

Key Issue/Priority: Community Development/Social Services

What you told us

Priorities for increased attention over the next 10 Years

- Opportunities to attract commuters to become residents; implications for housing, quality of life, and education (13)

Strengths

- High quality of life (3)
- Availability of jobs (2)
- Cultural diversity
- Educational opportunities

Weaknesses

- Severity of poverty in concentrated areas
- The community is overtaxed by the high need for social services
- Lack of decent affordable housing
- Current capacity of medical services is not able to meet demand, especially access to dental care
- Social services, family values, family erosion, single head of family – services to strengthen single head of family or weak dual parent families; most juvenile crime comes from weak parenting skills; support of developing children in education, interpersonal skills need to be enhanced (3)
- Gentrification of inner cities; crime/drugs we have poor people who are poorer than anywhere else in Indiana

Opportunities

- Attract commuting workers to be residents in Elkhart County (2)
- Improve quality of life through better social services
- Establish a Nursing School (2); two good hospitals, aging society
- Use natural resources for parks and recreation
- Governmental entities have good bond ratings, so that they can borrow cheaply to make infrastructure investments
- Energize youth as our future workforce

Threats

- Increase in non-traditional families
- Drugs
- Crime and personal safety
- Perceptions that crime and educational attainment levels are worse than they actually are
- Dual language problems
- Aging population may place a greater burden on the working generations
- Average per capita income is lower than the national average
- Poor persons are poorer than state averages
- Lack of skilled workers for technology industries because of poor educational attainment and the brain drain of educated workers to other parts of the county
- Comfort with the status quo
- Lack of fun

What the research tells us

- Between 1989 and 1990 the Elkhart County population grew by 17% (27,988). This was almost double the state rate of 9.7%
- 54% of the growth has been natural, the remainder has been migration into the county
- 20.8% of the current population is in the 5-18 year olds (school age); 60.3% 18-65 years old (workforce); 10% over 65 years old
- The growth rate is projected to slow a little to 15.4% between 2000 and 2010 with a slightly larger percent of 65+ year olds
- The Social Services Impact Model used indicated the following:

Child care – not meeting current need

In 2000, Elkhart County had only 132 licensed day care facilities with a maximum capacity of 2,556 children – it is estimated that 5,230 children, under 5 years are requiring day care. An estimated 5,785 children under 5 years old will require childcare by 2010

Parks and Recreation – not meeting current need

Planning standard is 15 acres per 1000 population for park set-asides. There is a current deficit of 240 acres to meet standards and a projected deficit of 664 acres by 2010 – based on planning standards

Health Services – not meeting current need

The county currently has 460 hospital beds and according to current standards needs 531. The model indicated that a total of 844 beds would be needed in 2010, if demand were to be served at the county level. Increases in population and an aging population will put further pressure on the demand for qualified health care personnel, especially nursing which is struggling to meet current demands at state and national level. The intense competition among local/regional hospitals will determine the extent to which local demand continues to be filled by local service providers.

Public Safety

The model does not indicate any shortage in current police personnel; police vehicles; fire personnel; fire vehicles; EMS personnel; and EMS vehicles. There will be a normal demand for increases in these resources for 2010

Libraries

Experiencing growth pressures but also a shift in demand due to the electronic revolution. Book stocks will need to be increased slightly but building size and seating needs must change due to change in usage

Kids Count Study:

- While per capita income rose and unemployment dropped in the county between 1990 and 1999, the percentage of children in poverty increased from 9.9% to 11.7%
- Child abuse and neglect decreased significantly in Elkhart County between 1990 and 1999
- The number of home schooled children increased from 15 – 479, between 1990 and 1999
- The percentage of low birth weight babies increased between 1990 and 1998 – during the same period the percentage of mothers receiving prenatal during the first trimester dropped from 74.5% to 69.6%
- While the rate of infant deaths decreased between 1990 and 1998, the rate of child deaths has increased
- Non compliance with youth tobacco access laws has risen from 9.1% in 1997 to 30% in 1999

