, however, that there is more disposable income.

While Piqua's for-sale prices are lower, its rents are generally within the same range as neighboring communities. At $415 per month (in 2000),

Piqua's median rent was higher than that of Sidney, but lower than Troy's. When comparing the return-on-value from rentals, Piqua comes out ahead of its neighbors at 92% (versus only 63% in Tipp City). This means that investors would make more on the dollar by renting properties in Piqua than they would in selling them, compared with the other three cities in the area. Thus, there is more of an incentive to be a landlord in Piqua than in Sidney, Troy, or Tipp City, especially if the for-sale market is weak. In 2007, rents in Piqua generally range from $450 to $650 for apartments in complexes, although rents in houses can be much lower.

Construction

Miami County saw an average of about 325 housing units permitted since 2000. The number of residential building permits increased since 2000 but has begun to level off. Almost all of these permits were for single-family dwelling units. Piqua permitted 94 units during 2004-05, for an average of 47 per year. This represents about 14.6 percent of the average number of units permitted in the County but only 72 percent of Piqua's share of the County's overall housing stock. Thus, the city did not capture its "fair share" of the County's residential construction for several years.

Housing Sales & Pricing

Housing sales peaked in Miami County in 2005, with a total of 1,042 sales that year. On average, about 930 homes have been sold each year in Miami County since 2001. Piqua's housing sales also peaked in 2005, at 338, versus an average of 271 over the six-year period. About 360 houses have sold per year in Troy and 132 in Tipp City (see Table 7.3).

TABLE 7.3– HOUSING SALE TRENDS - MIAMI COUNTY 2001-2005

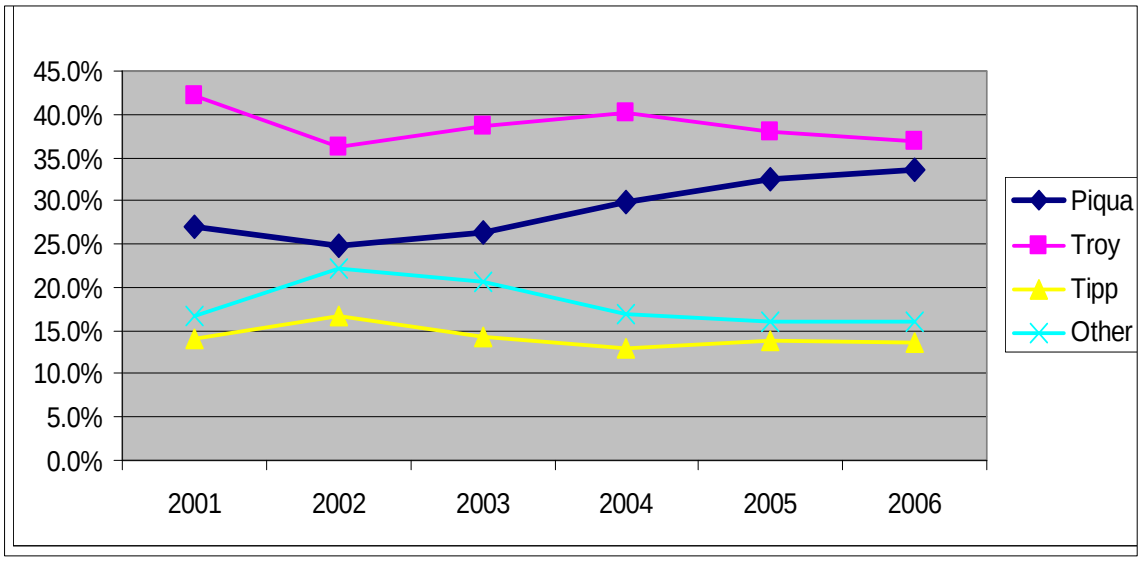
	Total	Piqua		Troy		Tipp City	
Year	Miami	#	%	#	%	#	%
2001	846	229	27.1%	356	42.1%	119	14.1%
2002	905	225	24.9%	328	36.2%	151	16.7%
2003	927	245	26.4%	358	38.6%	133	14.3%
2004	992	297	29.9%	399	40.2%	128	12.9%
2005	1,042	338	32.4%	395	37.9%	143	13.7%
2006	872	293	33.6%	322	36.9%	118	13.5%
Total	5,584	1,627	29.1%	2,158	38.6%	792	14.2%
Ave/Year	**931**	**271**	**29.1%**	**360**	**38.6%**	**132**	**14.2%**

Source:Irongate Inc; Rapatton Multiple Listing Service; Development Economics

Piqua has accounted for an increasing share of the County's housing sales, from 27.1 percent in 2001 up to 33.6 percent by 2006. Overall, Piqua has accounted for an average of 29.1percent of Miami County housing sales,

but only 14.6% of Miami County's new housing construction. Thus, there is significant turnover in older, existing housing stock in Piqua (see Chart 7.1).

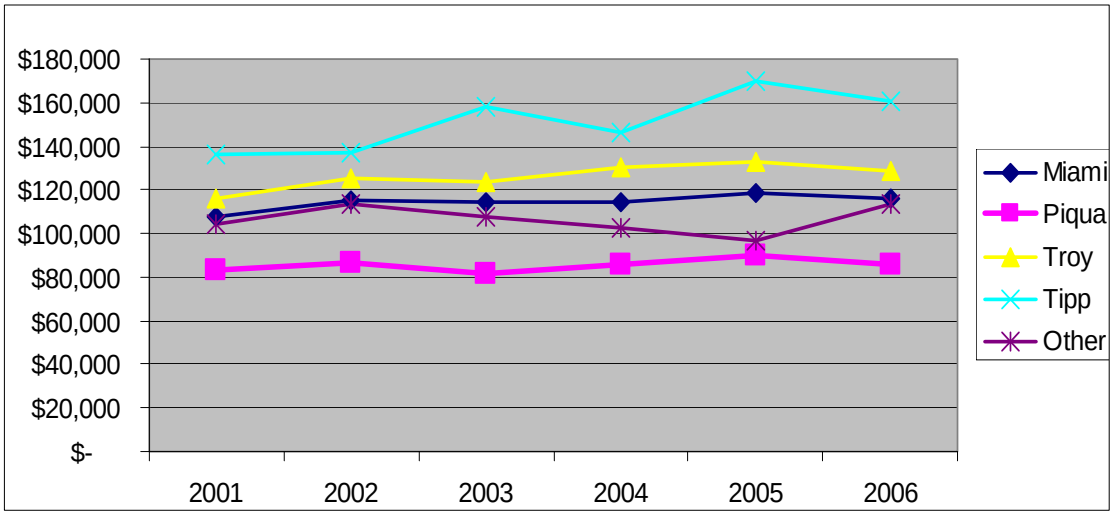
CHART 7.3 –HOUSING SUB-MARKET CAPTURE TRENDS



Source:Re/Max and Development Economics

Piqua's share of housing sales may relate in part to its relatively affordable housing prices. Median housing sales prices in Piqua were $86,000 in 2006, or only 74% of the median sale price in Miami County as a whole. Piqua's sale prices were one-third lower than those in Troy, and more than 43% lower than housing sale prices in Tipp City. Prices throughout the county peaked in 2005 and dropped back somewhat in 2006 (see Chart 7.2).

TABLE 7.4 –MEDIAN HOUSING PRICE TRENDS MIAMI COUNTY



Source:Re/Max and Development Economics

Piqua's Median Sale Price increased by 3.6% between 2001 and 2006. However, this price escalation is weak compared with those in neighboring Troy (10.7%) and Tipp City (18.0%) as well as with Miami County overall (7.6%). Furthermore, Miami County's housing escalation pales in comparison to the national average of 38.6% over this same period. Thus, Piqua's sale prices increased at less than one-tenth the national average since 2001.

TABLE 7.4 –HOUSING PRICE TRENDS 2001-2006

Year	Miami County	PIQUA	Troy	Tipp City	Other
2001	$ 108,000	$ 83,000	$116,000	$136,500	$104,377
2002	$ 114,875	$ 86,500	$125,000	$137,000	$113,494
2003	$ 114,500	$ 82,000	$123,950	$158,500	$107,837
2004	$ 114,200	$ 86,000	$130,000	$145,950	$102,338
2005	$ 118,250	$ 90,000	$132,900	$170,000	$ 96,331
2006	$ 116,200	$ 86,000	$128,450	$161,000	$113,450
Average	**$ 114,338**	**$ 85,583**	**$126,050**	**$151,492**	**$106,305**

Notes: 2004 is annualized based on data thru Sept.
N/A means Not Available.

Sources: Irongate Inc. Realtors;
Rapatton Multiple Listing Service; and
Randall Gross / Development Economics.

Source:Irongate Inc. Realtors; Rapatton Multiple Listing Service; and Development Economics

Existing Market Niches

The existing, for-sale housing market in Piqua has been driven by a variety of residents and newcomers in various life-stages. Based on input from brokers and realtors, it has been estimated that about 60% of housing sales have been driven by "move-ups," or existing residents who are moving out of rental properties, parent's homes, or smaller homes into their own house. About 30% of the market seems to be driven by "move-downs" or those who have downsized due to retirement, empty nest, divorce, lifestyle choices, and other reasons. Not more than 10% of housing sales appear to be driven by relocations to Piqua from other markets. Thus, the market is attracting relatively little in-flow for work or lifestyle reasons. Brokers also estimate that less than 5% of the homes they sell are occupied by people who commute to Dayton for work, although a number do commute to Sidney or Troy.

Demand Analysis

Baseline housing demand was forecasted by tenure for Piqua and surrounding areas based in part on the demographic forecasts and on market

characteristics. A Primary Housing Market Area (PMA) was defined as the city of Piqua, but a Secondary Market Area (SMA) also includes the cities of Troy and Sidney, since some housing decisions are made within this larger commutation area. Tipp City and Southern Miami County are excluded from the SMA because of commutation and travel patterns oriented southbound from there into Dayton rather than northbound towards Piqua.

For-Sale and Rental Housing

The three-city SMA is projected to add almost 300 households by 2011. Assuming that the share of households in owner-occupied housing will remain constant, gross for-sale housing demand was projected to be about 480 to 490 units by 2011. This range is consistent with housing development trends during the recent past. In addition to household growth, additional housing demand will be generated as a result of the need for replacement (as housing ages, becomes less competitive, or is demolished). A vacancy allowance is also assumed at 3.0%.

Of the 480 to 490 units, there would be demand for about 180 for-sale units in Piqua. This assumes that Piqua does not change its capture rate of secondary market demand, and assumes that Piqua's for-sale housing vacancy rate declines from 3.7% to 3.0%.

Gross demand for rental housing within the three-city SMA was forecasted at 290 to 300 units by 2011. Of that number, Piqua would capture demand for 50 to 60 units. Much of the SMA rental housing demand will be generated in Troy over the next few years. A summary of housing demand forecasts for both rental and for-sale housing is provided in Table 7.5.

TABLE 7.5 –BASELINE HOUSING DEMAND ANALYSIS 2007-2011

Factor	Piqua	Troy	Sidney	Total
HH Change	91	174	27	292
For Sale				
Share Owner	63.5%	60.2%	62.7%	62.1%
Number Owner	58	105	17	181
Available	138	150	180	468
Vac Allowance	3.0%	3.0%	3.0%	3.0%
Net Demand	83	123	(4)	203
Replacement	94	97	90	281
Gross Demand	**177**	**220**	**86**	**484**
For Rent				
Share Renter	36.5%	39.8%	37.3%	37.9%
Number Renter	33	69	10	111
Available*	187	164	133	484
Vac Allowance	5.0%	5.0%	5.0%	5.0%
Net Demand	(4)	84	26	104
Replacement	60	71	59	191
Gross Demand	**56**	**155**	**85**	**294**
Total Demand	**233**	**375**	**171**	**778**

Source: Development Economics

Overall, total demand for almost 800 additional housing units will be generated in the SMA by 2011. Of this number, there will be baseline demand for more than 230 additional units in Piqua even with an assumed reduction in the overall vacancy rates for both rental and for-sale housing.

Product Differentiation

Demand is also disaggregated by pricing, based on the income range for new households. Using these price ranges, several additional targets can be set with regard to the pricing of new product that should be brought on line within Piqua and its overall market area.

Given the projected income cohorts for new households, there would be demand for about 75 units priced at an average $261,900 or above. The market will remain thin for housing product priced in the $500 – $600,000 range, with demand for only 9 units over the entire five-year period at an average price of $680,500. As Piqua endeavors to attract "executive" housing, the minimum threshold should assume the 75-unit threshold just to serve the city's own projected household base.

At the same time, there will also be natural or baseline demand for 64 units priced at an average $78,400 and less, or for rentals averaging $270 to $470. Given that the lower range falls well below market rents, it is likely that affordable housing resources will be required for an estimated +/-30 additional households. Again, this should be viewed as a target number and perhaps a threshold over which Piqua would be offering more than its "fair share" of affordable housing resources. Remaining demand (almost 100 units) will fall in the middle range of $126,800 to $195,100 average price for housing. Most of this demand would be met through construction of for-sale units rather than rentals.

Plan It PIQUA
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8. Fiscal Assessment

COMPREHENSIVE PLAN UPDATE

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8. Fiscal Assessment

Overview

This report provides a summary community fiscal analysis as an input to the comprehensive planning effort. Understanding the City's fiscal structure and the impacts of development can help inform land use, zoning, and economic development decisions.

Fiscal analysis provides information to help the community prioritize development and infrastructure improvements, and helps communicate to the community underlying issues relating to the City's fiscal structure and constraints on its capacity. Fiscal assessments also identify any inter-jurisdictional relationships that can be affected by the planning process, as well as economic and structural issues that could be addressed through development policy. Fiscal issues relate directly to economic development objectives. Finally, an assessment of the fiscal costs and benefits of development help illustrate how land use, development, and economic policies can impact on the City's fiscal health.

This report provides a summary of the City's fiscal structure, to help inform the community as they move forward with the planning process. The report also includes the findings from a fiscal impact analysis of development by primary land uses on the City of Piqua and the Piqua School District. Thus, the costs and benefits of residential, retail, office and industrial uses were measured and compared to illustrate how different types of development impact (on average) on the City's and schools' budgets. The

analysis used actual Piqua revenue and expenditure data and attributes these revenues and expenditures to each of the land uses on a per-acre or per-unit basis.

Section 1 of the report summarized the fiscal structure while Section 2 summarizes the findings from the fiscal impact analysis. Several recommendations for planning are also provided based on the findings of the fiscal impact analysis.

Key Findings

- Income taxes generated 62% of the revenues collected by the City of Piqua in 2005.
- In general, Piqua residents' incomes have remained relatively flat or declined after accounting for inflation since 2000. Further dampening tax revenues, the City's private employment has also stagnated (as noted in the Target Industrial Analysis), resulting in a smaller overall tax base
- Thus, public safety is really the main function of Piqua's City Government, accounting for 52% of all expenditures.
- In general, City expenditures have been increasing for all functions, with the possible exception of parks and recreation.
- If the City is unable to increase its revenues through growth in the tax base, then current residents may have to pay more in terms of the tax rates or through bonds issued to pay for infrastructure.
- In general, residential uses produce little or no substantial net impact on the City of Piqua in that the revenues they generate are relatively equal to the costs for supplying housing with City services.
- Industrial and office uses generate a relatively high fiscal gain to the City, primarily because of the benefit of income taxes resulting from high-wage jobs.
- The highest net *benefits* per-acre are generated by office and industrial uses.
- Office space generates a net return of about $1.17 per square foot, while industrial space generates a return of about $0.47 per square foot. Retail, by contrast, generates a negative net fiscal return $2.44 per square foot.
- It is important to note that retail uses, while failing to support their share of City government costs, do produce a significant net benefit in support of Piqua's schools. In fact, retail uses generate a net positive impact of $10,587 per acre to the Piqua City Schools.

Detailed Information

Piqua Fiscal Structure

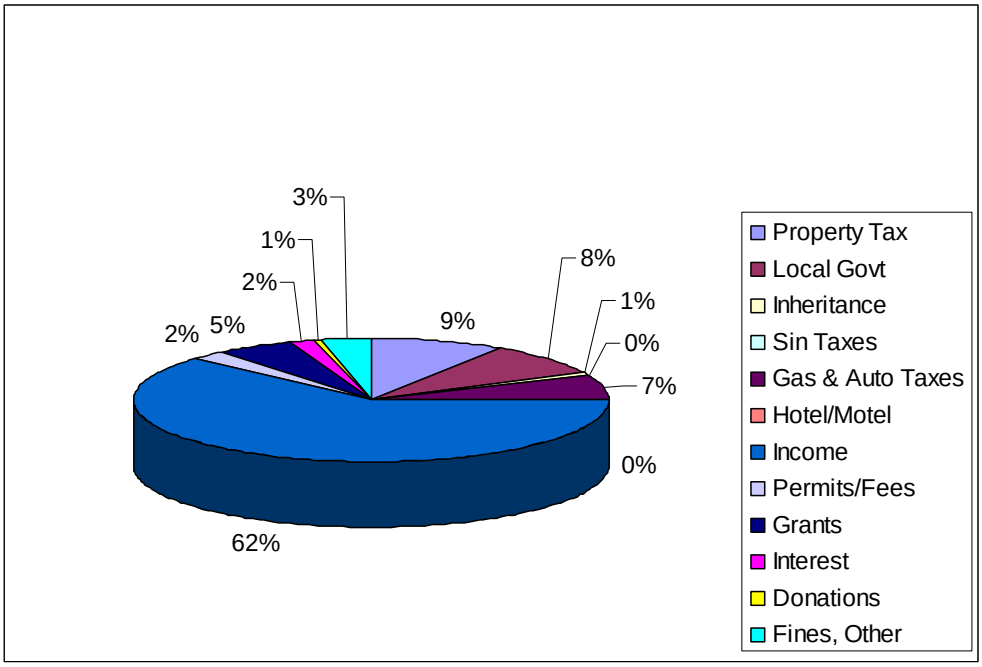
This section provides an overview of Piqua's fiscal structure, to help inform the community as it progresses in the comprehensive planning process. A summary of Piqua's revenues, in terms of the sources and trends, is provided below. The City of Piqua delivers a variety of services, and the expenditure types and trends are also presented below. Finally, basic

information on the status of the City's debt structure and other fiscal input is provided at the conclusion of this section.

Revenues

Piqua generates its revenues from a variety of taxes, fees, penalties, interest, donations, grants, and other sources. However, as in most municipalities in Ohio, income taxes are the main source of revenues for Piqua. A summary of revenue sources is provided in the following chart, using the base year of 2005.

CHART 8.1 – PIQUA REVENUE BASE (2005)



Source: U.S. Census

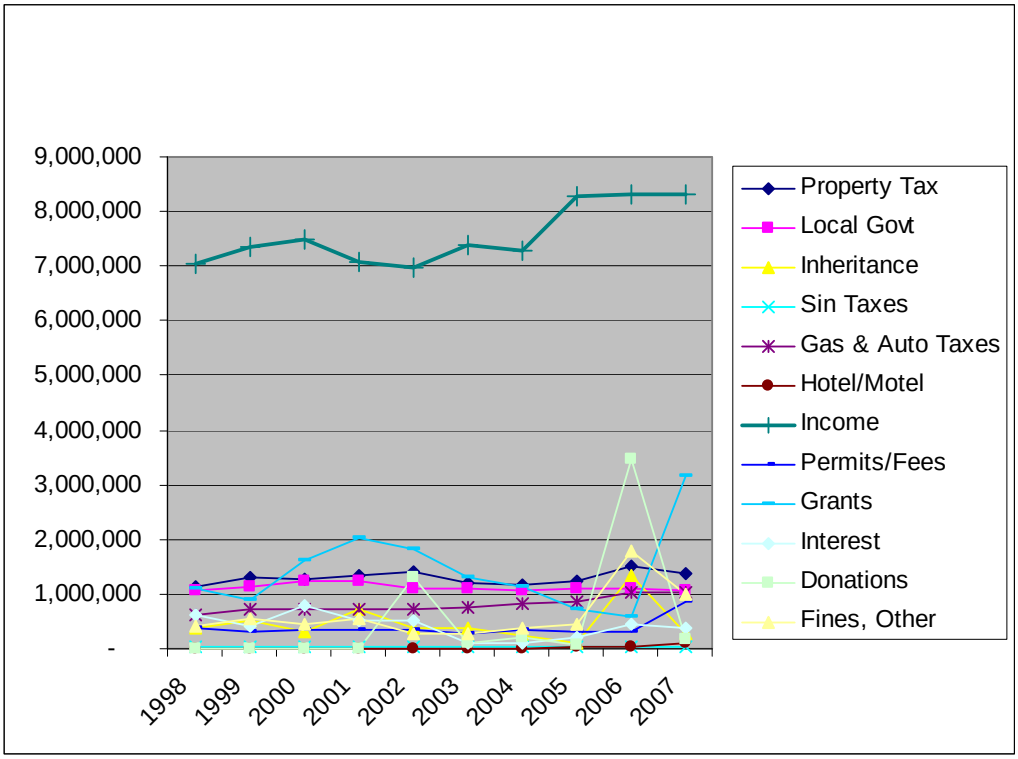
Income taxes generated 62% of the revenues collected by the City of Piqua in 2005. Ohio is relatively unique among states in that local governments impose their own income taxes and are dependent on this relatively progressive tax structure. It is "progressive" in that constituents contribute to the tax base according to their ability to pay. A more "regressive" revenue source such as sales taxes is often applied at a flat rate that does not vary based on a person's ability to pay. In other words, people must pay the same amount of sales tax on an article of clothing regardless of whether they are rich or poor. The amount paid in income tax obviously varies with the income of the person paying.

Like municipalities in all states, Piqua also received revenue from property taxes, which account for 9.0% of the City's revenues. In Ohio, property taxes are a main source of revenue for school districts. Other key municipal revenue sources include inter-governmental transfers, gas and auto taxes & fees, various grants, and "sin" taxes on alcohol and cigarettes.

Trends

Overall trends in Piqua's revenues by source are summarized in the following chart.

CHART 8.2 – PIQUA REVENUE TRENDS, 1998-2007



Source: U.S. Census

In general, Piqua residents' incomes have remained relatively flat or declined after accounting for inflation since 2000. Further dampening tax revenues, the City's private employment has also stagnated (as noted in the Target Industrial Analysis), resulting in a smaller overall tax base.

In 2005, Piqua was operating on a $15.6 million annual budget. The budget increased to $21.4 million in 2006. The estimated 2007 budget is $22.9 million. As shown in the chart, income taxes are by far the largest revenue source for the City. These income tax revenues remained relatively flat from 1998 through 2004, before increasing substantially in 2005 and stagnating once again in 2006. The increase in 2005 relates to a change in the City's tax rate, rather than growth in income or the tax base during that year. Thus, economic development efforts become even more important once it is recognized that the City's fiscal health is highly dependent on the creation of good-paying jobs and recruitment of profitable companies.

Property tax revenues have remained relatively stable at around $1.2 million since 1998. However, these revenues have declined in real terms after accounting for inflation. Ohio's school districts, which are more

dependent on property taxes, benefit from the relative stability of this revenue source. Piqua's Schools have a relatively unique tax structure that allows them to collect their own income tax revenues in addition to property tax. While this diversifies their revenue stream, the schools can also suffer like the City when the tax base shrinks due to economic stagnation.

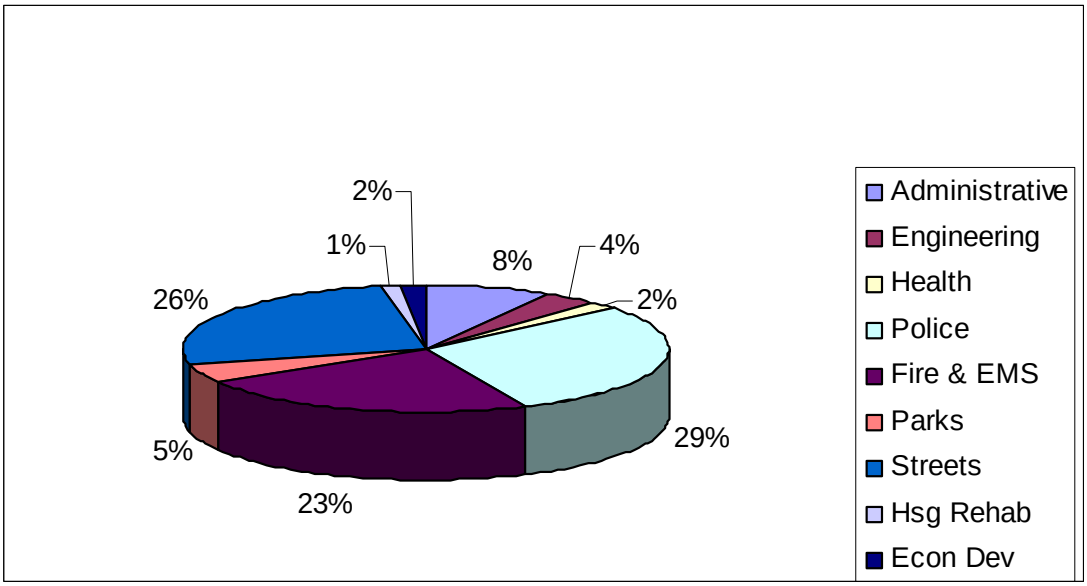
Several other sources of revenue are even less dependable or predictable, such as inheritance taxes and donations. A single death can have a major impact on the City's revenue stream, as evidenced in 2006 when a single estate resulted in significant inheritance taxes being registered as revenue to the City of Piqua. That same year, the City recorded donations that will be used for funding of its new library. Thus, there was a sudden spike in donation revenues. In reality, these revenues are dedicated for a specific use and are not available for the operation of City agencies or delivery of municipal services.

Expenditures

An overview of the City's expenditures was also completed in order to communicate information on the types of services that the City provides and the trends in those expenditures. Understanding these trends helps inform the planning process in terms of how land use and new development in the future will impact on the delivery of City services. These cost impacts are explored further in Section 2 of this report.

The City of Piqua provides a variety of services, but there are three departments in particular that account for the majority of City expenditures. Police protection accounts for 29% and Fire & Emergency Services (EMS) account for 23% of City expenditures. Thus, public safety is really the main function of Piqua's City Government, accounting for 52% of all expenditures. Streets are the third element of the City's functions that dominate expenditures, accounting for 26% of the City's budget in 2005. Piqua's expenditures are summarized by type in the following chart.

