

**New Jersey Community Capital
South Jersey Initiative:**

**An Investigation of Workforce and Economic Development
in Atlantic, Cumberland, Gloucester, and Salem Counties**

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NJCC's South Jersey Initiative
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Cumberland, Gloucester, and Salem Counties

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Executive Summary

This report creates a set of baseline data, information, and recommendations for New Jersey Community Capital's "South Jersey Initiative." The full report is organized in five chapters. Research and interviews with stakeholders in the public, private, and non-profit sector aided the creation of several key findings. The body of the report (Chapters 2-4) provide background information about the counties, workforce development efforts, and the current economic development sphere in the region. A chapter on analysis synthesizes data and on-the-ground perspectives to provide a more holistic view of the current situation in the region. The report then makes several recommendations regarding ways in which NJCC can directly or indirectly extend support to ongoing efforts in the four county target area. Several appendices provide further data and narratives about topics covered throughout the report.

First, the report provides an overview of the methods that we used. In Chapter 2, we present background information and data relating to the current employment and economic conditions of low-income residents of the four counties (Atlantic, Cumberland, Gloucester, and Salem), as well transportation, housing, and land use challenges in the area. The region, which is mostly rural, has low educational attainment, high unemployment, and suffers from a lack of transportation options to travel to jobs, education, or social services.

In Chapter 3, we provide details about the various public, private, and non-profit sector institutions that both shape the South Jersey workforce and inform readers about opportunities, barriers, and gaps that exist with the region's workforce development training programs. In Chapter 4, we highlight economic development efforts in each of the four counties and outline key growth sectors, as well as ongoing projects and the status of economic development in the four county region. The report identifies the need for community colleges and employers to communicate and build pathways toward gainful employment.

Lastly, in Chapter 5 we present recommendations for investment and how to most efficiently and effectively invest in Atlantic, Cumberland, Gloucester, and Salem Counties to ensure brighter futures for workers and businesses in the region. Our recommendations encompass investment by NJCC, coordinating with local stakeholders on existing programs, and advocating long term strategies at the local, regional, and state level. The recommendations include workforce development and regional retention, targeted regional economic development, regional transportation coordination, and integration of plans into a regional implementation strategy.

List of Acronyms

AC - Atlantic City
ACCC - Atlantic Cape Community College
ACIA - Atlantic County Improvement Authority
ACS - American Community Survey
ADP - Average Daily Populations
CAFRA - Coastal Areas Facilities Review Act
CCC - Cumberland County College
CDBG - Community Development Block Grant
CEDS - Comprehensive Economic Development Strategy
CSWIB - Cumberland/Salem Workforce Investment Board
DEPTCOR - New Jersey State Use Industries program
DRPA - Delaware River Port Authority
DVRPC - Delaware Valley Regional Planning Commission
EDD - Economic Development Department
EZ - Empowerment Zone
ESL - English as a Second Language
FEMA - Federal Emergency Management Agency
GSP - Garden State Parkway
HUD - U.S. Department of Housing and Urban Development
JDAI - Juvenile Detention Alternatives Initiative
LEP - Limited English Proficiency
MPO - Metropolitan Planning Organization
NJ - New Jersey
NJCC - New Jersey Community Capital
NJ DHS - New Jersey Department of Human Services
NJ DEP - New Jersey Department of Environmental Protection
NJ DVRS - New Jersey Department of Vocational Rehabilitation Services
NJ DOC - New Jersey Department of Corrections
NJ DOL - New Jersey Department of Labor
NJ DOL SETC - New Jersey Department of Labor, State Employment and Training Commission
NJ DOE - New Jersey Department of Education
NJ DOT - New Jersey Department of Transportation
NJEDA - New Jersey Economic Development Authority
NJLWD - New Jersey Department of Labor and Workforce Development
NJGIN - New Jersey Geographic Information Network
NJT - New Jersey Turnpike
NJ-STEP - New Jersey Scholarship and Transformative Education in Prisons Consortium
PATCO - Port Authority Transit Corporation
PSF - Pascale Sykes Foundation

Target Region - Atlantic, Cumberland, Gloucester, and Salem Counties

TANF - Temporary Assistance for Needy Families

TLD - Transportation, Logistics, and Distribution

RSU - Richard Stockton University

RCGC - Rowan College at Gloucester County

SCC - Salem Community College

SJCF - South Jersey Community Foundation

SJEDD - South Jersey Economic Development District

SJTA - South Jersey Transportation Authority

SJTPO - South Jersey Transportation Planning Organization

STEM - Science, Technology, Engineering, and Math

WIB - Workforce Investment Board

UEZ - Urban Enterprise Zone

UPWP - Unified Planning Work Program

USDOT - United States Department of Transportation

USEDA - United States Economic Development Authority

USGS - United States Geological Survey

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Chapter 1

Study Purpose & Methods

Chapter 1: Study Purpose and Methods

The objective of this study is to create a set of baseline data and information for New Jersey Community Capital's (NJCC) new South Jersey initiative. A group of students from the Rutgers Edward J. Bloustein School of Planning and Policy, addressed as the "study team" herein, consulted with NJCC and carried out the study. The report reviews the current employment and economic conditions of lower-income residents in South Jersey, the existing support systems helping these residents with training and jobs, and the economic conditions and opportunities, including job trends, new business starts, key growth sectors, and other potential job/business growth opportunities in the target region of Atlantic, Cumberland, Gloucester, and Salem Counties. Additionally, NJCC asked the study team to identify broad opportunities and specific programs or initiatives that NJCC might research more fully and potentially invest in the target region.

Data collection began in January 2015 after several discussions and meetings with NJCC staff about the scope and focus of the study. Data for this study included both primary and secondary sources. The study team incorporated data from a variety of sources in order to assess the current system of workforce supports and the economic climate of the region and to identify viable opportunities. The sources utilized existing reports and analysis on the South Jersey region, secondary data such as the U.S. Census Bureau, and key informant interviews. We used existing reports from organizations like the Senator Walter Rand Institute, as well as publicly available planning and strategy documents from Workforce Investment Boards and Economic Development Districts to help build a foundation for the report and gain general understanding of the strengths, weaknesses and challenges of the region. To supplement and update the available research, the study team gathered data from the U.S. Census Bureau, the U.S. Bureau of Labor and Statistics, and the New Jersey Department of Labor and Workforce Development, as well as other several similar sources. Whenever possible, the study team used the most up-to-date and accurate data estimates. We include tables and graphs in the text of the report and as well as in Appendix A. Regarding the U.S. Census American Community Survey, we used three-year estimates whenever possible; we chose three-year estimates as a compromise between accuracy and recentness of data.

The study team conducted interviews to understand frontline perspectives of stakeholders involved with workforce and economic development in the region. The interviews with stakeholders and government officials were helpful in framing the current workforce and economic development climate, gauge understanding of the issues, and to engage key organizations in the region. The study team contacted representatives and conducted interviews with representatives from Community Colleges, Workforce Investment Boards, One-Stop Centers, Planning Boards, Industrial Parks, and other groups (refer to Appendix B for a complete list of interviews). The interviews were semi-structured in order to collect in-depth responses from interviewees. The questions took into consideration stakeholder affiliations, and the

programs they participate in or implement directly. The questions also included prompts on organizational structure, goals, barriers, and partnerships within the target region. In total, the study team conducted sixteen telephone interviews. Interviews ranged from twenty minutes to an hour. Workforce and education interviews contained programmatic questions and questions directed at investigating demand for services. Economic development and planning interviews focused on types of businesses growth sectors, current business and land use conditions, opportunities, and both current and future potential projects.

Our findings are tempered by some limitations. The scope of the research project was considerable impeding our ability to go into great depth; many of the individual topics in this report would be fitting for their own full-length reports. We paired down a sizeable amount of information. Next, the interviews we conducted shape the content of our workforce and economic development chapters, as well as our recommendations and analysis. Although we reached out to a variety of organizations across the business, government, and nonprofit sectors, not all groups responded. There is a real possibility that stakeholders that were unresponsive held crucial information that might have altered, refuted or bolstered, or changed this report's findings. Finally, our report identified several interesting findings that we note but do not investigate substantively; analyzing each one of these in-depth was unrealistic based on the timeframe of the project. Some analysis or reasoning is included in each chapter; however we separate and present the majority of our conclusions in our analysis and recommendations chapter. Despite these limitations, this report includes a wide variety of sources and data present a substantial amount of information on the target region. The combination of key stakeholder interviews and data from primary and secondary sources enabled us to verify our findings and capture a well-balance picture of the target region. We encourage NJCC and future researchers to use the questions and shortcomings of our report as inspiration for future projects and investigation.

We organize the remainder of the report into four chapters. In Chapter 2, we present background information and data relating to the current employment and economic conditions of low-income residents of the four counties (Atlantic, Cumberland, Gloucester, and Salem), as well transportation, housing, and land use issues in the area. In Chapter 3, we provide details about the various public and non-profit sector institutions that shape the South Jersey workforce as well as discuss opportunities, barriers, and gaps that exist with the region's workforce development training programs. Then, we highlight economic development efforts in each of the four counties and outline key growth sectors, as well as ongoing projects and the status of economic development in the four county region in Chapter 4. Lastly, in Chapter 5, we present recommendations for investment and how to most efficiently and effectively invest in Atlantic, Cumberland, Gloucester, and Salem Counties to ensure future prosperity for workers and businesses in the region.

Chapter 2

Background Data: County Employment & Economic Conditions



Chapter 2: Background Data: County Employment & Economic Conditions

This report includes an analysis of Atlantic, Cumberland, Gloucester, and Salem Counties. Along with Cape May County, these four counties lie in the southernmost tip of the state and make up a large part of the geographic region recognized as South Jersey. Around nine percent of the New Jersey's population, or approximately 800,000 people, live in these four counties (U.S. Census Bureau, 2014). The target region comprises over 1,700 square miles, or 23 percent, of the state. Although these counties are all in South Jersey, each has its own unique characteristics. This chapter outlines background information on the target region, noting significant differences and commonalities among the four counties.

Key findings in this chapter include:

- The four county target region is sparsely populated and has recently been experiencing slow population growth.
- There are several sizeable vulnerable or special needs populations in the region:
 - All four counties have a higher percentage of 18 to 64 year-olds with a disability than the state.
 - In Atlantic and Cumberland Counties, over one quarter of the population speaks a language other than English at home.
 - In Cumberland County, nearly three quarters of the foreign born population identifies as not naturalized.
 - In Atlantic, Cumberland, and Salem Counties, the percentage of single-parent households with children under 18 is higher than the state.
- Atlantic, Cumberland, and Salem Counties have higher rates of poverty than the state.
- The target region has lower post-secondary educational attainment than New Jersey. Considering residents age 25 and over, all four counties have a lower percentage of individuals with a bachelor's degree or higher than the state. Atlantic, Cumberland, and Salem Counties have a lower percentage with a high school diploma or higher than the state.
- The unemployment rate is higher in each of the four counties than the state average overall. In Atlantic, Cumberland, and Salem Counties, workers have lower median earnings than the state. Young workers are one group that is struggling with employment in each of the four counties.
- Although Atlantic and Gloucester Counties have a significant number of bus and train routes within their borders that connect workers to jobs and enable regional transportation, there is a lack of viable public transportation to connect individuals in the region to jobs and social services.
- All four counties have a higher foreclosure rate than the state. Atlantic County has the highest rate and is the second highest nationwide.

- The region's housing costs consume a significant portion of residents' income despite relatively low rent and home ownership costs.
 - More than half of renters in each county are spending 30 percent or more of their household income on rent. All of the counties have a greater rate of housing-burdened renters than the state.
 - Atlantic County has the greatest percentage of the four counties of homeowners who spend 30 percent or more of their household income on the cost of owning a home. The percentage is greater than the state's.

Demographics and Poverty

The four counties in the target region are sparsely populated when compared to the rest of New Jersey (See Table 1). Cumberland and Salem Counties are the second and third least densely populated counties in the state (U.S. Census Bureau, 2010). Atlantic and Gloucester Counties are more densely populated counties in the region with roughly two and four times the population density of Cumberland County. Salem County is the least populated county in the state. Cumberland, Atlantic, and Gloucester Counties are the sixth, seventh, and eighth least populated counties in the state. In addition to their small populations, population growth is slower in each of these four counties compared to the state as a whole. From April 2010 to July 2013, the state's population grew 1.2 percent. During the same time, Gloucester's population grew by 0.7 percent, Atlantic's population by 0.5 percent and Cumberland's population by 0.3 percent. Salem County's population fell by 1.4 percent (U.S. Census Bureau, 2010).

Table 1: Population and Population Change					
	Atlantic	Cumberland	Gloucester	Salem	<i>New Jersey</i>
Population, 2014	275,209	157,389	290,951	64,715	8,938,175
% Change April 2010-July 2014	0.2%	0.3%	0.9%	-2.1%	1.7%
Source: U.S. Census Bureau, 2013 American Community Survey & 2010 Decennial Census					

The five largest cities in the target region are Vineland City (Cumberland County), Washington Township (Gloucester County), Egg Harbor Township (Atlantic County), Atlantic City (Atlantic County), and Galloway Township (Atlantic County). Atlantic and Gloucester Counties have eighteen cities with more than 10,000 residents. Cumberland has three municipalities with populations over 10,000 and Salem has only one municipality with more than 10,000 residents (U.S. Census Bureau, 2011-2013).

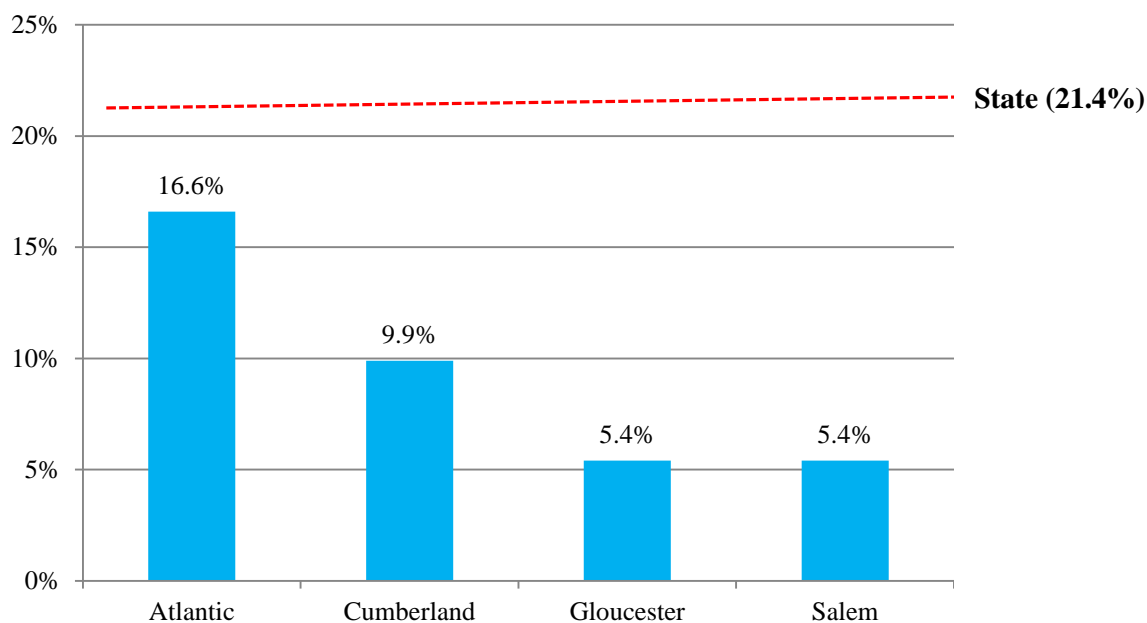
Table 2 presents data on racial and ethnic composition. Gloucester and Salem Counties have largely white populations, while Cumberland County has a more diverse population with nearly 20 percent of the population identifying as African-American and more than 25 percent of the population identifying as Hispanic or Latino (U.S. Census Bureau, 2011-2013). Atlantic County's population is highly reflective of the state's overall racial and ethnic composition (not as diverse as Cumberland, but not as homogenous as Gloucester).

Table 2: Ethnic/Racial Breakdown

	Atlantic	Cumberland	Gloucester	Salem	<i>NJ</i>
White alone	57.5%	49.1%	80.1%	76.0%	57.9%
Hispanic or Latino (of any race)	17.8%	28.1%	5.2%	7.4%	18.6%
Black or African American alone	14.5%	18.9%	9.8%	13.8%	12.7%
American Indian and Alaska Native alone	0.2%	0.6%	0.1%	0.0%	0.1%
Asian alone	7.8%	1.2%	2.9%	0.9%	8.7%
Other*	2.2%	2.1%	1.9%	1.9%	2.0%
Source: 2011-2013 American Community Survey 3-Year Estimates					
*Other includes Native American, Some other race alone, two or more races, and three or more races					

All of the target counties have significant and growing elderly populations. We provide a table displaying an age breakdown of county's populations in the Supplemental Table Appendix A, Table A1. There are over 100,000 individuals age 65 and over in the target area (U.S. Census Bureau, 2011-2013). From 2000 to 2010, Atlantic County's elderly population grew by 13 percent, while Gloucester's grew by 20.3 percent (New Jersey Department of Labor and Workforce Development, 2012). Cumberland and Salem's elderly populations grew by much smaller amounts and percentages; Cumberland's grew by 3.7 percent and Salem's grew by 6.5 percent. The five municipalities in the four counties with the largest proportion of their populations age 65 years and older are within Atlantic County; Longport, Margate City, Weymouth, Brigantine, and Ventnor City each have more than 20 percent of their populations with individuals age 65 years and older (U.S. Census Bureau, 2008-2013).

The foreign born population is largest in Atlantic County, but none of the four counties has a rate as high as the state's overall average (see Graph 1). In Cumberland County, over 70 percent are not citizens among the foreign born population. Gloucester County has the highest percentage non-naturalized foreign-born population. In Bridgeton, 90 percent of the foreign born population has not been naturalized. Other municipalities with over 60 percent of their foreign born populations identifying as being non-naturalized include Maurice River, Fairfield, and Vineland in Cumberland County, and Woodbury and Franklin in Gloucester County (See Table 3).

Graph 1: Foreign Born Population in the Target Area

Source: 2011-2013 American Community Survey 3-Year Estimates

Table 3: Foreign Born Population: Naturalization Status

	Naturalized U.S. citizen	Not a U.S. citizen
Atlantic	53.2%	46.8%
Cumberland	28.5%	71.5%
Gloucester	59.4%	40.6%
Salem	49.1%	50.9%
New Jersey	51.8%	48.2%
Source: U.S. Census Bureau, 2013 3-Year Estimates American Community Survey		

In New Jersey, 30 percent of the population aged five years and over speaks a language other than English at home (U.S. Census Bureau, 2011-2013). In Atlantic and Cumberland Counties, over one quarter of the population speaks a language other than English at home. In Atlantic, nearly 15 percent of the population speaks Spanish at home; in Cumberland, over 20 percent of the population speaks Spanish at home (U.S. Census Bureau, 2011-2013). During the 2013-2014 school year, over 5,000 limited English proficiency (LEP) students went to school in the four counties. Atlantic County has the largest number and percentage of its students who identify as having LEP (Table 4). During the 2012-2013 school year, Atlantic County had 2,419 students with LEP and Cumberland had 1,606 students with LEP. This represents 5.3 percent and 5.9 percent of the total number of students in each county, respectively. Cumberland County has the largest number of students with immigrant backgrounds- of the 430 K-12 students who are immigrants in the target area, 344 of them attend school in Cumberland County (NJDOE, 2003-2014).

Table 4: Limited English Proficiency (LEP), K-12, 2012-2013			
County	LEP Students	Total Enrollment	Percentage of LEP Students in Total Enrollment
Atlantic	2,419	45,444	5.3%
Cumberland	1,606	27,103	5.9%
Gloucester	290	48,638	0.6%
Salem	202	11,427	1.8%
New Jersey	61,639	1,373,182	4.5%
Source: New Jersey Department of Labor and Workforce Development, 2012			

At the city level, Bridgeton City has the largest proportion of their population that does not speak English at home of the cities in the target area; over 40 percent of their population speaks Spanish at home (U.S. Census Bureau, 2008-2013). Vineland and Maurice River also have high proportions of residents who do not speak English at home (29 percent and 13 percent, respectively). In Atlantic County, Egg Harbor, Hamilton, and Hammonton have more than 15 percent of their populations that speak a language other than English at home.

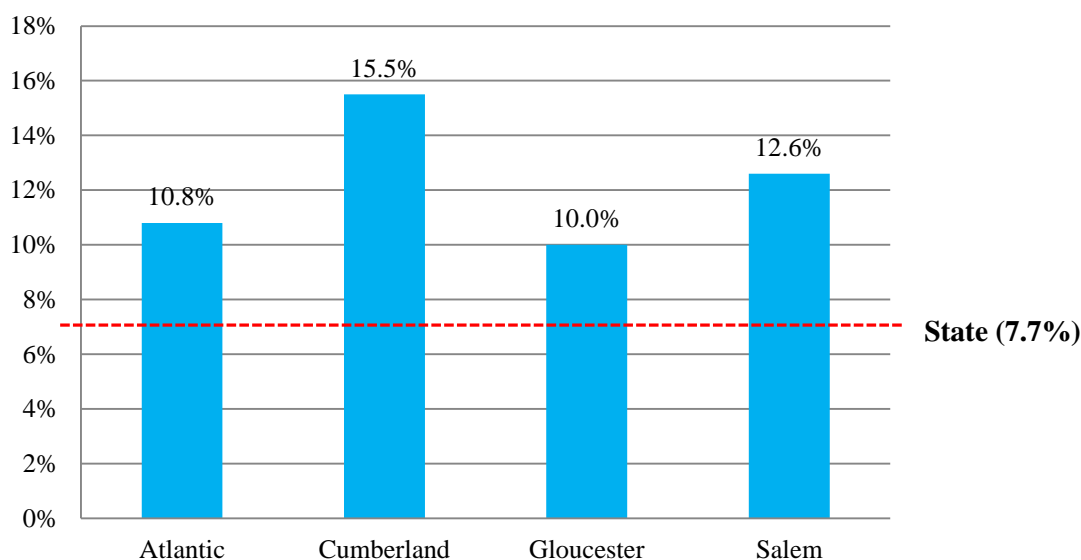
Two distinct subpopulations worth noting are single parents and people with disabilities as both groups have unique barriers to employment as well as community needs. The percentage of total family households led by single females with children under 18 is higher in Atlantic, Cumberland, and Salem Counties than the overall state percentage. The percentage of total family households led by single males with children under 18 is higher in all four counties than in the state. There are over 23,000 single mothers with children and over 7,000 single fathers with children in the target region. (U.S. Census Bureau, 2011-2013). Table 5 displays total estimates of single parent households with children in the region.