Northern Indiana State of the Workforce 2002 Report

- Elkhart County has a decrease in available childcare, despite having the greatest number of children (in the region) in the child-care age range

Implications/opportunities for action

- Is there an opportunity to attract the commuting labor force to move to Elkhart County? Is it a shortage of appropriate housing? Are the school systems a problem? Is quality of life a concern?
- Is the creation of an Elkhart County School of Nursing a possibility?
- The demand for social services seems to exceed the supply. Why is that happening? What strategies might assist in reducing the demand?
 - If childcare needs were met would that enable more parents to take a job or obtain training and/or education?
 - If public transportation were available, would that also allow people to get to work and maintain employment?

Key Issue/Priority: Cultural Diversity

What you told us

Priorities for increased attention over the next 10 Years

- Cultural diversity – must deal with it well, including housing and social services (20)

Strengths

- Caring; shared values

Weaknesses

- Lack of ability to embrace cultural diversity

Opportunities

- Build Hispanic leadership
- Greater integration of diverse cultures
- Capitalize on cultural diversity

Threats

- Dual language problems
- Comfort with the status quo

What the research tells us

- 1999-2000 the Hispanic/Latino population grew by 486%, from 2,869 to 16,300, from 1.8% of the population to 8.9% - 2 and a half times the state concentration (3.5%), but less than the national percentage.
- All employees report that the Hispanic/Latino workers are more loyal, productive, and dependable and demonstrate a higher work ethic than other segments of the workforce. (Northern Indiana State of the Workforce 2002)

Implications/opportunities for action

- Many Indiana communities are experiencing increases in the Hispanic/Latino population and are unprepared to deal with integrating them fully into community life. In many instances these new citizens are the primary source of new and needed employees. Failing to maximize the potential of all community citizens can prove very costly in the long run.
- For the high-tech industry sector, a skilled workforce is close to number one on the list, they and their workforce is attracted to high quality of life communities – recreation, night-life, and broad acceptance of diversity.

Key Issue/Priority: Economic/Business Development

What you told us

Priorities for increased attention over the next 10 Years

- Competition – national and global; implications for incentives, property tax rates, and the workforce (15)
- Build on entrepreneurial spirit; grow our own businesses (12)
- Lack of broadband capacity (8)
- Midwest location; close to many large markets (5)

Strengths

- Manufacturing base with key products (3)
- Affordable housing (3)
- Midwest location; close to major markets (4)
- Low cost of living
- Competitive utility costs
- Tourism industry
- We are so fortunate to be blessed with a good water supply (2)
- Economic and Tourism hub – within 150 miles; 20% of GNP and 20% of national workforce

Weaknesses

- Loss of corporate headquarters and related white-collar jobs and leadership capacity (4)
- Lack of high-speed, broadband capacity is a problem (5)
- Dependency on manufacturing; need to diversify
- Lack of diversity within the manufacturing sector
- Lack of economic incentives, both state and local
- Poor balance in job classification stratification; losing middle-income jobs
- No direct air service

Opportunities

- Deeper support for entrepreneurs/locally grown businesses (2)
- Build on competitive advantage of our location – proximity to resources and markets (2)
- Technology development and application, jobs (3)
- Expand and attract companies involved in biotechnology
- Creation of more service-sector jobs
- Attract industry that compliments existing industries
- Support local bank infrastructure
- Attract businesses and workers to Elkhart County because of the low cost of living
- Diversify the economic base
- Aging population will create demands for more healthcare services
- Be more proactive in attracting the “creative class” i.e. more cultural events, public art, preservation, museums, galleries, concerts, etc. – these people start technology and biotech companies.
- Develop local capital – charge banks to focus on local growth

Threats

- Losing manufacturing jobs to other communities and other countries (5)
- Loss of quality jobs
- Loss and lack of venture capital
- Over-dependence on recreational vehicle and mobile home industries