CHART 8.3 – PIQUA EXPENDITURES BY TYPE (2005)



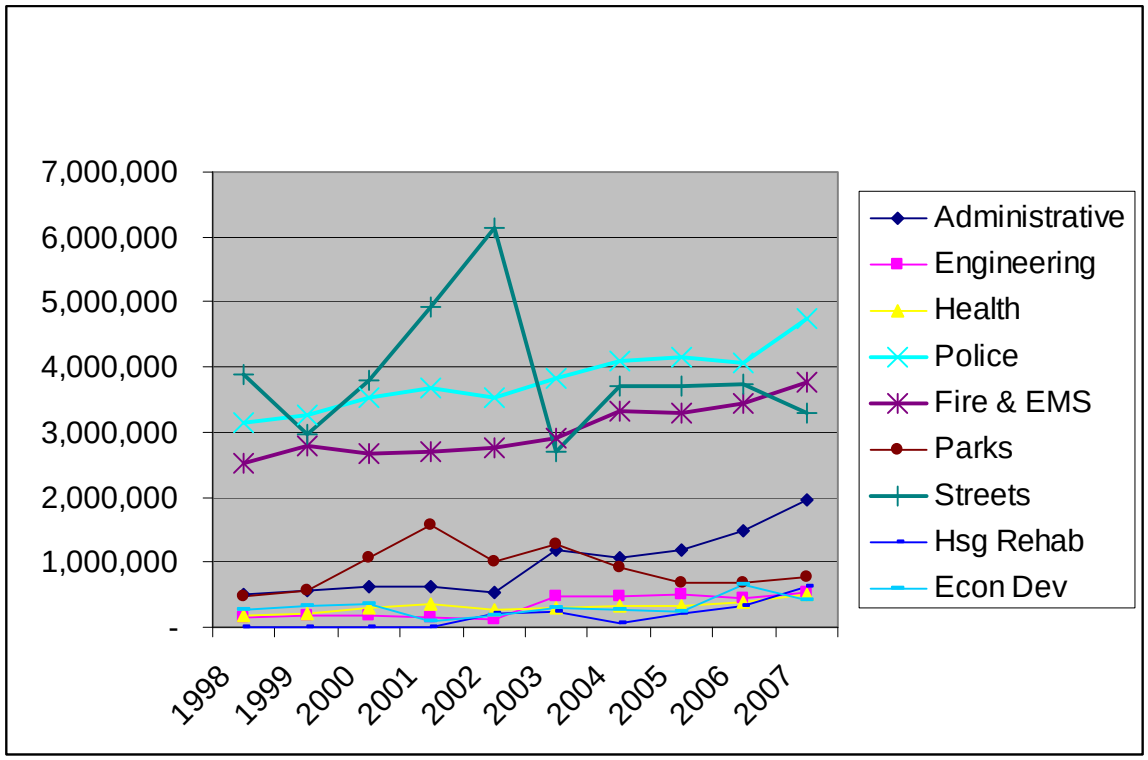
Source: U.S. Census

Administrative services account for up to 8% of the City's budget for such expenditures as City Hall, City Manager, Finance, Law, and other administrative functions. Other key City functions include parks and recreation, engineering services, economic development, health, and housing rehabilitation.

Trends

Trends by primary type of expenditure are summarized in the following chart. In general, City expenditures have been increasing for all functions, with the possible exception of parks and recreation. Parks have seen declining expenditures since roughly 2001. While the Streets budget spiked in 2001 and 2003 dues to re-surfacing expenses, the Streets budget has remained relatively stagnant. However, police, fire & EMS, administration, housing rehabilitation, health, and engineering have all seen increasing expenditures since at least 1998.

CHART 8.4 – PIQUA EXPENDITURES TRENDS, 1998-2007



Source: U.S. Census

Public safety expenditures for police, fire & EMS have increased at a somewhat faster rate than that for other departments. This trend is consistent with public safety expenditures in other Ohio jurisdictions, where there has been increased cost for security since 9/11 and because of contracts and other factors that tend to accelerate annual cost increases.

The fastest rate of increase has occurred in the engineering, administration, and health components of the City's budget. The budget for these functions has increased 193%, 187%, and 102% respectively between 1998 and 2006. Again, these increases do not account for inflation. The constant dollar increase in budgets has been much lower.

While the parks budget has declined consistently since 2001, that department's budget is still 42% higher than it was in 1998. By comparison, the police budget has increased by 29% and Fire/EMS by 36%. The Streets budget is 4% lower than it was in 1998.

Other Budget Considerations

The City also has enterprise funds, or self-operating funds that generate revenues from a fee structure designed to recover 100% of the costs for providing services. Such funds operate the City's pool and golf course, for example. Since these funds operate on a cost-recovery basis, they tend to be less impacted by development.

The City of Piqua also has a capital improvements plan (CIP) and the City finances many of these improvements through debt financing. As the

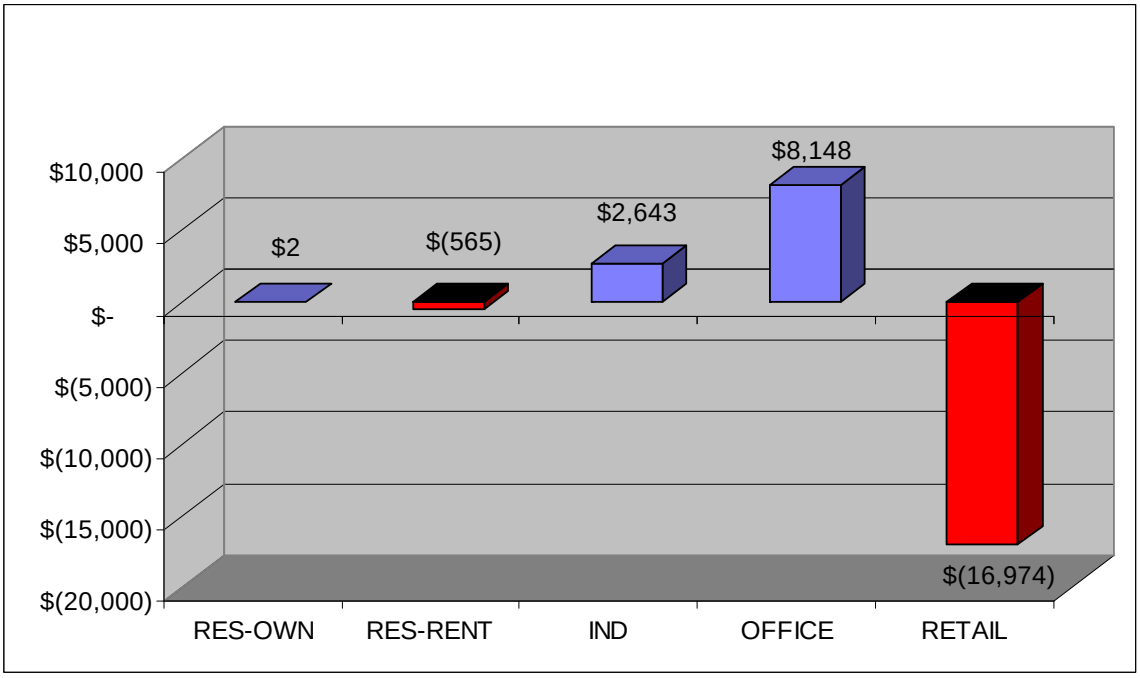
City ages, maintenance and replacement of existing infrastructure systems becomes more necessary and expensive. This is another reason why an increased revenue stream is important to help the City function even if the level of service remains the same. If the City is unable to increase its revenues through growth in the tax base, then current residents may have to pay more in terms of the tax rates or through bonds issued to pay for infrastructure. Piqua currently has $15.4 million in outstanding debt. Of this amount, about 1/3 is for government infrastructure while 2/3 is in "business type" activities such as for enterprise uses.

Land Use Fiscal Impacts

This section summarizes the results from an analysis of the net fiscal benefits of development by land use for the City of Piqua and the Piqua City School District. Findings from the fiscal impact analysis are presented first on a per-acre basis and then on a per-unit basis. The charts summarize the net annual fiscal benefits by specific land use type. Appendix tables provide more detailed input for both the City and the Schools. The land uses examined include the following as defined through zoning or by the City:

Residential (RES)
Single-Family Ownership
Multi-Family and Single-Family Rentals
Retail (RET)
Office (OFF)
Industrial (IND)

CHART 8.5 – PIQUA FISCAL IMPACTS BY LAND USE ACRE



Source: U.S. Census

Residential uses were disaggregated into single-family and multi-family, but were also examined by tenure (owner versus rental). Particular attention was paid to single-family houses that are being used as rentals, in part because the Housing Market Analysis identified the quality of this housing as an issue but also because information from City agencies indicated a relatively high number of calls for City services generated by those units.

The "net" fiscal benefits result from revenues (such as taxes) generated annually to the City of Piqua, less the annual or recurring costs (such as City administration, O&M, police, parks, etc) generated for seven land use types. Schools are examined separately from the City Government. Capital & debt service costs, enterprise funds, and capital development funds are excluded since this analysis focuses on the long-term annual fiscal impacts of different land uses.

City of Piqua

In general, residential uses produce little or no substantial net impact on the City of Piqua in that the revenues they generate are relatively equal to the costs for supplying housing with City services. The exception is in multi-family and rental housing units, where revenues such as those derived from property taxes are not quite sufficient to cover the costs associated with such development in the current market. It is possible that new higher-rent apartments would generate enough property, income, and other tax revenue to more than pay for themselves. However, this is not the case currently. Single-family houses that are being used as rentals are generating higher costs for City services, again due to the higher numbers (and cost) of calls for service as compared with the revenue generated by those houses in property, income, and other taxes. Multi-family properties appear to be generating fewer calls for service and thus are having less of an impact on the City's budget.

Industrial and office uses generate a relatively high fiscal gain to the City, primarily because of the benefit of income taxes resulting from high-wage jobs. These uses also produce lower per-acre costs for providing City services. For example, office and industrial tenants require less park and recreation use than do households.

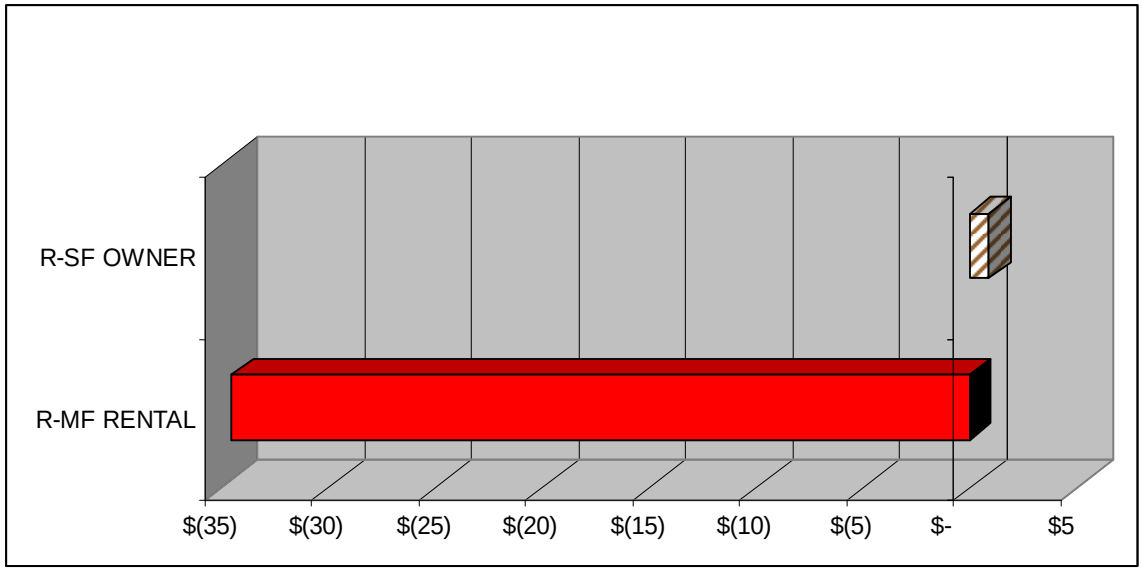
Retail uses, however, fail to recoup their costs in part because the lower-wage jobs in retail produce lower income tax benefits. But in addition, retail generates higher traffic use, which in turn produces wear and tear on City streets, resulting in higher maintenance costs. Since street maintenance and related expenses (e.g., street trees) are an important component of the City budget, uses like retail that generate more traffic therefore produce higher costs for the City than lower-traffic uses. These costs are compounded by the fact that some of the City's public safety costs also relate to traffic, such as through traffic accidents (15% of EMS calls), along with drunk driving, auto theft, and driving infractions (together accounting for up to 20% of police calls).

The traffic components of the fiscal model rely on traffic generation data produced by the Institute of Transportation Engineers (ITE) and on data supplied by the City. There is estimated to be a slight differential between downtown (CBD) retail versus suburban retail, based on data supplied on traffic generation in the Piqua central business district (CBD).

Land Use Impacts per Acre

The highest net *benefits* per-acre are generated by office and industrial uses. Single-family homeownership generates no net impact on the City. As noted above, multi-family / rental residential and retail uses can generate a negative net fiscal impact on the City of Piqua's operating budget. These impacts are summarized on a per-acre basis in the following chart.

CHART 8.6 – PIQUA RESIDENTIAL IMPACTS PER UNIT



Source: U.S. Census

Land Use Impacts per Residential Unit

The fiscal impacts per land use were also analyzed on a "unit" basis, such as for individual housing units (DU), or in terms of square feet of retail, office, or industrial space. Per-unit measures provide a more accurate one-to-one measure of impact since they reduce the influence of scale and density on the findings. The results per residential development unit are summarized below.

Owner-occupied single-family residential units generate practically no net impact on the City on average, largely because of the tax revenues produced by these properties are roughly equal to the cost of providing City services to them on a per-unit basis.

Multi-family and rental single-family units currently generate a negative fiscal return to Piqua City. As with single-family, higher-rent units will generate higher tax revenues, and also attract higher-income workers thereby

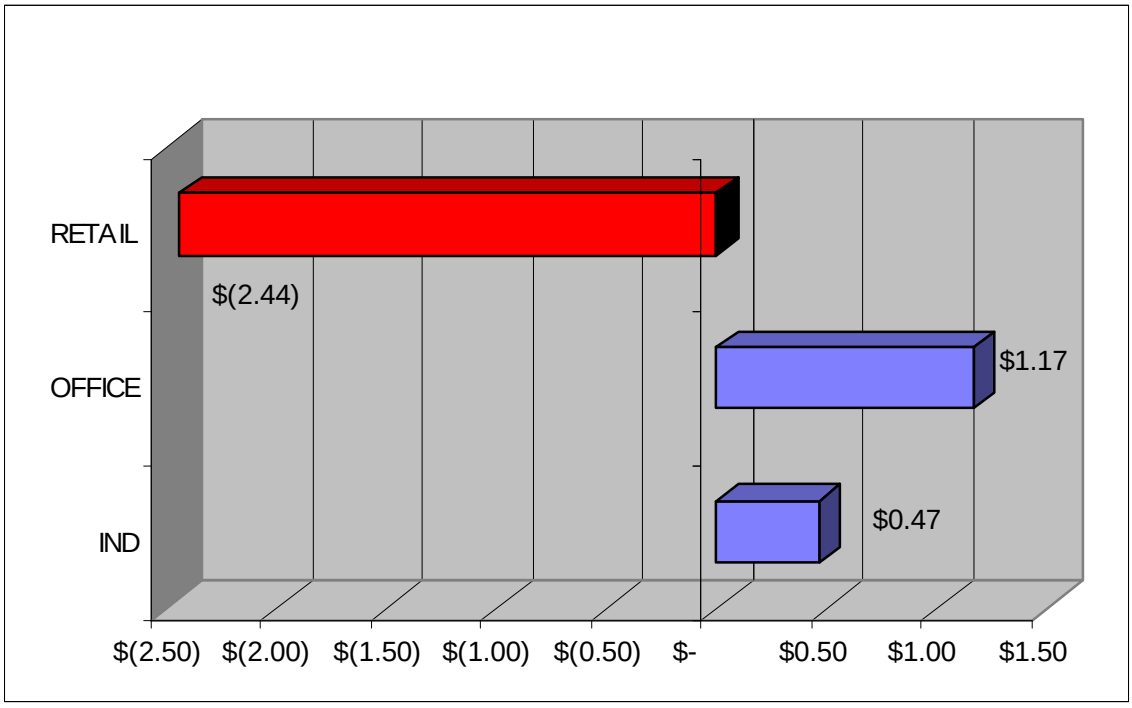
generating more income taxes to the City. However, the current base generates a net loss of $34 per multi-family or rental unit in Piqua. Even so, this negative impact is much lower than that seen in some other Ohio communities for which this analysis has been conducted. Even with a 100-unit apartment complex, the net impact would only be $3,400 per year.

Where the City is seeing higher calls for service and therefore higher costs is not so much in centrally-managed, multi-family rental properties but rather, in single-family rental housing. Based on sample information, much of this negative impact can be attributed to these older rental houses that are clustered near the downtown area.

Impacts per Commercial Square Foot

Impacts were examined on a per square-foot basis for commercial and industrial uses. The findings from this analysis are summarized in the chart that follows.

CHART 8.7 – PIQUA COMMERCIAL/INDUSTRIAL IMPACTS PER SQUARE FOOT



Source: U.S. Census

Office and industrial space generate a net positive fiscal benefit to the City of Piqua. Office space generates a net return of about $1.17 per square foot, while industrial space generates a return of about $0.47 per square foot.

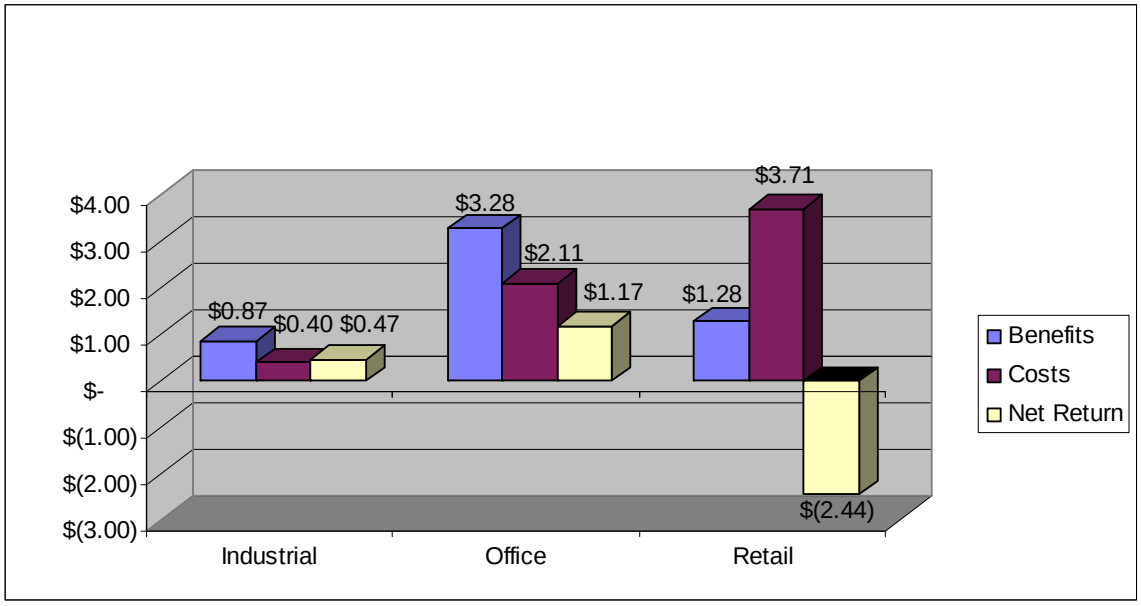
Retail, by contrast, generates a negative net fiscal return $2.44 per square foot. The retail impacts are influenced by the amount of traffic that is generated by retail uses on average, which could vary significantly depending on the type of retail development. For example, walkable downtown retail has a much lower impact on the cost of City services (because less auto trips are generated when people can walk between stores

or from home and work to shopping). Yet, downtown retail can generate the same or higher tax benefits. Even so, most new retail development does not conform to the downtown model. As such, the overall trend favoring office and industrial use over retail *on average* is consistent with the fiscal analyses of other communities in Ohio communities.

The fiscal impacts per unit and per acre will vary depending on the densities allowed for development. These analyses are based on typical densities for development based on existing property data. Clearly, any variation in density or type of development will impact on these findings and, in particular, on the results provided on a per-acre basis.

Components of Commercial Impacts. The following chart summarizes the components of the fiscal impacts for retail, office, and industrial uses. As illustrated here, the gross benefits for retail use actually outweigh those of industrial uses. However, the fiscal costs of serving industrial uses are much lower than those for serving retail. As a result, the net fiscal costs are much higher for retail use. Similarly, while the costs of providing municipal services to office space are higher than those for industrial uses, the benefits of office space (in terms of property taxes, income taxes, etc) far outweigh those of industrial uses. Thus, the net fiscal benefit of office space is much higher than that for industrial uses.

CHART 8.8 – DERIVATION OF NET RETURN TO PIQUA FOR COMMERCIAL USES



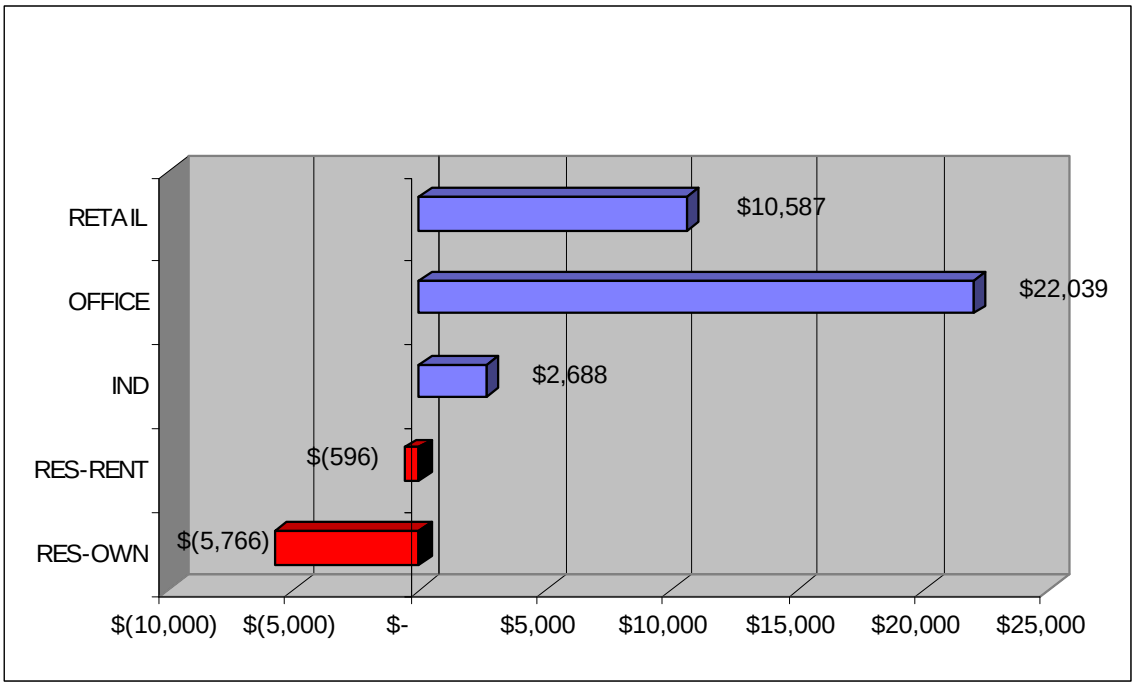
Source: U.S. Census

Piqua Schools

The fiscal impact analysis also determined the net fiscal benefits to local Piqua City Schools. In this case, costs are generated almost solely by residential uses, the source of school enrollment. Commercial and industrial uses do not generate students and, as a result, help cross-subsidize school

operating costs. The result of the net benefits analysis for schools is summarized in the following chart.

CHART 8.9 – PIQUA SCHOOLS NET FISCAL IMPACT PER ACRE



Source: U.S. Census

Land Use Impacts per Acre

Piqua's single-family residential uses fail to recoup their share of the cost for operating schools. Much of that benefit is provided by non-residential uses, particularly office.

It is important to note that retail uses, while failing to support their share of City government costs, do produce a significant net benefit in support of Piqua's schools. In fact, retail uses generate a net positive impact of $10,587 per acre to the Piqua City Schools.

Furthermore, the negative impact of rental residential on the school system is much lower than that for owner-occupied single-family housing. While owner-occupied housing generates sufficient tax revenues to cover City services, families are larger in those houses which results in more pupils and higher costs to schools. At the same time, lower-income families in rental housing help the School system attract more State and Federal financial assistance due to the structure of public education grant formulas.

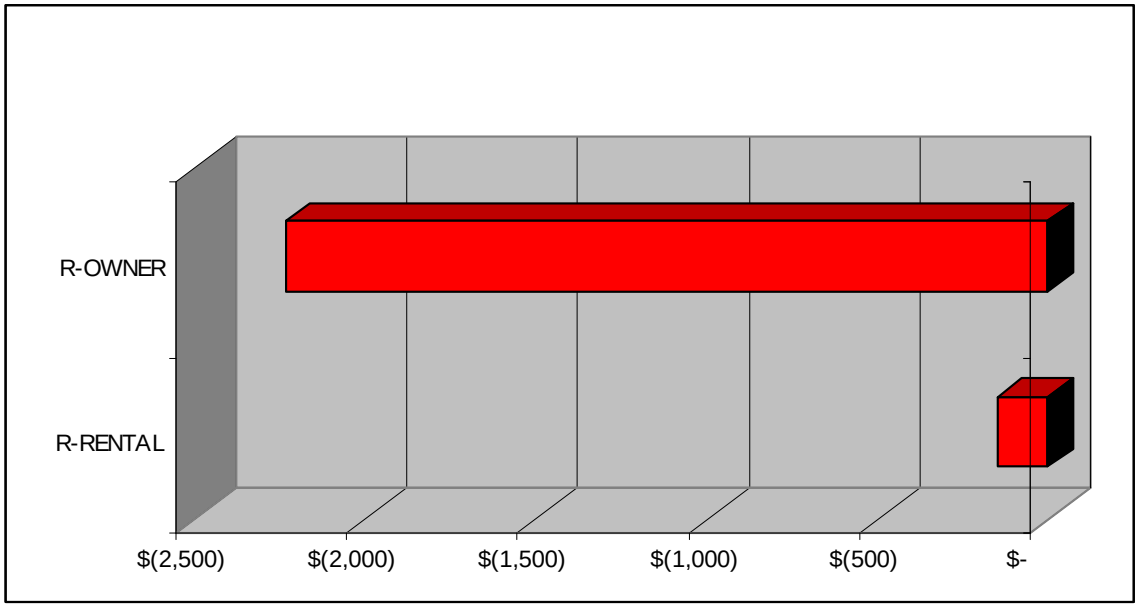
Land Use Impacts per Residential Unit

While single-family homeownership residential units generate an average net fiscal loss to Piqua schools of over $2,230 per housing unit, rental units generate an average impact of only $150 per unit. The fiscal costs to schools associated with residential uses relate partly to the student

population or "pupil yield" generated by those users but (as noted previously). As noted previously, the fiscal benefits to schools include property tax revenues but also grant revenues generated through the public school funding formulas.