Table 5: Single Mothers and Fathers with Children Under 18		
	Single parents	Single Parent Households as Percent of Total Family Households
Atlantic	11,942	17.50%
Cumberland	6,670	19.33%
Gloucester	9,121	11.97%
Salem	2,670	16.08%
New Jersey	287,546	13.08%
Source: U.S. Census Bureau, ACS 3 Year Estimates, 2011-2013		

All four of the counties have a higher percentage of 18 to 64 year-olds with a disability than the state. Cumberland County has the largest proportion of the civilian population with a disability. Graph 2 compares the rate of disability in each county to the state's average (see Appendix Table A3 for accompanying estimates). Over 55,000 individuals age 18 to 64 in the four county areas are disabled (U.S. Census Bureau, 2011-2013). In Salem City, over 25 percent of the population

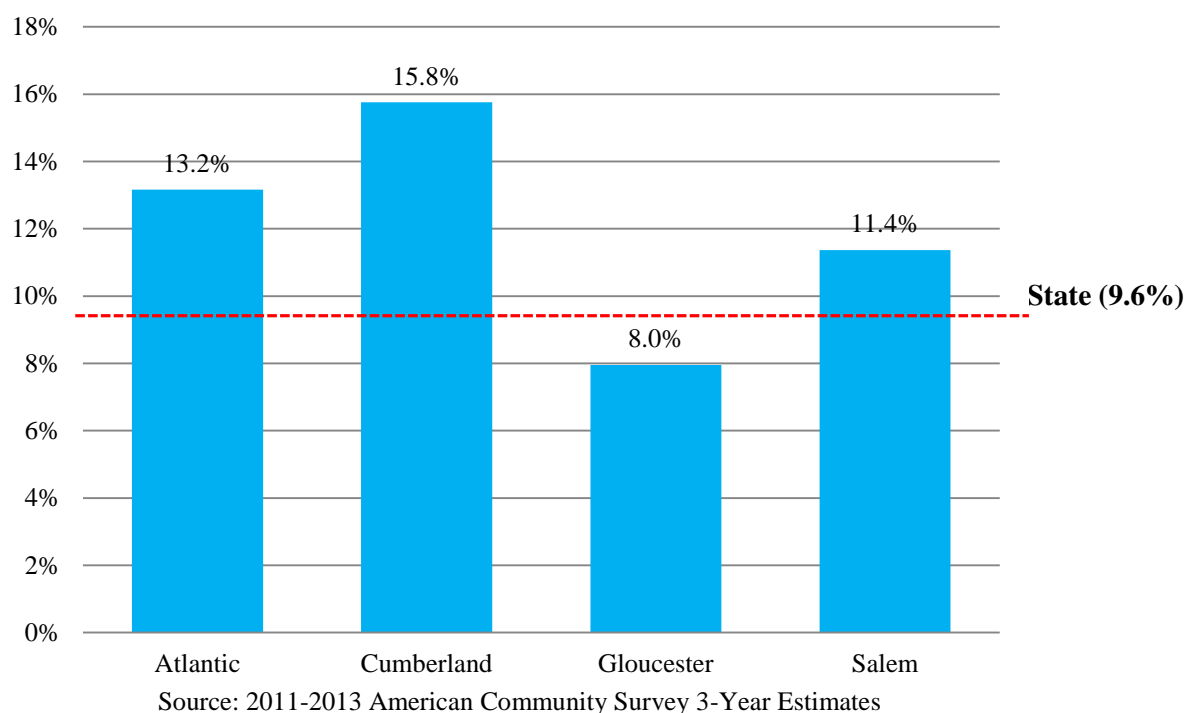
age 18 to 64 identifies as having a disability. Other municipalities with high rates of disability in the working age population include Bridgeton, Deptford, Fairfield, Hammonton, Millville, Monroe, Pennsville, Salem City, Vineland, and Woodbury all with rates over 10 percent (the statewide rate for the same time period was 7.6 percent). In nominal terms, Deptford, Egg Harbor, Millville, Monroe, Vineland, and Washington Township each have working age disabled populations over 2,000 (U.S. Census Bureau, 2008-2013). In Table A4 (see Appendix Table A4), the seven cities in the target area with the highest percentages of residents with disabilities are ranked from highest to lowest.

Graph 2: Disabled Population: 18-64 Years Old



Source: 2011-2013 American Community Survey 3-Year Estimates

There is a high percentage of individuals experiencing poverty in the region. Atlantic, Cumberland, and Salem Counties each have poverty rates above the statewide average (see Table 6). Only Gloucester County's overall and family poverty rates (5.9 percent) are lower than the statewide poverty rate. Cumberland has the largest proportion of families living with incomes below the poverty level and Atlantic has the largest total number of families living with incomes below the poverty level. Approximately 20,000 families and about 66,000 individuals 18 and older living with incomes below the poverty level in the four counties (U.S. Census Bureau, 2011-2013). In Atlantic and Cumberland Counties, of individuals 18 and older, those between 25 and 34 have the highest rates of poverty. In Gloucester County the 18-24 age group has the highest rates of poverty.

Graph 3: Total Population with Income below Poverty Level**Table 6: Total Population with Income Below Poverty Level**

County	% Total Population	Total Number
Atlantic	13.16%	17,758
Cumberland	15.76%	17,958
Gloucester	7.95%	28,258
Salem	11.37%	5,863
<i>New Jersey</i>	<i>9.55%</i>	<i>660,264</i>

Source: U.S. Census Bureau, ACS 3 Year Estimates, 2011-2013

The female population has a higher poverty rate in New Jersey and in each of the four counties. Around 60 percent of those living in poverty are female in the target area and in New Jersey (See Table 7). Single parent households with children make up a significant portion of the families living in poverty. For example, in Salem County, over 60 percent of families living in poverty are classified as “female householder with children under 18 present.” In each of the other counties, over half of the families living in poverty identify as either male or female householders with no spouse present living with children under age 18.

Table 7: Families with Incomes Below Poverty Level										
	Atlantic		Cumberland		Gloucester		Salem		NJ	
Total Families In Poverty	12.7%	8,648	14.9%	5,160	5.9%	4,493	10.8%	1,793	8.2%	<i>181,511</i>
Family Type Breakdown										
Married Couple	31.5%	2,726	27.5%	1,419	26.7%	1,198	15.8%	283	32.8%	<i>59,597</i>
Single Father w/ Children under 18	8.7%	756	8.0%	412	10.2%	457	10.9%	196	8.1%	<i>14,789</i>
Single Mother w/ Children under 18	52.1%	4,504	48.9%	2,525	54.2%	2,435	64.5%	1,157	48.1%	<i>87,365</i>
Single Head of Household (No Children)	7.7%	662	15.6%	804	9.0%	403	8.8%	157	10.9%	<i>19,760</i>
Source: U.S. Census Bureau, ACS 3 Year Estimates, 2011-2013										

Residents of the four counties rely on public assistance for help obtaining basic subsistence. Atlantic, Cumberland, and Salem Counties each had higher percentages of individuals who received food stamp or Supplemental Nutrition Assistance Program (SNAP) benefits in the past year than the state average (See Table 8). In Cumberland County, over 17 percent of households received SNAP benefits in the last year, compared with 7.4 percent at the state level (U.S. Census Bureau, 2011-2013). Of all the municipalities in the four counties, Salem City, Penns Grove, and Paulsboro Township had the highest percentages of households receiving SNAP benefits.

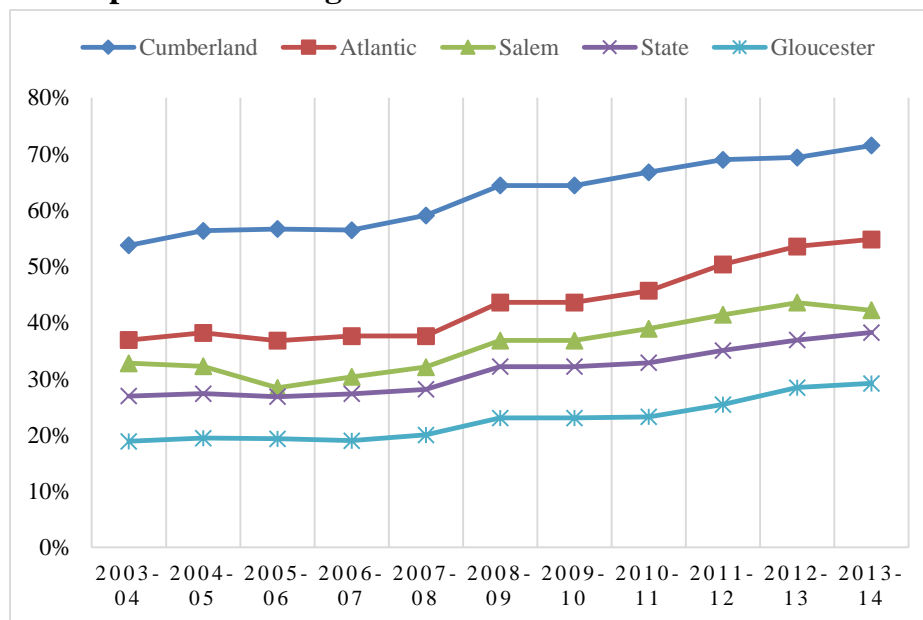
Table 8: Food Stamp/SNAP Benefits in Past 12 Months		
County	Households	Percent
Atlantic	13,938	13.8%
Cumberland	8,721	17.4%
Gloucester	7,734	7.4%
Salem	2,740	11.1%
<i>New Jersey</i>	<i>282,869</i>	<i>8.9%</i>
Source: U.S. Census Bureau, ACS 3 Year Estimates, 2011-2013		

In November 2014, in the four counties combined, over 110,000 people participated in the SNAP program and over 12,000 people participated in the Work First NJ or Temporary Assistance for Needy Families (TANF) programs (See Table 9). In Atlantic County alone, over 5,500 individuals were receiving Work First NJ or TANF Program benefits and over 45,000 individuals were participating in the SNAP program in November 2014 (New Jersey Department of Human Services, 2014).

Table 9: Work First NJ/TANF Program Participants

	Adults	Children	Total
Atlantic	1,842	3,720	5,562
Cumberland	1,060	2,354	3,414
Gloucester	852	1,669	2,521
Salem	276	674	950
New Jersey	27,952	57,040	84,992
Source: NJ Department of Human Services, Current Program Statistics: November 2014			

During the 2013-14 academic school year, over 62,000 students in grades K-12 participated in either free or reduced lunch programs in the target region (NJDOE, 2003-2014). Atlantic County had the largest total number students on free or reduced lunch while Cumberland County had the largest percentages of its K-12 population enrolled in free lunch program. In Atlantic, 20,725 students in grades K-12 enrolled in the free lunch program in 2012-13 while in Cumberland, 16,506 students were on free lunch in 2012-13. From 2003 to 2013, the percentage and total number of students receiving free or reduced lunch increased in the target counties (NJDOE, 2003-2014). Atlantic, Cumberland, and Salem Counties each had greater proportions of their students receiving free or reduced lunch than the state overall from 2003 to 2013 (see Graph 4).

Graph 4: Percentage of Students on Free/Reduced Lunch

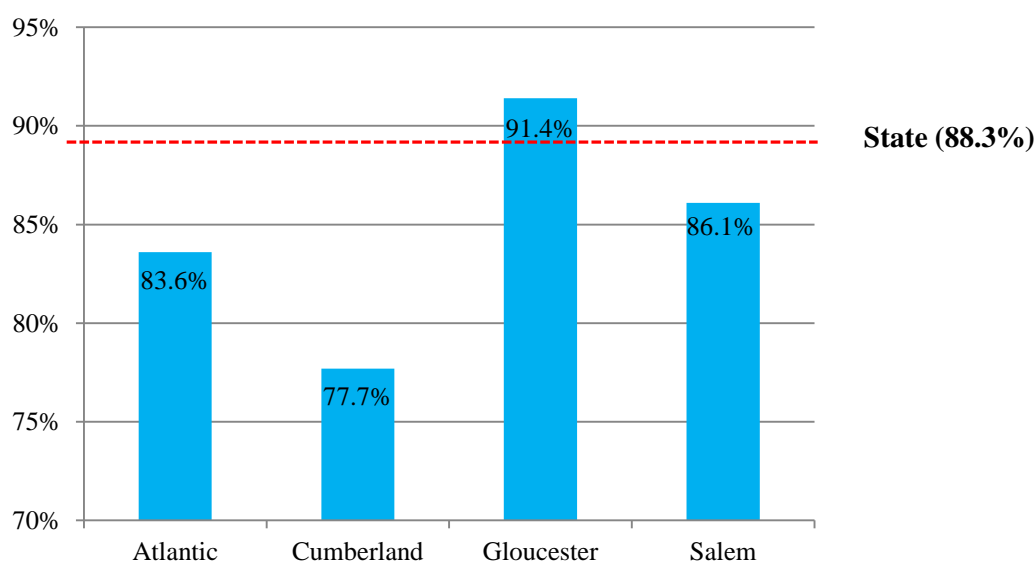
Source: NJDOE, 2003-2014

Gloucester County has the least percentage of total enrolled students on free or reduced lunch, with a rate less than that of the state. When looked at separately, the trend of the total number of individuals receiving free and reduced lunch is largely the same; however separating the two programs illustrates one important shift in Cumberland. From the 2011-12 school year to the 2012-13 school year, a large number (around 3,000) of students in Cumberland County switched from reduced lunch to free lunch. We present a breakdown of poverty by age for individuals over age 18 in the supplemental table appendix (see Appendix Table A5).

Education and Employment

New Jersey is consistent ranked among the most educated states. In New Jersey, 88.3 percent of the population aged 25 years and older has a high school diploma. In the target region, only Gloucester County has a higher percentage than the state average of high school graduates 25 years and older. Out of the four counties, Cumberland has the lowest percent of high school graduates over the age of 25 at 77 percent; Atlantic County has the second lowest percentage (83.6 percent) (U.S. Census Bureau, 2011-2013). In Cumberland County, Bridgeton, Maurice River, Fairfield, and Vineland each have less than 80 percent of their population age 25 years and older identifying as high school graduates. In Salem City, only about 75 percent of the population age 25 years and older identifying as high school graduates. Municipalities in Atlantic and Gloucester Counties have higher rates of educational attainment (U.S. Census Bureau, 2008-2013).

Graph 5: Over 25 w/HS Diploma or Higher

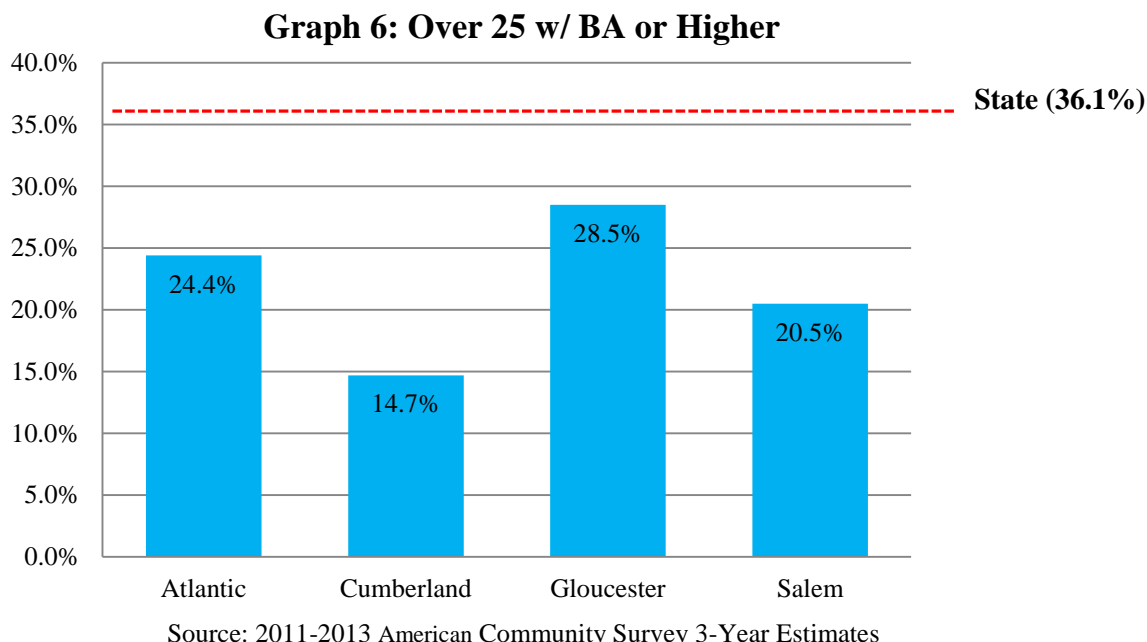


Source: 2011-2013 American Community Survey 3-Year Estimates

According to available data on graduation rates in the target region, Salem City High School had the lowest district wide graduation rate in the four counties in 2014 (NJDOE, 2014). Other high

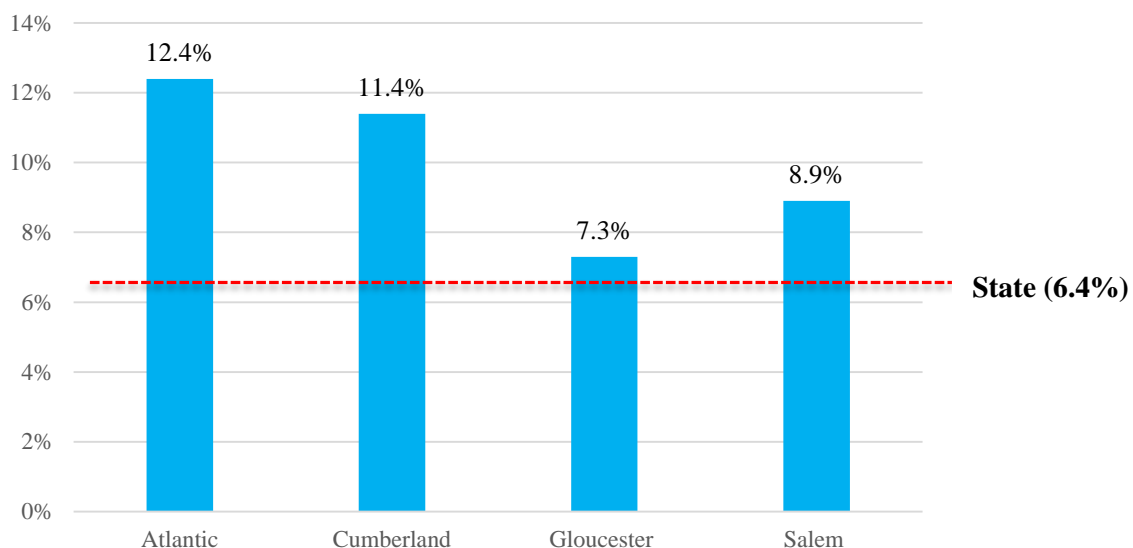
schools with low graduation rates include Atlantic City, Bridgeton, Pleasantville, Penns Grove, and Vineland high schools (see Appendix Table A8).

North Jersey has about twice the proportion of people with higher education as compared to South Jersey (Okulicz-Kozaryn, 2014).¹ In 2013, 36.1 percent of all New Jersey residents aged 25 years and older had a Bachelor's degree or higher while on average, the target region only had 22 percent with a Bachelor's degree or higher (see Graph 6). More specifically, Cumberland County's population only has 14.7 percent with a Bachelor's degree or higher.



New Jersey's unemployment rate has begun to stabilize; however, the four counties remain economically distressed. In February 2015, the target region's counties all had unemployment rates above the statewide average (U.S. Bureau of Labor and Statistics, 2015). New Jersey's unemployment rate was 6.4% in February 2015 (see Graph 7). Atlantic County had the highest rate at 12.4 percent and Gloucester County had the lowest with 7.3 percent. Cumberland and Salem Counties had unemployment rates of 11.4 percent and 8.9 percent respectively. Additionally, in Atlantic, Cumberland, and Salem, the proportion of the working age population that identifies as "Not in the Labor Force" is greater than the state's average (see Appendix Table A2). The state's "Not in the Labor Force" rate is 21 percent while the rates for Atlantic, Cumberland, and Salem Counties are 21, 24, and 23 percent respectively. The U.S. Census defines this population to include students, homemakers, retired workers, seasonal workers interviewed during an off season; and people who are not looking for work, institutionalized, or individuals who only do incidental unpaid family work.

¹ This is a generalization taken from a Rand Publication from May 2014; in their report they do not provide a specific definition of North Jersey.

Graph 7: Unemployment Rate, February 2015

Source: U.S. Bureau of Labor and Statistics, 2015

In addition, the “Not in the Labor Force” population in the target region has a larger proportion of individuals with disabilities (see Table 10). This indicates that those who are not working tend to have more needs in Atlantic, Cumberland, and Salem Counties (U.S. Census Bureau, 2011-2013). In addition, compared with the state, the target region has a higher percentage of the employed labor force that is working with a disability. Consequently, a larger proportion of workers in these counties may have special needs and face potential employment struggles.

Table 10: Percent of "Not in Labor Force" with Disability (Civilian Population Ages 18-64)

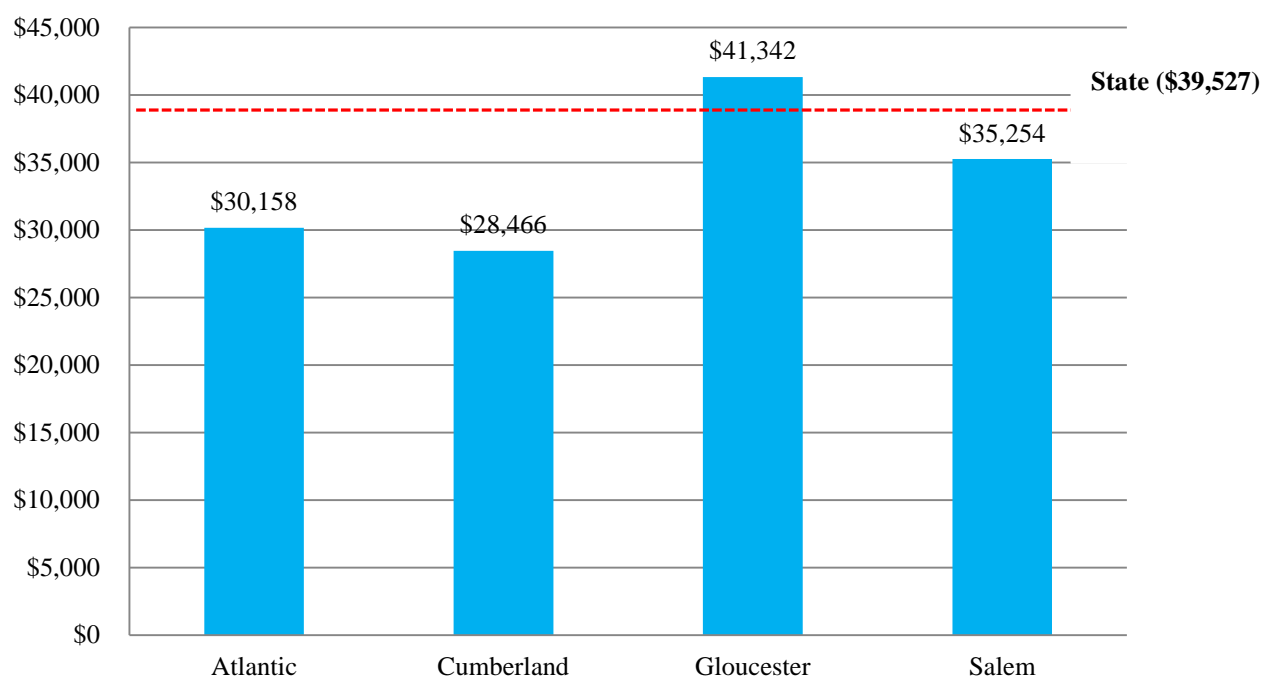
	Total Not In Labor Force	Not in Labor Force with Disability	Percent of Total Population
Atlantic	35,228	9,760	27.71%
Cumberland	21,714	8,629	39.74%
Gloucester	37,008	10,060	27.18%
Salem	9,145	3,046	33.31%
<i>New Jersey</i>	<i>1,146,040</i>	<i>236,485</i>	<i>20.63%</i>

Source: U.S. Census Bureau, ACS 3 Year Estimates, 2011-2013

Regarding wages, the median worker in New Jersey makes about \$39,527; except for Gloucester County, the median wage for workers is lower in the target counties compared with the state. In

the four counties, the five municipalities with the lowest median incomes are Bridgeton (Cumberland), Salem City (Salem), Maurice River Township (Salem), Pleasantville (Atlantic), and Penns Grove (Salem) (see Graph 8). We provide a table displaying the ten municipalities in the target area with the lowest median incomes in the Supplemental Table Appendix A, Table A11.