What the research tells us

- In 1999, 97% of Elkhart County personal income came from gross earnings – which are calculated by place of work, but 22.4% of the county workforce live in surrounding counties and take 19.7% of that earned income spending power back to those counties. Overall private earnings were 101.3% and 104.8 % of the state and region respectively, but only 90.8% of U.S. earnings average.
- Real personal income grew by 32% between 1989 and 1999 – above the state and the region, but behind the national level at 33.3%
- Between 1969 and 1999 Elkhart County per capita income fell from 110.5% of U.S. per capita income to 92.3% (18.2%) BUT 13.4% of that decline happened between 1969 and 1979 – the decline slowed significantly between 1979 and 1999 from 97.1% to 92.3% (4.8%). During the same period of time Indiana moved from 96.6% of US per capita income to 91.6% and the BEA region went from 99.3% of U.S. per capita income to 85.4% - Elkhart County fairs far better than the region and better than Indiana at 91.6% of U.S. per capita income they also have a per capita income at 100.8% of Indiana's
- Between 1989-1999 manufacturing employment declined 3.75% in the U.S. but in Indiana it grew by 7.1% and in Elkhart County it grew by 17.6% - mostly in the largest industries.
- Manufacturing accounts for 56.2 % of total county earnings, compared to 30 % statewide and 20% in the U.S.
- Manufacturing pays the highest average annual wage in Elkhart County at an average of \$19.92 an hour but that is only 92.9% of the regional rate, 82.0% of the state, and 80.9% of the U.S. (excludes Government/Gov. Enterprises, only employs 5.5% of the workforce).
- 45% of the workforce is employed in manufacturing, services at 18.1% and retail at 13.9% employ the next largest numbers of people, but average hourly earnings are only \$11.67 and \$8.17 respectively.
- 'Basic' industries (produce goods and services that are exported outside the local economy) form the underpinnings of the local economy. The research identifies:
 - Those that are growing locally, growing nationally but exceeding growth elsewhere: **Travel Trailers and Campers (employment grew from 4,917 to 7,859 1989-1999), Fabricated Metal Products (347-1,022), Lumber and Other Building Materials Dealers (271-832), Sheet Metal Work (400-775), Truck trailers (50-645)**
 - Those that are growing locally, doing poorly nationally (local factors make them successful – suppliers to other local growing businesses?): **Motor Homes; Truck and Bus Bodies; Metal Door, Sash, Frames, Molding and Trim, Plastic Products**
 - Those that are growing locally but slowly – could be caused by local factors or factors beyond local control, i.e. foreign competition: **Mobile Homes, Musical Instruments, Goods (Fabricated, Rubber related)**
 - Those that are declining locally in both absolute and relative (to nation) terms: **Motor Vehicle Parts and Accessories, Pharmaceutical Preparations, Plastic Foam Products, Public Building and Related Furniture, Wood Kitchen Cabinets.**
- Non-basic businesses (serve only the local market) but are growing and to the degree that they are not fully serving the local market could provide opportunities for import substitution – people buying the good or service elsewhere might buy it in the community if it was available:
 - Those that are experiencing growth locally and gaining employment share, are performing well nationally but not local specializations: **Offices and Clinics of Doctors of Medicine, Business Services, Accounting, Auditing and Bookkeeping Services, Offices and Clinics of Dentists, Home Health Care** (growth in business services key to area growth).
 - Those that are experiencing growth locally and gaining employment share, not performing well nationally, not currently local specializations: **General Medical and Surgical Hospitals; General Building Contractors –residential; General Building Contractors – nonresidential; Colleges, Universities and Professional Schools.**