Single-family housing in Piqua yields an estimated average of about 0.5 students per unit. Adult (55+) communities would generate little or no costs to schools, since the pupil yield should be closer to zero.

CHART 8.10 – RESIDENTIAL IMPACTS ON SCHOOLS, ON A PER-UNIT BASIS

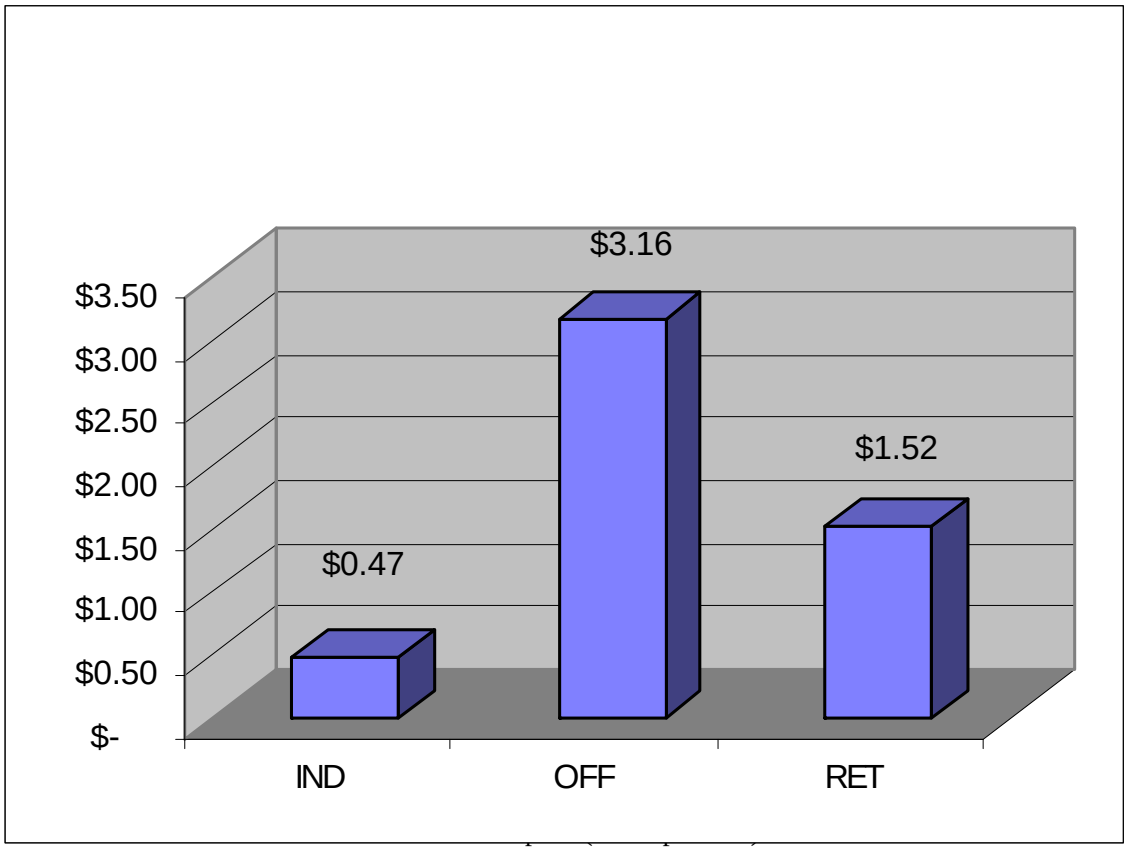


Source: U.S. Census

Land Use Impacts per Commercial Square Foot

Commercial and industrial uses generate a net positive fiscal benefit to schools because they do not generate any substantial costs to the operation of schools. The fiscal benefits created by commercial and industrial uses are summarized in Chart G.

CHART 8.11 – PIQUA SCHOOLS NET FISCAL IMPACT PER COMMERCIAL/INDUSTRIAL USES PER SQUARE FOOT



Source: U.S. Census

Summary

The overall combined impacts per acre on the City and Schools is summarized in Appendix Table 10. The fiscal impact analysis generally finds that office and industrial uses have net positive fiscal impacts on both the schools and the City budget. Office and industrial uses generate significant income taxes and other revenues that more than pay for their relatively limited demands on local government. Furthermore, these uses help subsidize the cost of operating schools.

Rental housing, particularly rentals in single-family houses, currently has a negative impact on Piqua City government. However, development of higher-value multi-family properties could result in higher benefits to the City. Due to its low pupil yields, multi-family housing does not have as negative an impact on area schools. By contrast, single-family housing units have high pupil yields and generate a negative return to the school system even though they support the cost of City services through higher tax revenues.

Retail uses bring in significant revenue to the schools but generate a major drag on the local government budget. A significant portion of the

impact relates to the traffic that retail uses put onto local roads, causing higher costs not only for street maintenance but also for police and EMS services that must attend to accidents, drunk driving, and other safety issues. Where there are opportunities for reducing the number of automobile trips, such as in mixed-use and more "walkable" developments, then such costs can be reduced by allowing more people to walk between shops and from housing and offices to retail.

Key Recommendations

- Despite negative yield to City's budget, retail is Integral to the city's quality of life & positive generator for Schools.
- Encourage pedestrian-oriented retail over auto-dependent retail uses to reduce negative impacts
- Strengthen downtown and secure its future by encouraging residential development west and north of town rather than east of the interstate. This will prevent leakage and position downtown as a primary commercial node for Piqua's residential market base.
- Office and Industrial are clearly necessary for balancing fiscal base
- Economic development should ensure diversification to attract professional office uses, since these uses generate the highest fiscal return to the city and the schools.
- Residential values are relatively low, resulting in break-even public return for single-family and losses on rental units.
- Rental use in single-family homes contributes to fiscal costs, such as zoning and health enforcement.
- Aging housing stock results in growing need for rehabilitation grants and loan costs to the City.
- Efforts should focus on reducing non-competitive housing stock and encouraging growth in human capital (i.e., through job training) and homeownership.

Supporting Tables

PIQUA CITY-WIDE ANALYSIS:

Piqua Gross Fiscal Benefits by Land Use

Table A-1. GROSS FISCAL BENEFITS BY LAND USE, PIQUA, OHIO, 2005

Use		Factor	Measure		Per Acre
SF-Owner	$	966	DU	$	2,492
Res Rentals	$	668	DU	$	10,950
Industrial	$	0.87	SF	$	4,915
Office	$	3.28	SF	$	22,839
Retail	$	1.28	SF	$	8,906

Source: Randall Gross / Development Economics.

Piqua Fiscal Costs by Land Use (Tables 2-5)

Table A-2. ADMINISTRATIVE / O&M FISCAL COSTS BY PIQUA, OHIO, 2005

Use		Factor	Measure		Per Acre
SF-Owner	$	270	DU	$	696
Res Rentals	$	283	DU	$	4,643
Industrial	$	0.30	SF	$	1,710
Office	$	0.44	SF	$	3,058
Retail	$	1.00	SF	$	6,987

Source: Randall Gross / Development Economics.

Table A-3. SAFETY COSTS BY LAND USE, PIQUA, OHIO, 2005

Use	Factor	Measure	Per Acre
SF-Owner	$ 556	DU	$ 1,434
Res Rentals	$ 401	DU	$ 6,561
Industrial	$ 0.09	SF	$ 509
Office	$ 1.66	SF	$ 11,567
Retail	$ 2.70	SF	$ 18,827

Source: Randall Gross / Development Economics.

Table A-4. PARKS COST BY LAND USE, PIQUA, OHIO, 2005

Use	Factor	Measure	Per Acre
SF-Owner	$ 139	DU	$ 360
Res Rentals	$ 19	DU	$ 310
Industrial	$ 0.01	SF	$ 54
Office	$ 0.01	SF	$ 66
Retail	$ 0.01	SF	$ 66

Source: Randall Gross / Development Economics.

Table A-5. TOTAL FISCAL COSTS BY LAND USE, PIQUA, OHIO, 2005

Use	Factor	Measure	Per Acre
SF-Owner	$ 965	DU	$ 2,490
Res Rentals	$ 703	DU	$ 11,515
Industrial	$ 0.40	SF	$ 2,272
Office	$ 2.11	SF	$ 14,691
Retail	$ 3.71	SF	$ 25,880

Source: Randall Gross / Development Economics.

Piqua Net Fiscal Benefits by Land Use – Summary

Table A-6.	NET FISCAL BENEFITS BY LAND USE, PIQUA, OHIO, 2005			
Use	**Factor**	**Measure**		**Per Acre**
SF-Owner	$ 1	DU	$	2
Res Rentals	$ (34)	DU	$	(565)
Industrial	$ 0.47	SF	$	2,643
Office	$ 1.17	SF	$	8,148
Retail	$ (2.44)	SF	$	(16,974)
Source:	Randall Gross / Development Economics.			

PIQUA SCHOOL IMPACTS (Tables 7-9)

Tax Revenues by Land Use

Table A-7.	SCHOOLS TAX & GRANT BENEFIT BY LAND USE, PIQUA, OHIO, 2005			
Use	**Factor**	**Measure**		**Per Acre**
SF-Owner	$ 1,819	DU	$	4,695
Res Rentals	$ 1,517	DU	$	6,021
Industrial	$ 0.47	SF	$	2,688
Office	$ 3.16	SF	$	22,039
Retail	$ 1.52	SF	$	10,587
Source:	Randall Gross / Development Economics.			

School Costs by Land Use

Table A-8. SCHOOLS FISCAL COSTS BY LAND USE, PIQUA, OHIO, 2005

Use		Factor	Measure		Per Acre
SF-Owner	$	4,054	DU	$	10,460
Res Rentals	$	1,667	DU	$	6,617
Industrial		-			-
Office		-			-
Retail		-			-

Source: Randall Gross / Development Economics.

Piqua Schools Net Impacts by Land Use

Table A-9. NET SCHOOLS FISCAL BENEFITS BY LAND USE, PIQUA, OHIO, 2005

Use		Factor	Measure		Per Acre
SF-Owner	$	(2,234)	DU	$	(5,766)
Res Rentals	$	(150)	DU	$	(596)
Industrial	$	0.47	SF	$	2,688
Office	$	3.16	SF	$	22,039
Retail	$	1.52	SF	$	10,587

Source: Randall Gross / Development Economics.

Piqua Schools Net Impacts by Land Use

Table A-10. NET FISCAL BENEFITS BY LAND USE, PIQUA CITY AND SCHOOLS COMBINED, 2004

Combined		Factor	Measure		Per Acre
SF-Owner	$	(2,233)	DU	$	(5,763)
Res Rentals	$	(185)	DU	$	(1,161)
Industrial	$	0.94	SF	$	5,331
Office	$	4.33	SF	$	30,187
Retail	$	(0.92)	SF	$	(6,386)

Source: Randall Gross / Development Economics.

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9. Attachments

A. Floyd Browne Group Transportation Tables

B. Target Industrial Assessment

C. Housing Market Assessment

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Attachment A

Floyd Browne Group Transportation Tables

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Attachment A: Traffic Counts

Information in this appendicies was compiled from ODOT data by the Floyde Brown Group. Miami County 24 hour traffic counts. The "average" figures were obtained by calculating an average of the south and north ADT data as the various routes enter and leave the City of Piqua, except for State Routes 66 and 185. Both terminate in the center of Piqua. For these routes, data was obtained from the termini points.

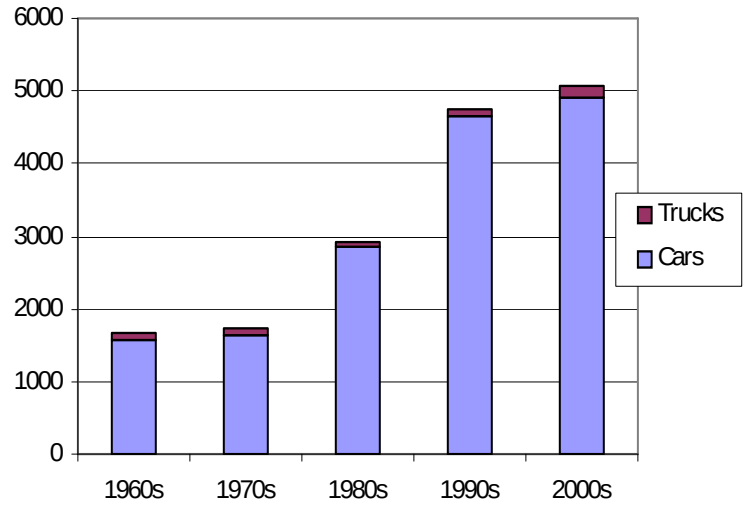
TABLE A.1 - TRAFFIC COUNTS

Year	Location	ADT		
		Cars	Trucks	Total
1968				
US 36	W. corp Line	6060	1060	7120
	E Corp Line	6820	1390	8210
	Average	6440	1225	7665
SR 66	At US 36 in Piqua	7300	910	8210
	N. Corp Line	1480	300	1780
		4390	605	4995
Interstate 75	S. Corp Line	12760	2960	15720
	N. Corp Line	11600	2960	14560
	Average	12180	2960	15140
SR 185	NW. Corp Line	1980	240	2220
	At Broadway/Ash	3030	310	3340
		2505	275	2780
1975				
US 36	W. Corp Line	6070	580	6650
	E Corp Line	8000	540	8540
	Average	7035	560	7595
SR 66	At US 36 in Piqua	8200	560	8760
	N. Corp Line	3820	220	4040
	Average	6010	390	6400
Interstate 75	S. Corp Line	13470	3500	16970
	N. Corp Line	11800	3530	15330
	Average	12635	3515	16150
SR 185	NW. Corp Line	2220	100	2320
	At Broadway/Ash	4360	110	4470
	Average	3290	105	3395
1982				
US 36	W. corp Line	7920	680	8600
	E Corp Line	6070	570	6640
	Average	6995	625	7620
SR 66	At US 36 in Piqua	4200	100	4300
	N. Corp Line	3780	220	4000
	Average	3990	160	4150
Interstate 75	S. Corp Line	19600	5320	24920
	N. Corp Line	19480	4960	24440
	Average	19540	5140	24680
SR 185	NW. Corp Line	2660	140	2800
	At Broadway/Ash	6750	350	7100
	Average	4705	245	4950

Year	Location	ADT		
		Cars	Trucks	Total
1990				
US 36	W. Corp Line	8540	620	9160
	E Corp Line	7030	590	7620
	Average	7785	605	8390
SR 66	At US 36 in Piqua	4790	150	4940
	N. Corp Line	3970	120	4090
	Average	4380	135	4515
Interstate 75	S. Corp Line	24870	7710	32580
	N. Corp Line	23220	7630	30850
	Average	24045	7670	31715
SR 185	NW. Corp Line	3210	250	3460
	At Broadway/Ash	3780	110	3890
	Average	3495	180	3675
1994				
US 36	W. Corp Line	9010	550	9560
	E. Corp Line	7050	610	7660
	Average	8030	580	8610
SR 66	At US 36 in Piqua	3870	130	4000
	N. Corp Line	6810	260	7070
	Average	5340	195	5535
Interstate 75	S. Corp Line	29400	9110	38510
	N. Corp Line	27670	9080	36750
	Average	28535	9095	37630
SR 185	NW. Corp Line	2770	130	2900
	At Broadway/Ash	4630	80	4710
	Average	3700	105	3805
2000				
US 36	W. Corp Line	12430	760	13190
	E. Corp Line	6730	790	7520
	Average	9580	775	10355
SR 66	At US 36 in Piqua	4830	150	4980
	N. Corp Line	5150	170	5320
	Average	4990	160	5150
Interstate 75	S. Corp Line	31200	15330	46530
	N. Corp Line	28880	15130	44010
	Average	30040	15230	45270
SR 185	NW. Corp Line	2760	70	2830
	At Broadway/Ash	4830	80	4910
	Average	3795	75	3870

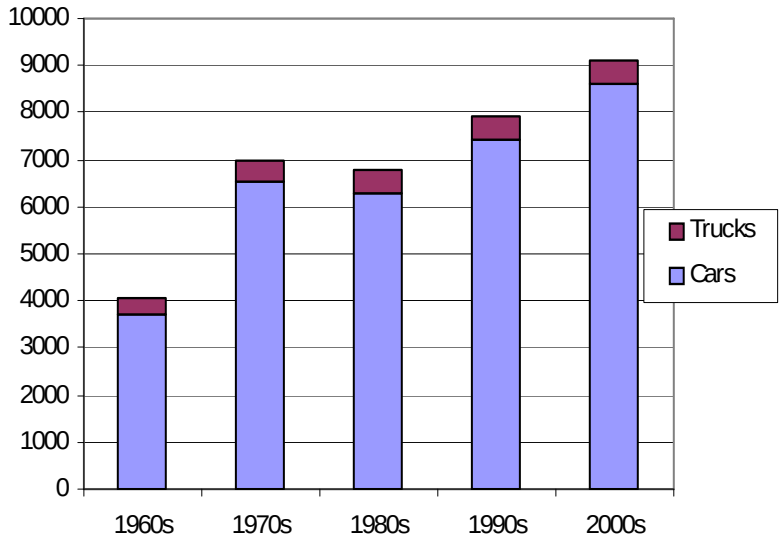
Year	Location	ADT		
		Cars	Trucks	Total
2006				
US 36	W. Corp Line	12400	760	13160
	E. Corp Line	10190	1140	11330
	Average	11295	950	12245
SR 66	At US 36 in Piqua	4660	140	4800
	N. Corp Line	4400	240	4640
	Average	4530	190	4720
Interstate 75	S. Corp Line	34130	16830	50960
	N. Corp Line	32730	16630	49360
	Average	33430	16730	50160
SR 185	NW. Corp Line	2620	70	2690
	At Broadway/Ash	3650	60	3710
	Average	3135	65	3200

CHART 3.4 -ADT SR 732 THROUGH OXFORD 1960-2000



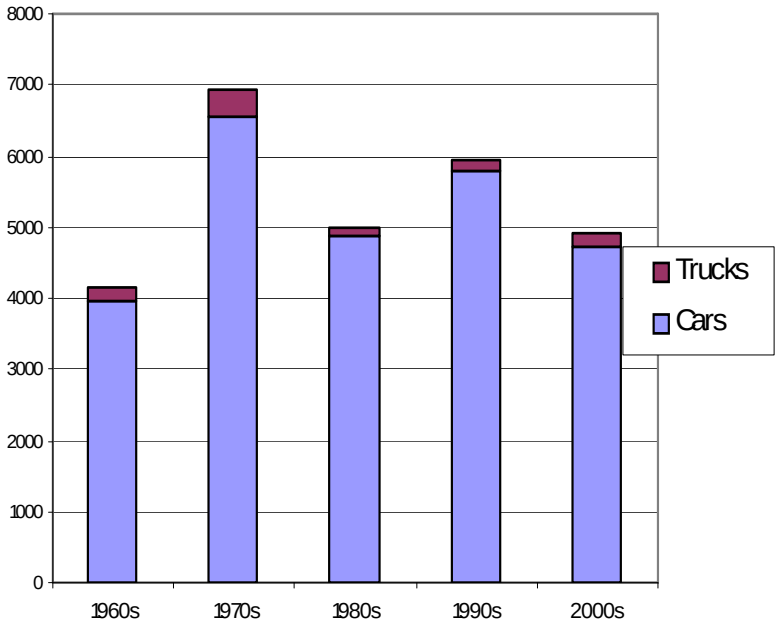
Source: Floyd Browne

CHART 3.5 -ADT US 27 THROUGH OXFORD 1960-2000



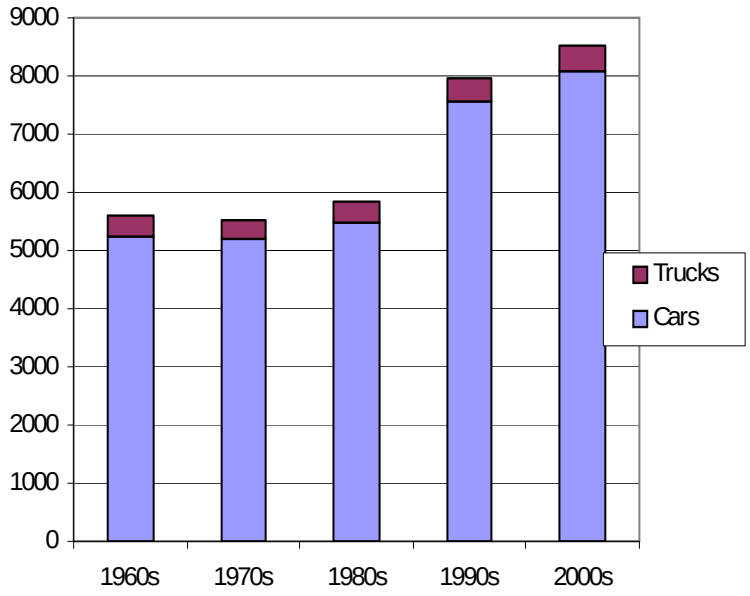
Source: Floyd Browne

CHART 3.6 -ADT SR 55 THROUGH TROY 1960-2000



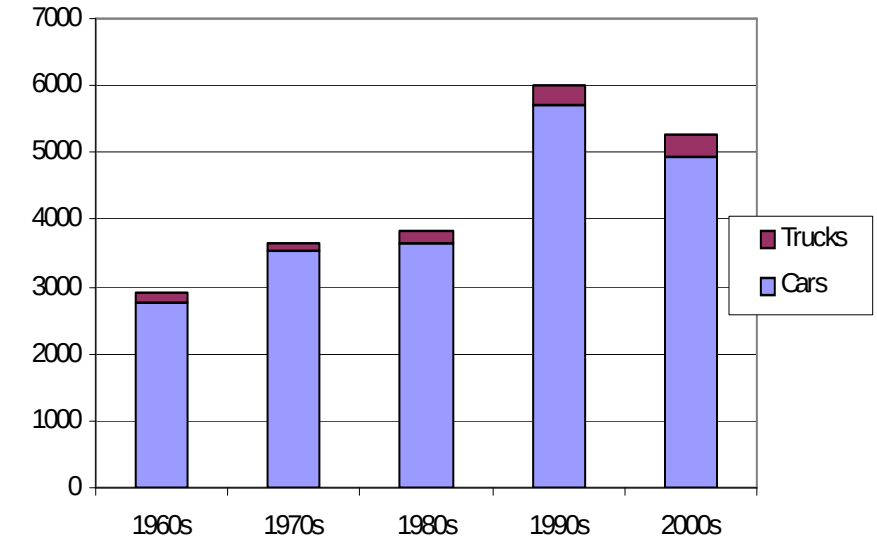
Source: Floyd Browne

CHART 3.7-ADT SR 41 THROUGH TROY 1960-2000



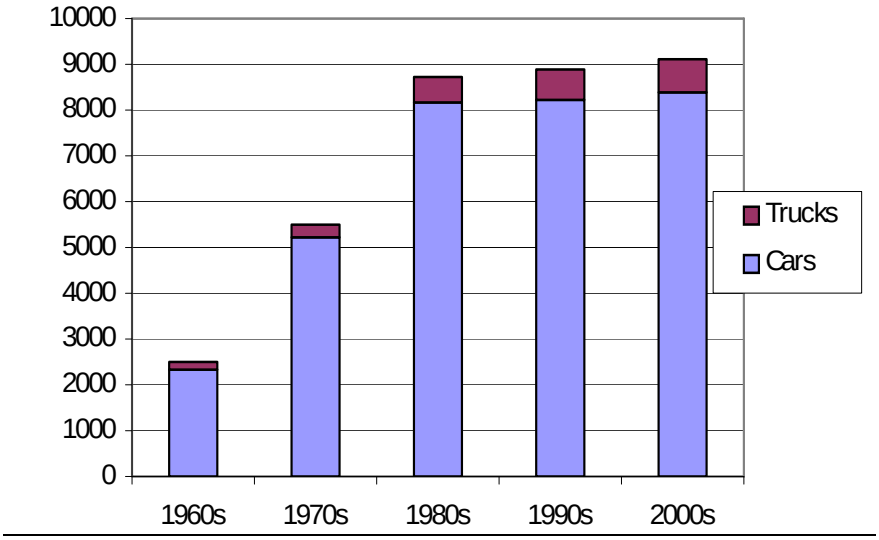
Source: Floyd Browne

CHART 3.8 -ADT SR 29 THROUGH SIDNEY 1960-2000



Source: Floyd Browne

CHART 3.9 -ADT SR 47 THROUGH SIDNEY 1960-2000



Source: Floyd Browne

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Attachment B

Target Industrial Assessment

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Attachment B: Target Industrial Assessment

Information in this appendices is the full Target and Industrial Assessment Report produced by Development Economics. A summary of the findings from this report are listed in Chapter 5.

Piqua

Target Industrial Assessment

Input to the Piqua Comprehensive Plan

Prepared by Randall Gross / Development Economics
On behalf of ACP and the City of Piqua
February 28, 2007

I. INTRODUCTION

This report provides a summary of findings from a target industrial assessment for Piqua. The purpose of the analysis is to identify economic sectors and specific industries which offer growth opportunities and for which Piqua has a distinct competitive advantage as a location. However, the report also provides broader recommendations for economic development as input to the overall comprehensive planning process.

The information from this analysis may be used to help refine the City's targeted economic development marketing and long-term planning & recruitment efforts. Piqua's competitive position must be understood in the regional context, since many business decisions affecting Piqua are made from within the Dayton region. Overall trends in Dayton's economic base impact on the health of Piqua's economy and that of other satellite communities in the Dayton Metro Area. Thus, the analysis focuses to an extent on Piqua's role within Miami County's and the region's economy.

Key Issues

Several key issues have been identified that are driving the need for targeted economic development efforts. These issues were identified based in part on the economic analysis, as well as on field reconnaissance and interviews with business leaders in the community.