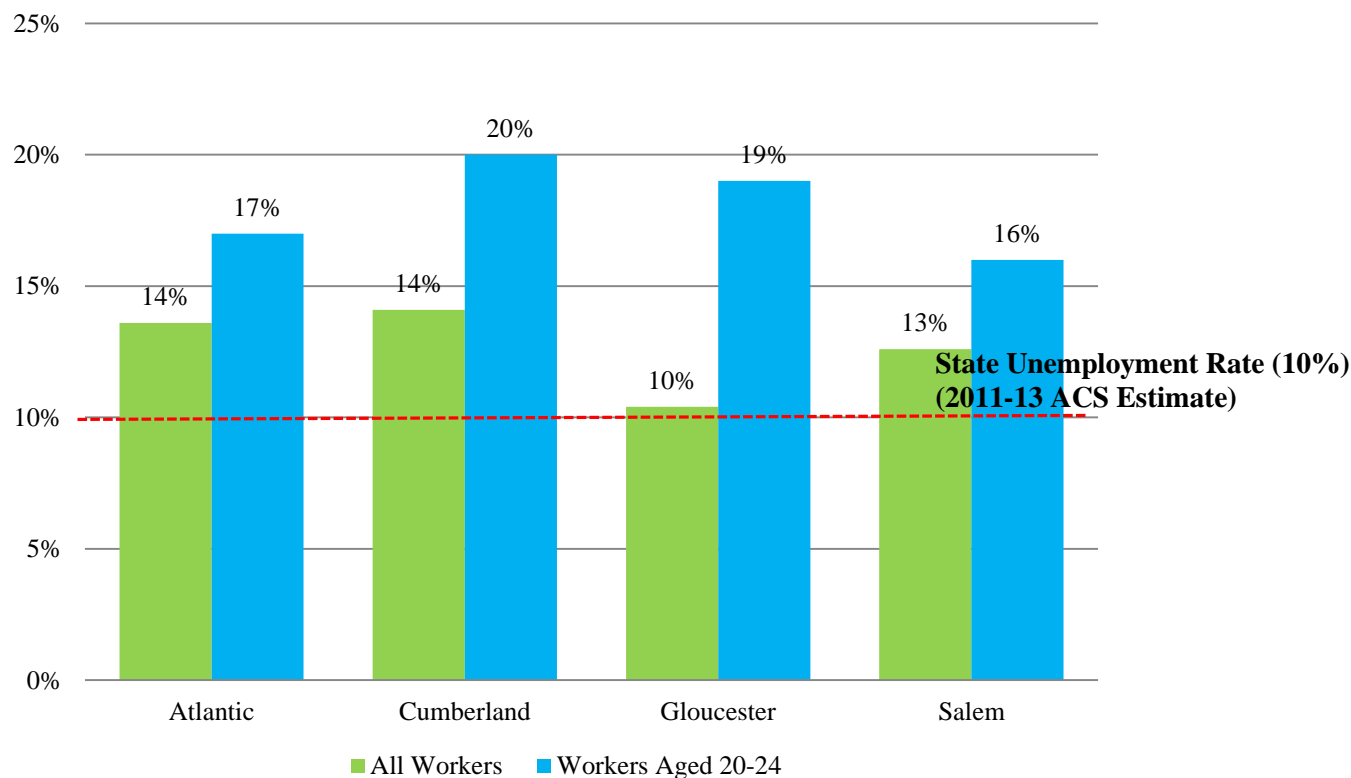
Graph 8: Median Earnings for Workers



Source: U.S. Census Bureau, ACS 5 Year Estimates, 2008-2013

In each of the four counties, individuals with less education tend to experience greater levels of unemployment (see Appendix Tables A6 and A7). In each of the four counties, individuals without a college degree are unemployed at a higher rate than the state average with the exception of Gloucester County. Individuals with less than a high school diploma or GED living in Atlantic and Salem Counties are unemployed at significantly higher rates than other groups. Individuals with some college are unemployed at a relatively high rate in Cumberland County when compared with the other counties and the state rate for the same group; in New Jersey, 10 percent of those with some college education are unemployed whereas in Cumberland 14 percent of those with some college education are unemployed (U.S. Census, 2011-2013). Finally, when workers between the ages of 20 and 24 are disaggregated from all workers, they are unemployed at rates from three to nine percent higher in each county (see Graph 9).

Graph 9: Unemployment of All Workers vs. Workers Ages 20-24



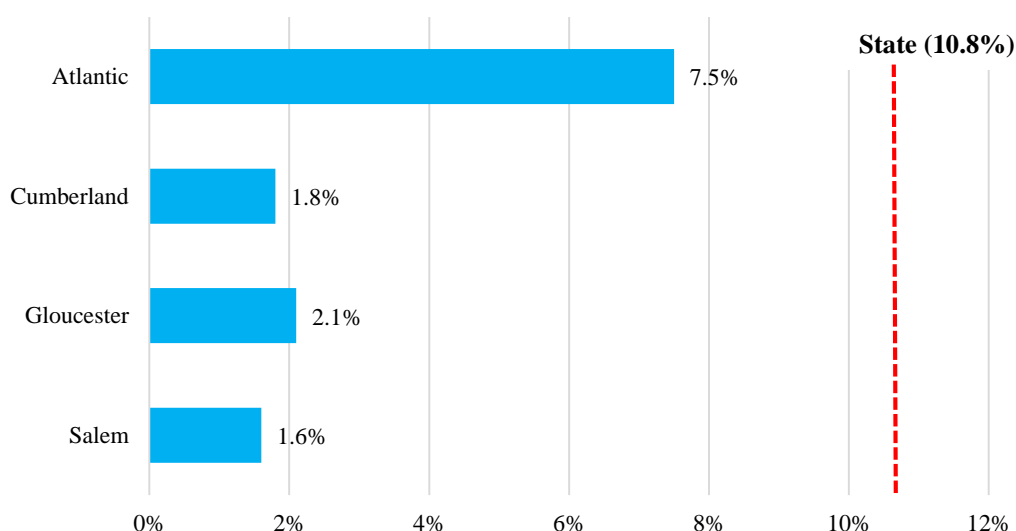
Source: U.S. Census Bureau, ACS 3 Year Estimates, 2011-2013

Transportation

Transportation is a crucial component to the workforce and economic development of any region; both workers and businesses benefit from reliable and accessible public transportation and well-maintained roads. In the target region, there are a number of transportation challenges that range from the availability of public transportation alternatives to the absence of funding opportunities for transit projects. Choose New Jersey, the state's economic development organization, noted that Atlantic County has 13 bus routes and one commuter rail line located in Atlantic City (Choose New Jersey County Profile, 2013). Cumberland County has seven bus routes, 11 commuter rail lines, and three light rail lines. Gloucester County has seven bus routes, one commuter rail line, and three light rail lines. Salem County has four bus routes, 11 commuter rail lines, and three light rail lines (Choose New Jersey County Profiles, 2013).

Overall, among residents who are of working age (16 years and over) in the state, the predominant mode of transportation is driving, followed by public transportation² (10.8 percent), and carpooling (8.4 percent) (U.S. Census Bureau, 2009-2013). The predominant mode of transportation after driving in Atlantic, Cumberland, Gloucester, and Salem Counties is also public transportation and carpooling. All four counties have a lower rate of public transportation than the State's rate (see Graph 10).

Graph 10: Commuting by Public Transportation



Source: US Census Bureau, 2009-2013

According to the New Jersey Long-Range Transportation Plan, the state has more lane miles of highway per square mile (11.4) than any other state except Rhode Island (Corzine and Kolluri, 2008). The national average is 2.4 miles. The plan notes that many of the state's residents will not be able to afford a car due to the existence of households who fall below poverty levels, and thus, public transportation provision is of essence. Moreover, the plan identifies an aging population that is likely to place a demand for paratransit options. There is a need for publicly available transportation materials to be printed in different languages in order to address the growing immigrant population in the state. In terms of the support for public transportation, the plan indicates very few capacity increases in terms of new highways for the state. A reason for this is that the state has acknowledged that the construction of new highways does not alleviate traffic and delays. One of the major challenges in the state is the level of funding that is in place or lack thereof. The Long-Range Transportation Plan identifies about \$200 billion that will be

² According to the American Public Transportation Association (APTA), public transportation (also called transit, public transit, or mass transit) is transportation by a conveyance that provides regular and continuing general or special transportation to the public, but not including school buses, charter or sightseeing service.
<http://www.apta.com/resources/statistics/Pages/glossary.aspx>

indispensable in transportation funds through 2030. To provide a picture of the transportation projects that will have an impact on or are in place in the South Jersey region, we provide a table of the NJ transportation projects (see Appendix F and G). The study team collected these projects based on interviews or availability of detailed transportation information published by New Jersey transportation and county agencies. Lastly, New Jersey is exploring its freight system in the region and plans to develop initiatives to enhance port access. According to South Jersey Transportation Planning Organization (SJTPO), trucks are a prevalent mode of transportation in the freight business. Operations in the freight business include truck to ship, truck to rail, and truck to air (SJTPO Regional Transportation Plan 2030, 2012).

A community organization that is addressing the prevalent need for transportation in the region is the Pascale Sykes Foundation. According to Darrell Edmonds, Program Manager, the Pascale Sykes Foundation, in collaboration with government officials and county agencies, have implemented shuttles in at least three of the four counties. The Foundation plans to launch the fourth shuttle on June 2015. Edmonds noted that the smallest shuttle has a capacity of approximately 15 people and the largest has a capacity of 30. He also explained that the foundation hopes to eventually integrate these shuttles as the area's community shuttles. Some of their initial data has discovered that the majority of the people riding the shuttles use them to get to and from work and/or to local higher education institutions. Edmonds noted that one of the challenges has been addressing marketing strategies to efficiently promote the shuttles to the community. The Foundation is continuously collecting data by surveying riders in order to improve shuttle service. Now in its third year of operation, approximately 61 percent of people who ride the English Creek-Tilton Road Community Shuttle in Atlantic County said, in a recent survey, that they have been using the shuttle service for six months or more. About 45 percent of riders indicated they use the shuttle for employment purposes and another 11 percent to get to schools and job training opportunities. In addition, many riders have been able to successfully connect to NJ Transit through these shuttles.

Housing

The counties have been facing severe housing challenges, especially after the recent economic downturn and the foreclosure crisis that is still very present in the Southern region. According to a CoreLogic's National Foreclosure Report, as of July 2014, 5.7 percent of homes with a mortgage in the state of New Jersey were in foreclosure (CoreLogic National Foreclosure Report, 2014). However, the state's slow-moving judicial foreclosure process has resulted in an inaccurate inventory of foreclosed homes. The report notes that at the national level, 1.7 percent homes with a mortgage were in foreclosure as of July 2014. Another housing report published by HUD's Office of Policy Development and Research described that the share of mortgages that were seriously delinquent or transitioned into Real Estate Owned (REO)³ status was 9.3 percent

³ They are homes that have been through the entire foreclosure process and are now owned by the lender.
http://www.freddiemac.com/homeownership/rent_or_buy/reo_bank_owned.html

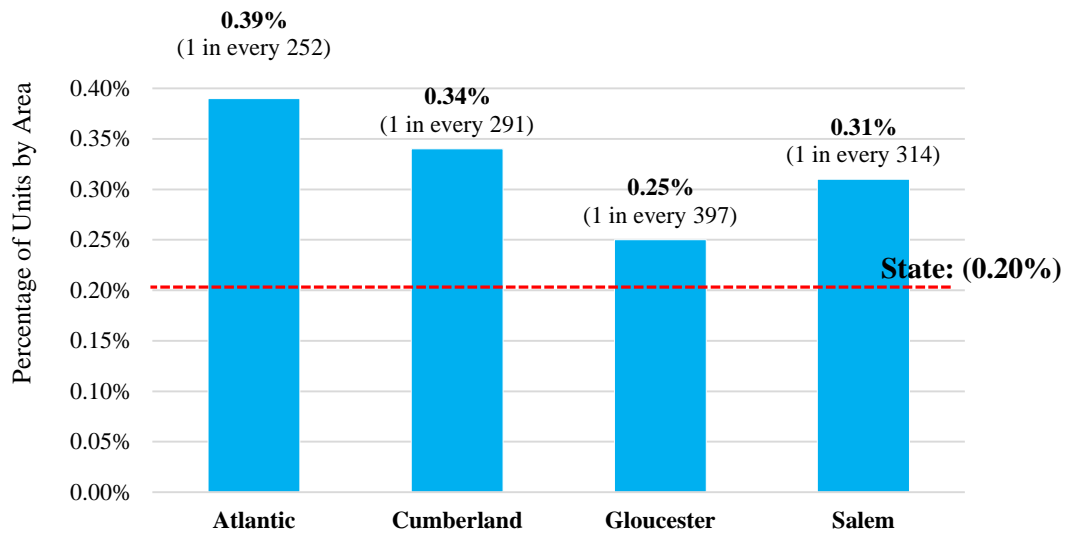
in New Jersey and 7.6 percent in New York, both above the rate of 4.6 percent for the nation in December 2014. Whereas the amount of REO properties decreased by 11 percent nationally from December 2013, they increased 41 percent for the New Jersey/New York region; almost doubling in New Jersey and increasing by 18 percent in New York (Moroz, 2014).

Locally, residents living in Southern New Jersey continue to be significantly burdened by housing costs in the region. Housing is the single largest expense for most families. Several indicators related to housing illustrate the economic health of these communities. By analyzing housing data, we can obtain a clearer picture of how housing challenges are impacting the workforce and economic development activities in the region.

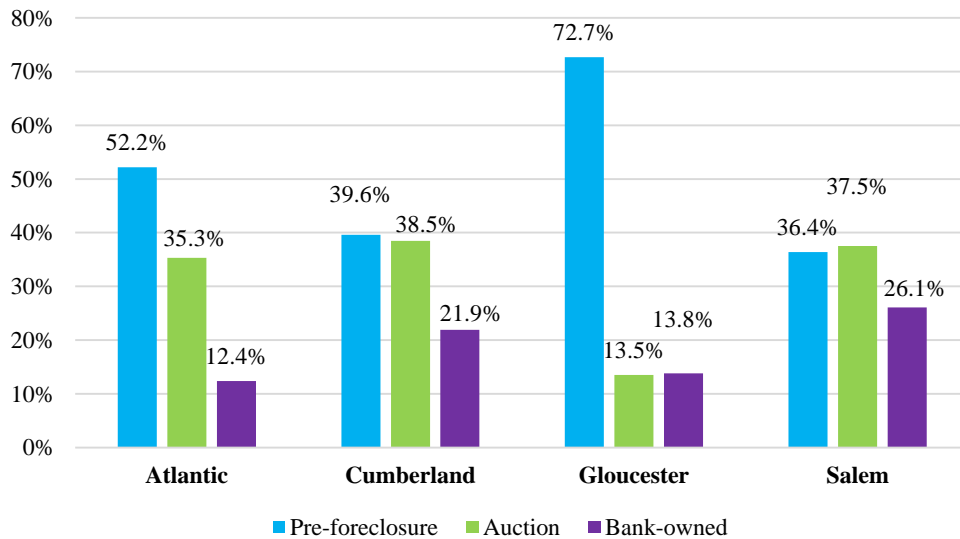
Approximately 80 to 94 percent of the existing housing units in each county are currently occupied (U.S. Census Bureau, 2001-2013). New Jersey's proportion of vacant housing units is 10.9 percent. Atlantic County has the largest proportion of vacant housing units in the target region with 20.4 percent (RealtyTrac, 2015).

Atlantic County also had the second highest foreclosure⁴ rate in the nation and was the first highest in 2014 (RealtyTrac in 2015). Cumberland and Salem Counties followed Atlantic. The county with the least foreclosures in comparison to the other counties was Gloucester (see Graph 11). All four counties had a higher foreclosure rate than the state. It is noteworthy to point out that the majority of the homes in all four counties that were in the foreclosure process were in pre-foreclosure status (see Graph 12). When this phase has been reached, many homeowners still have the opportunity to renegotiate and pay off unresolved debt or sell the property before it is has gone through the entire foreclosure process.

⁴ Note: There is a membership service fee in order to access a number count of foreclosures per county through RealtyTrac. The data in this section does not provide a count for this reason.

Graph 11: Foreclosures

Source: RealtyTrac 2015

Graph 12: Status of Active Foreclosures, March 2015

Source: RealtyTrac 2015

As the housing cost burden grows for households in the region, a substantial proportion of residents in the region are using a major share of their household income on housing costs. Among renting households, between 46.4 to 53.0 percent in each county are spending 35 percent

or more of their household income on the costs of rent.⁵ Overall, 45.3 percent of the 1,057,576 households in New Jersey are spending 35 percent or more of their household income on the costs of rent (US Census Bureau, 2011-2013). In Salem, 53.0 percent of residents are spending 35 percent or more of their household income on the cost of renting and 52.1 percent of Cumberland's renters are spending 35 percent or more of their household income on rent (see Table 11).

Table 11: Gross Rent as a Percentage of Household Income (GRAPI)					
	Atlantic	Cumberland	Gloucester	Salem	<i>New Jersey</i>
Total Occupied Units Paying Rent	32,190	15,786	19,605	6,597	1,057,576
Less than 15.0 percent	8.1%	6.6%	10.2%	9.0%	11.0%
15.0 to 19.9 percent	8.8%	10.3%	11.5%	10.4%	11.5%
20.0 to 24.9 percent	12.9%	12.3%	13.5%	11.3%	12.1%
25.0 to 29.9 percent	11.1%	9.9%	10.5%	11.1%	11.2%
30.0 to 34.9 percent	9.5%	8.7%	7.9%	5.2%	8.9%
35.0 percent or more	49.6%	52.1%	46.4%	53.0%	45.3%
Source: U.S. Census Bureau, ACS 3 Year Estimates, 2011-2013					

A significant proportion of region residents are burdened by monthly payments associated with home ownership (Table 12). Among homeowners, a significant percentage (40.2 percent) in Atlantic County spends 35 percent or more of their household income a month on the cost of owning; this is more than homeowners in each of the other three counties in the target region (Cumberland 33.4 percent; Gloucester 27.9 percent; and Salem 25.0 percent). This is in comparison to the 34.1 percent of the 1,435,116 of New Jersey's households who spend 35 percent or more of their household income a month on the cost of owning a home. Conversely, a greater percentage of homeowner households in Salem (31.6 percent) spend less than 20 percent of their monthly household income on the cost of owning (US Census Bureau, 2011-2013).

⁵ U.S. Department of Housing and Urban Development states "Families who pay more than 30 percent of their income for housing are considered cost burdened and may have difficulty affording necessities such as food, clothing, transportation and medical care. An estimated 12 million renter and homeowner households now pay more than 50 percent of their annual incomes for housing. A family with one full-time worker earning the minimum wage cannot afford the local fair-market rent for a two-bedroom apartment anywhere in the United States."

Table 12: Selected Monthly Owner Costs as a Percentage of Household Income (SMOCAPI)

	Atlantic	Cumberland	Gloucester	Salem	<i>New Jersey</i>
Total housing units with a mortgage (excluding units where SMOCAPI cannot be computed)	45,396	21,219	59,401	10,857	1,435,116
Less than 20.0 percent	21.5%	30.2%	30.4%	31.6%	27.3%
20.0 to 24.9 percent	16.3%	15.5%	18.6%	21.7%	15.6%
25.0 to 29.9 percent	11.9%	12.1%	12.6%	11.8%	13.0%
30.0 to 34.9 percent	10.2%	8.8%	10.4%	9.9%	9.9%
35.0 percent or more	40.2%	33.4%	27.9%	25.0%	34.1%
Source: U.S. Census Bureau, ACS 3 Year Estimates, 2011-2013					

The median cost of renting a home in all the counties, except in Gloucester, is below the state's median cost of renting. The median cost of owning a home in all four counties is below the state's median cost (US Census Bureau, 2011-2013). Graph 13 illustrates these figures. The figures corresponding to the cost of owning only include data for homes that had an active mortgage.

Graph 13: Median Housing Costs

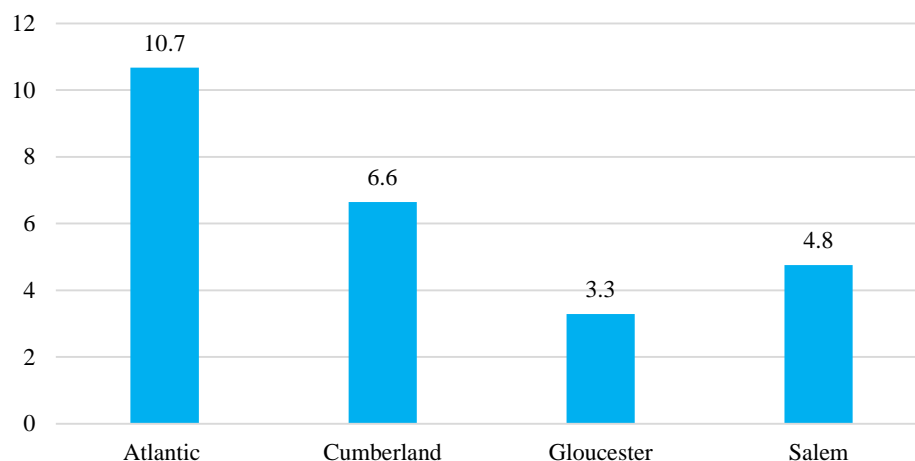


Source: U.S. Census Bureau, 2011-2013 3-Year American Community Survey

Graph 14 illustrates the number of units included in all the properties that have multifamily and Section 8 contracts for each county. By using data derived from the US Department of Housing and Urban Development (HUD), total population found in the US Census Bureau, and computing the per 1,000 rate, Atlantic County had the largest amount of units per 1,000 residents

that fell under this type of contract. According to HUD, the database they make available represent the most comprehensive list of project-based subsidies, but is not necessarily complete or all-inclusive⁶. HUD notes that they will be updating this data on a monthly basis.

Graph 14: Number of multifamily and Section 8 units per 1,000 residents



Source: US Department of Housing and Urban Development: 2015 Multifamily Assistance and Section 8 Contracts Database, and U.S. Census Bureau, 2011-2013 3-Year American Community Survey

Land Use

As a final point in this chapter, land use patterns have played an important role on the landscape of each of the four counties of interest. The significant rural characteristic of these counties has motivated the introduction of various programs and/or initiatives to preserve natural resources, open space, and farmland. All four counties have a greater proportion of their housing units in rural areas⁷ than the state's average (5.1 percent) (U.S. Census Bureau, 2010). Salem County (41.9 percent) has the most housing units in rural areas, followed by Cumberland County (22.1 percent). Gloucester County has the most housing units in urban⁸ areas (91.7 percent) followed by Atlantic County (89.2 percent). All four of the counties have less than New Jersey's average (94.9 percent) of housing units in urban areas (U.S. Census Bureau, 2010).

⁶ Multifamily Assistance and Section 8 Contracts Database Disclaimer

http://portal.hud.gov/hudportal/HUD?src=/program_offices/housing/mfh/exp/mfhdiscl

⁷ According to the US Census Bureau, "rural" includes all population, housing, and territory not included within an "urban" area.

⁸ According to the US Census Bureau, "urban" includes those urbanized areas with 50,000 or more people, and urban clusters of at least 2,500 and less than 50,000 people. For purposes of this report, both urbanized areas and urban clusters will be referred as "urban areas."