Implications/opportunities for action

- Business development is most effective when pro-active and results from the cooperative efforts of professionals, local elected and appointed officials, business, education and civic leaders.
- Economies are regional - target marketing efforts to those industries and businesses that fit the local and regional economic profile. Consider doing regional Cluster Analysis.
- According to site-selectors they prefer to look at a 'region' rather than an individual community. Is Elkhart County and surrounding counties working together collaboratively in order to expand the chances of bringing a business to the area?
- Consider creating a new, unified, countywide economic development entity to implement new strategies – should involve all major public, private and non-profit groups.
- Manufacturing is still strong but the pay scales are not as high as they were and there is decline in some sectors. What opportunities exist to pursue the development of more advanced manufacturing facilities, medical devices (a regional strength), and other technology dependent industries?
- Diversification of the economic base and economic development strategies – maximize tourism, grow your own - create business climate that supports the development of new/small business.
- Consider establishing a small business/micro-loan program to stimulate the development of new locally –based businesses.
- Establish a comprehensive incentive package targeting existing business expansion and industries targeted in your attraction strategy.
- While incentives are still a significant part of the business location game - everyone has incentives to give, they are generally not discussed until sites have been narrowed to the final few, and they are most often used as a tie-breaker. The determination will depend upon whether or not the community has what's necessary to stay in the game to the last lap.
- Create an organized and systematic Existing Industry Development Plan to help retain and expand the current Elkhart County businesses – especially those basic industries in growth sectors with the potential to enhance and broaden the Elkhart County economy. Provide customized, one-on-one technical support to local businesses – financial, modernization, export assistance etc.
- New business locations are still few and far between and are still driven by issues critical to that particular industry sector. For the high-tech sector, workforce is very high on the list of location factors and their workforce is attracted to high quality of life communities – recreation, night-life, broad acceptance of diversity – hence, so are they.
- Develop skills of existing and future workforce – skills needed by today's businesses for the higher paying/tech related jobs.
- Publicize your plan and celebrate every success.

Key Issue/Priority: Educational Attainment

What you told us

Priorities for increased attention over the next 10 Years

- Strengthen educational attainment; preparing the current and future workforce (36)
- Strengthen early childhood education and services (6)

Strengths

- Educational opportunities

Weaknesses

- Lack of educational attainment (5)
- Lack of early childhood educational services (2)
- Wide range of performance in school districts
- Lack of affordable [public] higher education

Opportunities

- Energize youth as our future workforce

Threats

- Brain drain – educated young people seek jobs elsewhere

What the research tells us

- There is a variance in the performance of local schools
- Elkhart Community Schools have the highest per pupil expenditure, the lowest average teacher salary, the lowest passing percentages rates on the ISTEP +, 2nd lowest SAT scores, 3rd and 6th highest “intending to pursue higher education
- Northridge HS (Middlebury) has the 3rd highest per pupil expenditure, 4th highest average teacher salary, highest passing percentage rates on ISTEP+, highest SAT scores, highest # intending to pursue higher education
- Goshen HS has, 2nd highest per pupil expenditure, 2nd highest average teacher salary, 2nd lowest passing percentage rates on ISTEP+, 5th lowest SAT scores, 4th lowest # intending to pursue higher education – BOTTOM LINE there is no direct correlation between the resources expended at schools and the performance of students
- In Elkhart County, in 2000, 15.5% of people over 25 years old had 4yr degree or better, compared to the state at 19.4% and national at 24.4%
- In Elkhart County, in 2000 24.3% of people over 25years old did not have High School Diploma compared to 17.9% at the state level and 19.61% at the national level
- The Elkhart County elementary school population is projected to grow by 11.1%, the high school population is projected to grow by 20.1% by 2010
- According to standards, 258 new teachers will be needed to maintain current service levels in 2010
- Building sizes are adequate by national standards but will need to be expanded to provide 251 more classrooms

Northern Indiana State of the Workforce 2002 Report

- Elkhart County has the highest growth rate in state of K-6 population – need strategies to cope
- Of the 121 under-supplied occupations, most will require advanced skills training
- Vocational enrollment in the region is below that of the state
- All employees report that the Hispanic/Latino workers are more loyal, productive, and dependable and demonstrate a higher work ethic than other segments of the workforce.