- Declining Regional Manufacturing Base
- Dependency on Manufacturing (lack of economic diversity)
- Competition with Neighboring Communities
- Negative Perceptions of Piqua
- Vacant & Aging Industrial Buildings
- Slow Absorption of Industrial Land
- Lack of Targeted Marketing Strategy
- Impact of Industrial Base on Residential Market

Overall, there is a need not just to strengthen the city's competitive position for attracting and retaining industry, but also to diversify the city's business mix so that it is not dependent on any one sector of the economy.

II. ECONOMIC BASE ASSESSMENT

An Economic Base Assessment was conducted in order to identify trends in the regional economy and to determine Piqua's role within the region. A key component of this analysis is to identify relative strengths in the regional economy which suggest opportunities for Piqua. This section examines employment and business base at three levels: Metropolitan Dayton, Miami County, and the city of Piqua.

Metropolitan Dayton

Dayton, like many "rust-belt" cities, has been impacted by the decline in heavy manufacturing. However, while cities like Pittsburgh or Milwaukee have had some success in attracting white-collar professional and technical services jobs, Dayton has continued to lose employment and business base across almost all sectors.

Employment Trends

The Dayton-Springfield Metropolitan Area (of which Piqua is a part) had a total employment of almost 360,000 in 2004. However, this represents a decline of 56,900 jobs or 13.7% from 1998. Between 1998 and 2004, the country as a whole experienced an IT and service sector boom as well as a recession in 2001-2002. The manufacturing sector was particularly hard hit because of the recession, but also because of increased competition from China and other low-wage foreign producers. While manufacturing output has recovered somewhat since 2002, the sector has continued to shed jobs as companies reinvest in new labor-saving technologies in order to become more competitive.

Most sectors in the Dayton economy lost jobs during the 1998-2004 period. In addition to manufacturing (which declined by **31.3%** for a loss of 27,400 jobs), management services, wholesale trade, retail trade, construction, transport, real estate, finance & insurance, and other services also saw significant losses. Job losses in the retail sector are particularly alarming because this sector is more dependent on the local demographic base and less so on national economic trends.

There were, however, several industry sectors that experienced growth in the Dayton region between 1998 and 2004. Professional and technical services employment increased by more than 5,600 (26.9%) to a total of almost 27,000 jobs. The sector became the 5th largest in the regional economy by 2004. Also, information services employment appears to have increased during the six-year period from 10,400 jobs to an estimated 17,500 (based on Census ranges).

Exact data on 2004 employment in the information services sector was not available due to companies holding certain information as proprietary. Even so, there was clearly an increase in emerging white collar job sectors while the region's traditional blue and "pink" collar sectors showed decline. Employment is summarized in Table 1, below.

Table 1. AT-PLACE EMPLOYMENT TRENDS, METRO DAYTON-S'FIELD, 1998-2004

Industry	1998	2004	1998-2004 Change Number	Percent
Agriculture	175	60	N/A	N/A
Mining	375	375	N/A	N/A
Utilities	1,750	1,750	N/A	N/A
Construction	16,625	14,721	(1,904)	-11.5%
Manufacturing	87,403	60,046	**(27,357)**	**-31.3%**
Wholesale Trade	17,829	14,469	**(3,360)**	**-18.8%**
Retail Trade	56,137	47,065	**(9,072)**	**-16.2%**
Transport	10,998	9,808	(1,190)	-10.8%
Information	10,394	17,500	N/A	N/A
Finance/Insurance	14,590	13,141	(1,449)	-9.9%
Real Estate	5,169	4,560	(609)	-11.8%
Prof/Tech Svcs	20,932	26,559	**5,627**	**26.9%**
Management	13,598	9,059	**(4,539)**	**-33.4%**
Admin Svcs	24,722	24,234	(488)	-2.0%
Education	13,049	17,500	N/A	N/A
Health Care	56,027	54,549	(1,478)	-2.6%
Arts/Entertain	3,750	3,697	(53)	-1.4%
Accomodation	36,435	34,597	(1,838)	-5.0%
Other/ Services	21,746	16,382	**(5,365)**	**-24.7%**
Auxiliaries	3,750	N/A	N/A	N/A
TOTAL	**414,619**	**357,719**	**(56,900)**	**-13.7%**

Note: N/A Means Not Applicable due to Census Rounding.

Sources: U.S. Bureau of the Census and Randall Gross / Development Economics.

Manufacturing. The manufacturing sector is such a large component of the Dayton regional economy that a more detailed analysis was conducted to examine the trends within individual manufacturing industries. Key industry groups include transportation equipment, machinery, fabricated metals, and plastics & chemicals.

Dayton's manufacturing is somewhat concentrated in the **transportation equipment industries**, which is natural given the city's location within the nation's motor vehicle manufacturing corridor that stretches from Detroit south into Alabama. Key transport manufacturing in the region includes truck and SUV parts, steering & suspension systems, and brakes for the motor vehicle industry; as well as aerospace equipment and rail rolling stock.

Machinery and equipment manufacturing is important in this region and includes industrial machinery, commercial & service industry machinery, HVAC systems, metalworking – tool & die shops, and engineering and welding equipment. Fabricated metal manufacturing here includes forging & stamping, coating, hand tools, plates, machine shops, and springs, among others. The Dayton-area chemicals & plastics industry includes adhesives, paint, plastics, foam, and rubber, among other products. Individual industry components are detailed in the Table 2 Notes found in the Appendix.

Trends. The trends analysis reveals that declines in manufacturing employment were seen across the Dayton Metro among almost all industries. The highest rates of decline were in furniture (57.2%), apparel & textiles (46.7%), transportation equipment (42.8%), and industrial machinery (32.0%) manufacturing. The largest absolute numbers of losses were seen in transportation equipment (13,100 jobs), followed by machinery (4,400), fabricated metals (2,400), printing (1,100), and furniture (1,000). These manufacturing trends are summarized by industry below.

Table 2. AT-PLACE MANUFACTURING EMPLOYMENT TRENDS, METRO DAYTON, 1998-2004

			1998-2004 Change	
Industry	**1998**	**2004**	**Number**	**Percent**
Food 1/	2,275	1,809	(466)	**-20.5%**
Textiles/Apparel 2/	983	524	(460)	**-46.7%**
Wood & Paper 3/	2,653	2,434	(219)	-8.3%
Printing 4/	4,859	3,750	(1,110)	**-22.8%**
Plast/Chem/Rbr 5/	7,801	7,686	(115)	-1.5%
Mineral Prods 6/	1,545	1,121	(424)	**-27.4%**
Steel, Metals 7/	1,750	1,750	N/A	N/A
Fabricated Metal 8/	11,233	8,877	(2,356)	**-21.0%**
Machinery/Equip 9/	13,775	9,363	(4,412)	**-32.0%**
Electronic/ical 10/	5,499	5,499	N/A	N/A
Transport Equip 11/	30,612	17,500	(13,113)	**-42.8%**
Furniture 12/	1,750	750	(1,000)	**-57.2%**
Misc Mfg 13/	1,965	1,750	(216)	-11.0%
TOTAL	**87,403**	**60,046**	**(27,357)**	**-31.3%**

Sources: U.S. Bureau of the Census and Randall Gross / Development Economics.

The severe decline in transportation equipment employment is particularly troubling, given the region's dependence on this industry. At the same time, some manufacturing industries experienced much smaller losses in employment during the six-year period. For example, plastics & chemicals lost 115 jobs or just 1.5% of total Dayton-area employment in that industry. This represents a relatively minor loss given the overall trend in manufacturing.

Business Trends

Trends in the number of establishments was also tracked by sector for the Dayton-Springfield Metro. Between 1998 and 2004, the number of businesses (excluding sole proprietorships) fell by 12.0% or almost 2,600 to a total of 18,800. A decline in the number of businesses is also significant because it indicates a loss of opportunity for future growth and a rebound in employment. Nevertheless, several sectors saw an increase in the number of businesses, including 51 additional information services companies (which confirms that there is overall growth in that sector), plus professional and technical services, education services, utilities, and the addition of one transport company. Business trends are summarized in Appendix Table A-1.

Manufacturing. The downward trend in manufacturing establishments was more severe than other industries, with the Dayton-Springfield Metro losing close to 400 manufacturing firms over the six-year period. By 2004, there were about 1,200 manufacturing businesses in the metro. All manufacturing industries lost business base, as shown in Appendix Table A-2. Some industries, such as plastics & chemicals saw consolidation during the period. Others, such as furniture and steel & metals saw relatively few businesses close between 1998 and 2004. A rapid decrease in employment in these industries with few closures suggests that these industries are adjusting to competition by shedding workers and updating their production technologies to increase productivity. Thus, industries like furniture and metals may be better suited to adjust quickly to economic downturns in the future.

Miami County

A similar analysis was conducted for the economic base within Miami County. Piqua shares much in common, in terms of location, political structure, and other factors, with its home county. Trends in employment and business base were again examined, with particular attention to the manufacturing sector.

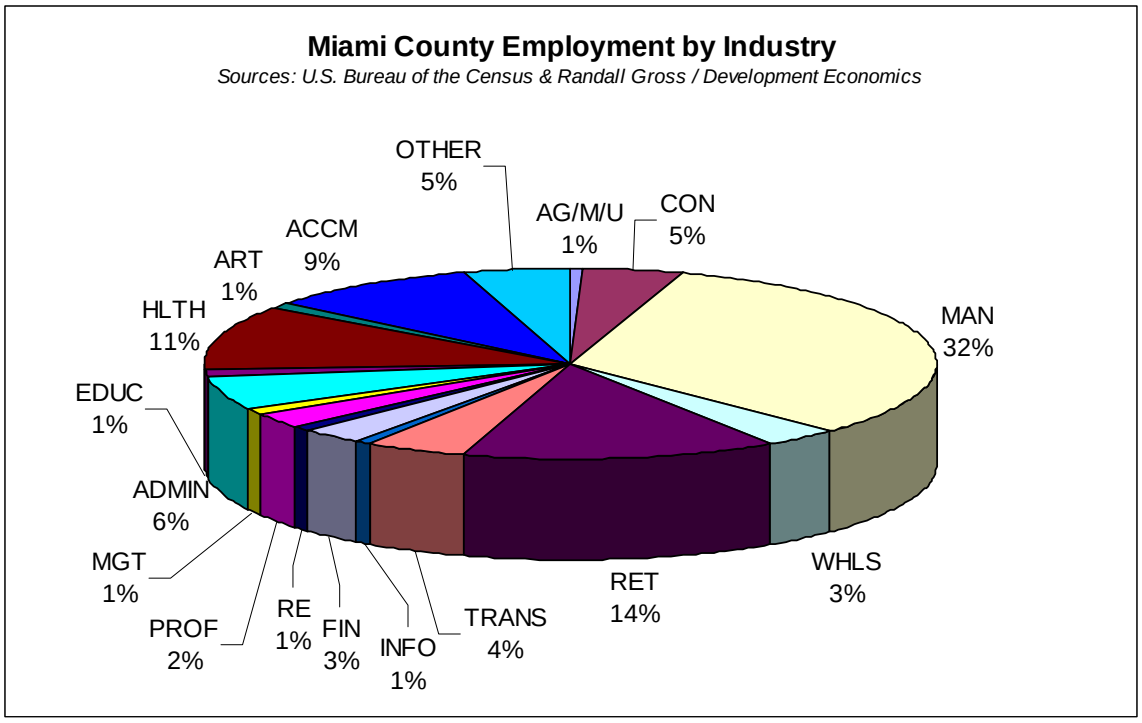
Employment

Employment in Miami County is heavily weighted to manufacturing, which accounts for 32% of all private-sector jobs in the county. This number compares with a national average of only 12%. Of the county's 12 largest employers, nine (75%) are manufacturing concerns, as shown below:

• A.O. Smith Electrical products Co.	manufacturing
• Evenflo Company, Inc.	manufacturing
• F-Tech, Inc. / F&P America	manufacturing
• Goodrich Corporation	manufacturing
• Illinois Tool Works, Inc.	manufacturing
• Jackson Tube Service	manufacturing
• MDDA Panasonic, Inc.	manufacturing
• Meijer, Inc.	retail
• Motoman, Inc.	manufacturing
• Stillwater Technologies, Inc.	manufacturing
• Troy City Board of Education	government (ed)
• Upper Valley Medical Center	health care

Retail trade, the next largest sector, only accounts for 14% of the county's jobs, followed by health care & social services (11%), accommodation & foodservice (9%), administration services (6%), and construction (5%).

Chart #1



Trends, There were about 36,400 people employed in Miami County's private sector in 2004. This represents a decrease of 1,500 or 4.1% from 1998. Clearly, Miami County has fared better economically than the Metro Dayton region as a whole. There were several sectors in Miami County that actually added employment since 1998. The county gained over 1,100 jobs in transportation services, for an increase of 244%. This sector would include trucking, warehousing, logistics, and other transportation service industries. Miami County's strategic location near the juncture of major north-south and

east-west highway corridors as well as a regional airport no doubt contribute to its competitiveness for transport services.

The county also added 260 finance & insurance jobs, 912 health care jobs, 215 professional & technical service jobs, 160 administrative service jobs, 148 accommodation and foodservice jobs, 121 arts/entertainment/recreation services jobs, and 152 in jobs other service sectors. Even so, manufacturing employment declined significantly in Miami County during this period, with a loss of 2,700 jobs or 18.4%. Miami County also lost 15.1% of its wholesale employment, 6% of its retail employment, and almost 70% of its management services jobs as shown in the following table.

Table 3. AT-PLACE EMPLOYMENT TRENDS, MIAMI COUNTY, 1998-2004

Industry	1998	2004	1998-2004 Change Number	Percent
Agriculture	4	15	**11**	**275.0%**
Mining	51	60	N/A	N/A
Utilities	175	118	N/A	N/A
Construction	1,667	1,678	11	0.7%
Manufacturing	14,505	11,834	**(2,671)**	**-18.4%**
Wholesale Trade	1,437	1,220	**(217)**	**-15.1%**
Retail Trade	5,347	5,016	(331)	-6.2%
Transport	467	1,610	**1,143**	**244.8%**
Information	312	302	(10)	-3.2%
Finance/Insurance	851	1,111	**260**	**30.6%**
Real Estate	296	300	4	1.4%
Prof/Tech Svcs	637	852	**215**	**33.8%**
Management	1,232	371	**(861)**	**-69.9%**
Admin Svcs	1,920	2,080	160	8.3%
Education	214	375	N/A	N/A
Health Care	3,147	4,059	**912**	**29.0%**
Arts/Entertain	220	341	**121**	**55.0%**
Accomodation	3,253	3,401	148	4.5%
Other/ Services	1,606	1,758	152	9.5%
Auxiliaries	750	N/A	N/A	N/A
TOTAL	**37,906**	**36,361**	**(1,545)**	**-4.1%**

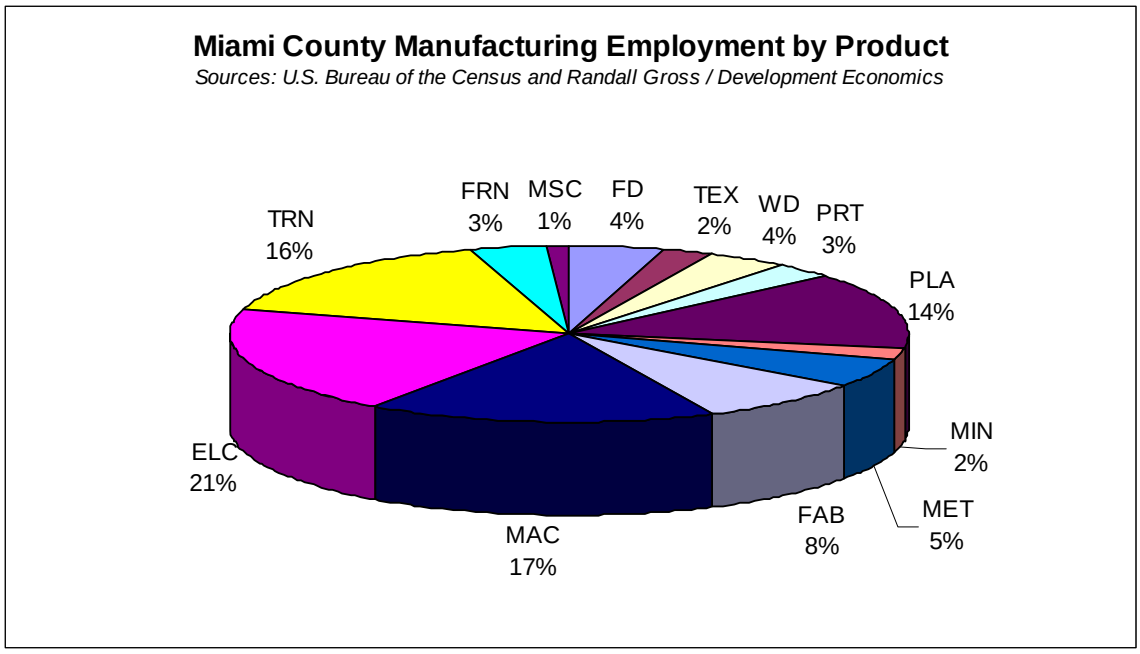
Note: N/A Means Not Applicable due to Census Rounding.

Sources: U.S. Bureau of the Census and Randall Gross / Development Economics.

Manufacturing. Miami County's manufacturing employment is concentrated in four industries: electronics & electrical equipment, industrial machinery, plastics, and transportation equipment, which together account for 68% of all manufacturing jobs. Other key industries include fabricated metals, primary metal industries, food, and wood products.

The county's manufacturing industry base is summarized in the following chart.

Chart #2



Trends. As noted earlier, Miami County's manufacturing base shed jobs since 1998. Declines were widespread throughout most production industries. However, several manufacturing industries did experience growth during this period, including textiles & apparel (77 jobs or 35%), plastics & chemicals (143 jobs or 9%), mineral products (16 jobs or 6%), and electronics/electrical equipment (273 jobs or 13%). The county lost almost 1,200 industrial machinery jobs related, no doubt, to the overall decline in manufacturing. The county also lost significant numbers of jobs in wood & paper production, steel & primary metals, printing, fabricated metal products, transportation equipment, furniture, and miscellaneous manufacturing.

The decrease in transportation equipment manufacturing is distressing, again, because Miami County is located in a motor vehicle manufacturing corridor and this industry has until recently, fed growth throughout the region. In fact, new automotive manufacturing plants are still under development in nearby areas. Greensburg, Ohio, for example, will be the new home of a Honda manufacturing facility that is now under construction. Overall trends in

manufacturing employment in Miami County are summarized in the following Table.

Table 4. AT-PLACE MANUFACTURING EMPLOYMENT TRENDS, MIAMI COUNTY, 1998-2004

Industry	1998	2004	1998-2004 Change Number	Percent
Food 1/	584	537	(47)	-8.0%
Textiles/Apparel 2/	217	294	77	**35.3%**
Wood & Paper 3/	752	494	(258)	**-34.3%**
Printing 4/	466	314	(152)	**-32.6%**
Plast/Chem/Rbr 5/	1,574	1,716	143	9.1%
Mineral Prods 6/	254	270	16	6.3%
Steel, Metals 7/	867	619	(248)	**-28.6%**
Fabricated Metal 8/	1,101	976	(125)	-11.4%
Machinery/Equip 9/	3,209	2,046	(1,163)	**-36.2%**
Electronic/ical 10/	2,124	2,397	273	**12.8%**
Transport Equip 11/	2,189	1,919	(270)	-12.3%
Furniture 12/	750	419	(331)	**-44.1%**
Misc Mfg 13/	390	149	(241)	**-61.8%**
TOTAL	**14,505**	**11,834**	**(2,671)**	**-18.4%**

Sources: U.S. Bureau of the Census and Randall Gross / Development Economics.

Business Trends

Miami County added ten businesses to its business base between 1998 and 2004. While small in number, the increase in business establishments suggests that Miami County is faring better than the metropolitan area as a whole as a location for businesses.

The growth in business base was particularly strong in finance & insurance, accommodations & foodservice, transportation services, and health care. There were small additions as well in information services and professional & technical services. Business establishment trends in the county are summarized in Appendix Table A-3.

Manufacturing. Fewer businesses were engaged in manufacturing in 2004 than in 1998 in Miami County. The number of industrial machinery manufacturers declined precipitously, from 60 to 41. However, there was a net gain in the number of fabricated metals, plastics & chemicals, and textile & apparel firms. Trends are summarized in Appendix Table A-4.

Piqua

Piqua's economic base has traditionally depended on manufacturing activities. The city was once known as a center for textiles and apparel, particularly for the manufacture of undergarments. Even today, several of the city's largest private sector employers are manufacturers.

Historical Context

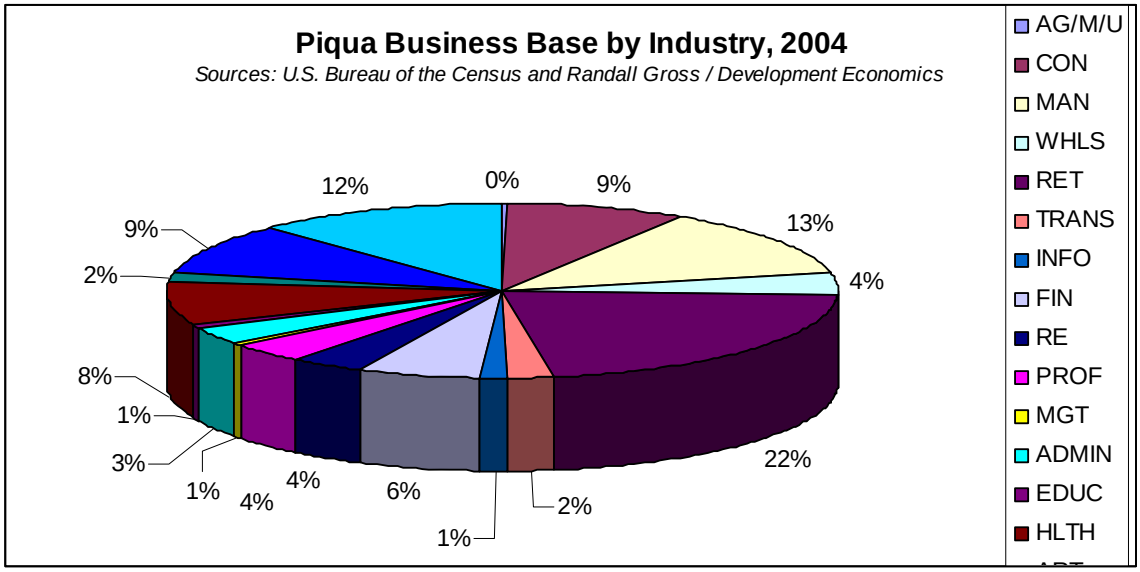
Piqua has a long history as a manufacturing and industrial center for south-western Ohio. Much of that history is tied to the apparel and textiles industries, where Piqua was a leader in the production of undergarments, shirts, blankets, and related products. Atlas Underwear and Superior Clothing were two of the better-known companies that once called Piqua home. Charles Atlas himself lent his good name to Piqua's underwear products. Thanks to its location near the birthplace of aviation, Piqua was (and remains) home to several aviation equipment manufacturers, including Lear Avia, Robbins & Myers, Meteor Motor Car, and Hartzell Propellers. Products that have been known to Piqua include stoves, shovels & tools, hearses, and printed publications, among others. The city's industrial history points to Piqua's competitive position for attracting and growing manufacturing concerns.

Current Business Base

Manufacturing is still the most important private employer in Piqua. Major employers include Hartzell Propellers, Crayex Corporation, Miami Valley Steel, Evenflo, Retterbush Fiberglass, and others. Old name companies like Hartzell Industries, Hobart Corporation, Orr Felt Company, and French Oil Mill Machinery have been joined by relative newcomers like B&L Labels.

Retail is the leading sector in terms of the number of businesses (22% of the total), but retail has not generated significant employment. Other large numbers of businesses are found in manufacturing (13%), administration services (12%), construction (9%), real estate (9%), health care (8%), and finance (6%). The following chart illustrates the industries that comprised Piqua's business base in 2004.

Chart #3



Employment & Business Trends

Piqua's employment has fallen by 1,700 or 15.6% since 1998. However, employment expanded by about 330 from 1998 to 2000 before it fell again by about 2,000 by 2004. In 2004, Piqua's employment totaled 9,366 according to U.S. Census numbers. The decrease in employment has been met by a parallel decrease in overall payroll. Local payroll declined from about $287.6 million to $269.5 million, a decrease of over $18 million or 6.3% over the six-year period. This decrease in income in turn impacted on local retail sales, real estate purchases, and bank holdings.

The number of business establishments in Piqua fell by 50 (7.3%) between 1998 and 2004, according to the U.S. Census. Almost every sector of the local economy weakened during this period, with a reduced number of businesses operating. The greatest losses in establishments were in real estate, administrative services, professional & technical services, and wholesale trade.

The city did see an increase in the number of information service, management, arts/entertainment/recreation, and other service firms. Altogether, Piqua gained about 10 businesses in these sectors, but not enough to overcome the loss of 60 in other sectors. Table 5 below summarizes overall trends in business establishments in Piqua, from 1998 to 2004.

Table 5. AT-PLACE BUSINESS ESTABLISHMENT TRENDS, PIQUA, 1998-2004

Industry	1998	2000	2004	1998-2004 Change Number	1998-2004 Change Percent
Agriculture	-	-	-	-	0.0%
Mining	-	-	-	-	0.0%
Utilities	1	1	1	-	0.0%
Construction	57	50	56	(1)	-1.8%
Manufacturing	85	86	81	(4)	-4.7%
Wholesale Trade	34	33	25	(9)	-26.5%
Retail Trade	147	143	138	(9)	-6.1%
Transport	15	14	14	(1)	-6.7%
Information	6	5	9	3	50.0%
Finance/Insurance	36	38	36	-	0.0%
Real Estate	33	26	23	(10)	-30.3%
Prof/Tech Svcs	32	27	23	(9)	-28.1%
Management	2	2	4	2	100.0%
Admin Svcs	31	33	20	(11)	-35.5%
Education	5	5	5	-	0.0%
Health Care	54	49	51	(3)	-5.6%
Arts/Entertain	7	9	10	3	42.9%
Accomodation	61	57	60	(1)	-1.6%
Other/ Services	76	74	77	1	1.3%
Auxiliaries	1	1	N/A	N/A	N/A
TOTAL	**683**	**653**	**633**	**(50)**	**-7.3%**
Employment	***11,100***	***11,431***	***9,366***	***(1,734)***	***-15.6%***
Payroll ($1,000)	***287,637***	***298,258***	***269,545***	***(18,092)***	***-6.3%***

Sources: U.S. Bureau of the Census and Randall Gross / Development Economics.