Chapter 3

Workforce Development

Chapter 3: Workforce Development

This chapter provides details about the various public and non-profit sector institutions, including educational offerings, higher education, the New Jersey Department of Labor (NJDOLE), Workforce Investment Boards (WIBs), and One-Stop Centers that are shaping the South Jersey workforce. Examples of specific programs, experiences gleaned from interviews, and supporting data combine to provide a picture of the state of workforce development in South Jersey. Specifically, this chapter presents the opportunities, barriers, and gaps that exist with the region's workforce development training programs. Key takeaways from this chapter include the following:

- A network of workforce development resources exist for residents in each of the four counties; Talent Networks, WIBs, and One-Stops work in conjunction with Community Colleges and provide a wide variety of training and programs.
 - Community College officials have the knowledge and connections needed to address the needs in their communities, but lack the funds and capacity to implement new programs.
 - The amount of awareness about available workforce development resources in the counties varies. Stakeholders recognized marketing as a barrier to bringing the unemployed to the One-Stops.
- Stakeholders identified a support system and several existing programs for certain unique populations, while noting a lack or need of programs for other populations.
 - Programs that target youth, the formerly incarcerated, and those with disabilities are available in all four of the counties, although the extent to which services are available varies.
 - Stakeholders perceive individuals between 18-24 years of age as a group with few targeted resources.
- Officials have identified basic education and soft skills as being deficient among individuals they meet at community colleges and One-Stop Centers.
- Key stakeholders viewed communication and cooperation between workforce development entities as insufficient to positively impact current county or regional conditions.

Key Institutions of Workforce Development

Educational Offerings & Higher Education

With at least one institution of higher education in each county, South Jersey residents have options as to which school and program is a good fit for them academically and financially. Funding from federal and state sources is available for individuals who qualify as low-income or receive military benefits. Individuals who are unemployed or not in the workforce are eligible for certain programs at a reduced or no cost; however, those programs are subsidized by federal, state, or foundation grants and they are not necessarily sustainable.

The target region has four (4) community colleges and two (2) Universities. Atlantic Cape Community College (ACCC), Cumberland County College (CCC), Rowan College at Gloucester County (RCGC), Salem Community College (SCC), Richard Stockton University (RSU), and Rowan University are located within the study area. According to the New Jersey Department of Higher Education, in 2011, over 14,500 residents of the target region attended one of the local colleges (New Jersey Department of Higher Education, 2011-2013). Specifically, 36 percent of those residents attended Richard Stockton University and Rowan University (New Jersey Department of Higher Education, 2011-2013).

To serve individuals with a high school degree or less, credit and non-credit educational programs are available at the local school district, community college, and university levels. Soft skill training and industry specific training are all available at specialized vocational schools. Institutions often tailor general education requirements such as mathematics, science, history, and English, to the students in their classes. For example, students in a particular math course might learn about the practical applications of math in cooking, construction, or auto repair. Typically, students can follow curricula a number of different programs, among them: culinary arts, automotive engineering, drafting/design, and cosmetology.

In addition to a variety of two year Associates degree programs in liberal arts majors, county colleges throughout the region provide courses for individuals seeking to build industry-specific skills. ACCC has new programs aimed at the growing natural gas and aviation services industries complementing programs in education, wellness, landscaping, and entrepreneurship. CCC is focusing on the growing manufacturing sector with its non-credit offerings. RCGC offers educational programs in Food Science, Small Business Development, Leadership, and Workplace Safety. SCC offers programs in Sustainable Energy and Green Technology, Nuclear Energy Technology, and Agribusiness, in addition to offerings in Healthcare.

Partnerships are in place to fund basic education courses and build the skills that industries perceive the workforce to be lacking. RCGC offers programs funded through NJDOL, the New Jersey Business and Industry Association, and the New Jersey Council of Community Colleges to provide free or heavily subsidized basic training courses in mathematics, writing, ESL, and computer skills. ACCC and CCC also provide free ESL, basic math, and reading courses. The state subsidizes unemployed individuals' attendance at these schools with grants tied to economic growth data. Community colleges have developed relationships with employers in the area, but are dependent on grant funding to train workers for those new jobs (Hassler, personal communication, March 2015; Simek, personal communication, February 2015). Moreover, a lack of major employers limits the number of industries for which colleges can offer training. Officials at several area colleges expressed an inability to develop new programs due to a lack of funding from the state and outdated economic growth data used to fund specific programs (Simek, personal communication, February 2015; Hassler, personal communication, March 2015).

Two major four-year institutions anchor South Jersey's professional higher education offerings. RSU and Rowan University offer Bachelor's, Master's and Doctoral degrees, as well as non-credit community education courses. At RSU, the Center for Public Safety and Security, the Small Business Development Center and the Center on Successful Aging create partnerships with State and regional agencies committed to academic research and practical implementation. A recent collaboration with Rutgers-Camden has allowed Rowan to create a School of Biomedical Science & Health Professions and open Cooper Medical School of Rowan University in Camden.

Retention rates for area institutions vary. The State of New Jersey's Department on Higher Education defines retention as the number of first year students that return to the same institution to continue their education. Richard Stockton University and Rowan University are both retaining more than 84 percent of full-time students as of the 2012-2013 academic year. At the community college level, none of the institutions in the study area retains more than 70 percent of their full-time students or 50 percent of their part-time students (2012-2013 academic year). There is not a wide range in the retention rates with ACCC retains 65 percent of their full-time students, the greatest number, while SCC retains 59 percent of their full-time students, the lowest. However, SCC retains the greatest percentage of part-time students (50 percent) while CCC retains the smallest percentage of part-time students (42 percent).

In one form or another, each college or university offers workforce development training or other non-credit programs for individuals looking to improve their skills and [re] enter the workforce. Per credit, costs at area colleges vary, as do the costs of various non-credit programs. Non-credit and certificate programs for all of the institutions range from no cost into the thousands of dollars in order to complete programs. County colleges charge different rates for in-county and out-of-county NJ residents. RCGC charges just \$95 per credit which represents the lowest per credit cost among the community colleges. Meanwhile, RSU charges approximately \$311 per credit, which is the lower of the two universities. Four-year institutions charge different rates for in-state and out-of-state residents and do not differentiate between in-county and out-of-county residents for tuition costs (see Table A10 in Supplemental Appendix A).

The New Jersey Consortium of Community Colleges for Workforce Development supports strategic planning efforts by area colleges and helps them reinforce their commitment to workforce development. Established in 2004, the Consortium serves as the manifestation of Governor James McGreevey's 2003 "Community College Compact" Executive Order. The Consortium serves as a convener and clearinghouse for community colleges statewide. The organization also serves the business community by cataloging the courses and training services that are available statewide. Consortium clients can participate in discounted advanced training courses through a partnership with the New Jersey Institute of Technology (NJIT). Training is available for biotechnology, machining, teaching/instruction, construction management, as well as programs for those interested in working for various public/private utility companies

throughout the state. Soft skill training is also available and supplements older workers' past experiences and other job training. ESL courses are available for English language learners. The Consortium connects men and women with job search resources including Jersey Job Clubs, Jobs4Jersey.com, and programs through the county One-Stop Centers.

New Jersey Department of Labor

The NJDOL oversees a multitude of different services and programs for the state. The Department runs the Jobs4Jersey service that caters to both job seekers and job providers; on the job seekers side, it helps to promote the One-Stop Career Centers for each county, as well as Job Fairs, Jersey Job Club, and OnRamp, a NJDOL service that aids in designing and restructuring resumes. The NJDOL also has compiled extensive demographic and unemployment fact sheets that are available on their website. One of the more detailed services provided by the NJDOL that connects jobseekers with job providers are the Talent Networks. NJDOL established Talent Networks to better prepare the workforce to adapt to the changing needs of the state, with training, networking, and workforce contacts between industry and job seekers. A number of different established Talent Networks are currently in place, specializing in Healthcare, Transportation, Logistics and Distribution (TLD), Advanced Manufacturing, and Retail, Hospitality and Tourism. According to stakeholder interviews and additional research (detailed below "Stakeholder View on Current Employment Situation"), the industries that the Talent Networks are focusing on have been established as growth industries or industries that county stakeholders have noted are of particular interest to the counties.

Another sector of the NJDOL is the State Employment and Training Commission (SETC). The Commission provides technical assistance to the county Workforce Investment Boards (WIBs), and essentially acts as the state WIB that oversees the county WIBS. The Purpose of the SETC is noted as follows: "the SETC identifies and analyzes critical issues relating to workforce readiness and provides policy guidance to the Governor and to state professionals in the fields of employment, training and education; supports innovative programs that advance collaboration among governmental agencies; and, reports to the Governor on the progress that has been made and the issues that must be addressed in the area of employment, training and education" (About SETC, n.d.). The representative from the NJDOL SETC mentioned that there is a strong national push to work together across different agencies to ensure regional planning.

Workforce Investment Boards (WIBs)

WIBs create partnerships with local businesses, higher and secondary education, community organizations and local government in order to connect the needs of the community to the available workforce. WIBs are a subsidiary of the county government, and therefore report to the boards of freeholders in each county. Structures of the WIBs in the four target countries are largely very similar, and they have similar missions and goals. The boards are made up of

representatives from the private and public sector; for instance, the Atlantic County/Cape May WIB's representatives to the board are comprised of more than half representation from the private sector (local business, community organizations, etc.) The Atlantic County/Cape May County WIB has 36 different representatives and a number of different committees. Likewise, the Gloucester County WIB has representatives from business, education, and economic development. WIBs do not necessarily operate programs themselves; most of the work at the WIB level is through their committees. For example, all of the WIBs of these four counties appear to have a “business development committee,” even though some may call it by a different name (for example, the “Apprenticeship and Workforce Development Committee” at the Gloucester WIB or the “Business and Industry Committee” at the Cumberland/Salem WIB [CSWIB]). These committees work with the local businesses to understand the employment trends of the counties and what the workforce needs are. WIBs also have committees devoted to the needs of the youth, literacy skills, and disabilities, among others.

One-Stop Centers

While the WIBs for each county oversee workforce development and seek to create partnerships between business and job seekers, One-Stop Centers for each county are the most connected resource for residents looking for employment. Established by The Workforce Investment Act, One-Stop Centers act as a complement to the WIBs. One-Stop Centers run programs and provide the direct support services for the county area that the WIBs have identified through their partnerships and research. Employees connect job seekers with training opportunities, and help them overcome barriers to employment, education, or on-the-job training.

One-Stop Centers also offer “Career Beacon Workshops” that can aid job seekers in anything from labor market research, to resume writing and interviewing. The Atlantic County One-Stop Center’s website offers resources on how to complete a high school equivalency, as well as information on recruitment services and hiring incentives for local businesses looking to utilize the One-Stop’s services. Additionally, the Atlantic County/Cape May WIB One Stop Directory of Services offers information of finding a job, jobs that are in demand, how to apply for training grants, educational services (GED classes, etc.), public assistance resources, and specific resources for workers with disabilities, youth, ex-veterans, and seniors. Finally, while Cumberland and Salem Counties share a WIB (CSWIB), they each have their own One-Stop Centers.

Collaboration among Key Stakeholders

Partnerships among key institutions are in place to fund basic education courses and build the skills that industries perceive the workforce to be lacking. The Gloucester County One-Stop Center has a partnership with Rowan College at Gloucester County Continuing Education and Career Training, as well as the Gloucester County Department of Economic Development.

RCGC offers programs funded through the State of New Jersey Department of Labor, the New Jersey Business and Industry Association, and the New Jersey Council of Community Colleges to provide free or heavily subsidized basic training courses in mathematics, writing, ESL, and computer skills. ACCC and CCC also provide free ESL, basic math, and reading courses. Officials at several area colleges expressed an inability to develop new programs due to a lack of funding and resources from public and private sources.

Marketing proves to be a barrier in bringing the unemployed to the One-Stops. When residents apply to receive unemployment, the state requests they go online to register or visit a One-Stop. In the past, there was a letter mandating them to visit the One-Stop as a condition of receiving unemployment; however, there is currently no mandate. The staff member from the Cumberland One-Stop noted that large portions of the population who might benefit from workforce development services are unable or unwilling to access the services they need.

Stakeholder View of Current Vulnerable Populations

This next section details unemployment information for the target region from the perspective of key stakeholders. In Chapter 2, we identified several vulnerable populations. Discussions with representatives from organizations in the target region supplemented and largely confirmed these groups presence and need in the area. A representative from the Cumberland County One-Stop noted that newly divorced single parents who have never worked, or have not worked due to being a stay-at-home parent, are one of the more vulnerable populations that visit their One-Stop Center in search of help to find a job.

Higher education officials noted that a number of factors adversely affect the individuals they have seeking out their programs. According to several stakeholders, men and women ages 18 to 25 years old are not eligible for certain programmatic funding aimed at workforce development in the community college setting. For example, higher education officials note that programs designed for the long-term unemployed or “displaced homemakers” seemingly exclude younger individuals. The ineligibility of young people means that they will incur higher out-of-pocket costs to train for careers. According to one community college official, there are more prominent job placement difficulties with individuals whose are 50-years-old and older. The official noted that despite that individuals in this age range have previous skills and/or job experience, they do not afford them an advantage when seeking gainful employment. Thus, this population needs additional support transitioning from their original career aspirations to training that will help them enter a new career path.

Individuals without basic skills are also vulnerable according to officials from all of the organizations interviewed for this study. In addition to literacy, a significant number of those

seeking workforce-training lack “soft skills”⁹ needed to handle customer service and other public-facing jobs. Officials at CCC noted that a lack of “soft skills” hinder the ability of otherwise qualified individuals from obtaining jobs.

Common Barriers to Employment

The workforce development stakeholders focused on three types of barriers to employment that cut across groups: low literacy levels, soft skills, and transportation. First, stakeholders identified literacy as a significant barrier to employment. Atlantic County/Cape May and Cumberland/Salem WIBs both have a Literacy Committee dedicated to addressing issues of literacy in the county that may affect employment. The Atlantic County/Cape May WIB also has a Strategic Adult Literacy Workforce plan for January 2012-July 2016. The plan describes a basic literacy structure with levels spanning from Beginning Adult Basic Education (ABE), where an individual has minimal reading or writing skills in any language, through High Intermediate Basic Education, where individuals must score between a 6th and 12th grade reading and/or math level. Atlantic County’s plan also notes a structured level system for ESL proficiency in its residents to better categorize the current situation and projected needs of the county. Atlantic County also has a “Learning Lab” program where individuals can attend training in a smaller group, or one that focuses on a certain set of skills. Learning Labs are held all over the county in order to be easily accessible by all who may need them. Gloucester County’s WIB has a Literacy Plan Committee similar in mission to Atlantic County’s program.

Second, numerous representatives from the One-Stop Centers and the NJDOL SETC noted that “soft skills” needed to boost employment outcomes are often lacking, and that they are just as important as “hard skills.” Residents may not have time in their current work schedule to take additional training or education classes that would enable them to be able to move up the career ladder, or the money to cover the purchase of books, which is often not included in tuition. The Gloucester County WIB Local Plan 2014-2017 notes the development of tools to enhance “soft skills” as their #4 Local Challenge.

Third, “structural” barriers, such as transportation. As noted in the above background chapter, the large majority of the target area does not have access to public transportation options. The Cumberland County One-Stop Center sponsors a transportation service that connects consumers with NJ Transit, and also assists them in getting to and from training or another social service (child care, for example). However, the staff member also mentioned that those that have their own car are not totally without their own barriers; they have long commutes and expensive gas. The Gloucester County WIB Local Plan 2014-2017 notes Transportation Needs as the largest local challenge to workforce development growth. In addition, the representative from the

⁹Soft skills are often described as communication skills, responsibility, respect, cleanliness, professional writing skills, teamwork, organization, personal attire, character, and/or multitasking.

NJDOL SETC noted another potential issue is cars breaking down because of lack of maintenance. In addition, finding adequate childcare could be a structural barrier to holding a decent job for any length of time. The Cumberland County One-Stop Center lists resources on its website and notes their in-house child care resource staff, but this may be difficult or impossible to find for those that do not have access to the internet.

Existing Programs and Support Systems for Special Populations

Youth

In recognition of the difficulties facing youth populations, NJDOL sponsors the New Jersey Youth Corps, which engages young adults in a year-round community services program while also promoting training and educational activities. In addition, the Youth Investment Council at the Atlantic County/Cape May WIB details a Youth Workforce Plan that spans from October 2012-September 2016. Some of the recommendations that stemmed from this plan include funding programs that provide job skills in the Healthcare, Green Jobs, and Technology industries, as well as marketing young adults as viable employees to the local businesses. Atlantic County has also opened a dedicated One-Stop Career Center for the youth, entitled YouthWorks, which is located in Pleasantville. There, out-of-school youth ages 16 to 24 can enroll in high school equivalencies programs, join a Job Club where they are exposed to a four-week interactive employment resource, or talk with an employment specialist if they are thinking of dropping out of school. In addition, the Cumberland/Salem WIB has a Youth Council that works with the Youth Services program at the Cumberland County One-Stop Center. They are currently drafting a Youth Employment Services brochure.

Programs for People with Disabilities

A subsidiary of the NJDOL, Jobs4Jersey, draws special attention to individuals with disabilities. They also have a New Jersey Division of Vocational Rehabilitation Services (DVRS) entirely dedicated to helping those residents with disabilities find jobs or keep their jobs. DVRS has offices in Bridgeton (Cumberland), Thorofare (Gloucester), and Pleasantville (Atlantic). The DVRS also supports the state's Centers for Independent Living, which are consumer-driven organizations that provide training, advocacy, and support for those with disabilities in the community. There is a Center for Independent Living of South Jersey, Inc. in Westville (Gloucester), as well as Total Living Center, Inc. (TLC) in Absecon (Atlantic) and Tri-County Independent Living Center, Inc. in Millville (covering Cumberland and Salem Counties). DVRS has also recognized the specifics regarding working with youth with disabilities in assisting students in the transition from school to work. They also have a variety of resources for employers looking to hire individuals with disabilities, like information on training reimbursements and hiring incentives.

The Disability Workforce Committee in the Atlantic County/Cape May WIB has developed a Strategic Plan to Serve Individuals with Disabilities, spanning from January 2012-June 2015. One lesson learned from their research and detailed in the Strategic Plan is that as jobs in hospitality and tourism decreased overall in Atlantic County, competition for these jobs between those with disabilities rose. The plan also highlights a Needs Assessment and Service strategy for workers with disabilities in the community. The Strategic Plan outlined a number of different recommendations for the future, including investing in professional development workshops specifically directed at and tailored for those with developmental and/or learning disabilities, and marketing individuals with disabilities as viable employment options to local businesses, with some financial incentives possibly being available.

Prison Population and the Formerly Incarcerated

There are 13 correctional facilities in the State of New Jersey, of which, Bayside and South Woods State Prisons are located in South Jersey. According to the State of New Jersey Department of Corrections offender statistics, as of 2015, there were 2,164 offenders in Bayside and 3,368. Bayside and South Woods State Prisons account for 25.7 percent of the total prison population in the State of New Jersey (Lanigan, personal communication, March 2015). One of the visible benefits of detention reform in New Jersey continues to be the decline in the number of youth committed to state training schools and other residential facilities. Employment resources exist for formerly incarcerated at One-Stop Centers. Ex-offenders in need of job services can contact the One-Stop Centers. They can focus on lists of employers that have hired ex-offenders in the past, or are interested in one of the numerous hiring incentives programs for ex-offenders. The One-Stops have also worked to eliminate or reduce some of the barriers to employment for ex-offenders, reading, writing, skill building, math, financial literacy, and a number of other subjects for adult learners. Additional information about programs specifically targeting the prison population and the formerly incarcerated can be found on Appendix D. The appendices section also further describes data on crime and substance abuse in the region (see Appendix E).

Regional Workforce Development Cooperation

In the team's assessment, cooperation among the counties would help to address common concerns. Opportunities for shared services, larger-scale training programs, and regional cooperation among businesses could build up the shared prosperity of the region. Based on available information and the interviews that were conducted, inter-county workforce development cooperation is uncommon.

Cumberland and Salem Counties both share a WIB (CSWIB). The Cumberland County One-Stop Center does boast a variety of services for their community, including To-Work Bus routes

and easy access to childcare resources. On the other hand, the Salem County One-Stop Center does not promote a lot of information on their website, and therefore may easily be overlooked.

The staff member from the Cumberland County One-Stop Center noted that the WIBs from each county communicate once a month, but not about training they provide, successes, or weaknesses. Stakeholders noted that a mobile “training trailer” is being used by the state to bring training specifically for manufacturing jobs directly to the consumers was also mentioned as a shared program. This trailer can be outfitted for different types of machinery, and eliminates the issue of transportation preventing residents from attending training classes.

Inter-county cooperation in higher education takes several forms. Atlantic County and Cape May County share Atlantic Cape Community College. This arrangement allows for a main campus and several satellite campuses where students from both counties can take classes and receive training. Through an association with the New Jersey Consortium of Community Colleges, a mobile trailer conducts workforce trainings around the state. The mobile trailer contains expensive machinery needed to train manufacturing workers on and alleviates the need for individual colleges to each purchase the machinery. Moreover, individuals who choose to take for-credit courses at community colleges outside of their own county can apply for a discounted per-credit price with their own county clerk’s office.

Chapter 4

Economic Development



Chapter 4: Economic Development

The following chapter highlights the economic development efforts in the four counties. This chapter reviews the climate of economic development in the target region including employment opportunities, job trends, key growth sectors, the industrial park sector, and other potential job growth opportunities. In this chapter, economic development means the capacity for key actors, like municipal government and business leaders, to act and to innovate (Shaffer et. al., 2004).

Key findings in the chapter include:

- From 2012-2022, healthcare and social services, construction and trade industries are predicted to have the most relative job growth across the four counties.
- Tourism is a large employer and industry in the region.
 - The region's economic health is at least partially tied to the economic health of Atlantic County's Accommodation and Service Sector.
 - Tourism is currently experiencing declines and is projected to decline in total number of jobs and economic impact over the next decade.
- Environmental regulations, budgetary constraints, and lack of government coordination are perceived hindrances to development in the region.
- The target area has an established logistics and transportation industry; there are several ports in the area.
- There are several established ports that bolster the regional economy; more than 4 million tons of cargo moves through ports along the Delaware River every year.

Industries and Jobs

Each of the four counties in this study has a unique employment and industry picture. Atlantic County is heavily dependent on the tourism industry; 47 percent of employment in Atlantic County is directly or indirectly related to tourism and only one of the top nine employers is not affiliated with the hospitality industry (NJ DOL, 2013). Cumberland County is the most strongly rooted in agriculture; however, its main industries are healthcare, construction, hospitality, and manufacturing. Gloucester County has the most diverse economy of the counties in the study with a mixture of agri-business, healthcare, manufacturing, heavy industry, commercial enterprises, and technology companies. Table 14 and 15 present occupational data. Table 13 presents the current non-farm jobs by industry in the four counties and Table 14 presents the three largest private employers in each of the four counties. In Cumberland and Gloucester Counties, the largest employers are in the healthcare industry. In Salem County, the two largest employers are in the energy and chemical industries. In the target region, the largest industries by total employment, excluding farming, are accommodation and food services and government, which employ 117,800 or 40 percent of the total workforce combined (NJDOL, 2014). For a table of percent of total non-farm jobs by industry in each county, see Table A12.