Implications/opportunities for action

- If we cannot attribute the variation in HS performance to the imbalance in resources - to what can it be attributed? School officials may be well aware of many of the reasons and of existing research that provides other clues, we need to determine what efforts are on-going, are they having any affect, do they just need better support, or is it time to look at something new?
- Clearly some schools have a higher percentage of challenged students, but if the perception is that the school system is weak, individuals and businesses will be reluctant to locate in the area.
- Develop/expand youth leadership skills and opportunities through civic involvement
- Focus more attention on the understanding/acceptance of other cultures
- The education attainment level in the current labor force is a concern as it is in many communities. Can more be done to deliver easily accessible adult education – electronically or otherwise? Is their /could there be a countywide Business Education Council that meets on a regular basis to address issues of school-to-work, customized, job-related training, portable credentials (GED, Associates Degrees, Technical Certification etc.)
- Pursue opportunities to expand relationships with local colleges/universities to deliver accessible adult education?
- Explore the potential of building/developing/attracting other institutions of higher education to Elkhart County
- A well-educated, highly skilled workforce attracts technology oriented, higher paying business and industry and vis-a-versa.

Key Issue/Priority: Government Coordination/Land Use Planning

What you told us

Priorities for increased attention over the next 10 Years

- Strengthen county-wide land-use planning: roads, utilities, sewer, water, sprawl, growth management (44 persons with this priority)
- Strengthen cooperation and coordination among elected officials and among local, county, and regional planning agencies; also concern for coordinated implementation (37)
- Lack of public transportation (2)

Strengths

- Good inter-governmental cooperation

Weaknesses

- Lack of land-use planning; no master plan for infrastructure development (4)
- Fragmentation of efforts – governmental and private; sometimes relates to the use of incentives (3)
- Inadequate community leadership (2)
- Poor management of growth
- To improve the quality of life and attract anyone to our area, we must consider the physical (biological) community to meet human needs.
- Need collaboration among municipalities, across county borders – regionally.
- Lack of public transportation
- Inadequate road transportation capacity
- Weak north-south transportation routes
- No direct air service

Opportunities

- Maximize the use of developed areas through better land use policies (2)
- Better land use planning: improve core areas in cities and gateways to cities, and redevelop brownfields and vacant land within cities
- Develop greater tax uniformity in the cities and the county
- Preserve farmland through the redevelopment of underutilized land already within cities
- This Horizon Project effort to develop a countywide approach with more collaboration (5)
- Develop the attitude of being a county team rather than parochial city approaches

Threats

- Property taxes discourage business growth, retention, and attraction
- Lack of infrastructure planning, especially roads
- Urban sprawl
- Lack of public dollars makes it difficult to be proactive, e.g., infrastructure development and guiding growth
- Excessive government regulation and un-funded mandates
- Environmental impact of business and farming practices
- Poor quality of surface water

What the research tells us

- The highest density areas are central Elkhart and central Goshen
- Population decentralization is occurring as people move outside of developed areas
- Between 1990 and 2000, highest growth rates have occurred in less dense areas – east of Elkhart and southwest of Goshen (27.2% - 34.8%)
- Growth rates in the Bristol area have been as high as 42.2%
- Most prime farmland is located in the southern two-thirds of Elkhart County
- Growth pressure from Bristol, Elkhart and Goshen is threatening portions of this prime farmland
- Central Elkhart saw stagnant growth rates between –2.3 and 5.2%