Manufacturing. Piqua's manufacturing base includes a mix of industries as summarized in "Table Notes" in the Appendix. The number of manufacturing businesses in Piqua fell by 3 between 1998 and 2004. The city, like Miami County and the region as a whole, lost a higher number of businesses fabricating industrial machinery & equipment. Piqua also lost two of its four food manufacturers. At the same time, the city gained textile, fabricated metal, electronics, and transportation equipment manufacturing firms, contrasting with regional trends. Overall manufacturing business establishment trends in Piqua are summarized for the 1998 to 2004 period in Table 6, below.

Table 6. AT-PLACE MANUFACTURING BUSINESS TRENDS, PIQUA, 1998-2004

Industry	1998	2004	1998-2004 Change Number	Percent
Food 1/	4	2	(2)	-50.0%
Textiles/Apparel 2/	2	3	1	50.0%
Wood & Paper 3/	7	6	(1)	-14.3%
Printing 4/	6	5	(1)	-16.7%
Plast/Chem/Rbr 5/	11	10	(1)	-9.1%
Mineral Prods 6/	2	2	-	0.0%
Steel, Metals 7/	7	6	(1)	-14.3%
Fabricated Metal 8/	23	24	1	4.3%
Machinery/Equip 9/	13	11	(2)	-15.4%
Electronic/ical 10/	1	2	1	100.0%
Transport Equip 11/	1	3	2	200.0%
Furniture 12/	3	3	-	0.0%
Misc Mfg 13/	5	5	-	0.0%
TOTAL	**85**	**82**	**(3)**	**-3.5%**

Sources: U.S. Bureau of the Census and
Randall Gross / Development Economics.

Summary

The Dayton regional economy faltered during the 1998 to 2004 period, largely because of the area's dependence on rapidly declining manufacturing industries. Even so, there were small gains in professional & technical services and information industries within the region, mirroring the growth of those industries nationwide. Miami County's economy fared somewhat better than the region as a whole, and its manufacturing base actually increased in number of establishments during this same period. Piqua has a long history as a manufacturing center and its dependence on this sector has impacted on its current economic situation. Overall, Piqua and the region attracted a sizeable transportation equipment industry, thanks to a location in the I-75 motor vehicle manufacturing corridor and Dayton's role as the birthplace of aviation. However, employment cut-backs and relocations have impacted negatively on this industry between 1998 and 2004, and transportation equipment manufacturing is only now beginning to recover.

III. TARGET INDUSTRIAL ASSESSMENT

This section summarizes findings from a target industrial analysis for Piqua. The purpose of this analysis is to identify key industries for which Piqua has competitive advantages and opportunities for further development. The analysis draws from an assessment of the local area's and region's existing industrial clusters, local industrial supply chain dynamics, Piqua's comparative strengths and weaknesses as an industrial location, and growth trends among regional and national manufacturing industries.

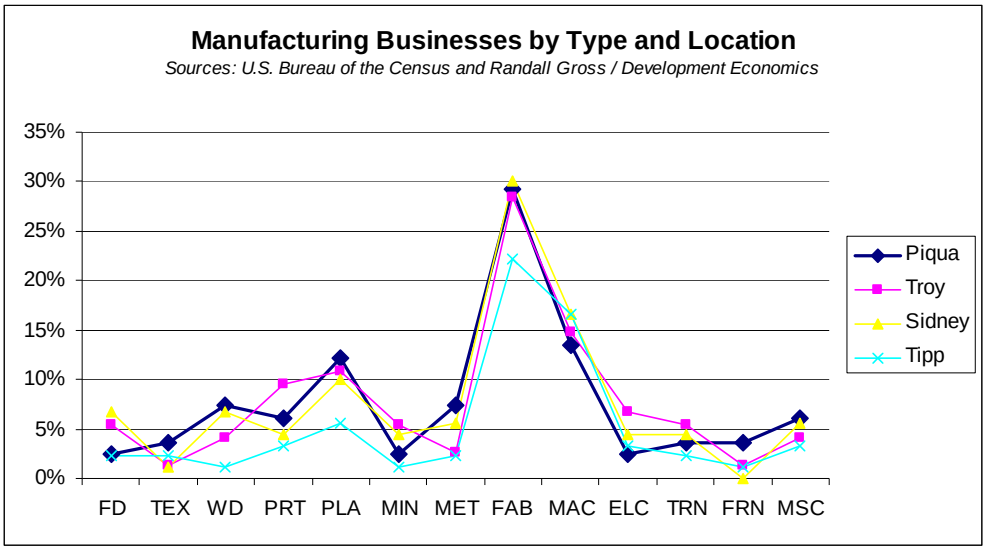
Industrial Clusters

Industrial clusters were identified for the four cities in the I-75 Corridor north of Dayton, including the city of Piqua. These clusters represent geographic agglomerations of industries and their suppliers within certain sectors or across sectors.

Corridor Cities' Manufacturing Base

An analysis of the manufacturing sector in the four cities in the I-75 Corridor north of Dayton , (Piqua, Troy, Sidney, and Tipp City), reveals that they have strikingly similar dependencies on several individual industries. The largest share (about 30%) of manufacturing business in each of the four cities is in metal fabrication.

Chart #4

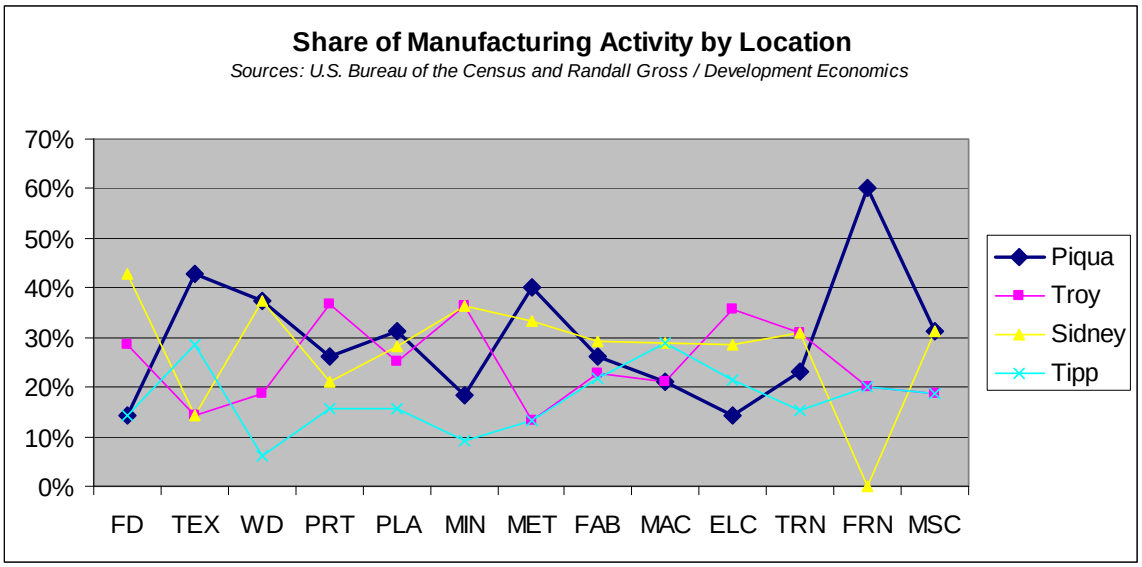


The four cities also share a similar dependency on machinery manufacturing, at around 15% of the total manufacturing base in each city. The only significant difference in the manufacturing base of the four cities is where Tipp City has a somewhat smaller share in plastics, wood products, and several other industries. These data suggest that the four cities, being equally dependent on the same manufacturing industries, are more likely to compete with one another for this same industrial base. If there was more diversity between the cities with respect to their industrial base, then they would be less likely to compete directly.

Share of Total Corridor Manufacturing

In assessing each city's overall share of the business base in each industry, several interesting trends emerge. First, Piqua has a relatively large share of the overall furniture manufacturing industry base, especially when compared with Sidney. Piqua also has a somewhat larger share of the textile, metals, and plastics manufacturing base than its sibling corridor cities. At the same time, Piqua has a relatively small share of the overall base of food, mineral, an electronics manufacturing in this corridor.

Chart #5

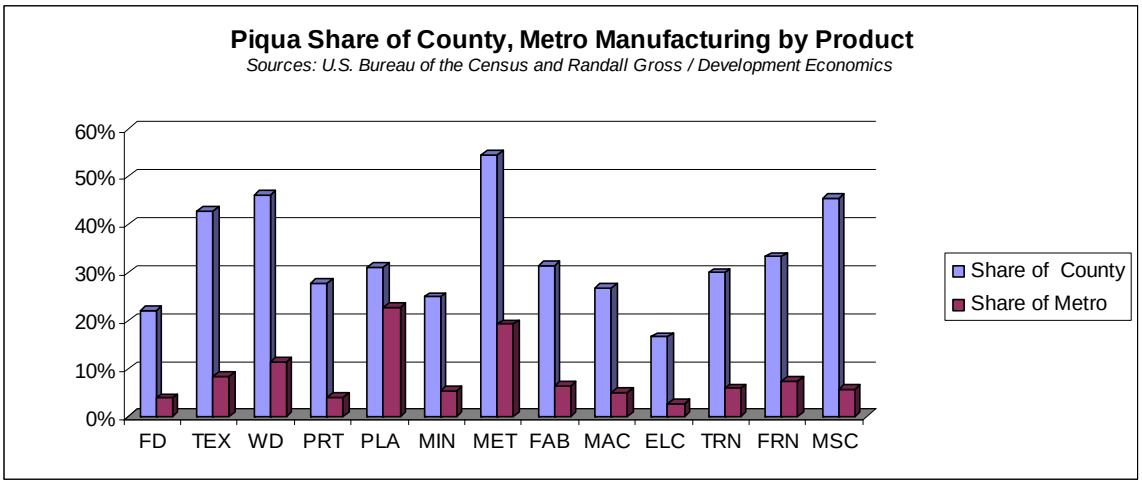


Troy has a relatively high share of electronics, minerals, and printing. Sidney has a fairly consistent share of most industries (at around 30% of the total), indicating a relatively diverse base, but also has the highest share of food and wood product manufacturers. Tipp City has a relatively low share of most of the corridor's manufacturing base, with the exception of machinery and textiles.

Share of County & Metro Manufacturing

A similar analysis was conducted comparing Piqua's share of the overall Miami County and Metro Dayton manufacturing base by type of industry. This analysis reveals that Piqua has a relatively high share of the plastics and metals manufacturing base in the region, but a low share of electronics, food, printing, and other industries. At the county level, Piqua has a high share of metals, textiles, wood products, and miscellaneous manufacturing.

Chart #6



Location Quotients

In order to identify Piqua's manufacturing clusters and its competitive advantages, each industry's share of the Piqua manufacturing base was compared to the shares for those industries in the four-city region, Miami County and Metro Dayton as a whole. This comparison yields a "location quotient" as a measure of Piqua's manufacturing clustering that goes beyond mere "concentrations."

The results of this analysis are summarized in the following table. Location quotients higher than 2.0 generally indicate an "industry cluster" and suggest a unique role for the city in the regional economy. There are several industries for which Piqua has location quotients above 2.0 within the Dayton Metropolitan Area. The highest such measure is recorded for Piqua's plastics & chemicals industry, which ranks it at **3.35** within the region. However, Piqua is only on par with other locations within Miami County, with a location quotient of about 1.0 within the county. This suggests that Miami County *in general* is an important location for the plastics cluster within the region, garnering a location quotient of 3.42 overall.

Piqua also has a relatively significant regional location quotient for the steel and primary metals industry, at **2.86**. The county overall is a strong location for this industry, but falls short of cluster status at 1.67. Piqua is similarly strong as a location within the county for this industry.

Table 7. ESTABLISHMENT LOCATION QUOTIENTS: PIQUA & MIAMI COUNTY VS METRO DAYTON

Industry	Miami County	Piqua-Miami	Piqua-Metro
Food	0.83	0.70	0.58
Textiles/Apparel	0.92	*1.34*	*1.23*
Wood & Paper	*1.18*	*1.45*	*1.70*
Printing	0.70	0.87	0.61
Plastics/Chem/Rbr	**3.42**	**0.98**	**3.35**
Mineral Prods	*1.02*	0.78	0.80
Steel, Metals	***1.67***	***1.71***	**2.86**
Fabricated Metal	0.97	0.99	0.96
Machinery/Equip	0.89	0.84	0.75
Electronic/ical	0.75	0.52	0.39
Transport Equip	0.92	0.94	0.87
Furniture	*1.06*	*1.04*	*1.11*
Misc Mfg	0.60	*1.42*	0.86

Source: Randall Gross / Development Economics.

Piqua also has more than its fair share of textiles & apparel, wood & paper, and furniture manufacturing within the region. However, none of these industries have been developed to the stage where there are significant synergies as yet to generate a clustering effect. The same type of analysis was conducted with a focus on employment in Miami County. Appendix Table A-5 illustrates the county's strong employment clustering effects in the textiles/apparel, electronics, and furniture industries.

Competitiveness

An assessment was conducted of Piqua's competitiveness against key location factors, including transport & market access, labor force availability & education, available industrial buildings & land, infrastructure, housing & quality of life, and other factors. A brief summary of key findings from this analysis is provided below.

Transport & Market Access

Piqua has excellent transportation access from points north and south along Interstate 75, from Canada to Florida. I-75 links Piqua to important markets including Detroit, Cincinnati-Dayton, Atlanta, Tampa-St. Petersburg, and Miami-Fort Lauderdale. I-75 provides direct access for business and commuters from Dayton, the closest large city. Piqua is part of the Dayton-Springfield Metropolitan Area and I-75 provides direct access to Piqua from other points in the metro area. Interstate 70 provides Piqua important east-west access, just 21 miles to the south where I-75 meets I-70.

Interstate 70 connects the Dayton region with large markets east and west, including Columbus, the Pittsburgh area, and Baltimore (to the east) as well as Indianapolis, St. Louis, Kansas City, and Denver (to the west). Piqua also has good local and regional east-west access via U.S. Highway 36. All of these roads provide very good visibility for the city and some of its available industrial property. However, several of Piqua's larger industrial areas are located away from I-75 and trucks must travel through the city to reach the interstate. Piqua is within a ½-hour drive of Dayton International Airport, at Exit 32 off of I-70. Dayton provides passenger and air cargo service via 12 commercial carriers. Finally, freight rail services are available on the north-south line connecting Toledo to Dayton and Cincinnati.

Labor Force & Education

December 2006 unemployment in Miami County was 5.7%, slightly higher than the state's rate of 5.4% and the national average of 4.3%. Miami County had a total labor force of 54,600, with 3,100 unemployed, available workers. Miami County has more residents commuting out for work than workers commuting in. The largest share of out-commuters are headed for Dayton (22%+) and many of those commuters live in Tipp City.

Miami County residents had the highest educational attainment in the four-county Job Center Network labor market area (Miami, Preble, Shelby, and Darke). However, education levels were slightly lower than statewide averages. For example, 7.4% of Ohio adults have a Masters Degree or higher, while 5.4% of Miami County adults have such degrees. Only 3.8% of Shelby Countians have a Masters degree. By contrast, 39.8% of adults in Miami County and 45.3% of those in Shelby County have a high school diploma. For most manufacturing jobs in the past, a high school diploma was often all that was required.

Piqua's schools have had a negative reputation in the past due in part to relatively low ratings given by the State Department of Education. In 2002-03, Piqua's schools were given a rating of 85.2 (out of 120), suggesting "Continuous Improvement." The Troy and Sidney school districts were also rated in this

category, with scores of 84.9 and 79.4, respectively. At the same time, Tipp City's schools were rated "Effective," with a score of 92.9. However, by the 2005-06 academic year, all four area school districts had raised their ratings. Piqua, Troy, and Sidney schools' ratings all increased to "Effective," with scores of 94.2, 99.4, and 94.0, respectively. Tipp City Schools' ratings increased to "Excellent," with a score of 103.7. These ratings suggest that area schools are improving and generally performing well, especially considering the lackluster economic conditions in the region.

Piqua has a competitive advantage as the home of Edison Community College, which offers 30 two-year associate degree programs in business, health care, public service, and engineering. The college and Upper Valley JVS also provide training services to local manufacturers and service establishments. Clearly, the presence of this college in Piqua adds to the overall asset base in the community for business.

Industrial Real Estate

For the purposes of this analysis, a Site Analysis was completed of industrial properties in Piqua and surrounding areas. All industrial areas in the city were visited and information collected on available property. Key industrial areas included:

- Commerce Drive Area - 95% (estimated) Built out.
  - One of the city's primary industrial areas.
  - Large/formal industrial area, some new buildings, office/ind mix
  - Key Uses: Hartzell Propellers, Evenflo, Crayax, Piqua Steel
- Paul Sherry Industrial Park – 80% (estimated) Built out.
  - Formal industrial park, full utilities
  - Key Uses: Miami Valley Steel Service, Piqua Technologies, DHL
- Meteor Road/Commercial Street Area – 100% Built out.
  - Informal industrial area, older building stock, poor definition
  - Key Uses: Hartzell Fan, Aesthetic Finishers, KB Machine & Tool
- West High Street Area – 100% Built out.
  - Small, Informal industrial area, older building stock, transitional
  - Key Uses: Piqua Paper Box, French Oil Mill Machine, Hartzell
- Southeast Piqua – 95% Built out.
  - Older, informal industrial neighborhood, residential/ind mix
  - Key Uses: Riverside Doors, Piqua Electric, Rois Aluminum Foundry
- Wyndham Industrial Park – 15% (estimated) Built out.
  - New, undeveloped industrial area. Lacks available buildings
  - Good visibility from I-75, but indirect access.
  - Key Uses: American Wood Shop, Westcom
- Industry Park Drive Area - 90% (estimated) Built out.
  - Informal suburban industrial area, industrial services
  - Key Uses: ITW Food Equipment, Piqua Concrete, Berwick Steel
- Other
  - Individual/stand-alone facilities in Piqua neighborhoods.
  - E.g. Uses: Cap Industries, Cummins Filtration, Retterbush Fiberglass

Piqua has only a handful of planned industrial parks, with many of the city's industrial uses located in older mixed-use neighborhoods or along city streets. The Commerce Drive area has a significant share of the city's industrial activity, but land is mostly built-out and the area is located on the opposite side of the city from I-75. As there is no east-west bypass, truck traffic must flow along city streets.

As noted above, most of the city's industrial areas are either built out or between 80 and 95% filled. Wyndham Industrial Park is the exception, with 108 acres of industrially-serviced land available for development within sight of I-75. However, the park has no speculative building space to attract potential users. Competitive cities in the region, especially Sidney, are attracting users who are looking for existing building space. Developers such as Bensar have added several competitive new 300,000 square-foot divisible speculative buildings in Sidney within the last few years. Potential users from outside of the Miami-Shelby area that typically require 30,000 to 40,000 square feet of space or more have been attracted by units within this relatively inexpensive and available new space with easy access from I-75.

A very rough estimate of total industrial & service building space in Piqua has been calculated at approximately 4.5 to 5.5 million square feet. Of this number, about 970,000 square feet is vacant, yielding a vacancy rate in the range of about 18 to 21%.

However, the 416,000 square-foot LTV Copperweld building accounts for almost one-half of this available space. It has no doubt taken longer to find a single user with these space requirements than if the building had been split into smaller units. The building's overall competitiveness has not been assessed with respect to its internal facilities, but it does offer a substantial block of space. Another 175,000 square feet of vacant space is located in the Aerovent building, at the gateway to downtown Piqua. If these two buildings are removed from the inventory, then there is a total of about 379,000 square feet of available industrial space in dozens of buildings scattered throughout the city. Some of this space is relatively competitive for certain industrial uses, such as three buildings totaling 40,000 square feet available in the Paul Sherry Industrial Park. However, some of the spaces have low ceiling heights, tight locations in urban neighborhoods, poor accessibility from I-75, or other aspects that make them less marketable.

Piqua and Sidney share relatively low industrial real estate prices, when compared with neighboring Troy or Tipp City. Piqua's competitive industrial rents range in price from $3.25 per square foot Triple Net (for 40,000 square feet) to $4.70 per square foot Triple Net (for 5,000 square feet), according to Industrial Property Brokers.

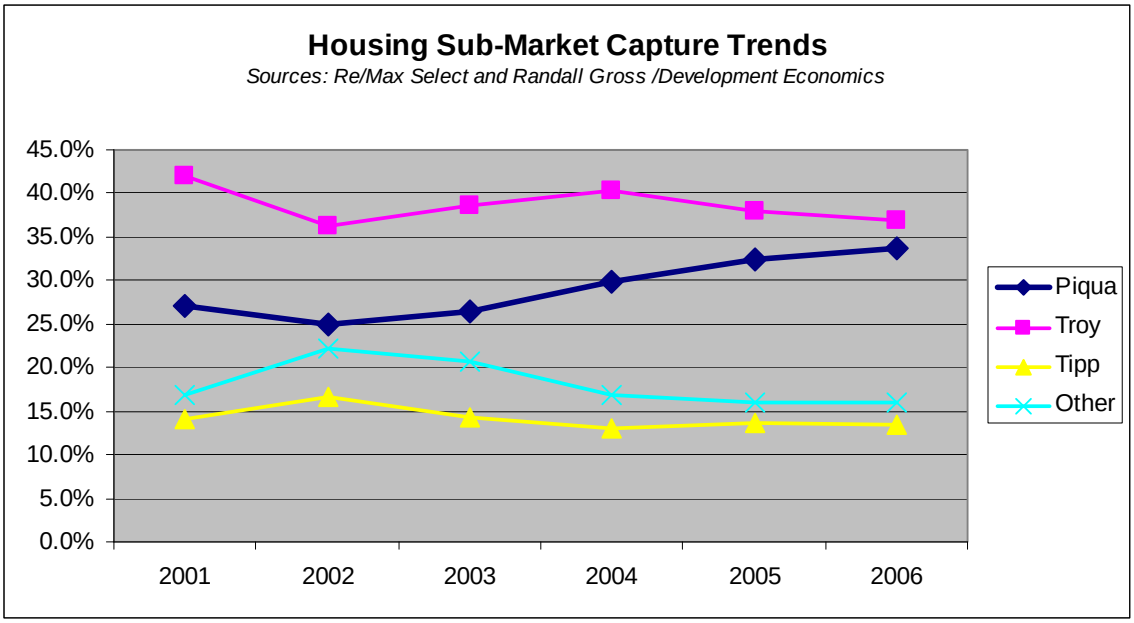
Utilities

Piqua benefited from a long-term energy contract since 1991 with Cinergi that guaranteed the city low electric rates for many years. Those low electric rates provided the city with a competitive advantage over its neighbors and over other regions. However, the energy supplier has been purchased by Duke Energy, and the original contract expired in 2006. According to City officials, Piqua's effective base rate is likely to increase now that the contract has expired. Power rates should settle to a level roughly equivalent to those in surrounding jurisdictions.

Housing & Amenities

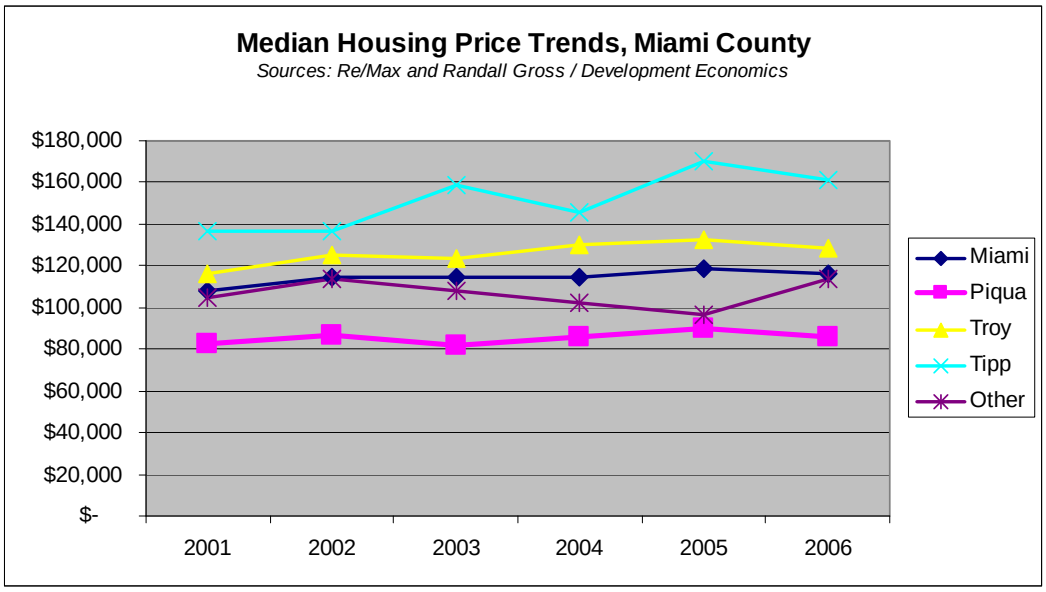
There is a perception that Piqua's housing market is weaker than other cities in the region and that the city has thus attracted more than its fair share of affordable and low-end housing stock. The reality is that Piqua's housing market has shown increasing strength against its neighbors (see chart), with increasing housing sales and an increasing capture of the overall housing market.

Chart #7



At the same time, it is also true that Piqua's prices have remained lower, on average than those in surrounding Miami-Shelby communities in the I-75 Corridor. Median home prices have stagnated in Piqua, especially in comparison to Tipp City, where the median price increased by 15% since 2001.

Chart #8



Piqua has a large stock of older, single-family frame homes, many of which have been converted to rental properties. Thus, the perception that lower-income housing is concentrating in Piqua may have some basis in reality. At the same time, however, there is new housing under development in the city. For attracting business, the city does lack some of the executive housing product that can appeal to managers and CEOs. This issue is explored further in the residential market assessment.

The city of Piqua has significant recreational amenities, with 260 acres of parkland, not including the popular bike paths. Mote Park offers a year-round community center with an auditorium and stage, 2 tennis courts, and other facilities. Pitsenberger Park offers 40 acres, with ball fields, 4 tennis courts, and a swimming pool. The City also operates Echo Hills Golf Course and other facilities. The YMCA has significant recreation programming and facilities. Piqua also offers cultural activities, such as the Piqua Players, the ballet program, and the planned new library. In general, however, the city lacks a state-of-the-art entertainment or cultural arts facility.