Table 13: Current Non-Farm Jobs by Industry

	Atlantic	Cumberland	Gloucester	Salem	Industry Total
Accommodation and Food Services	46,250	3,200	8,100	1,350	58,900
Government	22,950	13,250	18,350	4,350	58,900
Retail Trade	15,750	7,400	17,550	1,900	42,600
Healthcare and Social Services	17,950	9,000	12,650	2,950	42,550
Manufacturing	2,200	8,200	7,100	2,700	20,200
Wholesale Trade	3,050	2,850	8,750	400	15,050
Construction	4,600	2,250	5,600	1,200	13,650
Administrative and Waste Services	4,300	1,850	5,450	1,050	12,650
Other Services	5,050	1,850	4,100	550	11,550
Professional, Scientific, and Technical Services	4,300	1,050	3,450	750	9,550
Transportation and Warehousing	2,200	2,200	2,950	1,200	8,550
Finance and Insurance	2,750	1,100	2,150	500	6,500
Arts, Entertainment, and Recreation	1,800	450	1,300	250	3,800
Real Estate and Rental and Leasing	1,450	400	950	200	3,000
Utilities	750	100	150	1,800	2,800
Educational Services	1,100	500	1,000	150	2,750
Information	800	850	950	100	2,700
Management of Companies and Enterprises	750	650	350	0	1,750
Natural Resources and Mining	0	150	50	0	200
Total Non-Farm Jobs	138,000	57,300	100,950	21,400	317,650
Source: New Jersey Department of Labor and Workforce Development (2014). Industry and Occupational Employment Projections					

Table 14: Three Largest/Major Private Sector Employers

County	Employer	Industry	Est. Employment
Atlantic County	Caesar's Entertainment	Hospitality	5000+
	Harrah's Resort	Hospitality	5000+
	Trump Entertainment	Hospitality	5000+
Cumberland County	Durand Glass	Manufacturing	970
	Gerresheimer Glass Inc.	Manufacturing	880
	Inspira Health Network	Gen Med/Surgical Hospital	2800
Gloucester County	Inspira Health Network	Healthcare	1,000-2,499
	Kennedy University Hospital	Healthcare	1000-2,499
	Rowan University	Education	1000-2,500
Salem County	E.I. DuPont	Chemicals	1,000-2,500
	Mannington Mills Inc.	Manufacturing	500-999
	PSE&G	Energy	1,000-2,499
Source: Choose NJ (2013), County Profiles Choose NJ (2013), County Profiles			

Growth Sectors

NJDOL projects growth in several sectors in the target region. We display these projections in Table 16. The healthcare and social services, construction and trade industries are predicted to have the greatest relative job growth across the four counties from 2012-2022 (NJDOL, 2013). The health care and social services sector is projected to be the fastest growing sector in each of the four counties through 2022 (see Table 15). Professional, scientific, and technical services is another fast growing sector; it is projected to add 1,000 jobs in the four counties combined. Despite the predictions of local growth in the education and health care service industries, some analysts caution that they may overestimate growth (Chatterji, 2013). As more educational services are outsourced to online or open source platforms and there is a shift to outsourcing medical services to major regional medical facilities, these trends may reverse.

Table 15: Projected Job Change, 2012-22

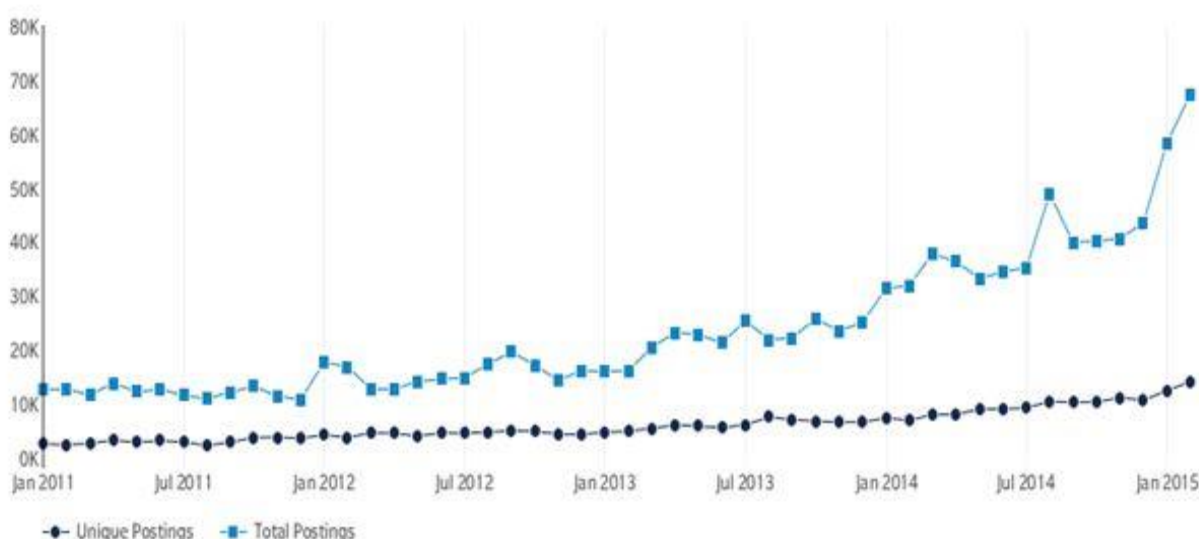
Industry	Atlantic	Cumberland	Gloucester	Salem	Total Jobs
Healthcare and Social Services	2,550	1,250	3,150	450	7,400
Construction	1,350	750	1,000	250	3,350
Retail Trade	950	350	400	100	1,800
Wholesale Trade	300	200	950	50	1,500
Transportation and Warehousing	350	300	550	100	1,300
Professional, Scientific, and Technical Services	500	150	200	150	1,000
Other Services	550	50	150	50	800
Administrative and Waste Services	250	100	100	150	600
Educational Services	200	100	100	0	400
Arts, Entertainment, and Recreation	200	50	150	0	400
Real Estate and Rental and Leasing	150	0	100	0	250
Finance and Insurance	100	-50	150	50	250
Management of Companies and Enterprises	50	50	50	0	150
Natural Resources and Mining	0	-50	0	0	-50
Utilities	100	0	0	-200	-100
Information	-100	-100	-100	0	-300
Manufacturing	0	-150	-300	-150	-600
Government	-450	-150	-700	-50	-1,350
Accommodation and Food Services	-3,200	50	850	50	-2,250
Total Jobs	3,850	2,900	6,800	1,000	14,550
Source: New Jersey Department of Labor and Workforce Development (2014). Industry and Occupational Employment Projections					

The two largest employers in the region, government and accommodation and food services, are predicted to have negative net job growth in the four counties from 2012-2022. Atlantic County is projected to lose over 3,000 jobs in these industries (NJDOL, 2013). This projection might be conservative; during 2013-2015, more than 10,000 casino jobs were lost. Despite this, tourism remains the largest industry and employer in Atlantic County (Oxford Economics, 2014). Notwithstanding this, in Gloucester County, accommodation and food services is predicted to grow by 850 jobs between in the same time.

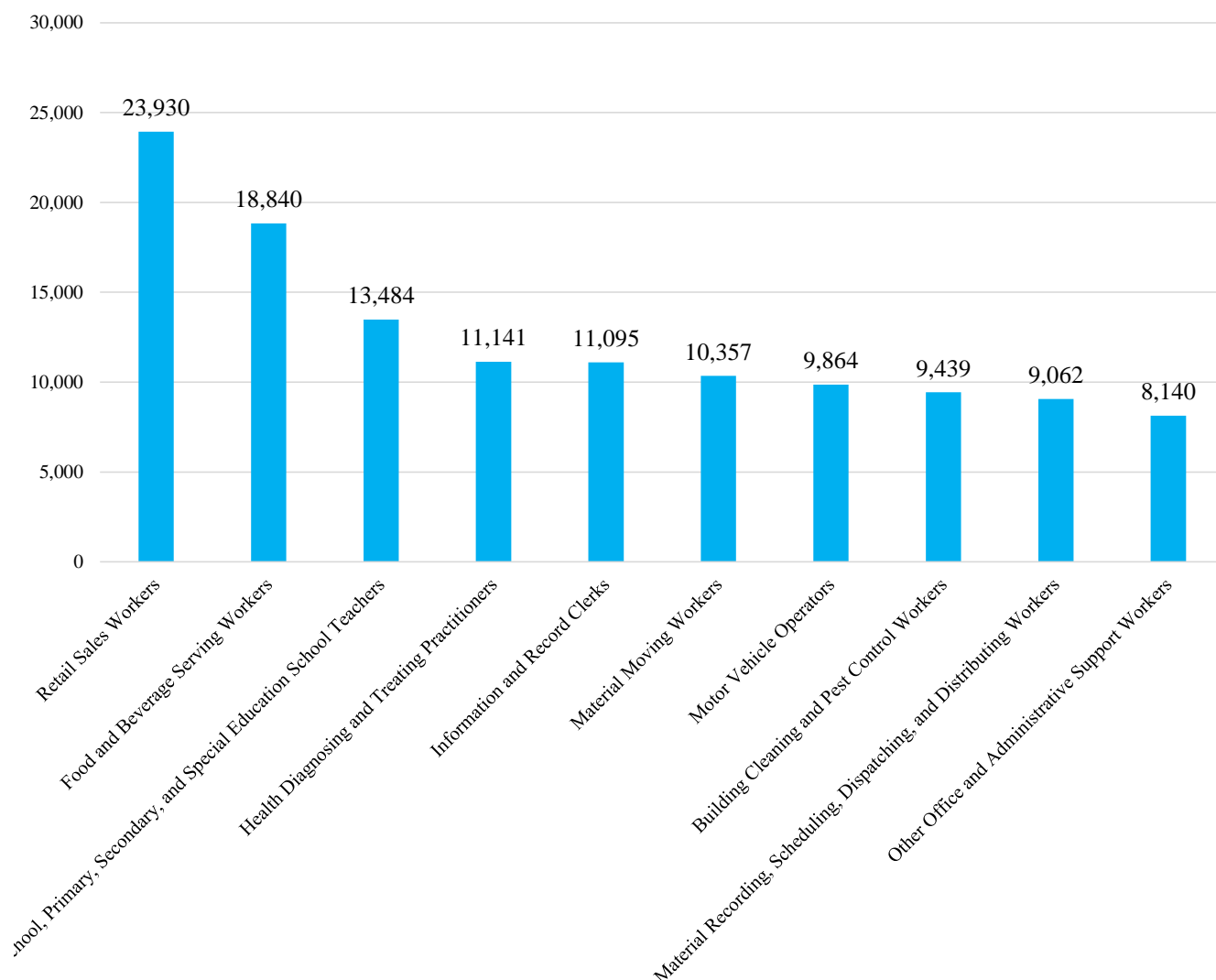
According to the 2007 Agricultural Census, Atlantic County is the second largest agricultural county in the Garden State producing crops and livestock worth \$128.3 million annually. Accommodation and food services in Atlantic County has recently suffered significant job losses. Cumberland County's business and industry landscape encompasses all elements of a modern and diverse economy. Its former industries were rooted in glass manufacturing, textile production, and food processing. Presently, the county includes such assets as a state of the art health care, new technologies, national retail opportunities, and a wide range of logistical, service, and other industries.

Two specific indicators that can be used to gauge the economic climate of a region are job postings and the change in employment measured by the growth in the top fifteen occupations in the four counties. Job posting data provide a snapshot of an area's economy; it is a measure of strength in the economy. Job postings indicate whether employers are hiring or seeking more employees. Unique postings refer to non-redundant job postings. When examining job-posting data for the target region since 2011, the number of unique job postings is stable with slight increases through the first quarter of 2015. Graph 15 shows that from July 2014 to July 2015 total number of job postings has increased precipitously in the four counties as a whole.

Graph 15: Total vs. Unique Job Postings

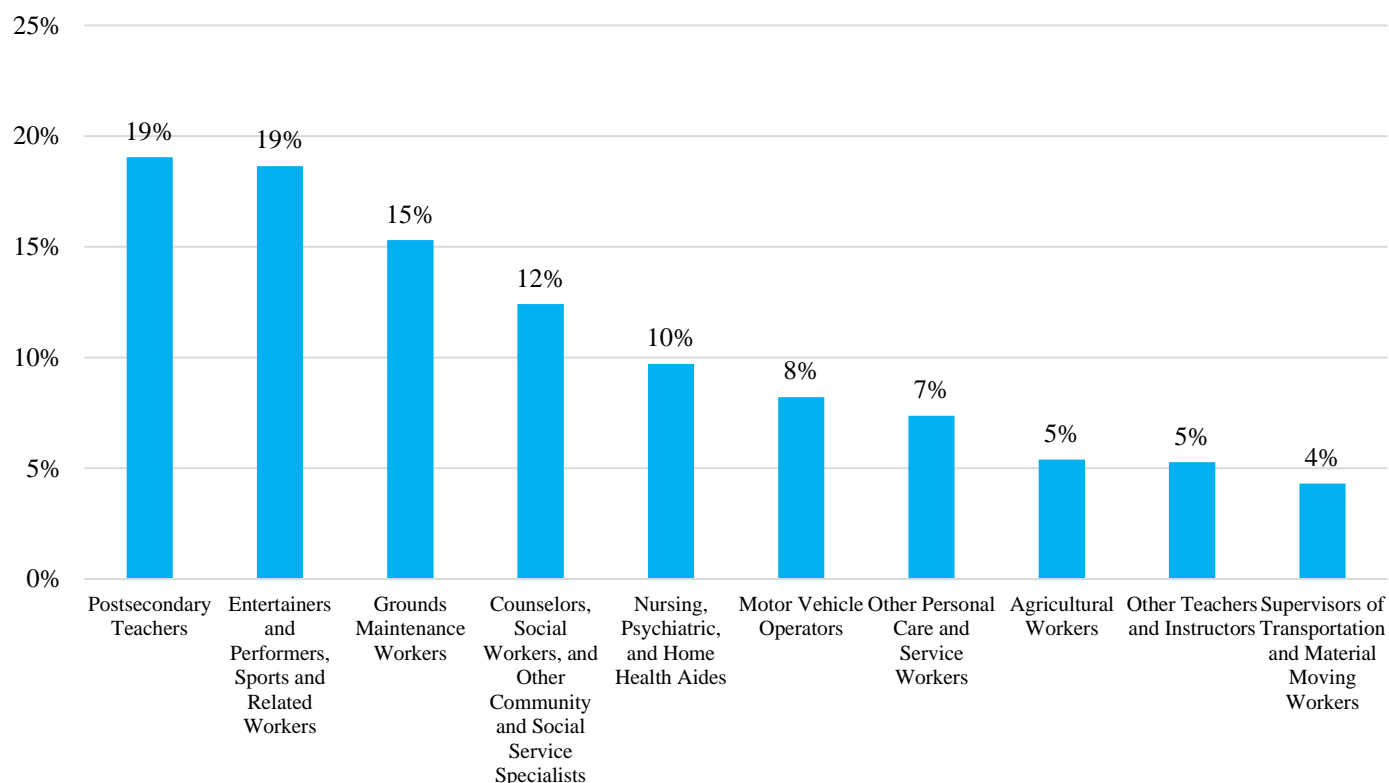


Source EMSI; This report uses state data from the following agencies: New Jersey Department of Labor and Workforce Development

Graph 16: Top Ten Occupations (2015)

Source: New Jersey Department of Labor and Workforce Development (2015)

Occupational data provides a good portrait of the region's economy. Standard Occupational Classification (SOC) code system data, which classifies occupations, shows that the occupations with the most jobs in 2015 in the target area are retail sales, food and beverage workers, educators, counselors and social workers, and health diagnostic workers (Graph 16). Data also shows that between 2010 and 2015, postsecondary teachers, grounds maintenance workers, and counselors and social workers, and nurses and health aides had the largest proportional growth (Graph 17).

Graph 17: Ten Occupations with Greatest Percentage Growth (2010-2015)

Source: New Jersey Department of Labor and Workforce Development (2015)

Tourism

The tourism industry is the sixth largest private employment sector in the target region. Over 315,000 individuals were employed in jobs directly related to tourism in New Jersey in 2014 (Oxford Economics, 2014). That same year, over 52,112 individuals in Atlantic County were employed in a tourism related trade or sector; Cumberland, Gloucester, and Salem Counties combined to have only 9,402 individuals employed in the tourism industry (see Table 16). Atlantic County has the highest tourism sales compared to all other counties in the state. Atlantic County's tourism industry related businesses brought in over \$7 billion in 2014 while Cumberland, Gloucester and Salem's combined sales totaled nearly \$926 million. However, in 2014, Gloucester and Salem Counties had the largest percentage change in direct tourism sales compared to Atlantic and Cumberland. Gloucester's tourism sales grew by 15.5% or \$55 million dollars from 2013 to 2014. Salem's tourism related sales grew 11.3% or \$20 million (see Table 17).

Industrial Parks and Transportation Linkages

Industrial parks are a key component in the four county region's economy. Industrial parks are seen as an important linkage in the shipping and distribution system in the region for the warehousing, agriculture, and transportation industries. The following subsection outlines the opportunities and issues related to development around the industrial parks and the distribution links developing throughout the four counties.

The region is located in a multiple modal supply chain passageway. Goods are easily moved through the region on roadways and waterways. Originally, industrial parks were designed as planned industrial districts (Coupal, 1999) but today their structure also includes research parks and other themed developments. Industrial parks are key nodes in the movement and the distribution of goods across the four county area. In South Jersey, the industrial parks are growth poles which "[take] advantage [of] external economies that exist in the region such as transportation, qualified labor pool, or technological spillovers" (Coupal 1999, 4). There are several large industrial parks in the four county region. Some notable parks include the Pureland Industrial Complex in Logan Township, the Commodore Business Park in Swedesboro, Forest Park Corporate Center and the Mid-Atlantic Industrial Park, West Deptford and Matrix Gateway Business Park, Oldmans Township in Salem County. Industrial parks serve as hubs for the transferring of raw materials and finished goods to markets throughout the region.

There are three major roadways that transverse the four counties: the New Jersey Turnpike (NJTP), the Atlantic City Expressway (ACE), and, the Garden State Parkway (GSP). Additionally, several state routes in the region are key roadways for the movement of goods and services. Route 55 connects Camden County to Millville and Vineland to Cape May. Route 42 connects Camden County to Gloucester County and Interstate 95 to the ACE. Also, Route 49 that transverses Salem, Cumberland, and Cape May and links Interstate 95 to the NJTP and to the Port of Salem.

Each of the four counties in the target region has a coastline and the ability to develop a network of ports. Several port facilities in Gloucester and Salem Counties are fully developed while large-scale facilities in the other counties do not yet exist. The South Jersey Port Corporation (SJPC) manages several facilities. The Port of Salem, Beckett Street Terminal, Broadway Terminal, and Paulsboro Terminal are four examples. The Port of Salem includes both SJPC and private terminal related operations and handles aggregate (e.g. sand), clothing apparel, fishing apparel, motor vehicles, food products, and consumer goods. Beckett Street Terminal (120 acres) handles wood products, steel products, cocoa beans, containers, iron ore, furnace slag, scrap metal, and project/over-dimensional cargo movements. Broadway Terminal (180 acres) handles petroleum coke, furnace slag, dolomite, other dry bulk items, steel products, wood products, minerals, cocoa beans, fresh fruit, and other containerized materials. Broadway Produce Terminal (26 acres) is operated exclusively by and for Del Monte and handles bananas,

pineapples, and other perishables. Finally, Paulsboro Terminal is still under construction (Parsons Brinckerhoff, 2010).

The combined value of the goods movement in the South Jersey region is substantial; the estimated market value of all agricultural products sold is \$580 million per year and the estimated market value of all seafood products sold is \$600 million per year (South Jersey Freight Transportation & Economic Development Assessment, 2010). The South Jersey region (including the target region as well as Camden, Burlington, and Cape May Counties) provides an estimated 50 million square feet in business and industrial parks along I-295 and provides 50,000 directly related jobs (South Jersey Freight Transportation & Economic Development Assessment, 2010). When considering the Delaware River ports, 2.8 million tons of goods move through the Camden port and it provides 1,100 jobs; the Gloucester City port handles 4.1 million tons of cargo per year; and, 170,000 tons are handled at the Port of Salem.

In addition to the movement of goods, several legacy industries contribute heavily to the South Jersey economy. For instance, the glass product industry employs an estimated 3,000 workers in the target region. Some other examples include the Paulsboro/Valero refinery that contributes more than 500 jobs, the Salem County/DuPont chemical plant provides approximately 1,200 jobs, and the Chambers Works (owned by DuPont) has roughly 750 jobs (see Table 15). Finally, Cumberland County has also emerged as a leading provider of construction aggregates--sand, gravel, and crushed rock--and industrial sand that is used in the glass industry and for “frac sand” in shale natural gas extraction (South Jersey Freight Transportation & Economic Development Assessment, 2010).

Stakeholder Views on Economic Opportunities

In key stakeholder interviews, growing existing industries, such as agricultural-business and tourism was seen as essential in Western Atlantic, Cumberland, and Salem Counties. Stakeholders in Gloucester County saw agricultural tourism as an opportunity as well (Boyer, personal communication, March 2015). Representatives noted their interest in the region promoting and investing in itself by buying more locally sourced goods and services, and focusing regional tourism on wineries and historic sites. One stakeholder noted that an agreement between the state and county for a more development-friendly atmosphere would greatly benefit the region. Stakeholders from Atlantic County saw the tourism industry in the North and South of Atlantic County as vibrant during the spring and summer seasons, and noted that the Western portion could be developed into a new tourism niche.

Agriculture has a strong presence in Atlantic and Cumberland Counties. According to the 2007 Agricultural Census, Atlantic County is the second largest agricultural county in the Garden State producing crops and livestock worth \$128.3 million annually. Most plants, sod, and trees for new development in New Jersey are bought from Cumberland County (Brewer, personal communication, March 2015). Cumberland County is an important source of fertilizer, seeds,

flowers, bushes, trees, and shrubs. The larger communities of Upper Deerfield Township, Hopewell Township, and Greenwich are agricultural communities with strong farmland preservation programs. Cumberland's agricultural industry has a 20 to 30 percent higher dollar value than neighboring Burlington County (R. Brewer, personal communication, March 2015). Atlantic County has strong truck farming businesses that transport tomatoes, lettuce, peppers, cabbage, and blueberries. The county has the second largest clam fleet on the East coast, but there are no maintenance facilities to support the industry (J. Peterson, personal communication, March 2015). The agricultural industry is an economic bright spot with places like Johnson Farms and Perdue Farms, located in Bridgeton (R. Brewer, personal communication, March 2015). However, businesses in the county have limited roadway access and the Port of Bridgeton is currently defunct.

Transportation is another key area for the region's economic development. There are several connectivity issues in the target area. Several stakeholders substantiated our background research regarding the lack of public transportation, connectivity, and the need for greater investment in transportation in the region. Two key regional organizations, DVRPC and SJTPO believe that the Glassboro line would benefit not only Gloucester County, but also Cumberland County and other surrounding municipalities. Key stakeholders cited the region's transportation infrastructure as an area in need of investment, especially in Salem and Cumberland Counties.

In Atlantic County, an expansion of the aviation industry is also seen as an opportunity for development. ACIA, SJTPO and SJEDD saw the research park in Atlantic County as the most important opportunity for the region. This would expand aviation related businesses and airports. A large opportunity in Atlantic County was establishing the county as a center for aviation research. There has been extensive research to develop a research and high-tech center in conjunction with NextGen and Stockton Aviation Research and Technology Park of New Jersey, Inc. The partners of the consortium are currently recruiting tenants and vendors before construction takes place this year (see Appendix H for more information).

Another opportunity involves local universities working to redevelopment areas of distress. For example, Stockton University is helping Atlantic City and Rowan University is helping Glassboro and Vineland. The education system allows for the attraction and retention of professionals and research, and also brings commercial and retail development to the areas where they are located (R. Westergaard, personal communication, March 2015). Both strategic planning documents and planners in the region see working with the county colleges as a key strategy to achieve more a stronger system for workforce development.

Regional Barriers

Although there are many areas for growth, there are also many barriers to economic development. The following section uses information and data gathered from key stakeholders in

the four county region. The region has many perceived and real barriers to economic development including a low-skilled workforce, poverty, stagnant population growth, increased costs in housing, state and federal environmental regulatory protections, state and municipal mandates, and lack of infrastructure and transportation. Additionally, as noted above, the strength of infrastructure and lack of east-west connectivity affect the robustness of the South Jersey industrial economy.

Environmental Regulations

Several key stakeholders identified environmental regulations as a hindrance to economic development. For example, according to the 2000 Atlantic County Master Plan, development in the county has been greatly impacted by the Coastal Area Facility Review Act (CAFRA) and the Pinelands Protection Act of 1979. CAFRA attempts to steer growth to designated Coastal Centers throughout the CAFRA area. The Pinelands Comprehensive Management Plan concentrates on restricting land use to prevent regional growth. This has resulted in significant growth in CAFRA Coastal Centers and Pinelands Regional Growth Areas in Atlantic County in Egg Harbor, Galloway, and Hamilton Townships. These towns are located along the coastal and mainland areas and encompass the older Bay Shore communities and suburban townships located along the AC Expressway and GSP corridors (J. Peterson, personal communication, March 2015). In addition to the deterrence of commercial growth, there are also public service projects that have been restricted due to regulations. Stakeholders in Cumberland County cite their rural and environmentally sensitive status as reasons for their lack of main water and sewer services (R. Brewer, personal communication, March 2015).