Implications/opportunities for action

- If the county feels that protection of prime farmland is of importance, appropriate policies and development controls will need to be implemented to guide development to more suitable locations. Consider:
 - Instituting agricultural land preservation policies
 - Conservation Easement and Impact Fees
 - Implementing a detailed site plan review process
 - Using farmland preservation techniques such as the Land Evaluation and Site Assessment (LESA) system for site plan review
 - Determining Urban Service Boundaries
 - Instituting Cluster Development Overlay Zone
 - Adopting Agricultural ‘Buffer Zones’
 - Raising minimum lot sizes for new subdivisions in unincorporated areas of the county
 - Strengthening cooperation and coordination among local county and regional planning agencies
 - Proactively determine what changes each community wants
 - Expand involvement by the county in the redevelopment process
 - Review and amend the county and city land use plans
 - Evaluate the creation of an Elkhart County Unified Planning Agency
 - Redevelop Brownfield’s
 - Support established neighborhoods
 - Make sure the plan approval process is not an impediment
 - Support public/private partnerships
- Physically attractive communities, with managed growth and development help attract and keep businesses and population; they also help maximize diversification of the economic base through tourism development, attraction/retention of corporate headquarters, business support services, and high-tech companies – those demanding a higher quality of life.
- Development/preservation of agriculture offers opportunities as an economic development strategy – value-added, import substitution, alternative crops, etc.

Key Issue/Priority: Leadership Development

What you told us

Priorities for increased attention over the next 10 Years

- Danger of being too comfortable with the status quo (6)

Strengths

- Entrepreneurial spirit (reported by 9 tables)
- Strong work ethic (4)
- Small town environment with big city can-do attitude
- Conservative values (hard work, honesty, family, etc.)
- Caring; shared values
- Good community leadership (3)
- Political will to make changes and improvements

Weaknesses

- Lack of ability to embrace cultural diversity
- Poor image – old manufacturing community
- Failure to adopt daylight savings time
- Fragmentation of efforts – governmental and private; sometimes relates to the use of incentives (3)
- Inadequate community leadership (2)
- Lack of development of future leaders
- Successful business owners earn their money in Elkhart county and then leave in retirement and spend their money elsewhere

Opportunities

- This Horizon Project effort to develop a countywide approach with more collaboration (5)
- Develop the attitude of being a county team rather than parochial city approaches
- Energize youth as our future workforce
- Emphasize positive aspects and potential

Threats

- Exodus of corporate headquarters to other communities; losing the ability to support local activities (2)
- Not leading in a positive way on cultural diversity (2)
- Lack of leadership for cooperation among communities
- Lack of implementation following a planning process
- Loss of central business districts

What the research tells us

- In relative terms Elkhart County has done fairly well economically but, the economic base is not as strong as it was, there has been a decline in per capita income and continuing instability of the state, national and global economy.

Implications/opportunities for action

- The state is struggling with a budget deficit, which is, and will continue to affect the finances distributed to communities.
- Communities face increasing operating costs, more un-funded mandates and a decline in the resources needed to address them – this situation contributes to the challenges facing community leaders.
- The participants in the Community Leadership Workshop very clearly state that, only through collaborative, forward thinking leadership will Elkhart County create and implement a vision for the future and a strategic plan designed to overcoming current challenges, manage change and build a strong, inclusive and economically sustainable community.
- The loss of middle and high-income jobs has undoubtedly resulted in a shortage of community leaders. Other communities have found success in overt efforts to bring new and young people into leadership positions

Key Issue/Priority: Redevelopment

What you told us

Priorities for increased attention over the next 10 Years

- Redevelopment of brownfield areas: underutilized and abandoned houses and buildings (14)

Strengths

- None listed

Weaknesses

- None listed

Opportunities

- Maximize the use of developed areas through better land use policies (2)
- Better land use planning: improve core areas in cities and gateways to cities, and redevelop brown-fields and vacant land within cities
- Develop greater tax uniformity in the cities and the county
- Preserve farmland through the redevelopment of underutilized land already within cities
- Downtown Development

Threats

- None listed

What the research tells us

- Central Elkhart (City of) saw stagnant growth rates between -2.3 and 5.2% (location of many brownfields?)
- Development pressures in Bristol, Elkhart, Goshen areas are threatening prime farm land

Implications/opportunities for action

- Declining downtowns/central cities are a disincentive to development of any kind
- The values of current citizens and existing business match those of all people and businesses – real downtowns/vibrant central cities are essential quality of life components
- Redevelopment is an essential component of economic development, community development land use planning