Crime & Safety

Some perceive there to be a lingering crime problem in Piqua, no doubt linked to the perceptions of low-income housing. In fact, Piqua has had a comparatively higher overall *reported* crime rate than neighboring communities. For example, in 2002 Piqua's overall UCR (FBI) crime rate was 47% higher than that of Troy and 104% higher than that of Tipp City. Piqua's overall crime rate had increased by 25.9% by 2005, according to UCR statistics. In 2005, Piqua's overall reported crime rate was significantly higher than the national average.

However, Piqua's crime is characterized by strong enforcement of property crimes, rather than a large number of reported violent crimes. Piqua's violent crime rate is only 45% of the national average and only 22% of Dayton's. There was only one murder in Piqua in 2004, and none for several years before that. What is most relevant to industrial development in Piqua is not the crime rate, but the *perception* of crime, which can potentially impact on the community's marketing efforts for attracting business.

Business Resources & Climate

Piqua offers tax abatements of up to 75% on personal property and on real property for a period of up to 10 years. The City also offers a community reinvestment tax incentive (100%) for up to 15 years. All of the city's industrial sites are apparently located within CRAs and/or Enterprise Zones. Overall, Piqua offers a competitive incentive package that places it in line with its neighboring jurisdictions. Many of the city's current businesses recognize and appreciate the City's efforts to assist them.

Piqua nevertheless must still counteract its past image as a no-growth community with relatively low school performance, poor housing standards, and lack of government assistance. This past image still impacts on the minds of real estate professionals and others in the region that are in a position to help attract business to Piqua.

Input-Output Analysis

An analysis was conducted based on data and information collected by area industries on the types and sources of inputs, as well as the products and markets, for goods produced in the Piqua area. The purpose of this analysis is to identify competitive features of Piqua both for the "import" and "export" of goods, as well as synergies that may exist for further industry cluster development.

Inputs

The analysis identified as key area inputs plastic packaging, chemicals, aluminum and other metals from suppliers in the local area, Ohio, and the Midwest. Other key inputs include paper and hardware from the south, and food & composite materials from the west.

Markets

The analysis also found that key markets include the region's transportation equipment manufacturers, to which many local companies supply products. Food companies and large contracts (including government) were also important markets on a regional basis. Comparatively few local companies supply goods primarily or largely to an international market.

Industrial Growth Assessment

An industrial growth assessment was conducted to review growth trends and prospects for key local clusters, and to identify other industries for which there are growth prospects that could benefit Piqua. A brief summary of findings is provided below.

Plastics & Chemicals

The plastics industry has shown certain resilience in the face of decline among Dayton-area manufacturers. In reality, the plastics industry performed better in the Dayton region than it did nationally during the last recession. This strength is characteristic of businesses that have found new markets for a variety of plastic products and materials. The medical equipment and supply industry, for example, has made a dramatic switch from metal to plastic components in recent years. Perhaps more salient to Dayton and the I-75 Corridor, transportation equipment manufacturers made a similar switch to plastic gradually over the past 20 years.

Given the preponderance of transportation manufacturing companies in the region, it is not surprising that the Dayton area has had large suppliers in machinery and metals for the transportation industry. Miami County, and Piqua in particular, has captured more than its fair share of plastic injection molding operations to feed automobile and other transportation equipment manufacturers. Plastics accounts for 14% of Miami County manufacturing, and was one of only four manufacturing industries in the county that increased employment between 1998 and 2004 (by 9%), bucking national trends. Plastics generated the second highest job growth among manufacturers in the county, trailing only electronics.

Piqua has a relatively high location quotient for plastics manufacturing and a base of companies that represents more than 20% of the regional base. Piqua's relatively low cost of energy and its ready water supply have no doubt benefited this industry. However, most of Piqua's plastics industry is concentrated in injection molding for transportation, with few operations engaged in the preparation of packaging materials, consumer products, medical supplies, or other uses for plastics.

The products that represent growth opportunities within the resin & plastics industry and for diversification of Piqua's plastics base include **plumbing fixtures, urethane, and plastic pipe.** Ironically, some of the region's and city's other growth opportunities are also interrelated with plastics production, including electronics, adhesives/coatings & inks, and furniture & furnishings. Thus, synergies can be explored in marketing and product development between these industries.

Wood Products

The regional wood products industry includes a broad range of businesses engaged in activities ranging from wood preservation to home manufacturing. Dayton Metro employment fell in most of these industries, many of which are represented by only one or a handful of businesses. The somewhat more stable industries include capital-intensive sawmills, wood preservation, hardwood veneer & plywood manufacturers, trusses, reconstituted wood, flooring / other millwork, manufactured homes, prefabricated wood buildings, and miscellaneous wood products manufacturers.

However, there was some marginal growth in several wood products industries in Ohio, including the following manufacturers:

1. Pallets and wood containers
2. Windows and doors
3. Cut stock

Nationally, employment in the wood products cluster fell by 8% between 1998 and 2002, a loss of over 46,000 jobs. However, there were gains in the following industries:

1. Wood Preservation
2. Truss manufacturing
3. Windows & Doors
4. Flooring & other Millwork
5. Prefabricated Wood Buildings

Much of the growth in these industries was associated with expansion in the building industry, helped in part by a boom in residential construction linked in part to historically low interest rates. Window and door manufacturing has expanded locally, regionally, and nationally.

Chemicals

The chemical industries declined moderately in the region, losing jobs and businesses at a rate of about 13.8% between 1998 and 2004. Among the chemical industries that saw employment growth in some parts of Ohio during this period were:

1. Polish & other sanitation goods
2. Basic organic chemicals
3. Industrial gas
4. Toilet preparations
5. Photo film, plate, paper, & chemicals
6. In-vitro diagnostic substances

Other regional chemical industries remained stable, including those engaged in the manufacture of basic inorganic chemicals, resin & plastics material, fertilizer for mixing, medicinals & botanicals, pharmaceutical preparations, biological product, paints & coating, adhesives, soaps & detergents, printing ink, resin compounds, and miscellaneous chemical products. At the same time, several chemicals manufacturers had declining employment during this period, including those making alkalies & chlorine and synthetic rubber products.

Nationally, the chemicals cluster declined by 8% between 1998 and 2002, with the loss of almost 73,300 jobs. However, there were several chemical industries that saw employment growth during this period, including:

1. Pharmaceutical preparations
2. In-vitro diagnostic substances
3. Biological products (except in-vitro)

Employment in the manufacture of in-vitro diagnostic substances expanded both regionally and nationally during this period.

Primary Metals

Another local cluster, primary metals manufacturing, saw a dramatic decrease in employment between 1998 and 2002. In the Dayton region, this industry lost 2,356 jobs or 21% of its employment base during the six-year period. The biggest losses were seen in steel and iron foundries, steel & iron pipe manufacturers, copper & aluminum rolling & drawing, and aluminum smelting. At the same time, other primary metals industries remained stable, including iron & steel mills, rolled steel shape manufacturing, steel wire drawing, aluminum extruded product, copper smelting & other non-ferrous rolling, non-ferrous die casting, and aluminum & copper foundries. Among these, the largest employers are rolled steel shape manufacturers.

Employment in the primary metals cluster declined by 19% nationally, with the loss of over 114,000 jobs between 1998 and 2002. While there was some nominal growth in aluminum smelting and other aluminum rolling industries, jobs were lost in almost all primary metals industries.

Furniture

The furniture industry saw the steepest decline in employment of any manufacturing industry in the Dayton region between 1998 and 2004, at more than 1,000 jobs or close to 60%. Dayton had historically been an important producer of metal office furniture, but has seen this business base eroded by a decrease in demand for certain office furniture products. Wood furniture,

however, has a more promising future particularly in the specialty craft and kitchen furnishings categories. Demand for wood furniture and furnishings has increased along with the recent expansion of homeownership as well as remodeling activity in the U.S. Piqua has a substantial share of Miami County's furniture manufacturing concerns, including children's furniture, kitchen cabinetry, and other furnishing products.

Textiles & Apparel

The textiles industry has been shedding employment in the US for decades, but the decrease accelerated with increased price pressures from China since 1998. Overall US textile employment fell by almost 42% from 1998 to 2004. Textile products employment also fell during this period, although at the comparatively slow rate of 21%. However, employment in the US apparel manufacturing industry has effectively collapsed since 1998, with the industry shedding almost 400,000 jobs or nearly 60% of its already decimated workforce. US manufacturers have survived and prospered but only by reducing labor input and by making major investments in new technologies, or by focusing on high-value products.

Piqua was once a center for apparel manufacturing. However, Ohio overall was never a major textile or apparel producer and the union environment in the 1950s and 1960s quickly reduced the state's competitiveness for this once labor-intensive industry. The state lost 2,779 apparel jobs since 1998, out of a total of only 4,821. Thus, Ohio has only a tiny fraction of its population engaged in this industry. Even so, as apparel manufacturers adjust to new realities and invest more heavily in capital inputs, they may find that states like Ohio offer better locations for accessing machinery and reaching certain markets. With nominal labor requirements, these firms are less likely to be impacted by union activity. Still, their numbers are small and Piqua's opportunities for attracting them relatively narrow.

Other Opportunity: Electronics and Electrical Equipment

The US lost almost 573,000 jobs (34%) in the computer & electronic equipment manufacturing industry between 1998 and 2004. Every single manufacturing industry within this cluster lost employment during the period, which coincided with a "bust" in the tech sector and the growth of Chinese competition. The smallest employment decrease was seen in the medical-related equipment and instrument industries, including electromedical apparatus, analytical laboratory instruments, and irradiation apparatus.

Ohio's electronic equipment sector is highly diversified, with a broad mix of manufactured products ranging from telephones to irradiation apparatus. Employment in this cluster fell between 1998 and 2002 by more than 10,600 jobs or 29%. Among the few growth industries in this cluster were:

1. Search, detection, and navigation equipment
2. Printed circuit assembly
3. Other communications equipment

Many other computer & electronics industries lost employment in the region during the period, including telephone apparatus, automatic environmental controls, industrial process controls, other measuring & controlling devices, radio/tv broadcast & wireless communication equipment, analytical laboratory instruments, and software reproducing. Stable industries included electronic computer manufacturing, other computer peripheral equipment, audio-visual equipment, electron tube manufacturing, printed circuit boards, other electronic equipment, electromedical apparatus, total fluid meter & counting devices, electricity measuring & testing, irradiation apparatus, and pre-recorded cd/tape/record reproducing.

Electronics are well-represented in Miami County, where the location quotient exceeds 2.2. However, Piqua is under-represented in this industry within the county and if the county has succeeded in attracting electronics manufacturers (mainly to supply the transportation manufacturing industry), the Piqua can certainly increase its share of that existing or expansion market.

Business Survey

A survey of industrial businesses in Piqua was conduced in order to collect information on key area strengths and weaknesses, as well as other factors that are impacting on these companies' location and operations in the Piqua market. The survey was conducted by e-mail and consolidated with information from additional companies collected through in-person interviews. Findings from this survey are summarized below.

Key Strengths

- **Labor Force.** Some of the area's industrial employers emphasized the labor force as a key strength for Piqua.
    - ***Work Ethic*.** Many area employers specifically mentioned the strong work ethic of the local labor force as a key selling point for Piqua. Whereas employers in other parts of the country have difficulty in finding hard-working employees for basic low- and moderate-skilled jobs, some of Piqua's employers seem to have more success in locating such workers. On the other hand, some employers complain about the lack of available workers.
    - ***Availability.*** A weak regional economy has actually helped existing employers find available, highly qualified and skilled workers.

Again, some companies are starting to complain about the lack of available workers. So, there are differences on opinion on this.

- ***Relevant Skills & Low-Cost Labor.*** Many area workers have the relevant skills for manufacturing jobs, particularly in the metals industry, tool & die, and related businesses. Some companies note that the cost of labor is relatively low.
- ***Lack of Competition.*** Again, because of the relatively weak economy, local employers find a lack of competition for the best workers. They therefore share a natural apprehension of Piqua attracting large, high-wage industry that would create competition for their labor supply.

- **Low-Cost Power.** Piqua has had an ample supply of relatively cheap power due to its long-term supply contracts which locked in electricity at relatively low rates. However, this situation is changing.
- **Low-Cost Real Estate.** Some companies note that real estate costs are relatively low in Piqua. However, competitive industrial buildings are hard to find.
- **Central Location.** Clearly, Piqua's location near the intersection of major cross-country interstate highways (I-75 and I-70) helps propel its appeal to those companies that require inputs or service markets that are regional and national in scope. Up to 70% of the U.S. population is located within a day's drive of Piqua.
- **Metals Industry.** Ohio is a hub for the metals industry and, even with its declining employment, the state (and the Cleveland area in particular) still has a significant share of the major supply base. Proximity to this supply base as well as a labor force trained in this industry, is very important to others in metals or related industries.
- **Local Government.** Many local firms offered that the local government has been increasingly sympathetic to their needs in recent years and they are grateful for the assistance that Piqua has provided. This assistance includes tax incentives, but also other work on behalf of companies.

Weaknesses

- **Lack of Qualified Engineers.** Some area businesses noted the difficulty in recruiting qualified engineers and other white-collar professionals to the region. Similarly, there was a sense that local kids with college degrees do not return home after graduation. There was also a sense that the area has a shortage of qualified machinists, given the demand for that skill in many of the area's manufacturing concerns.
- **Lack of Amenities.** Some made the connection between a lack of amenities (e.g., restaurants, nightlife, cultural & entertainment amenities, shopping) to the challenges in recruiting professional staff.
- **"Parochial" Attitudes.** There was a feeling that some in Piqua are living in the past and not thinking pro-actively about the city's potential.

Alternatively, some feel that there is too much emphasis on the city's position vis-à-vis Troy, Tipp City, etc.

- **Negative Perceptions of School System & Underclass.** Some businesses noted that negative perceptions of the local schools (regardless of the improving realities) had impacted on their ability to attract professional workers to live in Piqua or northern Miami County. A few business people commented negatively on the city's "welfare class.**"**

Key Target Opportunities

Based on an analysis of the regional economic base, industrial cluster patterns, key location factors, input-output, industrial growth, and business requirements, key industries have been identified as targets for marketing in Piqua. These industries are summarized below.

Manufacturing

This analysis has focused on manufacturing industries due largely to the nature of the Miami Valley economy. Key industries identified for which Piqua may have a competitive advantage and where there are regional and national growth opportunities include:

- **Plastic Packaging Materials**
- **Plastic Pipe & Plumbing Fixtures**
- **Specialty Plastic Components** (e.g., medical, transportation equipment)
- **Dyes, Inks** (specialty chemicals)
- **Metal Stampings, Fittings & Hardware**
- **Computer Hardware**
- **Wood Cabinets, Doors, & Furnishings**

Non-Manufacturing

While the analysis focused on manufacturing industries, it is imperative that Piqua consider every opportunity to diversify its economy away from an over-reliance on manufacturing. In a sense, every effort to attract or expand manufacturing businesses should also be met with an effort to grow other economic sectors within Piqua's economy. Diversity helps a local economy to overcome shocks from downturns in any one sector.

The following industries were identified again based on overall regional and national growth prospects and on opportunities for further development of the Piqua base within these sectors.

- **Tourism & Travel Services**. Tourism is among the world's largest and fastest growing industry clusters. Piqua has significant resources, such as historic buildings and downtown, on which to build additional tourism

interest. More importantly, Piqua is located in a major travel corridor frequented by "snow birds" en route from Canada, Michigan and other cold climates to Florida and back. There is also the opportunity, given Piqua's hard-working labor force to attract "pink collar" jobs in travel-related services. The tourism market potential in Piqua should be explored further.

- **Back Office**. Piqua is well-located to benefit companies that require large facilities and labor force for back office uses. Such uses can include credit card or check processing, other financial services, client support, billing/invoicing, etc. While much of the customer service component of back-office use has been "off-shored" to India and other locations in south Asia, there are still functions which require centrally-located processing and distribution services to serve a regional or national market.

- **Emerging Fuel Technologies.** The President and others have called for increased funding for emerging fuel technologies that hold out the promise of energy independence. Ethanol and other bio-fuels generated from corn, soy, and bio-waste have received a boost not only from federal tax incentives and growing awareness of global warming but also from the high price of oil, which has made bio-fuels more competitive in the market despite their significant capital development requirements. Unfortunately, a drop in oil prices will also reduce the opportunities for such fuels to compete. Nevertheless, Piqua's location in the heart of the Midwest farm belt and near a major interstate crossroads does provide it with certain advantages as a location for bio-fuel development. The risk of such development must account for the growing number of competitors that have joined the bio-fuel "rush" and invested in large capital facilities throughout the Midwest. Thus, every effort should be made to assess the long-term economic viability of bio-fuel facilities in the area.

IV. RECOMMENDATIONS

This section provides preliminary recommendations with respect to the marketing of Piqua for target industries. Specific recommendations relate to targeted industries, industrial real estate, intra-regional marketing, public relations, amenity development, small business assistance, and joint regional marketing efforts.

Target Industrial Marketing

The City of Piqua is refining its long-term marketing strategy, informed in part by the results of this analysis. However, the City should remain mindful that only a small share of business development and job growth is actually attributable to relocations of large companies. Most growth will remain internal to existing businesses or encouraged through entrepreneurship and small business development at the local and regional level.

Nevertheless, Piqua's efforts at external industrial marketing should focus on accommodating the industries identified in this analysis. The "marketing" approach detailed here focuses on building Piqua's internal strengths as a way of establishing a ***reputation*** that attracts these (and other) industries and encourages their development.

Industrial Real Estate

Many of the targeted industries are "light on their feet" and are thus attracted by available, low-cost building space, low-cost energy, and good transportation access. A somewhat more detailed real estate strategy is therefore recommended later in this section.

Existing Industry Services

Attracting businesses within these industries first begins with an intensive effort to assist the businesses that already exist locally, where possible, by understanding their specific needs and how to help their companies grow. Working closely with these existing businesses will also help identify any potential synergies between them and businesses that might be attracted from within their industry. Working closely with the Edison Community College and JVS to further focus programs where there is need in the local business base is essential. Sharing the target industry information with these institutions and encouraging further program development within these industries is also helpful.

Promoting the "Work Ethic"

Area businesses have identified a real strength in Piqua's and the area's labor force work ethic. Given the labor challenges facing industrial businesses nationally, especially in times of economic expansion and immigration controls, Piqua should focus its outward promotional effort and limited advertising efforts on promoting the community's work ethic as well as its vocational education & training resources. This can be accomplished best through extensive testimonials from existing businesses. The definition of "work ethic" needs to be explored further with local companies so that the actual benefits are easily communicated. Keep in mind, however, that local businesses will not want to advertise this strength where too much competition is created for the available local labor force.

"Centers of Excellence" and "Industry Hubs"

Another recommended approach is for the City to participate in concert with local industries in establishing Centers or Hubs for certain industry clusters. For example, a **Transportation Equipment Components Hub** might be established that includes existing local businesses in the *plastic molding, metal stamping, and electronics industries*. This "hub" might only consist of a roundtable discussion at first to explore synergies, challenges, and opportunities between the companies within this component cluster. Over time, the "hub" might be encouraged to develop its own structure, with an elected Board (like a Chamber) to oversee programs that might include:

- Liaison with Edison Community College / JVC
- Regional networking functions (Miami Valley / Dayton)
- Joint contract marketing & development
- Lobbying of State / Federal agencies
- Entrepreneurship development / incubator for small business suppliers
- Recruitment effort pooling
- Other resource pooling (e.g., to write down health care costs)
- Joint Marketing programs
- Attracting local, state, or federal incentives for the cluster
- New product development & intra-hub synergies
- "Center of Excellence," joint R&D effort for attracting federal or institutional research funding to the area.

Piqua's economic development division would then have the ability to market the city's hub and its overall efforts to enhance the business environment for businesses within this transportation equipment components cluster and its specific industries (metal stamping, plastic molding, and electronics, for example). More importantly, the hub offers an opportunity for diversification of industries within the cluster, by attracting new types of manufacturers or service providers to the area. Other possible hubs or centers might include a hub for the

Furnishings Materials Industries (e.g., plastic & wood cabinet, door, & furniture manufacturers) or might be oriented specifically to one industry, i.e., **plastics** for example.

By facilitating the creation of such centers or hubs, the City is in effect creating a marketing tool for attracting more businesses that would benefit from this effort. The hub concept can be marketed first within the Miami Valley, at the least as a networking tool, to raise the visibility of Piqua on the regional level for those industries. Later, Piqua can use the hub as a tool for marketing and recruiting businesses from outside of the region. In effect, the hub concept strengthens the synergies of a cluster, which builds on itself by attracting further businesses within that cluster.

Industrial Real Estate

One of Piqua's clear inadequacies identified through this target industry analysis is the availability of competitive, new industrial building stock. Sidney has been successful in attracting new industry in large measure due to its active local development community and their creation of large and competitive new industrial buildings available at affordable rates. While Piqua has several very large available industrial buildings, they are substantially larger than the average building requirement for most relocating light manufacturing firms. Some of the smaller available buildings are competitively constructed but are located away from the major transportation corridor in the area, I-75. Where industrial land is available and proximate to I-75, there is comparatively little building product to attract potential users. Thus, several recommendations are made to close this gap in the local industrial offering:

1. Create a marketing tour of Piqua's industrial sites and buildings, for regional industrial and commercial brokers from throughout Dayton and the Miami Valley. The purpose is the raise the visibility of Piqua, and perhaps change perceptions, among those in the regional real estate community.
2. Determine the viability of speculative industrial space, including appropriate building types, sizes, features, and locations; perhaps in coordination with regional brokers.
3. Identify City-owned land or sites where master-planned industrial development should be encouraged, as part of the comprehensive planning process. If no City-owned properties exist, then determine a strategy for assemblage in concert with private land owners. The land should be located with east access and good visibility from I-75. The industrial park would have the full marketing strategy in place to encourage long-term development in a high-value location for attracting light industry.
4. Generate a request for proposals to attract industrial developers (e.g., those from Shelby County or others in the surrounding area), using City-

owned land and incentives to leverage private development interest. Alternatively, provide incentive funding for a public-private partnership in development of initial speculative industrial building.

Intra-Regional Marketing & Public Relations

Piqua and its school system have made significant progress in recent years with respect to amenities, school performance, and other factors. However, there is a need to change lingering negative perceptions that permeate the regional conscience among real estate professionals, area residents, returning students, businesses, and others inside and outside of Piqua. Importantly, most business decisions that would impact on Piqua's economic development are made within the Dayton region, as businesses expand and select sites for larger facilities or to serve a broader market. Some of Piqua's existing businesses relocated to the city from other communities within the Miami Valley.

Thus, economic development efforts should be focused first on accommodating existing businesses and entrepreneurs within the region that are looking to expand or grow their business. This is not to suggest that Piqua should deliberately "cherry pick" individual businesses from its neighboring communities. Rather, efforts should be oriented to changing the overall perceptions of Piqua as a place to live, work, and grow a business within the Miami Valley.

A systematic public relations campaign is recommended that focuses on changing perceptions first "at home" in Piqua, secondly in Miami County, and finally in the Dayton Metropolitan Area and Miami Valley Region. This campaign would target three groups: entrepreneurs & small/growing businesses, white-collar professionals with families, and returning students (or graduating seniors).

Amenity Development

The city needs to focus on efforts to reduce the "brain drain" and attract young professionals, especially industrial engineers and others that are needed by local businesses, back to the city. Targeting students, entrepreneurs, and white-collar professionals will require a complete package that must include added and enhanced amenities. The planning process has identified certain amenities that could appeal to these groups and encourage more college graduates to return home to Piqua. Downtown and its nightlife, retail, cultural venues, entertainment facilities, and restaurants, should play a key role in this effort. As such, it is recommended that the market potentials for downtown and specifically for such activities be explored further to determine where there are viable opportunities.

There is also the need to work with developers and builders in diversifying the housing mix. This concept is explored further in the housing market assessment. Issues relating to Piqua's large stock of older, single-family housing

are being addressed partly through code enforcement, but there is also a need for a longer-term marketing strategy for that housing, again explored in the market analysis report.

Where the city already has valuable amenities, such as in its recreation facilities, trails and parks, such amenities should be expanded and enhanced. New recreation facilities should be developed that appeal to the target market. The decline in membership for the local golf course relates in part to declining interest in the sport. So, the City should ensure that it is responding to changing needs in recreation facilities. The planning effort is already focusing on ways to enhance the city's riverfront, for example.

Small Business Incentives

Piqua does have fiscal incentives for industrial businesses, but relatively few financial incentives or services oriented to encouraging entrepreneurship and the growth of small businesses. Most jobs are created by small business, and Piqua has the opportunity to establish a niche among its neighbors with an emphasis on small business development. Piqua already benefits from the presence of regional vocational education programs, and there is a need to expand the components of these programs that are oriented to entrepreneurship. Over time, many of the small businesses that originate or move to Piqua will expand and prosper.

Among the types of incentives and approaches that are often most helpful to small businesses are the following. Each of these concepts would need to be explored further to assess their overall viability and whether they are necessary and appropriate to meet local needs.

- Working Capital Loans. Many small businesses suffer from growing pains, where they have insufficient stock to meet the needs of the market. Working capital loans through a loan pool created by local government in concert with local banks, would be one approach to meeting this need.
- Venture Capital. There are very few venture capital funds in the Dayton region oriented to small businesses. Yet, Dayton was once known as one of the entrepreneurial capitals of the country. Establishing a Miami Valley VC Fund, based in Piqua, may succeed in attracting entrepreneurs
- Small Business Training Assistance. Regional education resources, as well as SBA and other agencies, provide small business training. There may be opportunities to supplement these resources with an occasional contract for specialized training as necessary. More formal business incubators also serve a role in helping to grow emerging businesses.
- Shared Administrative Functions. In addition to the incubator model, there are opportunities to redevelop existing space for small business units with shared administrative and meeting space.

- Insurance Co-operatives. In an effort to reduce costs, small businesses often form co-operatives for insurance, health care, etc. Encouraging the development of such co-operatives, by providing access to information, legal advice, or seed funding can be a role for local government.
- Small Building Rehabilitation Loans. Many local governments provide rehabilitation and other capital loans for small businesses that are locating into enterprise zone or CRA areas.

Regional Marketing Structure

Many of the issues impacting on Piqua's economic growth and diversification are common to Miami County and the Dayton region. Dayton overall has a need to re-establish its national image and marketing approach. It is recommended that Piqua continue to take a leadership role within Miami County to bring local economic development agencies and officials together to discuss opportunities for Miami Valley regional marketing. If resources can be shared and specialized niches developed, then the region and the individual communities all stand to benefit. A good example of this type of effort is the Greater Richmond Partnership, Inc., which promotes Richmond to the national and international markets and distributes leads to individual community agencies within the region. Richmond was an old industrial city with ties to dying industries such as cigarette manufacturing. Through regional marketing, the city was able to change its image and become a growth center for medical technology and other emerging industries.