Budgetary Constraints

Budgetary constraints, as well as state and federal mandates, add to the barriers faced by the target region. Budget constraints affect municipalities who are in dire need of public services for their residents. For instance, Atlantic County's assessed valuation has decreased from \$58.2 billion in 2008 to \$39.8 billion in 2015 (Atlantic County Budget Address, 2015). This decrease of \$18.4 billion and the state's budget cap of 2.0 percent continue to erode the county's tax base. To make up for these losses, has eliminated or frozen 122 positions, imposed two years of voluntary or mandatory furloughs, and privatized programs such as the Youth Shelter, Jail Social Services, Senior Citizen Case Management, and the Medical Examination and is planning reductions in the hours and days of public services, (Atlantic County Budget Address, 2015). Cumberland County is also experiencing budgetary struggles. In 2015, Cumberland County will be freezing salaries and closing the Juvenile Detention Center to save \$1.2 million (Cumberland County Budget Presentation 2015). In 2014, Gloucester County increased taxes to offset the cuts in spending, health insurance costs, and the closing of the Gloucester County and Jail and regionalization of correctional services (Caffrey, M. 2015). Salem County has also been experiencing increased costs and decreasing revenues; decreasing revenues can be attributed to

decreases in houses' assessed values while increased costs from health insurance and contractual raises of salary and wages of government employees (Salem County Introduces Budget 2015).

In addition to financial strains that have become common for all local and regional governments across the country, most of the municipalities within the target region are also filing for Superstorm Sandy money, updating master plans, open space, and farm preservation plans, and providing new land development standards. The towns are required by law to submit a master plan to the county; however, it costs around \$50,000 (R. Brewer, personal communication, March 2015). State officials are full time professionals, while the mayors and councils are only part-time and sometimes on a volunteer basis. The lack of time commitment and professional staff to file paperwork and provide professional support is burdensome in most of the communities (J. Peterson, personal communication, March 2015)

Weak Government Coordination

Within the target region, there is a lack of shared public services, redevelopment, county road improvements, and transportation and infrastructure. There is leadership from agencies like DVRPC and SJTPO, but no larger organization to lead collaboration between the state and the counties as well as the counties and the towns (R. Westergaard, personal communication, March 2015). Furthermore, there are perceptions from regional leaders that each town only focuses on their own Main Street and community (L. Joyce, personal communication, March 2015).

Currently, the Gloucester County planning division is active in its coordination with other county services, veteran assistance, transportation services, state agencies, and DVRPC. The DVRPC is working in conjunction with the county to update the Master Plan from 1982 (M. Boyer, personal communication, March 2015). The county is also working with U.S. Geological Survey on a future 25-year plan to include an addendum of issues and or a Natural Resource Conservation Center. The Greater Atlantic City Chamber of Commerce in partnership with the Atlantic County WIB has developed a pilot program to get dislocated workers back to work. ACIA recently recommended the creation of an umbrella organization to assemble a comprehensive inventory of all services for better communication, problem solving, joint purchasing, and permit the formulation of collaborative proposals for the future (Human Transportation Service Update, 2010).

Despite these examples of organizational cooperation, all key stakeholders we interviewed stated that was a need for greater cooperation and shared services within the four county area. Traditional and or historical boundaries and “home rule” are no longer economically feasible nor the most effective or efficient in enabling economic growth and workforce development.



Chapter 5

Analysis & Recommendations

Chapter 5: Analysis and Recommendations

The purpose of the final chapter of our report is threefold. First, we highlight and integrate some of the key findings from the previous four chapters. We identify issues that overlap as well as make note of disconnects among our observations in the three areas of socio-economic conditions, workforce development, and economic development. Second, we discuss some guiding principles that emerged from our stakeholder interviews. The guiding principles of accessibility, capacity, awareness, and sustainability, are foundational themes that were woven throughout the workforce and economic development chapters of our report, and in some cases articulated as assumptions for any successful approach to development in the region. Finally, we discuss our four categories of recommendations:

- workforce development and regional retention,
- targeted regional economic development,
- regional transportation coordination, and
- integration of plans into a regional implementation strategy.

Analysis

The four county target region delineated for NJCC's South Jersey initiative have individual county and collective strengths, but there are also several weaknesses. In developing our recommendations, we considered both strengths and weaknesses of the region; we particularly strived to "connect the dots" among socio-economic conditions, workforce systems, and economic development opportunities.

The four county region is sparsely populated relative to the state and is experiencing slow population growth. Moreover, several of the region's largest employment sectors are projected to decline over the next decade. The food service and accommodation sector is projected to see the largest declines in the regional economy, in large part due to the re-stabilizing of Atlantic County's tourism sector. Traditionally, the region's economic stability has been partially tied to tourism and Atlantic County's ability to attract visitors to its many shore communities. While several stakeholders identified tourism as a possible solution for the region, data does not support this as a major growth sector that will result in a significant creation of jobs. Other sectors that face projected job losses in the region include manufacturing, information and utilities.

To further elaborate on the current socio-economic conditions of the region, housing affordability and lack of public transportation options are important areas to consider. These are two other major challenges residents in the region are facing. In fact, housing costs make up a significant portion of a family's monthly household income for both renters and homeowners alike. The existence of rising costs of housing only adds pressure to the already struggling region. The evident lack of resources has a paramount impact on the quality of life for people.

The absence of an effective and established network of public transportation in the form of buses and rail is not a viable option for individuals who need to travel to social service or employment locations. These two impediments continue to hinder workforce development and in turn economic growth in the region.

It is clear that the region faces significant struggles including declining employment opportunities and slow economic growth. Also, there is a growing aging population in these counties and all four counties have a higher percentage of 18 to 64 year-olds with a disability than the state average. Thus, the demand for health care related needs for both of these populations is higher than for other populations. Our research indicates that the healthcare sector is projected to grow in the region.

Other key sectors projected to grow in the four county region include construction, retail, and TLD. Secondary data research and stakeholder interviews identified agriculture as yet another area of potential growth. Farms and crop production are perceived as a key strength in the region. The environment and green space protection is important to South Jersey residents and stakeholders as it distinguishes the region from the more dense North Jersey. Despite this, in some of our key interviews individuals identified environmental concerns as a barrier to economic development in the region.

Many positions in these sectors do not require college degrees or higher education, but do require certain skills and training that public agencies in the region currently do not have the funds or capacity to provide. The region's population has lower overall educational attainment in comparison to the rest of the State. All four counties have less than the state average of people 25 years and older with a Bachelor's degree. Atlantic, Cumberland, and Salem Counties also have a lower percentage of people 25 years and older with a high school degree than the state average.

Despite the efforts made by a network of regional workforce development actors who are attempting to connect residents to training that is reflective of evolving economic sectors, the rates of individuals who are unemployed, in poverty, and enrolled in state and federal assistance programs are higher than the rest of the state. Additionally, there is a substantial presence of individuals with unique needs and several of these subpopulations are also disproportionately unemployed, in poverty, and in need of attention in the region. These populations are not dissimilar from struggling groups at the state level (e.g., single mothers, former prisoners, and the disabled population). Younger workers are another group that our research identified as struggling to find training and employment opportunities in the region. There is also a large subset of the population in Atlantic and Cumberland Counties that primarily speak a language other than English at home.

Employers have identified basic skills and soft skills as lacking among individuals applying for jobs. Several linkages exist between institutions of higher education and employers, but better coordination is needed to identify funding for industry-specific training. Funding for programs

at community colleges and One-Stop Centers can be limited and time sensitive; industry specific training, certifications, and continuing education are not options for individuals who lack basic skills. Workforce development programs devote significant time and resources to basic literacy, math skills, and customer service training. Developing pathways to employment where employers supplement the funding of basic skills and soft skills training will result in a more prepared workforce.

A network of community colleges and two universities anchor the region where numerous public and non-profit agencies provide workforce development training. While few major employers are located in the region, job clusters exist in each of the four counties. These clusters include established and emerging growth sectors such as agriculture and food production, technology, and aviation. They have great potential for growth, and thus, public and private organizations have worked together to invest and establish a foundation through these sectors. Despite their efforts, there is still a great need to improve coordination, cooperation, and publicity to fully realize the potential of these sectors, and as a result, attract higher skilled workers that will invest in the region. Stakeholders from workforce development agencies identified the need to create more opportunities that will lead individuals directly to jobs.

The four counties are not connected by any formal associations or governments. While similarities exist between the four counties, each county currently operates independently and without regard for the challenges, opportunities, or economic health of the others. Further, there are no regional MPOs or other coordinating agencies that cover the four county area to govern land use, transportation, economic development, or housing. Increased attention, politically, is needed to generate regional solutions to address the gaps identified in this report. Without regional coordination, large scale planning activities would pose a challenge and progress for the region will continue to fall short.

In spite of the previously mentioned, those stakeholders who were contacted for interviews for this NJCC's South Jersey initiative were not completely unaware of each other's efforts, organizational functions, and capacities. On occasions, the groups do work successfully in tandem. However, interviews with stakeholders often noted similar problems, frustrations, and issues that needed attention. They also articulated common core approaches and themes as synthesized in the following section.

Guiding Principles

Research on the counties of interest and stakeholder interviews from the region resulted in several key themes that remained at the forefront of our analysis. These themes served as guiding principles for the development of the following recommendations. The principles include accessibility, capacity building, awareness, and both budgetary and environmental sustainability.

Accessibility

Accessibility refers to the principle of ensuring that all residents in the counties are able to utilize services and programs. Beyond making sure services exist and are available, creating accessible services enables residents to participate. The goal is for residents to be able to participate in programs and services regardless of personal and family circumstances such as income, location, or car vehicle access. Recommendations took into account the need for accessible and affordable services for the residents.

Capacity

Capacity refers to the principle of ensuring that organizations or municipalities have the leadership, resources, and manpower necessary to carry out its tasks entirely. In defining capacity, building long-term financial partnerships were also considered. In order to realize the potential of the South Jersey project, we strived to identify realistic opportunities based on existing abilities and capacities of the stakeholders involved. Thus, the recommendations of this project considered the constraints on development that prevent people, organizations, and governments from realizing their goals.

Awareness

Awareness refers to the principle that communicating opportunities about the regional economy and promoting existing/upcoming resources in these communities will help to engage current residents as well as those looking to move into the region. Local governments, community institutions, and local businesses within the region share a common identity. Raising awareness, and thus participation, of each county's offerings and programs will help drive economic development.

Sustainability

Sustainability refers to the ability of organizations and initiatives to endure over long periods of time. For this project, sustainability involves the consideration of the factors affecting environmental outcomes, financial strength, and smart growth strategies. Sustainability is the symbiotic relationship between the natural environment and economic development; it seeks development that can withstand any and all hardships.

Recommendations

Workforce Development and Regional Retention

Our first group of recommendations directly relate to developing the region's workforce for both existing jobs as well as those in identified growth sectors. Our recommendations are rooted in the goal of retaining an educated and a qualified worker force in the region.

Identify and Evaluate Gap Training

We recommend that NJCC investigate opportunities with higher education institutions in order to develop certifications and training courses to address the skills gaps for some of the burgeoning industries discussed here. By creating completion certifications for these skills, job seekers can bolster their resumes and skill sets to become better candidates for jobs in industries that stakeholders in the four counties are identifying as growth industries. Some of these growing industries are Healthcare and TLD (Transportation, Logistics, and Distribution).

- **Help identify funding to continue successful programs or create new programs.** We recommend that NJCC explores expanding and supporting the One-Stop Center mobile skills vans, which are at risk of closure due to lack of funds or creating entirely new programs.
- **Financially support the promotion of certification and training programs and evaluate the programs.** We suggest that NJCC help identify funding for higher education centers, to evaluate current certification programs – e.g. how successful they are in helping job seekers in the counties find jobs or how many dropouts there are due to factors such as transportation, etc. In order to assess the best certification and gap training programs in the region, NJCC and its partner would need to analyze and evaluate further funding decisions and contributions.
- **Act as a liaison between employers and higher education institutions.** We propose NJCC facilitate conversations between businesses and higher education certification programs, ensuring the needs of both parties are being met. NJCC could reach out to One-Stop Center Directors and higher education professionals at major universities in South Jersey and expand upon conversations started by the practicum team and described in the report.

Enhance Skills Training and Entrepreneurship Courses

We propose that NJCC help identify support for residents through two types of existing programs. First, GED programs which would benefit individuals who are lacking professional workplace skills due to a lack of education or long-term unemployment. Second, we recommend support for resume and job interviewing skill programs. Some of these programs exist at One-Stop Centers and local community colleges in the counties.

- **Develop basic skills programs.** We advise NJCC to explore funding programs One-Stop Centers and the community colleges currently offer aimed at the development of basic skills, ranging from basic math and literacy skills to personal finance skills.
- **Support soft skills curricula.** We suggest that NJCC investigates the possibility of providing seed money to fund the adaptation of the US Department of Labor (USDOL) curriculum called “Soft Skills to Pay the Bills--Mastering Soft Skills for Workplace Success” or the development of similar ones at local agencies throughout the four counties. This curriculum is targeted to youth with disabilities, but focuses on six major soft skills that could serve potential workers of all ages and skill levels. The USDOL has made this curriculum readily available online through PDF downloads (Youth in Transition, USDOL).
- **Connect residents to business ownership.** We recommend NJCC help identify the funding for training courses already existing at several of the community colleges that include entrepreneurial skills that can lead residents to owning and operating their own business.

Assist the Incarcerated and Ex-offender Population

We recommend that NJCC collaborate with existing community organizations such as NJ-STEP and correctional facilities to support and/or extend their current programs to incarcerated and formerly incarcerated individuals. Such programs aim to support successful prisoner re-entry and education opportunities in order to reduce recidivism.

- **Develop mentoring programs to assist formerly incarcerated individuals.** The *Justice Center* at the Council of State Governments and the *Find Youth Info* website publishes a list of funding opportunities to support this population. Also, in 2007, the United States Department of Labor published *Mentoring Ex-Prisoners: A Guide for Reentry Programs*. This guide can be a useful tool for organizations that may want to establish and include this type of service to this population. Thus, we recommend that NJCC explores the possibility of identifying additional funding to go towards expanding efforts of an existing New Jersey based organization that is working with this population.
- **Provide a series of training programs for formerly incarcerated individuals.** NJCC could explore the possibility of extending funding to WIBs/One-Stops to create a set of training programs that will connect these individuals to employers and help them build skills. One of the dominant challenges for this population is their lack of technology skills. Curriculum to address this issue and opportunities to engage with technology in meaningful ways could be developed.
- **Facilitate higher education opportunities to incarcerated and formerly incarcerated individuals.** According to a Rand Corporation publication, individuals incarcerated today

have less educational opportunities than people who have been incarcerated in prior years. NJCC could explore extending funding to an organization that will connect this population to education in and out of correctional facilities. An example of this type of program is the NJ-STEP who provides and connects incarcerated and formerly incarcerated individuals with higher education opportunities.

Promote Community Benefit Agreements

We propose that NJCC collaborate with existing community organizations and businesses to support and act as a liaison between stakeholders in order to ensure results, better communication, and oversight. This could be achieved through the promotion of community benefit agreements.

- **Work alongside businesses to promote Community Benefit Agreements (CBAs).** We recommend that NJCC works with local employers in the previously identified industrial parks, businesses in growth industries, and One-Stop Centers, to help promote CBAs.
- **Help employers identify partners for capacity building.** Within CBAs, local businesses may hire residents identified by the One-Stop Centers and provide funding to help certify residents in machinery or participate in a certification at a local college (see “Gap Training”, above). After providing this training, employers would expect to hire most, if not all of these residents after the terms of the CBA are completed.
- **Extend initial funding to support CBAs.** These agreements are beneficial to both job seekers and those looking to hire workers. NJCC’s role could be extending initial funding to fund a CBA, with the idea that it would continue to grow and become self-sustainable in the long term (e.g., the business may take over the majority of the funding sources in future iterations).

Increase Overall Awareness of Current Programs

Another workforce development challenge within the region is the lack of awareness of existing programs. Stakeholders have identified some existing programs as partially successful, but not well-attended. In addition, users of the One-Stop Centers are largely limited to those individuals collecting unemployment benefits. Some others benefit from One-Stop services by participating in additional training to make themselves more marketable for promotions at their current jobs.

- **Improve awareness through marketing strategies.** NJCC could explore providing the financial or administrative support so that One-Stop Centers and community colleges can improve their own marketing strategies. This endeavor could complement existing strategies and reach more low to moderate individuals looking for workforce training programs.

- **Facilitate regional communication efforts.** Due to the lack of overall communication, NJCC can investigate the possibility of taking an organizational role to connect stakeholders and facilitating ideas, help market existing and upcoming programs, and identify future challenges.

Support Youth Engagement/School-to-Work Transitions

We suggest that NJCC investigates the possibility of implementing a School-to-Work Transition program. The program integrates a system of youth education, job training, and labor market information to provide a faster and more successful transition from school to stable employment (Kash, 2008). School-to-Work Programs” can be mentorships, internships, job shadowing, or even apprenticeships. The essential factor is to retain business involvement. (Kash, 2008).

- **Facilitate collaboration between stakeholders and businesses to support transition from school to employment.** NJCC can consider facilitating collaboration between stakeholders and local businesses in the four-county region, including some of the more successful industrial parks outlined in this report, to connect residents to the type of opportunities included in the School-to-Work Program.
- **Form partnerships between schools and businesses.** NJCC can advocate for the creation of an apprenticeship or internship program for community college students. Local businesses benefit from a higher productivity from these students who must meet certain criteria to get school credit for their work experience.
- **Identify funding for a School-to-Work Transition program.** Stakeholders have mentioned that youth in the region are exiting secondary school (primary-high school) and entering the workforce or post-secondary school without the proper skillset to succeed. We recommend NJCC explore funding for a School-to-Work Transition program. Comparatively to the recommendation previously mentioned (see “Awareness of Programs”), there could be a marketing strategy aimed primarily at the youth still in high school and graduating seniors.

Work Experience Programs

A publicly funded work experience program allows for persons currently in between jobs or the long-term unemployed to gain skills and income. Such a program is a possible area where the county governments can work together. We recommend that there could be some organizational support to local governments, WIBs, and One-Stop Centers in creating a marketing strategy (similar to strategies outlined in the “Awareness” section above) that gathers participants, and then assigns them to jobs that the counties need completed; these could be anything from painting city buildings to mowing public lawns or planting flowers.

- **Serve as a liaison between local governments and communities.** NJCC may serve as a liaison between the local governments to help organize this strategy and also to identify projects that need to be completed in the community.
- **Provide funding to programs after identification and evaluation.** NJCC could explore the possibility of providing grant money for programs established by municipalities with limited resources, if there is a significant need. Evaluative criteria to determine which municipalities receive funding would be established by NJCC. Gathering unemployed residents together in one place would also serve as a marketing strategy for the One-Stop Centers' other programs, as well as potential certifications and trainings.

Targeted Regional Economic Development

The second group of recommendations encourages economic development of the target region.

Encourage a Four County Accelerator

A four county accelerator would promote entrepreneurial ventures in Atlantic, Cumberland, Gloucester, and Salem Counties with hands on support and financing. Accelerators are primarily financing vehicles for entrepreneurial ventures as they exchange capital for an equity stake in the company; they are usually the first investors in promising ventures. Notable examples of accelerators are: Angel List, the Foundry Group, Tech Stars, NYC Seed Start, and Tech DFW.

- **Identify and evaluate partners and investors to be accelerators.** We recommend that NJCC consider local assets such as agriculture and higher education, both of which offer a robust cluster of support services in each of the counties as the basis for accelerators by promoting innovation in the sectors.
- **Provide targeted services such as mentoring and other development assistance.** Once the accelerator has accepted the venture, they provide targeted services, like mentoring and other development assistance.
- **Assist in monitoring and structure of the accelerator.** The usefulness of this structure rests in its network; that is, how well it connects the entrepreneur with capital, how strong its mentor/talent channels are, and how knowledgeable its staff is.
- **Provide the initial seed funding.** This structure could tie together several development goals and provide a foundation to attract additional funders and opportunities.

Support Industry Hubs 1, 2, and 3

We have identified several growth industries in the four counties. Additionally, there are existing structures to help build and grow industry hubs in the region. The first industry hub is the Stockton University Aviation Research and Technology Park, followed by the food industry hub; and finally, the Rowan University Technology Park is the third industry hub present in the target region.

1. The Stockton Aviation Research and Technology Park: Egg Harbor Township, Atlantic County

Stockton University and the FAA William J. Hughes Technical Center are the leading partners in developing an aviation research and technology facility on 58 acre-tract in Egg Harbor Township. Industry partners of the park include aviation and defense contracting companies Hi-Tec Systems, Sunhillo Mission-Critical Data Interoperability, RVA Robinson Aviation Inc., Enterprise Engineering Services (EES), and Engility. Other non-governmental organizations affiliated with the park include the South Jersey Transportation Authority and Atlantic County Institute of Technology. More information on the status of the park can be found in Appendix H.

We recommend that NJCC considers to:

- **Support regional stakeholders to leverage incentives.** Stakeholders in the region see great potential for ARTP. NJCC may consider working with Stockton University, SJEED, and other regional stakeholders to leverage tax incentives and/or market the area's unique competitive advantages to attract businesses.
- **Provide the foundation for training courses directly related to the park.** Currently, Atlantic Cape Community College has aviation related programs in Aviation Studies, such as Professional Pilot Option, Pre-Aerospace Engineering, and Air Traffic Control Terminal in Applied Sciences. We suggest NJCC investigate and evaluate the status of these programs and current enrollment.
- **Promote aviation and defense contract related businesses and employers.** NJCC may consider exploring involving itself with marketing efforts as the project looks to attract aviation and defense contract related employers and businesses to the park. The development of the park could potentially be accelerated or kept on track with pressure from industry and the actuality of several businesses moving into the park.

2. The Food Industry Hub: Rutgers, Rowan, Co-op

One of South Jersey's strong industries is the agricultural and food industry. NJCC can leverage the strong presence of this industry. Also, of interest, is leveraging the local procurement opportunities and existence of support industries and institutions to not only augment the purchasing power for the area, but also to generate workforce development and training opportunities for local area residents. We recommend NJCC to consider to:

- **Utilize Rutgers Food Innovation Center as a partner in the region.** The Rutgers Food Innovation Center, established in 1997, is a reputable and well-funded business incubator and economic development accelerator program that gives business and technology expertise to startup and established food companies. We propose that NJCC works with the center in terms of education and training for individuals within the region. The facilities offer business and technical mentoring services (e.g. analytical testing, package

development, product optimization/expansion, strategic plan development) and manufacturing and operations assistance (e.g. production/processing, sourcing raw materials, quality assurance, and auditing).

- **Establish a food cooperative in the region.** We recommend that NJCC explore extending funding to an organization that could coordinate the formation of a Food Cooperative in the region and leverage the existence of the predominant food industry. A cooperative could be further explored to leverage the job opportunities for vulnerable populations such as the unemployed young adult population, ex-offenders, and people with disabilities. For more information on cooperatives and examples of these, refer to Appendix I.

3. South Jersey Technology Park at Rowan University: Mullica Hill, Gloucester County

SJTP at Rowan University was funded with a \$5.8 million dollar grant from the NJEDA. The goal of SJTP is to revitalize the region through an integrated program of science, technology, and business initiatives. The focus of SJTP is advancing technology and enabling entrepreneurs to build and grow their technology related businesses with state of the art facilities and expert assistance. It is in the early stages of development and recently completed the Innovation Center for academic research and tenants. The Rohrer College Business Incubator and Rowan College of Engineering's research laboratory are currently housed at the center. We suggest NJCC to:

- **Work alongside the incubator to attract new business growth.** Their services provide business tenant facilities and services for emerging, high growth technology businesses in the South Jersey region. Services include dedicated or shared virtual tenants for commercial space, with access to conference and meeting rooms, high speed internet and other telecommunications, state of the art printing and copying, reception and mail services.

Regional Transportation Coordination

Regional transportation coordination in the South Jersey region is an important priority and will be subject of our third series of recommendations. The greatest challenge is the lack of public transportation options in the counties. Although some transportation opportunities do exist, some of the most vulnerable populations residing in these counties lack or have very minimal transportation service provision. Thus, some of their main needs such as getting to and from their place of employment and commuting to school has been severely affected. Some transportation initiatives appear to be underway by transit agencies servicing the region, but much are long-range or future projects, and others are transportation projects that are desired, but not necessarily financed.

Notably is also the robust presence of freight transportation in the region. The South Jersey Port area has already been identified as an essential freight region for New Jersey. County officials are optimistic about the continual growth of freight operations as it relates to economic development for the region and understand that there is a need for continued investment and assessment to maximize its potential.

- **Maximize ridership through existing transit opportunities.** It was made evident through stakeholder interviews from WIBs, the Pascal Sykes Foundation, and county officials, that recent initiatives in place that are addressing transportation needs in these communities often times lack the proper marketing to increase awareness and ridership for those individuals who need it the most. We recommend that NJCC explores funding awareness and/or marketing campaign in the languages necessary to communicate with those affected residents.
- **Provide improved mobility opportunities to transit-dependent populations.** Below are some possible recommendations to expand transportation options to these populations.
 - **Jitney Service.** Jitneys are an affordable mode of transportation. One of the prominent Jitney servicers can be found in Atlantic County. The Jitney Association includes 190 individually operated vehicles servicing Atlantic City. Providing finance to expand Jitney Service to other counties may be a viable recommendation that NJCC might want to explore due to the relatively economical costs associated with implementation.
 - **Shuttles.** Counties have expanded transportation options to residents by implementing shuttle service from One-Stop Centers and WIBs to employment locations and to local higher education institutions. An organization that has initiated relationships with stakeholders and has financed immediate transportation services is the Pascale Sykes Foundation. The Foundation has been able to finance three community shuttles servicing Atlantic, Cumberland and Salem Counties. A shuttle that will service Gloucester County will be launched this June 2015. Ensuring that these community shuttles remain in place long-term is a concern due to potential challenges with funding. NJCC can explore providing the capital to expand and/or to implement strategies leading to sustainability.
 - **Paratransit.** As the data section of this report stipulates, there is a significant proportion of people with disabilities or a disabling health condition residing in the region. Financing proper paratransit services for these individuals would be another recommendation. NJCC can explore locating local partnerships with government or non-government institutions to ensure this population is provided with proper paratransit services.

- **Locate transportation stations near major employment centers, activity centers, and residential areas.** A studied coordination of any possible transportation initiatives to make connections to WIBs, One-Stops, higher education institutions, places of employment or any location with high traffic is necessary. Potential transportation initiatives that could be funded should include a conscious effort to allocate transportation to sites in places of interest for residents.
- **Support or complement policies that will increase transit opportunities for the region.** Although this recommendation is not necessarily one that can be directly handled by NJCC, identifying funds for another entity such as the SJTPO that will provide the planning for and implementation of transportation related policies needed to push the region forward. NJCC can explore partnering with the SJTPO who could bring about systemic change for the region on the long run.
- **Support the region's strong presence of freight operations.** The four counties in the region have a robust freight presence and contribute significantly to the local economy. In particular, all four counties have access to coastline and highway connections, which provide the opportunity to establish a well-developed network of ports. Some port facilities are already well established, while others still need to be developed. We recommend that NJCC explores the possibility of investing in the regional economy through the movement of goods and expanding freight opportunities in the area.

Integration of Plans into a Regional Implementation Strategy

Our final series of recommendations surround integrating plans into a regional implementation strategy and empowering an existing or creating a new regional umbrella organization. Both interviews and background research highlighted the fact that there is a lack of coordination and integration of plans and the implementation of those plans between organizations in the region. NJCC has a unique opportunity with its new South Jersey initiative to work with the regions' various key stakeholders in workforce and economic development to better coordinate all efforts aimed at building the regional economy and workforce.

There are three WIBs in the four counties, each with their own programs, facilities, and strategic planning documents. There are several regional planning organizations that coordinate transportation, land use, and economic development in one or more of the counties (e.g. ACIA, SJEED, DVRPC). Additionally, county colleges within the target region run workforce skills programs and trainings at their facilities. To ensure the most efficient and effective allocation of government and private funds in the region, strong coordination between these organizations is needed.

Some recommendations NJCC might consider pursuing include:

- **Coordinate a conference with county representatives to establish strong relationships.** NJCC can explore the possibility of convening a conference with representatives from the four counties (and possibly other South Jersey Counties) with the aim of establishing better relationships between stakeholders and ideally initiating a coalition of groups that not only communicate more effectively but also cooperate and incorporate other groups activities and plans into their own group's efforts.
- **Establish a listserv or message board to increase cooperation and communication.** We recommend that NJCC considers contacting the various stakeholders and coordinating a listserv or message board to foster better communication and cooperation. NJCC could provide the infrastructure / groundwork for this effort and encourage participation until this communication/cooperation tool became ingrained or a natural process.
- **Generate a framework and strategy for the region.** We recommend that NJCC explores hiring a consultant group to read WIB, Economic Development, Planning, and all other regional strategic plans thoroughly and to synthesize the array of documents into one coherent framework and strategy or plan for the region.
- **Establish a development coordination system.** A four county coordination system for listings of developable land and best practices is recommended. This system would encompass each county identifying developable properties and, to the extent possible, ensuring that any barriers to development have been resolved; that is, in terms of brownfield obligations, liens, and title issues. Examples of best practices include the coordination activities of the city of Millville and the Holly City Development Corporation (HCDC is a subsidiary of the Millville Housing Authority) and the city of Bridgeton's HOPE VI development project. HCDC is revitalizing center city Millville by leveraging a grant from South Jersey Gas to demolish abandoned properties facilitating redevelopment in the area. The Bridgeton HOPE VI project through which Bridgeton has purchased, demolished, and redevelopment derelict and abandoned properties.
- **Investigate the feasibility to empower a new/existing regional umbrella organization**

There are several regional bodies that currently exist in South Jersey; however, no regional body or MPO covers the four counties studied for this report. The SJTPO provides coordination for transportation, planning, and land-use issues in Atlantic, Cumberland, Salem, and Cape May Counties -while Gloucester County is a part of the DVRPC. The SJEDD covers most counties in the region, but does not include Gloucester County.

We suggest NJCC investigate the following:

- **Identify whether existing organizations have the capacity to plan and implement regional planning efforts.** Identifying areas of overlap and opportunities for greater cooperation and coordination will guide the region for years to come.
- **Identify what (if any) structure must be in place to ensure regional cooperation.** Regional shared services, workforce development programs that span the regional economy, and improved access to transportation through the coordination efforts of a regional umbrella organization.
- **Convening leadership from current regional bodies and identifying opportunities for staff consolidation and resource sharing.** Convening meetings with local government stakeholders, helping to avoid the duplication of services, and generally promoting cooperation among county and regional organizations will allow South Jersey Counties to work together to build a stronger regional economy.
- **Investigating the feasibility and practicality of a state-wide, New Jersey-specific MPO or similar development organization system.** A New Jersey specific MPO helps to address issues New Jersey Counties encounter while working to tie all parts of the state's economy together.
- **Consolidating regional and local plans under one umbrella organization.** NJCC can help shape the future of South Jersey's economy by commissioning a study concerning current regional organizations.

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Appendix A: Supplemental Tables

Table A1: Age Breakdown, 2011-2013 Estimates

Age	Atlantic		Cumberland		Gloucester		Salem		New Jersey	
Under 5 years	16,748	6.10%	10,814	6.90%	16,854	5.80%	3,849	5.90%	536,105	6.00%
5 to 9 years	16,753	6.10%	10,899	6.90%	18,848	6.50%	4,233	6.40%	554,949	6.30%
10 to 14 years	17,656	6.40%	9,834	6.20%	20,279	7.00%	4,130	6.30%	584,488	6.60%
15 to 19 years	18,936	6.90%	9,716	6.20%	19,751	6.80%	4,309	6.60%	588,078	6.60%
20 to 24 years	18,553	6.70%	10,915	6.90%	19,676	6.80%	3,962	6.00%	556,891	6.30%
25 to 34 years	32,239	11.70%	23,110	14.70%	33,942	11.70%	7,579	11.50%	1,132,147	12.80%
35 to 44 years	34,102	12.40%	21,757	13.80%	38,913	13.40%	7,786	11.90%	1,196,426	13.50%
45 to 54 years	42,833	15.60%	21,904	13.90%	46,170	15.90%	10,129	15.40%	1,365,264	15.40%
55 to 59 years	18,877	6.90%	9,809	6.20%	19,802	6.80%	4,821	7.30%	599,595	6.80%
60 to 64 years	17,499	6.40%	8,377	5.30%	17,272	6.00%	4,416	6.70%	506,814	5.70%
65 to 74 years	23,104	8.40%	11,246	7.10%	21,697	7.50%	5,631	8.60%	668,632	7.50%
75 to 84 years	12,264	4.50%	6,431	4.10%	11,456	4.00%	3,282	5.00%	388,913	4.40%
85 years and over	5,775	2.10%	2,846	1.80%	5,177	1.80%	1,524	2.30%	189,607	2.10%
Total	275,339		157,658		289,837		65,651		8,867,909	

Source: 2011-2013 American Community Survey 3-Year Estimates

Table A2: Labor Force Status

	Total Pop. 18-64	In Labor Force		Not In Labor Force	
Atlantic	169,733	134,505	79%	35,228	21%
Cumberland	89,109	67,395	76%	21,714	24%
Gloucester	182,529	145,521	80%	37,008	20%
Salem	39,656	30,511	77%	9,145	23%
New Jersey	5,520,395	4,374,355	79%	1,146,040	21%

Source: U.S. Census Bureau, ACS 3 Year Estimates, 2011-2013

Table A3: Disabled Population: 18-64 Years Old

	Percent of Population	Number
Atlantic	10.8%	18,331
Cumberland	15.5%	13,812
Gloucester	10.0%	18,253
Salem	12.6%	4,997
New Jersey	7.7%	425,070

Source: U.S. Census Bureau, ACS 3 Year Estimates, 2011-2013

Table A4: Disabled Population, Age 18-64, Selected Cities				
City	County	Population 18 to 64 years	With a disability	
Salem City	Salem	2,978	765	25.7%
Millville	Cumberland	17,609	2804	15.9%
Vineland	Cumberland	36,477	5699	15.6%
Fairfield	Cumberland	3,140	467	14.9%
Pennsville	Salem	8,411	1121	13.3%
Deptford	Gloucester	19,497	2480	12.7%
Bridgeton	Cumberland	12,372	1514	12.2%
Source: U.S. Census Bureau, ACS 3 Year Estimates, 2011-2013				

Table A5: Individuals 18 and Older with Income in Past 12 Months Below Poverty Level, By Age Group										
	Atlantic		Cumberland		Gloucester		Salem		New Jersey	
18 to 24 years	15.07 %	4,08 5	13.56 %	2,29 5	26.17 %	442 9	16.86 %	912	17.04 %	107,251
25 to 34 years	22.38 %	6,06 6	23.42 %	3,96 4	19.41 %	328 6	20.09 %	1,087	20.87 %	131,362
35 to 44 years	16.57 %	4,49 2	19.37 %	3,27 9	16.09 %	272 4	20.70 %	1,120	17.54 %	110,445
45 to 54 years	17.16 %	4,65 0	15.50 %	2,62 4	14.56 %	246 4	17.52 %	948	16.58 %	104,396
55 to 64 years	14.75 %	3,99 9	14.82 %	2,50 9	10.89 %	184 3	12.75 %	690	12.69 %	79,906
65 to 74 years	8.51%	2,30 6	7.59%	1,28 5	6.13%	103 8	6.14%	332	7.12%	44,851
75 years and over	5.56%	1,50 7	5.74%	971	7.46%	126 2	5.93%	321	8.15%	51,308
Total	27,105		16,927		17,046		5,410		629,519	
Source: U.S. Census Bureau, ACS 3 Year Estimates, 2011-2013										

Table A6: Unemployment by Education (Age 25-64)					
	Atlantic	Cumberland	Gloucester	Salem	<i>NJ</i>
% Less than HS Unemployed	21%	13%	18%	25%	15%
% HS Grad Unemployed	13%	13%	12%	12%	12%
% Some College Unemployed	12%	14%	8%	12%	10%
% Bachelor's Degree Unemployed	6%	7%	4%	3%	5%
Source: U.S. Census Bureau, ACS 3 Year Estimates, 2011-2013					

Table A7: Unemployment by Education (Age 25-64), Percent Unemployed and Number Estimate

	Atlantic		Cumberland		Gloucester		Salem		Total
% Less than HS Unemployed	3,189	21%	1,135	13%	1,011	18%	528	25%	5,863
% HS Grad Unemployed	4,654	13%	2,651	13%	4,517	12%	1,201	12%	13,023
% Some College Unemployed	4,023	12%	2,223	14%	3,234	8%	989	12%	10,469
% Bachelor's Degree Unemployed	1,930	6%	765	7%	1,931	4%	193	3%	4,819
Total	13,796		6,774		10,693		2,911		34,174

Source: U.S. Census Bureau, ACS 3 Year Estimates, 2011-2013

Table A8: High Schools with Graduation Rates under 80 percent: 2014 Four Year Cohort Rates

County	School	Four Year Graduation Rate
Salem	Salem High School	69%
Atlantic	Atlantic City High School	70%
Cumberland	Bridgeton High School	71%
Atlantic	Pleasantville High School	76%
Salem	Penns Grove High School	77%
Cumberland	Vineland Senior High School	78%

Source: U.S. Census Bureau, ACS 3 Year Estimates, 2011-2013

Table A9: Commuting in South Jersey

	Atlantic	Cumberland	Gloucester	Salem	NJ
Employed (16 yrs. +)	123,800	59,619	136,708	28,115	4,107,798
Car, truck, or van -- drove alone	75.9%	80.7%	85.3%	84.9%	71.9%
Car, truck, or van -- carpooled	8.1%	12.3%	7.3%	7.7%	8.4%
Public transportation (excluding taxicab)	7.5%	1.8%	2.1%	1.6%	10.8%
Walked	3.9%	1.5%	1.5%	2.3%	3.1%
Other means	2.4%	2.4%	1.0%	0.7%	1.9%
Worked at home	2.3%	1.3%	2.6%	2.7%	3.9%

Source: US Census Bureau, 2009-2013

Table A10: 2014 Per Credit Cost, Selected Colleges

	Atlantic-Cape Community College	Cumberland County College	Rowan College at Gloucester County	Salem Community College	Richard Stockton University	Rowan University
In-County	\$113	\$110	\$95	\$102	\$311.81	\$348
Out-of-County (paperwork)	\$113	\$120	\$115	\$125	\$311.81	\$348
Out-of-County (no paperwork)	\$168	\$188	Not Listed	\$102 (non- resident verified working in Salem County)	\$311.81	\$348
Sources: Atlantic Cape Community College, 2014, Cumberland County College, 2014, Rowan College at Gloucester County, 2015, Salem Community College, 2014, Stockton University, Fall 2014, Rowan University, 2014						

**Table A11: County Median Earnings and 10 Cities with Lowest Median Earnings
(for workers)**

County	Overall	City	Earnings
Atlantic	\$30,158	Pleasantville	\$22,562
		Atlantic City	\$23,634
		Egg Harbor City	\$25,095
		Galloway Township	\$26,569
Cumberland	\$28,466	Bridgeton City	\$17,695
		Maurice River Township	\$22,369
		Fairfield Township	\$24,824
Gloucester	\$41,342	Glassboro Borough	\$23,482
Salem	\$35,254	Salem City	\$21,917
		Penns Grove Borough	\$22,982
New Jersey	\$39,527		
Source: U.S. Census Bureau, ACS 5 Year Estimates, 2008-2013			

Table A12: Current Non-Farm Jobs by Industry, Percentages				
	Atlantic	Cumberland	Gloucester	Salem
Accommodation and Food Services	33.5%	5.6%	8.0%	6.3%
Government	16.6%	23.1%	18.2%	20.3%
Retail Trade	11.4%	12.9%	17.4%	8.9%
Healthcare and Social Services	13.0%	15.7%	12.5%	13.8%
Manufacturing	1.6%	14.3%	7.0%	12.6%
Wholesale Trade	2.2%	5.0%	8.7%	1.9%
Construction	3.3%	3.9%	5.5%	5.6%
Administrative and Waste Services	3.1%	3.2%	5.4%	4.9%
Other Services	3.7%	3.2%	4.1%	2.6%
Professional, Scientific, and Technical Services	3.1%	1.8%	3.4%	3.5%
Transportation and Warehousing	1.6%	3.8%	2.9%	5.6%
Finance and Insurance	2.0%	1.9%	2.1%	2.3%
Arts, Entertainment, and Recreation	1.3%	0.8%	1.3%	1.2%
Real Estate and Rental and Leasing	1.1%	0.7%	0.9%	0.9%
Utilities	0.5%	0.2%	0.1%	8.4%
Educational Services	0.8%	0.9%	1.0%	0.7%
Information	0.6%	1.5%	0.9%	0.5%
Management of Companies and Enterprises	0.5%	1.1%	0.3%	0.0%
Natural Resources and Mining	0.0%	0.3%	0.0%	0.0%
Total	100%	100%	100%	100%
Source: New Jersey Department of Labor and Workforce Development (2014). Industry and Occupational Employment Projections				

Appendix B: Interviews

- Atkins, Margaret (2015, March). New Jersey Scholarship and Transformative Education in Prisons (NJSTEP) Consortium [Telephone interview].
- Bell, Mary. (2015, March). Delaware Valley Regional Planning Commission, Manager of Demographic and Economic Analysis [Telephone interview].
- Bierig, Michael. (2015, March) Bierig Brothers Meat Wholesalers [Telephone interview].
- Brewer, Robert. (2015, March). Cumberland County Planning Department Director [Telephone interview].
- Boyer, Michael. (2015, March). Delaware Valley Regional Planning Commission, Manager of the Office of Long Range Economic Coordination. [Telephone interview].
- Chelius, Tim. (2015, March). South Jersey Transportation Planning Organization Executive Director [Telephone interview].
- Didio, Tony. (2015, March) Hamilton Business Park [Telephone interview].
- DiLeonardo, Christy. (2015, February). Cumberland/Salem One-Stop Center [Telephone interview].
- Edmonds, Darrell. (2015, April). Pascale Sykes Foundation Program Manager [Telephone interview].
- Hargo, Sidney (2015, March). South Jersey Community Foundation Executive Director [Telephone interview].
- Hassler, Mary Ellen (2015, March). Salem County College Noncredit Program Coordinator [Telephone interview].
- Herzog, Christina. (2015, March). New Jersey Department of Labor, State Employment and Training Commission [Telephone Interview].
- Joyce, Louis C. (2015, March). South Jersey Economic Development District Executive Director [Telephone interview].
- Mandayam, Dr. Shreekanth. (2015, March). South Jersey Technology Park & Rowan University, (2015, March). [Telephone interview].

Rogers, Diana. (April, 2015). Department of Housing and Economic Development, City of Trenton, NJ [In-person interview].

Simek, Vicki. (2015, February). Cumberland County College Professional & Community Education Executive Director [Telephone interview].

Westergaard, Rick. (2015, March). Gloucester County Planning Division Director [Telephone interview].

Appendix C: Supplemental Resources

Atlantic/Cape May County Youth Development Van:

http://www.atlanticcapewib.info/pdf_files/Job%20Development%20Van%2006.pdf

Atlantic City Learning Lab Schedule:

http://atlanticcapewib.info/pdf/Literacy_Directory.pdf

Cobbs Fletcher, Renata (2007). Mentoring Ex-Prisoners: A Guide for Reentry Programs.

Retrieved from http://www.doleta.gov/PRI/PDF/Mentoring_Ex_Prisoners_A_Guide.pdf

Davis, Lois M. (2013). Education and Vocational Training in Prisons Reduces Recidivism, Improves Job Outlook. Rand Corporation, Santa Monica, California. Retrieved from

<http://www.rand.org/news/press/2013/08/22.html>

Economy League of Greater Philadelphia (2011). Economic Benefits of Employing Formerly Incarcerated Individuals in Philadelphia. Retrieved from

http://economyleague.org/files/ExOffenders_-_Full_Report_FINAL_revised.pdf

Find Youth Info – Funding Opportunities

<http://www.findyouthinfo.gov/funding-information-center>

Justice Center at the Council of State Governments – Funding Opportunities

<http://csgjusticecenter.org/reentry/online-tools/funding/>

Pay for Success Program at the White House

<https://www.whitehouse.gov/omb/factsheet/paying-for-success>

Pureland Shuttle Brochure:

<http://www.gloucestercountynj.gov/civica/filebank/blobdload.asp?BlobID=6405>

Appendix D: Programs for the Prison Population and Formerly Incarcerated

Programs for Prison Population

The New Jersey Scholarship and Transformative Education in Prisons (NJ-STEP) is an initiative that offers educational and employment opportunities to incarcerated and formerly incarcerated individuals. Individuals in NJ-STEP undertake academic curriculum while in detention, are provided opportunities to enroll in higher education, and reentry support and services. The initiative offers individuals academic support leading to an associate and eventually a bachelor's degree. These opportunities are made possible through a collaborative effort between NJ-STEP staff, participating higher education institutions, detention officials, and the community. NJ-STEP collaborates with the NJ Department of Corrections (NJDOC) and NJ State Parole Board, to offer academic courses to those incarcerated under the custody of the State of New Jersey, and help with their transition to college life after release. There are seven participating New Jersey prisons in this initiative include the Albert C. Wagner Youth Correctional Facility, Edna Mahan Correctional Facility for Women, Mountainview Youth Correctional Facility, Garden State Youth Correctional Facility, East Jersey State Prison, South Woods State Prison, and Northern State Prison. Of these, only South Woods State Prison is in Bridgeton, Cumberland County. Cumberland County College and Salem County Community College both participate in the program. NJ-STEP recently met with Rowan University to speak about its subsidiary, Rowan College at Gloucester County, participating in the near future. NJ-STEP is currently accountable to 700 detained individuals in the initiative, of which, 110 are detained at the South Woods State Prison in Bridgeton City in Cumberland County.

NJ-STEP was selected for the national Pathways Project managed by the Vera Institute and funded by a conglomerate of funders including Ford, Gates, Kaiser, Soros, and the Sunshine Lady Foundation. Pathways is a 3-state initiative focused on creating, sustaining, and evaluating a model of inside/outside college education. Ford and Sunshine Ladies Foundation have committed \$4 million over the next four years to support the project. Every aspect of NJ-STEP will be subject to Pathway's evaluation through RAND Corp, a national research organization. Michigan and North Carolina have programs like NJ-STEP, but not at the scale or scope as in New Jersey. NJ-STEPs long-term goals are to grow as feasible and fiscally sound model for the nation, and become financially sustainable. While they only launched in 2013, NJ-STEP strongly believes that by expanding college opportunities for those in prison, it will reduce recidivism, increase public safety, and reduce the immediate and collateral costs of prison. Their goal is to continue as a self-sustaining institution (M. Atkins, personal communication, March 2015).