Summary

These are but a few initial recommendations for expanding and diversifying Piqua's economic base. The planning process will no doubt help refine some of these concepts. Local policy may preclude others. Nevertheless, this report provides a starting point for long-range economic development planning.

V. APPENDIX

Dayton Area Manufacturing (See Table 2)

Table 2 Notes:

1/ Pet food, corn mill, frozen sptly food, meat
2/ Fabric & textile mills, apparel cut & sew, lthr
3/ Millwork, window/door, pallet, contnr, box
4/ Litho, flexo, screen, digital printing, forms
5/ Chem, adhesives, paint, plastics, foam, rubr
6/ Cement, ready-mix
7/ Foundries (ferrous, non-ferrous), die-cast
8/ Fabricated metals, forging/stamp, coating, hand tools, plate, machine shops, spring
9/ Ind Machinery, comm/svc machinery, HVAC, metalworking-tool & die, eng, weld
10/ Computer periph, tube, meas/contrl, motor
11/ MV-truck/suv, steer/sus, brake, parts, Aerospace equipment, rail rolling stock
12/ Metal household furniture, wood kitch cb
13 / Surgical appliances, dental lab, signs

Table A-1. **AT-PLACE BUSINESS TRENDS, METRO DAYTON-S'FIELD, 1998-2004**

Industry	1998	2004	1998-2004 Change Number	Percent
Agriculture	23	21	(2)	-8.7%
Mining	23	22	(1)	-4.3%
Utilities	21	25	4	19.0%
Construction	1,908	1,636	(272)	-14.3%
Manufacturing	1,581	1,280	(301)	-19.0%
Wholesale Trade	1,221	953	(268)	-21.9%
Retail Trade	3,468	2,838	(630)	-18.2%
Transport	444	445	1	0.2%
Information	274	325	51	18.6%
Finance/Insurance	1,290	1,244	(46)	-3.6%
Real Estate	792	749	(43)	-5.4%
Prof/Tech Svcs	1,973	1,988	15	0.8%
Management	155	141	(14)	-9.0%
Admin Svcs	1,085	898	(187)	-17.2%
Education	201	213	12	6.0%
Health Care	2,125	1,963	(162)	-7.6%
Arts/Entertain	292	274	(18)	-6.2%
Accomodation	1,780	1,622	(158)	-8.9%
Other/ Services	2,665	2,170	(495)	-18.6%
Auxiliaries	52	N/A	N/A	N/A
TOTAL	**21,373**	**18,807**	**(2,566)**	**-12.0%**

Sources: U.S. Bureau of the Census and
Randall Gross / Development Economics.

Table A-2. **AT-PLACE MANUFACTURING BUSINESS TRENDS, METRO DAYTON, 1998-2004**

Industry	1998	2004	1998-2004 Change Number	Percent
Food 1/	61	51	(10)	-16.4%
Textiles/Apparel 2/	40	36	(4)	-10.0%
Wood & Paper 3/	67	52	(15)	-22.4%
Printing 4/	164	121	(43)	-26.2%
Plast/Chem/Rbr 5/	136	44	(92)	-67.6%
Mineral Prods 6/	51	37	(14)	-27.5%
Steel, Metals 7/	33	31	(2)	-6.1%
Fabricated Metal 8/	420	369	(51)	-12.1%
Machinery/Equip 9/	294	217	(77)	-26.2%
Electronic/ical 10/	84	75	(9)	-10.7%
Transport Equip 11/	72	51	(21)	-29.2%
Furniture 12/	45	40	(5)	-11.1%
Misc Mfg 13/	114	86	(28)	-24.6%
TOTAL	**1,581**	**1,210**	**(371)**	**-23.5%**

Sources: U.S. Bureau of the Census and
Randall Gross / Development Economics.

Table A-3. **AT-PLACE BUSINESS TRENDS, MIAMI COUNTY, 1998-2004**

Industry	1998	2004	1998-2004 Change Number	Percent
Agriculture	4	5	1	25.0%
Mining	5	4	(1)	-20.0%
Utilities	2	3	1	50.0%
Construction	265	256	(9)	-3.4%
Manufacturing	272	257	(15)	-5.5%
Wholesale Trade	106	96	(10)	-9.4%
Retail Trade	358	342	(16)	-4.5%
Transport	60	72	12	20.0%
Information	15	24	9	60.0%
Finance/Insurance	121	143	22	18.2%
Real Estate	77	74	(3)	-3.9%
Prof/Tech Svcs	147	151	4	2.7%
Management	8	8	-	0.0%
Admin Svcs	109	97	(12)	-11.0%
Education	16	15	(1)	-6.3%
Health Care	191	201	10	5.2%
Arts/Entertain	33	39	6	18.2%
Accomodation	167	187	20	12.0%
Other/ Services	286	280	(6)	-2.1%
Auxiliaries	2	N/A	N/A	N/A
TOTAL	**2,244**	**2,254**	**10**	**0.4%**

Sources: U.S. Bureau of the Census and
Randall Gross / Development Economics.

Table A-4. AT-PLACE MANUFACTURING BUSINESS TRENDS, MIAMI COUNTY, 1998-2004

Industry	1998	2004	1998-2004 Change Number	Percent
Food 1/	11	9	(2)	-18.2%
Textiles/Apparel 2/	5	7	2	40.0%
Wood & Paper 3/	13	13	-	0.0%
Printing 4/	17	18	1	5.9%
Plast/Chem/Rbr 5/	30	32	2	6.7%
Mineral Prods 6/	9	8	(1)	-11.1%
Steel, Metals 7/	10	11	1	10.0%
Fabricated Metal 8/	72	76	4	5.6%
Machinery/Equip 9/	60	41	(19)	-31.7%
Electronic/ical 10/	11	12	1	9.1%
Transport Equip 11/	9	10	1	11.1%
Furniture 12/	11	9	(2)	-18.2%
Misc Mfg 13/	14	11	(3)	-21.4%
TOTAL	**272**	**257**	**(15)**	**-5.5%**

Sources: U.S. Bureau of the Census and Randall Gross / Development Economics.

Piqua Manufacturing (See Table 6)

Table 6 Notes:

1/ Confectionary, bakeries.
2/ Broadwoven fabric/misc mills, cut & sew.
3/ Misc wood, boxes, converted paperboard.
4/ Litho, screen, form, other printing.
5/ Dye, misc chem, plastic sheet/frms, rubr.
6/ Concrete, mineral wood
7/ Pipe/Tube, rolled steel, foundry, die cast
8/ Fabricated metals, hardware, springs, machine shops, coating, plating, pattern
9/ Farm & plastics machinery, fans, molds, tool & die, metalworking, pump, welding
10/ Coil/transformer, component
11/ MV metal stamping, aircraft pts, other
12/ Kitchen cabinets, metal furniture
13 / Silverware, sporting goods, gasket, etc

Table A-5. **EMPLOYMENT LOCATION QUOTIENTS: MIAMI COUNTY VS METRO DAYTON, 2004**

Industry	Miami-Number	Miami Employment
Food	0.83	*1.51*
Textiles/Apparel	0.92	**2.84**
Wood & Paper	*1.18*	*1.03*
Printing	0.70	0.42
Plast/Chem/Rbr	**3.42**	*1.13*
Mineral Prods	*1.02*	*1.22*
Steel, Metals	*1.67*	*1.80*
Fabricated Metal	0.97	0.56
Machinery/Equip	0.89	*1.11*
Electronic/ical	0.75	**2.21**
Transport Equip	0.92	0.56
Furniture	*1.06*	**2.84**
Misc Mfg	0.60	0.43

Source: Randall Gross / Development Economics.

Plan It PIQUA

Preserve the Past — Empower the Future

Attachment C

Housing Market Assessment

COMPREHENSIVE PLAN UPDATE

Plan It PIQUA

Preserve the Past — Empower the Future

Attachment C: Housing Market Assessment

Information in this appendices is the full Housing Market Assessment Report produced by Development Economics. A summary of the findings from this report are listed in Chapter 7.

Piqua

Housing Market Assessment

Input to the Piqua Comprehensive Plan

Prepared by Randall Gross / Development Economics
On behalf of ACP and the City of Piqua
March 2, 2007

I. INTRODUCTION

A Housing Market Assessment was completed as an input to the comprehensive planning process for Piqua. Critical issues have been identified that relate to the quality of Piqua's housing stock and the ability of Piqua to capture its "fair share" of executive housing. The ability of Piqua to offer higher-end housing is important if the city is to attract industry and to attract and retain young professionals including its own graduates. Piqua's image has sometimes been impacted by the perception that the city has a high percentage of affordable and low-income housing. In reality, Piqua does have a higher poverty rate than in surrounding cities. Some have wondered whether the *availability* of low-income housing resources in Piqua has helped *attract* low-income residents from other parts of the region, thus creating a cycle that further concentrates low-income housing in Piqua.

Some of these questions cannot be answered within the scope of this market assessment. However, this study can provide information on housing demand and opportunities to strengthen and diversify Piqua's housing stock. Recommendations are also provided to help address some of the issues that are impacting on perceptions of housing in the city.

II. EXISTING CONDITIONS

Field reconnaissance, interviews, and data analysis were conducted to obtain information on existing conditions relating to Piqua's housing stock. Several key indicators are discussed below.

Housing Stock & Tenure

As of 2000, Piqua had 8,238 housing units or 20.3% of the housing stock in Miami County. Homeownership was at 63.5%, slightly higher than in both Sidney and Troy, but lower than Tipp City. The fact that Piqua has a relatively high homeownership rate for this area is a positive signal. However, the Miami-Shelby area's homeownership rate lags behind that of the United States in general (67.2% in 2000) and more specifically, that of the Midwest region (72.2%, the highest of all regions).

Rental in Single-Family Units

Piqua has several apartment complexes, primarily located in its western suburbs. However, a substantial share of Piqua's rental housing (**35%**) is located in older, single-family detached homes in blue-collar neighborhoods. The share of rental housing in these homes is particularly striking when compared with nearby jurisdictions. For example, about 25% of rental occupancy is in single family homes in Sidney and Troy, and only 18% in Tipp City. According to Piqua

City staff, the large number of rental units in aging single-family housing has led to code-enforcement issues and may have contributed to a concentration of poverty. These issues are not at all unusual where rentals occur in aging, single-family housing. A primary concern is often the management and maintenance of those properties, which do not benefit from centralized management as is found in multi-family properties. Management of single-family rentals is inefficient, from an economic perspective, and often less profitable for the landlord than multi-family apartments.

Vacancy

The housing vacancy rate in Piqua exceeded that of neighboring communities in 2000, at 7.2% (versus 6.9% in Sidney, 6.3% in Troy, and 4.0% in Tipp City). About one-half of the vacant housing is available for rent, a somewhat higher share than in Sidney and Troy, but lower than Tipp City. If non-marketed housing is included, then nearly 70% of vacant units were rentals versus for-sale housing. That share is about 10% higher than in Piqua's neighboring communities and suggests that there are a number of vacant rental housing units that are not being actively marketed in Piqua. Overall, Piqua's vacancy rate was 12.8% for rental housing, versus 3.7% for for-sale housing.

Table 1. HOUSING UNITS BY OCCUPANCY & TENURE, PIQUA MARKET AREAS, 2000

Tenure	Piqua	Troy	Sidney	Total	Share
Occupied	8,238	8,940	7,973	25,151	**93.2%**
Owner	5,232	5,378	5,003	15,613	**57.9%**
Renter	3,006	3,562	2,970	9,538	**35.4%**
Vacant	637	598	586	1,821	**6.8%**
For Sale	194	234	285	713	**2.6%**
For Rent	443	364	301	1,108	**4.1%**
Total	**8,875**	**9,538**	**8,559**	**26,972**	**100.0%**

Sources: U.S. Bureau of the Census, and Randall Gross / Development Economics.

Age of Stock

Among the factors that may account for Piqua's higher vacancy rate is the age of its housing stock. Nearly **40%** of Piqua's housing was built prior to 1939, with the median age of 50 years. This compares with only 26% of Sidney's housing built before 1939 and a median age of 38 years. The median age for Tipp City housing was 27 years in 2000. But the fact that a substantial share of the city's rental housing is in single-family homes may also account for the higher vacancy rate, since these homes are more difficult to market and manage. Thus, some homes remain vacant and un-marketed. Age and other existing housing factors are highlighted below.

Table 2. **EXISTING HOUSING FACTORS, MIAMI VALLEY CITIES, 2000**

Factor	Piqua	Sidney	Troy	Tipp City
Vacancy Rate	7.2%	6.9%	6.3%	4.0%
Vacant for Rent	49.0%	32.4%	39.1%	70.8%
Homeownership	63.5%	62.8%	60.2%	66.3%
Built Pre-1939	**38.1%**	26.4%	21.3%	20.6%
Rentals	**35.0%**	27.0%	21.0%	15.0%
Median	**1951**	1962	1963	1973
Median Rent	$ 415.00	$ 378.00	$ 435.00	$ 436.00
Return-on-Value	**92%**	80%	82%	63%
Median Value	$ 84,000	$ 87,600	$ 98,700	$ 129,400
Mortgage	69.1%	70.2%	71.2%	71.6%
Rental in SF	**34.7%**	25.3%	25.6%	18.2%
Poverty Rate	***12.2%***	*11.5%*	*8.2%*	*5.2%*

Sources: U.S. Bureau of the Census and Randall Gross / Development Economics.

Rents & Housing Values

Housing values in Piqua were lower than in nearby communities in 2000. The median home value in Piqua was $84,000, or about 96% of Sidney's, 85% of Troy's, and just 65% of Tipp City's median housing value. Again, the age of the housing stock accounts for some of this cost differential. Tipp City's relative proximity to Dayton and the I-75/I-70 crossroads, plus the excellent reputation of its schools, has helped inflate its land and housing prices. Interestingly, slightly fewer Piqua homes retain a mortgage (69%) than in nearby communities. Piqua has older homes and a slightly higher share of people who have lived in them long enough to pay off their mortgage. This is a positive sign, from the standpoint that people have slightly less debt to service on their homes in Piqua. It does not necessarily mean, however, that there is more disposable income.

While Piqua's for-sale prices are lower, its rents are generally within the same range as neighboring communities. At $415 per month (in 2000), Piqua's median rent was higher than that of Sidney, but lower than Troy's. When comparing the return-on-value from rentals, Piqua comes out ahead of its neighbors at 92% (versus only 63% in Tipp City). This means that investors would make more on the dollar by renting properties in Piqua than they would in selling them, compared with the other three cities in the area. Thus, there is more of an incentive to be a landlord in Piqua than in Sidney, Troy, or Tipp City, especially if the for-sale market is weak. In 2007, rents in Piqua generally range from $450 to $650 for apartments in complexes, although rents in houses can be much lower.

Poverty Rate

Clearly, Piqua's lower incomes and higher poverty rate have an impact on the housing market. The poverty rate in Piqua (12.2%) was significantly higher than in other Miami County locations, and even higher than in Sidney, in 1999. The notion that the higher poverty rate has attracted more assistance which, in turn has attracted more people seeking assistance, may have some basis in reality. However, the critical issue is whether poverty is concentrated in the city and whether this has affected housing conditions.

Construction

Miami County saw an average of about 325 housing units permitted since 2000. The number of residential building permits increased since 2000 but has begun to level off. Almost all of these permits were for single-family dwelling units. Piqua permitted 94 units during 2004-05, for an average of 47 per year. This represents about 14.6% of the average number of units permitted in the county but only 72% of Piqua's share of the county's overall housing stock. Thus, the city did not capture its "fair share" of the county's residential construction for several years.

Summary

Piqua has relatively old housing stock, and a significant share of its single-family housing has been converted to rentals. The combination of these to factors has impacted on the overall quality, value, and image of the city's housing stock. The city lags behind its neighbors in new housing construction, with fewer opportunities for diversification.

III. DEMOGRAPHIC ANALYSIS

A demographic analysis was conducted as the basis for forecasting demand for housing in Piqua. Population, households, and household income were examined in Piqua, Troy, Tipp City, other Miami County, and Sidney.

Trends

Key demographic trends are summarized below.

Table 3. DEMOGRAPHIC TRENDS, PIQUA AREA & OTHER MIAMI COUNTY, 2000 - 2006

Sub-Area/ Factor	2000	2006	2000-2006 Change Number	Percent	Per Year 00-06
Piqua					
Population	20,738	20,584	(154)	-0.7%	-0.2%
Households	8,263	8,413	150	1.8%	0.5%
HH Income	$ 55,789	$51,164	$ (4,625)	-8.3%	-2.1%
Troy					
Population	21,999	21,976	(23)	-0.1%	0.0%
Households	8,920	9,122	202	2.3%	0.6%
HH Income	$ 57,883	$52,770	$ (5,113)	-8.8%	-2.2%
Tipp City					
Population	9,221	9,360	139	1.5%	0.4%
Households	3,632	3,769	137	3.8%	0.9%
HH Income	$ 72,756	$69,107	$ (3,649)	-5.0%	-1.3%
Other Miami County					
Population	46,910	49,687	2,777	5.9%	1.5%
Households	17,622	19,063	1,441	8.2%	2.0%
HH Income	$ 66,263	$62,082	$ (4,181)	-6.3%	-1.6%
Sidney					
Population	20,211	19,928	(283)	-1.4%	-0.4%
Households	7,981	8,062	81	1.0%	0.3%
HH Income	$ 57,979	$54,053	$ (3,926)	-6.8%	-1.7%

Note: Income expressed in constant dollars.

Sources: U.S. Bureau of the Census; Claritas, Inc.; and Randall Gross / Development Economics.

Population in Piqua, as well as in Troy and Sidney, fell between 2000 and 2006, based on Census estimates and data collected from Claritas, Inc. Within Piqua, the population was about 20,580 in 2006, down by approximately 150 or 0.7% from the 2000 Census. Sidney's population fell at an even greater rate of 1.4%. However, population in Tipp City and other parts of Miami County overall increased, suggesting that most of the county's growth occurred in the southern portions of Miami County closer to Dayton and outside of the two main cities.

Despite the decrease in population, the number of households increased in all four cities and in Miami County. Piqua added 150 households or almost 2.0% to its existing household base. Troy's household base increased by 2.3%, while Miami County's expanded by 5.0% during the six-year period. Household growth occurred as a faster rate than population due to a continuing decrease in average household size. As such, even though population fell in three of the cities, the number of households increased, driving demand for additional housing.

Average household income fell in real dollar terms between 1999 and 2006. This decrease occurred in part due to conditions relating to the national recession of 2001-02. However, declining employment in the manufacturing sector has no doubt impacted on local wages and income, since the Dayton region is heavily dependent on manufacturing industries. Piqua's income fell by an estimated 8.3% since 1999, to an average $51,200. However, Troy's incomes fell at a slightly faster rate while Sidney's fell at a slower pace. Tipp City's incomes fell by 5.0% during this period.

Mobility

The mobility of the population affects the demand for housing and the rate at which housing changes ownership or tenancy. Approximately 26.3% of households moved to a different house or apartment within Miami County during the period from 1995 to 2000. This suggests that about 5% of the residents moved "up" or "down" to other housing but stayed within the county during that period. This number would include young people who graduated high school and moved out on to their own, or were married or divorced and moved into their own homes for example. Another 17.3% of the county's residents migrated into Miami County from someplace else (including 5.4% from another state and 0.5% from another country). This accounts for another 3% of moves per year. Altogether, about 8% of the residents of Miami County moved in any given year during the 1995 to 2000 period. It is likely that this share has increased since 2000 because of national trends and because of the recession and local economic conditions.

Forecasts

Demographic forecasts were made based on information from Miami Valley Regional Planning Commission, U.S. Bureau of the Census, and Claritas,

Inc. Piqua's population is expected to stabilize in the next five years, with only a modest decrease by 0.4% by 2011. Troy's population will increase slightly by 0.7%. However, Sidney is projected to continue losing population, albeit at a slower pace. Sidney's population is expected to decline by 215 or 1.1% by 2011.

The stable population, coupled with a continued but slowing decrease in average household size, will result in the addition of about 100 more households (1.1%) in Piqua by 2011. Troy will gain about 175 households and Sidney is projected to add 30. Overall, Miami County will add almost 1,430 households by 2011, but most of this growth will be centered in the southern Miami County area outside of the main cities. Demographic forecasts are summarized below.

Table 4. DEMOGRAPHIC FORECASTS, PIQUA AREA & OTHER MIAMI COUNTY, 2006 – 2011

Sub-Area/ Factor	2006	2011	2006-2011 Change Number	2006-2011 Change Percent	Per Year 06-11
Piqua					
Population	20,584	20,501	(83)	-0.4%	-0.1%
Households	8,413	8,504	91	1.1%	0.3%
HH Income	$ 51,164	$55,962	$ 4,798	9.4%	2.3%
Troy					
Population	21,976	22,120	144	0.7%	0.2%
Households	9,122	9,296	174	1.9%	0.5%
HH Income	$ 52,770	$57,123	$ 4,353	8.2%	2.1%
Tipp City					
Population	9,360	9,515	155	1.7%	0.4%
Households	3,769	3,879	110	2.9%	0.7%
HH Income	$ 69,107	$75,242	$ 6,135	8.9%	2.2%
Other Miami County					
Population	49,687	51,857	2,170	4.4%	1.1%
Households	19,063	20,114	1,051	5.5%	1.4%
HH Income	$ 62,082	$67,876	$ 5,794	9.3%	2.3%
Sidney					
Population	19,928	19,713	(215)	-1.1%	-0.3%
Households	8,062	8,089	27	0.3%	0.1%
HH Income	$ 54,053	$59,116	$ 5,063	9.4%	2.3%

Sources: U.S. Bureau of the Census; Claritas, Inc.; and Randall Gross / Development Economics.

As the national economy continues to expand and create new jobs, incomes will increase in the near term. Between 2006 and 2011, average household incomes are expected to increase from $51,160 to $55,960 in Piqua,

an increase of 9.4% in real terms or 2.3% per year. Piqua and Sidney will share among the highest income growth rate in the two-county area.

Households by Income

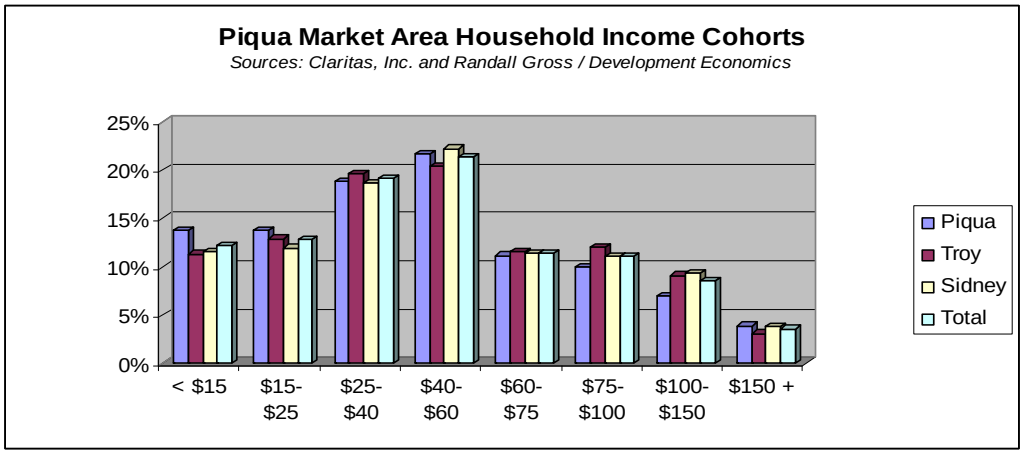
Since the level of income available to households will help determine the price of housing, household forecasts were disaggregated by income cohort within Piqua, Troy, and Sidney.

Table 5. HOUSEHOLD FORECASTS BY INCOME, PIQUA MARKET AREA, 2011

Income Cohort	Piqua	Troy	Sidney	Total	Share
Under $15,000	1,169	1,052	933	3,154	**12.2%**
$15-$24,999	1,168	1,196	966	3,330	**12.9%**
$25-$39,999	1,603	1,824	1,510	4,937	**19.1%**
$40-$59,999	1,839	1,895	1,796	5,530	**21.4%**
$60-$75,000	950	1,070	919	2,939	**11.4%**
$75-$100,000	849	1,113	899	2,861	**11.1%**
$100-$150,000	594	845	760	2,199	**8.5%**
Over $150,000	332	288	306	926	**3.6%**
Total	8,504	9,283	8,089	25,876	**100.0%**

Sources: Claritas, Inc.; and Randall Gross / Development Economics.

In 2011, about 12.2% of the households within these three cities will have incomes below $15,000. At the same time, 3.6% of the households will have incomes above $150,000. The largest share of households within these three cities will have income in the $40,000 to $60,000 range. Overall, about two-thirds of area households will have incomes below $60,000 and one third will have incomes above that amount.



More of Piqua's households fall into the lower-income cohorts. In comparison to Troy and Sidney, more of Piqua's households earn less than $15,000 per year. Similarly, more of Piqua's households fall into the $15-$25,000 and $40-$60,000 cohorts. Fewer of Piqua's households fall into the higher-income cohorts, between $60,000 and $150,000. However, Piqua has about the same share of households in the $150,000-plus income category. This suggests that Piqua is no different from the other cities in attracting the *wealthiest* households. It is the professional class of worker households earning between $75,000 and $150,000 that is lacking in Piqua, as illustrated in the chart above.

Summary

Piqua's population base is declining, but its household base is increasing thanks to the continued decrease in average household size. The increase in households will generate demand for more housing in Piqua and surrounding areas. Still, Piqua and Troy lag behind the faster growing areas in Tipp City and southern Miami County. Piqua's incomes are generally lower than in surrounding communities, with more households in low-income brackets and fewer residents in the higher income cohorts. Incomes fell during the recession of 2001-2 but have gradually recovered and are expected to increase in the next few years.

IV. HOUSING MARKET TRENDS

This section provides a summary of selected housing market trends in Piqua and surrounding areas. Key factors include housing sales, price trends, recent developments, product types, and market niches. Each of these factors is explored below.

Housing Sales & Pricing

Housing sales peaked in Miami County in 2005, with a total of 1,042 sales that year. On average, about 930 homes have been sold each year in Miami County since 2001. Piqua's housing sales also peaked in 2005, at 338, versus an average of 271 over the six-year period. About 360 houses have sold per year in Troy and 132 in Tipp City.