In 2004, New Jersey began replication of another prisoner focused development program. The Annie E. Casey Foundation selected New Jersey to be among the first states to replicate the nationally recognized Juvenile Detention Alternatives Initiative (JDAI). JDAI came about due to the severe increase of secure detention for juveniles despite decreases in juvenile arrests, and the

growing overcrowding in youth detention centers. The initiative seeks to generate effective processes in regards to the use of detention. JDAI also works to refocus resources toward successful reform strategies and to improve conditions of confinement in detention facilities for those youth who require this most secure level of supervision. As of 2011, fifteen counties were participating in JDAI in New Jersey including Atlantic and Cumberland. New Jersey is the only state to be designated a national model for detention reform by the Casey Foundation. In 2008, NJ was designated this achievement due to the program's notable outcomes.

Before JDAI, participating counties committed 1,037 youth to state custody. In 2013, these same counties committed just 301 youth, a 71 percent reduction. As of 2012, 38 JDAI sites had reduced their average daily populations (ADP) in detention by 50 percent or more from their pre-JDAI levels (Mendel, 2014a). The downward trend in commitments is a benefit for taxpaying citizens due to the high recidivism rates documented among youth returning from training schools and the significant costs associated with training school confinement (nearly \$400 per night). New Jersey also receives funding from the Casey Foundation to administer two-day working sessions with delegations from other states interested in replicating New Jersey's JDAI success (Mendel, 2014b).

Another prison related program is the State Use Industries program or DEPTCOR. The mission of the program is to educate, train, and deliver marketable skills through different manufacturing and service enterprises, which hires inmates to produce products at reasonable costs. DEPTCOR includes 21 shops and offices that hire about 1,000 inmates. Three of the sixteen DEPTCOR locations are in South Jersey correctional facilities. These include the South Woods State Prison, the Bayside State Prison, and the Southern State Correctional Facility. An overarching goal of DEPTCOR's is to offer inmates with alternatives to idleness and to diminish recidivism. Program administrators want to be able to aid inmates with the transition from prison jobs to careers and improve their likelihood of reentry into the community. The program maintains a revolving fund within the NJDOC and is self-sustaining because it generates revenues from its products and services (Lanigan, 2012).

Finally, the AgriIndustries Revolving Fund provides different food and dairy items to several government agencies at reduced costs, and offers inmates jobs and training that could be of benefit upon their release. Bayside State Prison Farm, which produces milk, and the South Woods State Prison, which has two processing plants and provides meat, vegetables, and fruit products are both located in South Jersey, and are part of AgriIndustries (NJDOC AgriIndustries, 2015). Overall, the various AgriIndustries food production plants train and hire approximately 100 inmates daily in all areas of production; making them the largest food production employer in the state. AgriIndustries is also a self-sustaining program without appropriated funds (Lanigan, 2012).

Appendix E: Crime and Substance Abuse

In this appendix, we present a few pieces of data on crime and substance abuse. These are exceedingly large topics to report on and analyze. This appendix aims to provide readers with some key statistics and point out two sources that enable further research. The two sources for this appendix are the New Jersey State Police's Uniform Crime Report and the New Jersey Chartbook of Substance Abuse Related Social Indicators.

Substance Abuse

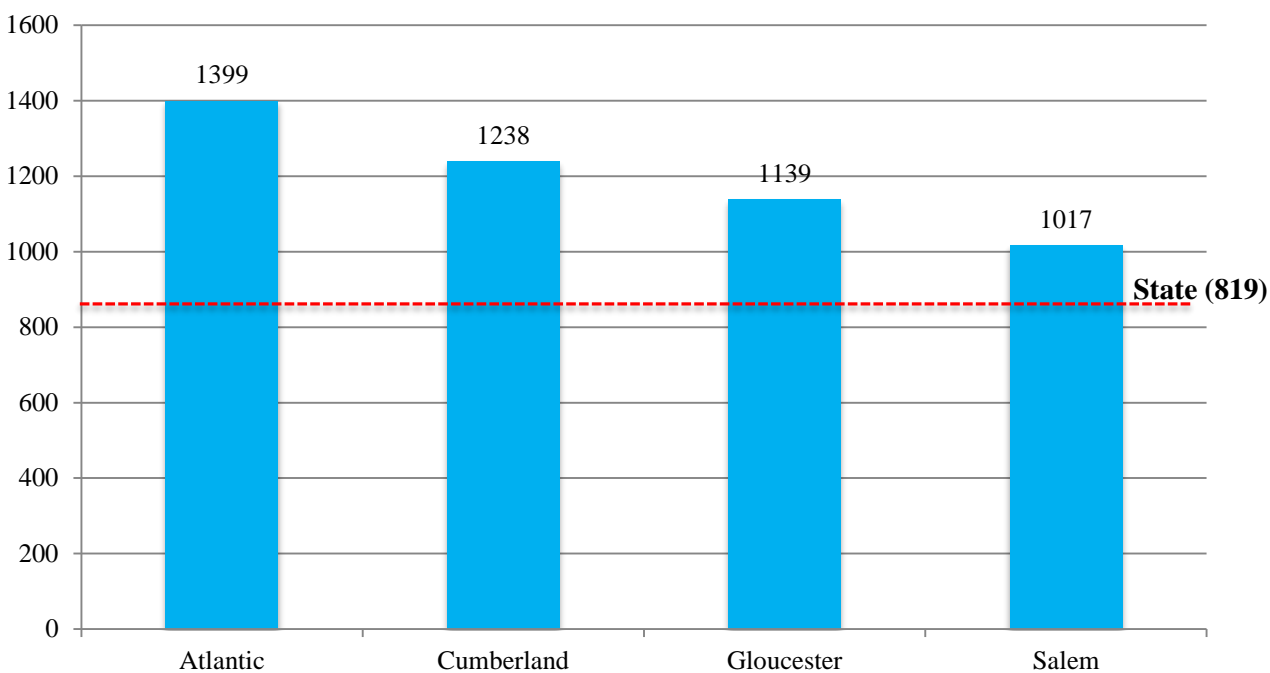
In 2010, the number of arrests related to drugs ranged from 775 to 1,086 per 100,000 and alcohol ranged from 751 to 836 per 100,000 in the four counties (New Jersey Chartbook of Substance Abuse Related Social Indicators, 2013). These rates were higher compared with similar measures at the state level; the state had 721 drug arrests per 100,000 and 517 alcohol arrests per 100,000. Similarly, the four counties had a higher rate of drug treatment admissions per 100,000 than the state. In 2010, the drug treatment admission rate in the target area ranged from 266 to 401 and the alcohol treatment admission rate ranged from 751 to 1,027. The state had a drug related admissions rate of 261 per 100,000 and alcohol related admissions 558 per 100,000 during the same time. The majority of the individuals admitted for treatment of substance abuse in the four counties were 25 to 44 year-olds. In the counties, between 48.5 to 57.6 percent of those admitted for substance abuse were between ages 25 and 44 year-olds. The majority of treatment admittances were due to abuse of heroin and other opiates (each county rate was between 32.3 to 51.7 percent) followed by alcohol (26.2 to 32.4 percent).

Table A13: Drug and Alcohol Arrests, 2010

	Alcohol Arrests Per 100,000	Drug Arrests Per 100,000
Atlantic	836.31	945.56
Cumberland	843.4	1,086.10
Gloucester	760.67	775.08
Salem	750.6	895.04
<i>NJ</i>	<i>517.2</i>	<i>720.9</i>
Source: New Jersey Chartbook of Substance Abuse Related Social Indicators, May 2013		

Table A14: Treatment Admissions Rate Per 100,000

	Alcohol	Drug	Total
Atlantic	372	1,027	1,399
Cumberland	401	837	1,238
Gloucester	309	830	1,139
Salem	266	751	1,017
<i>New Jersey</i>	<i>261</i>	<i>558</i>	<i>819</i>
Source: New Jersey Chartbook of Substance Abuse Related Social Indicators, May 2013			

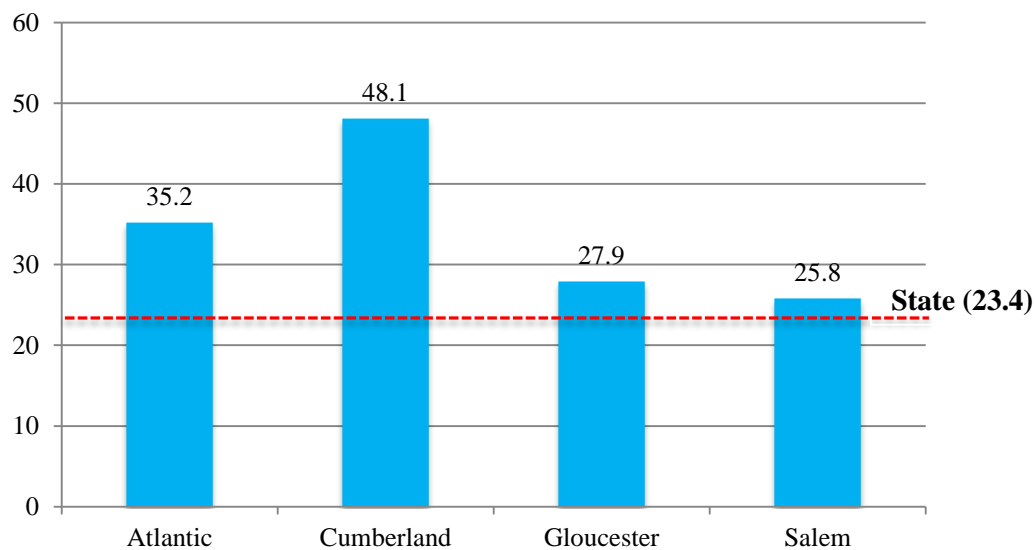
Graph A1: Drug & Alcohol Treatment Admissions Rate (Per 100,000)

Source: New Jersey Chartbook of Substance Abuse Related Social Indicators, May 2013

Crime

In 2012, a total of 9,688 offenses and 14,854 arrests were reported in Atlantic County, 7,633 offenses and 10,727 arrests were reported in Cumberland, 8,065 offenses and 17,530 people were arrested in Gloucester and in Salem 1,694 offenses and 5,635 arrests were reported.

In New Jersey, in 2012, there were 23.4 victims for every 1,000 inhabitants. This rate was higher in each of the four counties in this study (State of New Jersey, Division of State Police, 2012). The predominant type of crimes committed in the four counties was larceny-theft, followed by burglaries. There were 35.2 victims for every 1,000 permanent inhabitants in Atlantic County, 48.1 victims for every 1,000 inhabitants in Cumberland, 27.9 victims per 1,000 inhabitants in Gloucester, and 25.8 victims for every 1,000 inhabitants in Salem.

Graph A2: Victims Per 1,000 Inhabitants

Source: New Jersey Chartbook of Substance Abuse Related Social Indicators, May 2013

Appendix F: Transportation Projects Impacting the Southern Region

New Jersey Transportation Projects Impacting the Southern Region				
Project Name	Project Description	Downloadable Documents Providing More Information	Project Status	Projected Date of Implementation
NJ TRANSIT South Jersey Bus Rapid Transit (SJBRT) System	Bus Rapid Transit (BRT) system connecting Philadelphia to Gloucester and Camden Counties and downtown Camden and Center City Philadelphia.	http://www.southjerseytransit.com/SJBRT%20Fact%20Sheet%20-%20April%202014.pdf	To advance the SJBRT System, the next step is the federal environmental review as required by the National Environmental Policy Act (NEPA).	Year 2020
		http://www.southjerseytransit.com/index.html		
Glassboro-Camden Line	The purpose of this project is to improve transit service along the Glassboro to Camden corridor with a focus on increasing mobility and improving links between the established communities, jobs, and activity centers. The proposed line would restore passenger rail service along an existing rail line using light rail vehicles similar to the NJ TRANSIT River LINE.	http://www.glassborocamdenline.com/images/uploads/GCL_Information_Brochure_November2013_web.pdf	The project is awaiting completion of environmental studies and preparation of the Draft Environmental Impact Statement (DEIS). Coordination with municipalities along the study corridor continues. The original June 2014 publication date for the DEIS was postponed.	Year 2019
		http://www.glassborocamdenline.com/		
		http://pascalsykesfoundation.com/wp/wp-content/uploads/2015/04/English-Creek-April-2014-2015.pdf		
Community Shuttles	The Pascale Sykes Foundation, along with local government agencies and stakeholders has been expanding local transportation needs through the implementation of shuttle service in the counties of interest.	http://pascalsykesfoundation.com/wp/wp-content/uploads/2015/04/GBAT-April-2014-2015.pdf	Shuttles and/or trolley service have been implemented for local residents in Atlantic, Cumberland and Salem Counties.	The Gloucester County Shuttle will be launched on June 2015.

Atlantic City Jitneys	The Jitney Association includes individually owned and operated vehicles that provide transportation service in Atlantic City. Jitneys were established by two individuals who saw an opportunity after a trolley strike severely impacted transportation during the 1900s.	http://jitneyac.com/about.php	190 jitneys are currently servicing Atlantic County around the clock. Opportunities to franchise exist and are included on the Jitney Association's website. The site also includes their current routes.	N/A
Freight Operations	Stakeholders in the counties of interest have noted that more than 4 million tons of cargo moves through ports along the Delaware River every year. The New Jersey Long-Range Transportation Plan 2030 document notes that the state's ports, rail lines and highways should meet regional needs and connect North America to the world. The report recommends that priority be given to transportation projects that support redevelopment of brownfields for freight use.	http://www.co.cumberland.nj.us/filestorage/173/251/761/2947/3098/10005/Cumberland_County_2020_Strategic Actio n_Agenda.pdf	Key stakeholders interviewed for this study noted transportation infrastructure as an area in need of investment. According to county officials and planning documents, Salem and Cumberland, have a strong potential for growth in these areas. Several port facilities in Gloucester and Salem Counties are fully developed while large-scale facilities in the other counties do not exist. More detailed information can be found in this report.	N/A
		http://www.state.nj.us/transportation/works/njchoices/		

Appendix G: Transportation Project Support

The region houses several agencies charged with providing transportation project support and comprehensive planning. The Delaware Valley Regional Planning Commission (DVRPC) is a regional metropolitan planning organization (MPO) responsible for prioritizing transportation projects in Mercer, Burlington, and Gloucester Counties. MPOs are responsible for maintaining a continuing, cooperative, and comprehensive transportation planning process. Beyond DVRPC's role in transportation planning, the DVRPC helps to develop economic development strategies, community development initiatives, and watershed management. Another MPO is the SJTPO, which serves 68 municipalities in Atlantic, Cape May, Cumberland, and Salem Counties. The SJTPO does not act as a land use or planning agency like DVRPC. However, they do collaborate with DVRPC on grants and several subcommittees such as aviation, crime and public safety, regional freight, and traffic safety education.

Each of the four counties has county-specific transportation goals and plans. Atlantic County has been concerned with the connection of affordable housing to public transportation (Atlantic County, 2011). Some challenges with its current transportation provision model are that transit runs on East-to-West routes, with few North-to-South networks. Mass transit in Atlantic County has been more effective for day-visitors, workers and others, while those in rural areas who are transit dependent receive marginal service.

Cumberland County's goals include the expansion of their transportation system to reduce travel time, congestion, environmental and social costs, and to promote economic development. The County's objectives include paratransit for people with disabilities who are not able to use public transportation and regional needs to increase mobility. The Delaware River Port Authority (DRPA) has been advancing the concept of a light rail system from Camden to Glassboro and eventually to Cumberland County (Cumberland County Strategic Action Agenda 2020, 2008). Other goals reinforce highway enhancements and access. In particular, the County's well-positioned rail freight system appears to be an advantage for any future industrial land development. Lastly, the county has demonstrated interest in an Express Bus service as a provisional transit alternative until the expansion of rail service in the county.

Gloucester County's goals include developing its public transportation, highways and public utility access for businesses and commercial centers. The County's list of priorities includes port, rail, and highway transportation investments (Damminger and Simmons, 2014). One project that significantly advances the goals of the Comprehensive Economic Development Strategy (CEDS) is the planned extension of a light rail to Gloucester County. The initial plan for this extension calls for the phase one portion of the rail line to Woodbury station that will eventually extend the line south to Glassboro (Damminger and Simmons, 2014). The County also intends to pursue transportation projects through the DVRPC's Transportation Improvement Program (TIP).

The prime concern of the Salem County Transportation Plan is the conservation and enhancement of a transit system, which provides safe, quality, and efficient services. Its transportation plan recognizes the importance of supporting economic development, providing service to transit-dependents and others, reducing vehicular-related air pollution, providing safe and user-friendly facilities for pedestrians and bicyclists (Salem County Traffic and Transportation Plan Element, 2012).

Appendix H: Stockton University Aviation Research and Technology Park

Stockton University Aviation Research and Technology Park (ARTP) was initiated in 2005 and formerly called the Next Generation Aviation Research and Technology Park. The project idea was affiliated with the Federal Aviation Administration's (FAA) "NextGen" initiative. The FAA's "NextGen" project is a \$40 billion effort to modernize the nation's air traffic control system from an aging radar-based network to one using satellites. The name was changed last year to reflect Stockton University's involvement in the project and the new broader mission of expanding the aviation industry in the region (Esposito, 2014).

Currently, there is a consortium of organizations affiliated with the park. Richard Stockton College of New Jersey was a founding organization; the park is an auxiliary organization of Stockton University (Stockton Aviation Research & Technology Park, 2015). Stockton University took over the project in 2014 from the South Jersey Economic Development District (SJEDD), after mismanagement, delays, and financial difficulties stalled the project. SJEED is working with Stockton to transfer the land ownership and begin construction and attraction of key businesses for the park. There are many vendors interested in being partners at the development.

The signing of contracts and forms is the last thing needed before a developer builds next year. SJTA, SJEDD, FAA, USDOT, and Stockton University will need to sign off on the new lease. The recent resignation of the Stockton University President will have no impact on the site. Previously, Atlantic County provided funding for the main roads and streetlights for the site. Construction is slated to begin within the next year 2015-2016 on the first of seven buildings in the proposed development complex.

There is great potential for the Stockton ARTP. Atlantic Cape Community College currently has four aviation related programs: Aviation Studies (AS), Aviation Studies – Professional Pilot Option (AS), Pre-Aerospace Engineering (AS), and Air Traffic Control Terminal (Associate in Applied Science).

Stockton ARTP is one of six test sites designated for Unmanned Aircraft Systems (UAS). Recently, SJEED contracted with a consulting firm and released a research paper on Atlantic County's potential growth into the UAS industry and the region's comparative advantage for UAS companies looking to locate and to develop and test UAS.

Appendix I: Cooperatives

Cooperative Name	Description	Additional Information	Analysis	Resources	Financing
Evergreen Cooperatives, Cleveland, Ohio http://evergreencooperatives.com/	Evergreen Cooperatives was established by a working group of local institutions. These included foundations, healthcare institutions, educational institutions, and local government. The development of Evergreen Cooperatives sought to address:	Cooperatives under Evergreen Three worker-cooperatives: 1. Evergreen Laundry 2. Evergreen Energy Solutions 3. Green City Growers	Cooperatives can be developed by converting existing businesses into this model or by starting new cooperatives entirely. The presence of a significant amount of farmland in South Jersey can be leveraged, but any industry can become a cooperative. Cooperatives are more likely to create stable fair paying jobs,	1. US Federation of Worker Cooperatives http://www.usworker.coop/news/upcoming-webinars Sample Webinars <ul style="list-style-type: none"> Loan Readiness: Technical assistance intensive and borrower perspectives. New Worker-Owner Orientation: One-per-month online webinar. Human Resources for Worker Coops: HR law, personnel policies, evaluation and accountability systems. Service Provider Directory A list of cooperative technical assistance and professional service providers such as lawyers, accountants, tax preparers, interpretation services,	Local Enterprise Assistance Fund Service Area: National http://leafund.org LEAF has been providing flexible financing and development assistance to community-based and employee-owned businesses that create and save jobs since 1982 National Cooperative Bank Service Area: National http://www.ncb.coop Providing loans to cooperatives for expansion, renovation and acquisition. Northcountry Cooperative Development Fund Service Area: National http://www.ncdf.coop/ NCDF has been providing financing to cooperatives for almost 35 years. Operating as a co-op of co-ops, NCDF understands the unique ownership and governance structure of cooperatives and the benefits that co-ops provide to their communities.

	<ul style="list-style-type: none"> • Locate financing to create jobs despite the presence of constrained resources. • Tackle the absence of economic opportunity at a time when unemployment was at double-digits, and as many as 30% of the residents were under the poverty line. • Generate real employment opportunities through green industry. • Stabilize and revitalize disinvested neighborhoods. <p>Evergreen Cooperatives were designed by the Democracy Collaborative, http://community-wealth.org/; and are</p>		<p>adopt environmentally sustainable business practices and invest in the local community. They often evaluate success based on a variety of metrics in addition to profit, such as worker health and happiness, sustainability, and community benefits (Think Outside the Boss: How to Create a Worker-Owned Business, 2014).</p>	<p>marketing professionals, and others.</p> <p>2. The National Center for Employee Ownership An organization that provides information on employee stock ownership plans (ESOPs), equity compensation plans, and ownership culture. They publish field research, hold Webinars and in-person meetings annually, and provide services to members and others.</p> <p>3. Corey Rosen Fellows at Rutgers School of Management and Labor Relations Research fellows whose research focuses on worker cooperatives and Employee Stock Ownership Plans (ESOPs) http://smmr.rutgers.edu/research-centers/corey-rosen-fellows</p>	<p>The Working World Service Area: Primarily NY, some national http://www.theworkingworld.org/us/ TWW is a non-profit providing investment capital and technical assistance for worker cooperatives. The financing model is based on building successful cooperatives and lasting wealth for worker-owners.</p> <p>Food-Coop Initiative (up to \$10,000) Service Area: National http://www.foodcoopinitiative.coop/resources/loans</p> <p>USDA Rural Cooperative Development Grant Program (up to \$200,000) Service Area: National http://www.rd.usda.gov/programs-services/rural-cooperative-development-grant-program</p> <p>USDA Rural Business Development Grants (up to \$500,000) Service Area: National http://www.rd.usda.gov/programs-services/rural-business-development-grants</p> <p>USDA Economic Impact Initiative Grants (up to 75% of eligible project</p>
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	supported by the Cleveland Foundation			<p>4. Employee Stock Ownership Plan (ESOP) Foundation http://www.esopassociation.org/the-esop-association</p>	costs based on need and funding availability) Service Area: National http://www.rd.usda.gov/programs-services/economic-impact-initiative-grants
				<p>5. ESOP Research http://www.nceo.org/main/articles.php http://www.ownershipopportunities.org/</p>	USDA Rural Community Development Initiative Grants Service Area: National http://www.rd.usda.gov/programs-services/rural-community-development-initiative-grants
Real Pickles , Greenfield, Massachusetts http://www.realpickles.com/index.html	Real Pickles recently transitioned from a traditional business model to a cooperative to ensure it remains independent and locally-owned.	More details about the conversion can be found at: http://www.project-equity.org/case-studies-business-conversions/case-study-real-pickles/		<p>6. Urban Ag Law A collaborative approach to collect and disseminate important legal information, best practices, and supporting tools to support urban agriculture in the U.S. http://www.urbanaglaw.org/</p>	
Other Case Studies http://www.project-equity.org/case-studies-business-conversions/download/	Project Equity publishes research based on cooperative case studies.			<p>7. Democracy at Work Institute http://institute.usworker.coop/projects/rural-development A national organization dedicated to worker cooperative development in economically and socially marginalized communities.</p>	

US Federation of Worker Cooperatives Directory http://www.usworker.coop/find-a-worker-coop	The US Federation of Worker Cooperatives also publishes a directory of worker cooperatives located nationwide.			8. Brooklyn Law School Center for Urban Business Entrepreneurship Provides legal tools for Worker Cooperatives and the Sharing Economy.	
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Appendix J: South Jersey Map of Higher Education Institutions, WIBs, and One-Stop Centers