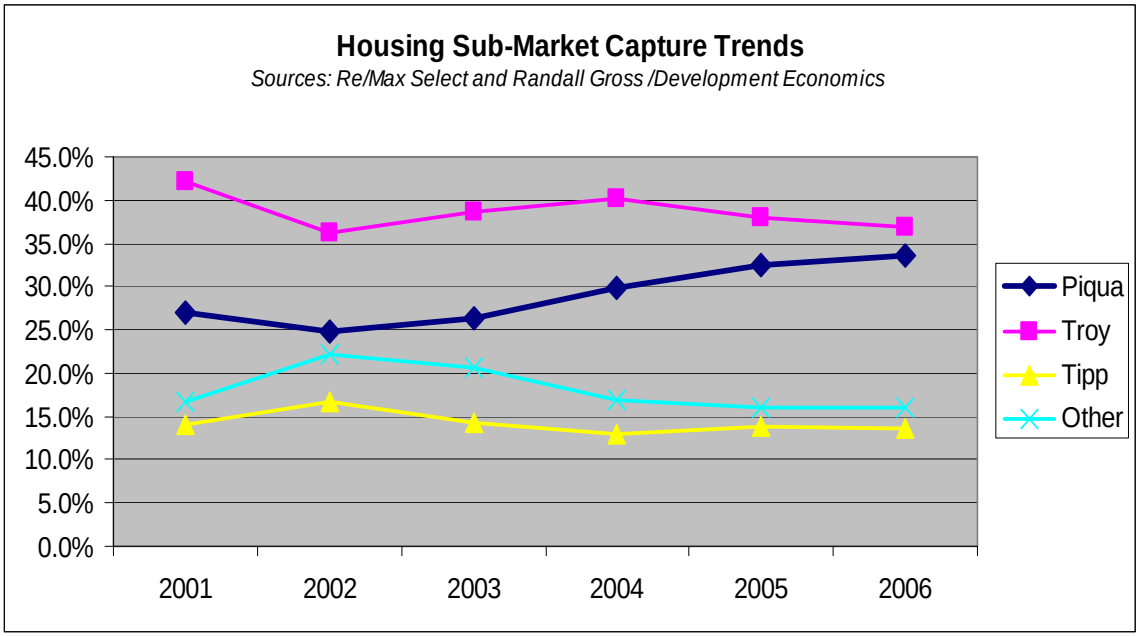
Table 6. HOUSING SALES TRENDS, MIAMI COUNTY MARKET, 2001-2006

	Total	Piqua		Troy		Tipp City	
Year	**Miami**	**#**	**%**	**#**	**%**	**#**	**%**
2001	846	229	27.1%	356	42.1%	119	14.1%
2002	905	225	24.9%	328	36.2%	151	16.7%
2003	927	245	26.4%	358	38.6%	133	14.3%
2004	992	297	29.9%	399	40.2%	128	12.9%
2005	1,042	338	32.4%	395	37.9%	143	13.7%
2006	872	293	33.6%	322	36.9%	118	13.5%
Total	5,584	1,627	29.1%	2,158	38.6%	792	14.2%
Ave/Year	**931**	**271**	**29.1%**	**360**	**38.6%**	**132**	**14.2%**

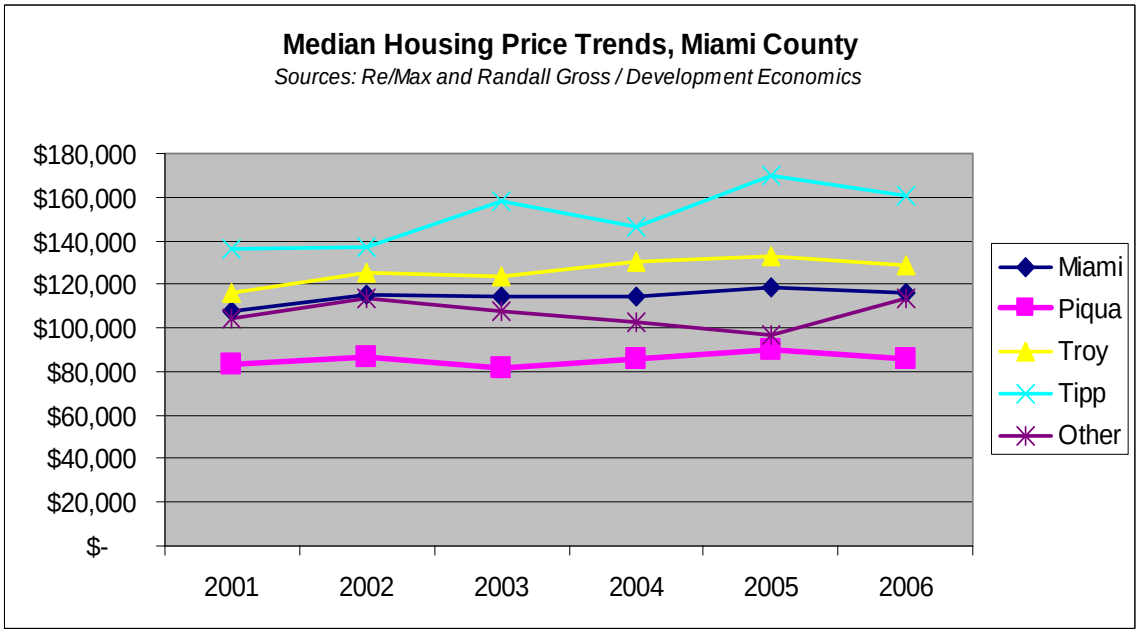
Notes: 2004 is annualized based on data thru Sept.
N/A means Not Available.

Sources: Irongate Inc. Realtors;
Rapatton Multiple Listing Service; and
Randall Gross / Development Economics.

Piqua has accounted for an increasing share of the county's housing sales, from 27.1% in 2001 up to 33.6% by 2006. Overall, Piqua has accounted for an average of 29.1% of Miami County housing sales, but only 14.6% of Miami County's new housing construction. Thus, there is significant turnover in older, existing housing stock in Piqua.



Piqua's share of housing sales may relate in part to its relatively affordable housing prices. Median housing sales prices in Piqua were $86,000 in 2006, or only 74% of the median sale price in Miami County as a whole. Piqua's sale prices were one-third lower than those in Troy, and more than **43%** lower than housing sale prices in Tipp City. Prices throughout the county peaked in 2005 and dropped back somewhat in 2006.



Piqua's Median Sale Price increased by **3.6%** between 2001 and 2006. However, this price escalation is weak compared with those in neighboring Troy (10.7%) and Tipp City (18.0%) as well as with Miami County overall (7.6%). Furthermore, Miami County's housing escalation pales in comparison to the national average of **38.6%** over this same period. Thus, Piqua's sale prices increased at less than one-tenth the national average since 2001.

Table 7. HOUSING PRICE TRENDS, MIAMI COUNTY AND CITIES, 2001-2006

Year	Miami County	PIQUA	Troy	Tipp City	Other
2001	$ 108,000	$ 83,000	$116,000	$136,500	$104,377
2002	$ 114,875	$ 86,500	$125,000	$137,000	$113,494
2003	$ 114,500	$ 82,000	$123,950	$158,500	$107,837
2004	$ 114,200	$ 86,000	$130,000	$145,950	$102,338
2005	$ 118,250	$ 90,000	$132,900	$170,000	$ 96,331
2006	$ 116,200	$ 86,000	$128,450	$161,000	$113,450
Average	**$ 114,338**	**$ 85,583**	**$126,050**	**$151,492**	**$106,305**

Notes: 2004 is annualized based on data thru Sept.
N/A means Not Available.

Sources: Irongate Inc. Realtors;
Rapatton Multiple Listing Service; and
Randall Gross / Development Economics.

Housing Developments & Sample Product

There are several residential communities that include new housing or housing under construction in Piqua. These communities offer a range (albeit somewhat narrow) of housing including executive homes as well as more affordable family housing. Several of Piqua's residential communities are discussed below.

Eagles Nest

Eagles Nest is an executive home community located on the northwest quadrant of Piqua off of Sunset Drive. The community offers homes in the $165,000 to $340,000 range, attracting 30 to 50-year old professionals with proximity to the City's golf course, recreation facilities, and other amenities. Sales started slow but have picked up in recent years.

Greens of Springcreek

The Greens of Springcreek is a new development underway off of Hertzler Road north of Piqua. Started in 2000, this community has housing priced in the $295,000 to $375,000 range and takes advantage of rolling farmland and rivers to attract professionals who work in Sidney, Piqua, or elsewhere in the region. Other homes in the Village of Springcreek are priced in the more affordable $120,000 to $225,000 range.

Indian Ridge

Indian Ridge, started in 1996, is another relatively new community on the north side of Piqua (off 25A) that features a mix of single-family detached houses and attached patio home condominiums. Homes are priced in the $122,000 to $240,000 range, attracting young couples and start-ups. The patio homes are priced in the $160,000 to $180,000 range (or about $106 per square foot). Its location near the high school is attractive to young parents.

Deerfield

Deerfield, located on the western edge of Piqua near Clayton Road, also offers a mix of single-family, patio home, and apartment living. Opened in 1994 by Craycon Homes, the project includes homes priced in the $130,000 to $200,000 range, with site amenities including fishing ponds and parks. Patio homes are located in Deerfield Trace. Deerfield Crossing Apartments include two-bedroom / 1.5-bath units renting for $475 per month ($0.53 per foot) plus $50 for garages. The apartment complex is 100% occupied, but rents have fallen by almost $100 from two years ago due to an increase in subsidized housing available in the area. This impact illustrates the price sensitivity of the rental market.

Farmington Meadows

Farmington Meadows is another new residential community located on the north side of Piqua near Springcreek. Lots are being sold in this development for $29,000 to $42,000, with builders including Behm, Mike Hawk, Berry, and Burelle.

Brookwood Place

Brookwood Place, a relatively new development off of Seidel Parkway in northeast Piqua, offers townhouse-style rental apartments. Three-bedroom units with garage rent for $899 or $0.54 per square foot. Thus, while the units are large, they are comparable in price to other apartments in Piqua (on a square foot basis).

Existing Neighborhoods & Other Areas

There are a number of other residential areas in Piqua that offer a variety of housing choices. Maplewood is an older neighborhood with large older homes located in the city near Echo Lake. Arrowhead Estates is a new community under development. Affordable patio-style garage homes can be found in Candlewood (ca 1960s-1980s), with prices in the $65,000 to $110,000 range attracting 1st-time buyers. Park Ridge (ca 1970s-1990s) offers ranch-style homes in the $89,000 to $200,000 range ($165 per square foot), attracting baby boomers and empty nesters. Piqua's Downtown Historic District offers beautiful historic homes to match a variety of tastes. Other multi-family rental apartments include Woodgate, Piqua Village, Colonial, Sunset Square, and others.

Existing Market Niches

The existing, for-sale housing market in Piqua has been driven by a variety of residents and newcomers in various life-stages. Based on input from brokers and realtors, it has been estimated that about 60% of housing sales have been driven by "move-ups," or existing residents who are moving out of rental properties, parent's homes, dormitories, or smaller homes into their own house. About 30% of the market seems to be driven by "move-downs" or those who have downsized due to retirement, empty nest, divorce, lifestyle choices, and other reasons. Not more than 10% of housing sales appear to be driven by relocations to Piqua from other markets. Thus, the market is attracting relatively little in-flow for work or lifestyle reasons. Brokers also estimate that less than 5% of the homes they sell are occupied by people who commute to Dayton for work, although a number do commute to Sidney or Troy.

Summary

Piqua has captured an increasing share of housing sales in the region, but its prices have remained relatively stagnant as compared with neighboring communities. The flat median sale prices in Piqua are cause for concern, especially in light of the national and regional ramp-up in housing prices since 2000. Again, one reason for Piqua's stagnant housing prices is the age of the housing stock and the lack of new construction as compared with nearby cities. Even so, Piqua does have new, attractive housing stock in suburban communities. The pace of construction is slow, but there are several high-quality developments with new houses available. The local market is being driven primarily by move-ups and move-downs among existing residents, rather than relocations.

V. DEMAND ANALYSIS

Baseline housing demand was forecasted by tenure for Piqua and surrounding areas based in part on the demographic forecasts and on market characteristics. A Primary Housing Market Area (PMA) was defined as the city of Piqua, but a Secondary Market Area (SMA) also includes the cities of Troy and Sidney, since some housing decisions are made within this larger commutation area. Tipp City and Southern Miami County are excluded from the SMA because of commutation and travel patterns oriented southbound from there into Dayton rather than northbound towards Piqua.

For-Sale Housing

The three-city SMA is projected to add almost 300 households by 2011. Assuming that the share of households in owner-occupied housing will remain constant, gross for-sale housing demand was projected to be about 480 to 490 units by 2011. This range is consistent with housing development trends during the recent past. In addition to household growth, additional housing demand will be generated as a result of the need for replacement (as housing ages, becomes less competitive, or is demolished). A vacancy allowance is also assumed at 3.0%.

Of the 480 to 490 units, there would be demand for about 180 for-sale units in Piqua. This assumes that Piqua does not change its capture rate of secondary market demand. It also assumes that Piqua's for-sale housing vacancy rate declines from 3.7% to 3.0%. To accomplish the latter, Piqua would need to continue to take pro-active actions to improve the quality of its older housing stock and increase its competitiveness in the market. In some cases, this would require improvements in the physical conditions of the housing itself, although there are also code enforcement and other issues at play. With respect to Piqua's capture rate, the city does have the opportunity to increase its share of certain housing product niches. Recommendations relating to older housing stock and to product niche capture are included in the final section of this report.

Rental Housing

Gross demand for rental housing within the three-city SMA was forecasted at 290 to 300 units by 2011. Of that number, Piqua would capture demand for 50 to 60 units. Much of the SMA rental housing demand will be generated in Troy over the next few years.

Here again, the forecasts are based on demographic projections and on the historic pattern of tenure in each community. A natural vacancy allowance of 5.0% has been assumed, although this is significantly lower than Piqua's actual rental vacancy, which was almost 13.0% in 2000 and has been concentrated in the city's older, single-family housing stock. Thus, **5.0% is set as a target** to reduce vacancy in such housing and improve the competitiveness of that housing for both rental and for-sale tenure. While vacancy rates may have declined since 2000, it is likely that Piqua will still require pro-active efforts to continue improving its older housing stock and reduce vacancy levels. A summary of housing demand forecasts for both rental and for-sale housing is provided below.

Table 8. BASELINE HOUSING DEMAND ANALYSIS, PIQUA MARKET AREA, 2007-2011

Factor	Piqua	Troy	Sidney	Total
HH Change	91	174	27	292
For Sale				
Share Owner	63.5%	60.2%	62.7%	62.1%
Number Owner	58	105	17	181
Available	138	150	180	468
Vac Allowance	3.0%	3.0%	3.0%	3.0%
Net Demand	83	123	(4)	203
Replacement	94	97	90	281
Gross Demand	**177**	**220**	**86**	**484**
For Rent				
Share Renter	36.5%	39.8%	37.3%	37.9%
Number Renter	33	69	10	111
Available*	187	164	133	484
Vac Allowance	5.0%	5.0%	5.0%	5.0%
Net Demand	(4)	84	26	104
Replacement	60	71	59	191
Gross Demand	**56**	**155**	**85**	**294**
Total Demand	**233**	**375**	**171**	**778**

Notes: Available for sale based on active market.
Available for rent based on active leasable.

Source: Randall Gross / Development Economics.

Overall, total demand for almost 800 additional housing units will be generated in the SMA by 2011. Of this number, there will be baseline demand for more than 230 additional units in Piqua even with an assumed reduction in the overall vacancy rates for both rental and for-sale housing.

Product Differentiation

Demand is also disaggregated by pricing, based on the income range for new households. Using these price ranges, several additional targets can be set with regard to the pricing of new product that should be brought on line within Piqua and its overall market area.

Price

Given the projected income cohorts for new households, there would be demand for about 75 units priced at an average $261,900 or above. The market will remain thin for housing product priced in the $500 – $600,000 range, with demand for only 9 units over the entire five-year period at an average price of $680,500. As Piqua endeavors to attract "executive" housing, the minimum threshold should assume the 75-unit threshold just to serve the city's own projected household base.

Table 9. HOUSING DEMAND BY RENT AND PRICE RANGE, PIQUA MARKET, 2011

Income Range	Average Rent	Average Price	Piqua Units	Other Units
Under $15,000	$ 270	$ 45,000	32	62
$15-$24,999	$ 470	$ 78,400	32	68
$25-$39,999	$ 760	$ 126,800	44	105
$40-$59,999	$ 1,170	$ 195,100	50	116
$60-$75,000	$ 1,570	$ 261,900	26	62
$75-$100,000	$ 2,040	$ 340,300	23	63
$100-$150,000	$ 2,920	$ 487,000	16	50
Over $150,000	$ 4,080	$ 680,500	9	19

Source: Randall Gross / Development Economics.

At the same time, there will also be natural or baseline demand for 64 units priced at an average $78,400 and less, or for rentals averaging $270 to $470. Given that the lower range falls well below market rents, it is likely that affordable housing resources will be required for an estimated +/-30 additional households. Again, this should be viewed as a target number and perhaps a threshold over which Piqua would be offering more than its "fair share" of affordable housing resources. Remaining demand (almost 100 units) will fall in the middle range of $126,800 to $195,100 average price for housing. Most of this demand would be met through construction of for-sale units rather than rentals.

Competition

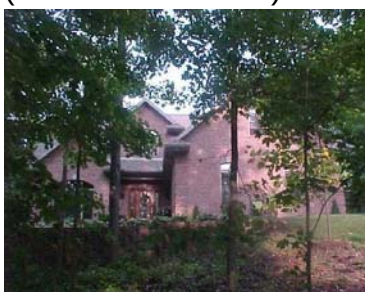
Piqua's housing must be competitive in the SMA for the city to capture its "fair share" of the market. There are a number of competitive housing communities in various stages of development, particularly in Troy but also in Sidney and other areas between or near the three cities. Examples of competitive housing product include the following:

Carriage Crossing. Begun in 2002, this executive home development in Troy includes 3, 4, and 5-bedroom homes priced in the $180,000 to $280,000 range.

Shenandoah. Also located in Troy, the Shenandoah community was mostly built out during the 1970s through 1990s. Amenities include the nearby Troy Country Club and Golf Course. Homes continue to sell in the range from $134,000 up to $425,000.

Westbrook. Troy's Westbrook is an older community built in the 1950's through 1980's that is still considered desirable. A range of housing is available, priced from $79,900 to $224,900.

Willow Creek. Willow Creek is a newer development (1990's to 2000's) with affordable and higher-end housing in the $159,000 to $300,000 range.



Plum Ridge. Located in Sidney, Plum Ridge offers estate homes built in the 1990's and 2000's. Priced in the $300-$400,000 range, housing sells for less than $120 per square foot.

West Lake. Sidney offers homes in the $300,000 range in Westlake. This subdivision includes homes built from 2000 and still under construction. Prices are a little higher

at $126 per square foot, but offer lake views and other amenities.

Other. Other competitive communities in Troy or Sidney include Premwood, Saxony Woods, Stonebridge, Cedar Ridge, Hywood Estates, Bon Air, and Concord Woods, among others.

Summary

Piqua can expect demand for more than 230 housing units by 2011, including 180 for-sale units and 50 to 60 rental units. The forecasts are based in part on the assumption that Piqua can work pro-actively to reduce the vacancy rate in both for-sale and rental housing. Vacancies in older housing should be addressed, with a target vacancy rate of 5.0% in older housing that has been used or marketed for rentals. For Piqua to expand its share of the area's executive housing market, new housing would have to compete with developments in Troy and Sidney. To differentiate its product, Piqua would need to create more amenity value associated with its housing stock but also influence perceptions about the quality of life in the city. This is explored further in the next section.

VI. STRATEGIC RECOMMENDATIONS

Several strategic recommendations are provided below, based on the findings from the assessment of existing housing conditions and demand for new housing in Piqua and surrounding areas. These recommendations may be refined as the planning process moves forward and additional issues or questions are put forward.

Older Single-Family Housing

Several issues related to Piqua's older housing stock are impacting on the overall image and marketability of Piqua for new development. Among these issues are the age and design of the housing stock, the high percentage of single-family homes used as rentals (with resulting management and maintenance issues), relatively high rental vacancy rates in older housing, and an overall concentration of poverty in older housing stock.

Neighborhood Investment District (NID)

Within several targeted older residential sections of Piqua, there is the need to encourage pro-active re-investment in housing for homeownership. A Neighborhood Investment District (NID) initiative is recommended to accomplish this through stronger regulation and enforcement, as well as through financial and other incentives. The NID is aimed at strengthening, not replacing, existing City staff efforts to improve code enforcement and housing quality in central city neighborhoods.

Regulation ("sticks"). Code enforcement and other regulatory tools are being applied to the extent it is possible within targeted neighborhoods in Piqua. In addition to stronger code enforcement, there is the opportunity to further develop a rental licensing program like those found in other communities that requires landlords to meet certain standards in order to receive renewals on their licensing for rental property.

- **Rental Licensing Program**. A rental licensing program is extremely helpful. Such programs require landlords to register and obtain a license for their rental units in single-family dwellings. This allows for better tracking and verification of rental properties. Occupancy permits also allow for tracking. In both cases, the property is treated as a business enterprise and is therefore subjected to standards that can be imposed by the City in order for landlords to obtain or renew a license.

- **Tracking**. Once a licensing program has been instituted, the City should create a database of rental properties (included those whose households are receiving housing assistance) and track their locations, condition, incentives, and enforcement issues. A portion of the license fee can be used for this purpose, while other portions of the fee may be used to fund a "Paint and Porch Program" (see below) or interim enforcement activities.

Incentives ("carrots"). There are several incentives that can also be implemented in tandem with stricter enforcement of regulations. Tax abatements have been provided through CRA, and should be based on the cost of rehabilitation (investment) made into properties. But, the City can also establish a linked-deposit program for low-interest rehabilitation loans to encourage property owners to reinvest in their housing for the purposes of homeownership.

Homeownership in older neighborhoods can be encouraged through purchase incentives, where the City works to help fund or waive appraisal fees, origination fees, application fees or other costs associated with the purchase of property for homeownership within a specified NID. As with commercial investors, the City can also provide technical assistance, such as through a "Paint & Porch Program" that brings out specialists to work for free with property owners on the best ways to rehabilitate and upgrade their houses. Technical assistance can be coupled with rehabilitation loans or grants as part of the Paint & Porch Program.

Through the NID, the City can also work with County housing agencies to ensure that the availability of resources is meeting a need but not contributing to the problem by encouraging a concentration of poverty.

Finally, the City can help remove some of the existing regulatory barriers that prevent existing homeowners from expanding their properties. Many of the existing homes are less marketable because they are relatively small and do not meet the current market standards for size or layout. Therefore, strict regulation on the expansion of these homes only serves to make them less marketable and encourage rental use over homeownership, resulting in worsened physical conditions. Encouraging reinvestment in properties, including expansion, is essential and should be regulated primarily in terms of design standards.

Redevelopment

Where appropriate, Piqua should be encouraging redevelopment of older housing stock. Some of the older, high-density single-family housing in areas outside of the Downtown Historic District will be increasingly unmarketable for attracting homebuyers. In targeted locations, the City can establish a redevelopment plan with the buy-in from property owners and residents that

improves the quality of the housing stock through infill or redevelopment. Clearly, this is not advisable or possible with historic housing. But much of the housing near downtown will not qualify as historic. The redevelopment areas are most likely to coincide with a portion of the NID, but the NID should be viewed primarily as a rehabilitation and management tool and not as a redevelopment entity.

Executive Housing

As noted in the market assessment, Piqua will generate demand for some higher-income housing over the next five years and it is assumed that homebuilders will step forward to meet that demand. From an economic development perspective, the City wishes to ensure that adequate supply of executive housing exists to attract business and industry. To some extent, the housing follows the executives, not the other way around. However, recommendations are provided below to help diversify the housing mix and increase demand for housing in Piqua, resulting in more development of new housing to capture the higher-income market.

Marketing Committee

It is recommended that Piqua encourage the creation of an informal Housing Marketing Committee to work with brokers and property owners and increase the visibility and enhance the image of the city in the local and regional market.

Marketing Materials & Media. The committee can work to improve or create marketing materials that are targeted to a regional Miami Valley audience. The committee can also work with the media to ensure that information is made available on progress that the city is making on numerous fronts as well as housing incentives that may be available. Among the items that the committee might address or use to help change perceptions of Piqua in the regional market are improved school performance (see industrial report), new industries, new housing product, etc.

Home Tours & Shows. The committee may work on establishing or expanding annual home tours for new and historic homes in the Piqua area to attract prospective home buyers from other parts of the region. Agents and brokers along with developers and builders would team with the committee to establish or broaden the home tour. The tour should include the Downtown Historic District as well as new home communities.

Relocation Home Packages. The marketing committee might also work with existing industries in the area to package new homes with job offers to relocating professionals. Special builder incentives might be offered, for example, to professionals who are relocating from outside of the area. The incentives might be packaged with the benefits offered by the local companies.

At the least, a partnership could be developed between homebuilders and local industrial companies to work on incentives to attract "relos."

Amenity "Package"

As noted in the industrial report, there is a need to increase the amenity value of housing and neighborhoods in Piqua if the city is to attract industry and professional workers. The city does have recreational amenities, which are already used to some extent by brokers as part of their marketing efforts. However, these recreation amenities are not "packaged" and marketed in a comprehensive way (such as through golf club discounts to new homeowners) to appeal to homebuyers. The amenity "package" should also be expanded to include more cultural, entertainment, and other activities that enhance the quality of life for existing and incoming residents. The market for additional cultural venues, programs, and for downtown retail should be explored further. As noted in the industrial report, such amenities are also important for attracting business and for retaining the city's home-grown professional labor.

Summary

The City is already working towards improving its older housing stock through better enforcement of regulations. Licensing of rental properties is also an important step towards better enforcement and tracking of rental units in single-family homes. There is also a need for a more diverse compliment of incentives, including not just fiscal incentives but also technical assistance and reduced closing costs for homeowners and buyers. Opportunities for redevelopment should be explored particularly where housing conditions warrant upgrading. Overall, there is a need to encourage new housing development, both in central city neighborhoods as well as in suburban areas. Marketing efforts led by a dedicated committee would focus on enhancing the identity of the city and its housing stock, through home tours, media, relocation packages, and other approaches. Finally, the city's overall amenity package needs to be enhanced in order to market the city for housing and business development. A gap in the city's cultural offering will be partially filled by the new library, but this effort should be complimented by downtown cultural programming, entertainment, and retail.