

**2002 Lancaster County Quality of Life Survey  
Forum Presentation – November 14, 2002**

**INTRODUCTION**



**Art Mann:** Good evening. I'm Art Mann, and welcome to the third Hourglass Foundation Forum on our bi-annual survey. When we first commissioned this Hourglass survey, it was our thinking that it was important to know the public perception of issues that impact the future of Lancaster County and its quality of life. And we also thought that an accurate and thorough survey would help our public officials understand public sentiment on key issues, because they are the ones who are responsible for leading and making decisions with respect to these issues. It is our hope that they find this survey useful in making those decisions. And we also thought that, for this survey to be of use, we would have to be above reproach or criticism that would impugn the integrity of what we report. And so, to that end, we have expanded our sample this year to more than 1,200 people across the county, giving us a highly accurate statistical sample of our county. So, at this point, I would like to introduce Mr. Tom Lepson, who is seated here. Tom comes highly recommended, because he has a lot of degrees. He has a B.S., and he is an Associate Professor of Marketing at York College of Pennsylvania. He has a B.S. from the University of Baltimore, an M.B.A. from American University, and a Ph.D. from Union Graduate School, which makes him an expert, I guess, and he will talk about the survey he was commissioned to do. We are going to do things a little bit differently tonight. Tom will review some key findings of the survey, and then a Mr. Chip Smedley will be the moderator, and we are going to get reactions from the audience, because we would like to get people's reactions to some of these questions, as to what do they mean, and you will see as we get into it, what we are after. So, before we get started, I would like to thank Jim Corrigan. This is Jim's project. He is our board member, and he shepherds this project every two years and does a great job. And, with that, I'm going to turn it over to Dr. Lepson, and we'll get started.

**PRESENTATION**

**Tom Lepson:** Can you all hear me? I'm going to start off here, and I'm going to move my way up here, and Chip is going to work here and do that. I do teach some college, but most of my time is spent with a firm called Polk Lepson Research Group, at which I work full time, and we research a number of different areas. When one undertakes a research project like this, the very first thing I attempt to do, or we attempt to do, is to create what we call the environment of the truth. So, what am I talking about? In this particular case, I try to make sure, that whatever sample I take reflects the whole of the universe, in this case the people who live in the county. Now the question is, "How do I do that?" Well, I do that a number of different ways. The first one is what Art alluded to, and that is I have to have a large enough sample of doing

that. Early on, the Hourglass realized how important that happened to be and authorized a sample for me to do of 1,200 households. The actual sample was 1,224 households. And, in research terms, that yields a sample accuracy of 2.8 +/-%. That's great. What does that mean? It means it is one really accurate sample, that's what it really means. This is the kind of sample you use for a national study. While it's just not enough to have a large sample, you have to talk to the correct people. So, I want to show you something and share something with you, how we went around talking with the right people. So, up here, you're going to see that what we did is we established some quotas, and over here you'll start seeing that this is the census of those people who are over 18 in Lancaster County. (Appendix 1-A) We established quotas for two demographics: one is gender and the other one is age. You can see how the actual sample matched up with what is the U.S. Census that happens to be here, and sometimes it gets absolutely eerie just how close they happen to be. Because we established this, I must tell you, other demographic factors matched up, such as race, and such as other factors, demographics, but also geographically of the people who live in the city versus the people who live in the county. The third thing we attempted to do to get this environment of the truth and get the right sample is how you collect the data. And we collected the data during the week, during the day, at night, and on weekends. So, we took these three things so that we would make sure that we had a credible sample for you, and I walk away, in all honesty, never feeling as strongly about a sample as I have done in the 30 years I have been doing this.

The next thing, of course, you have to do to create this environment, and this is on our part, Polk Lepson's part, and that is you have to have a good research instrument, and that's a fancy term for a questionnaire. And we were so lucky in doing this, in that this is our third time, as Art alluded to, so this process is an evolutionary process, rather than a revolutionary process. So we could take some of the questions that we had previously used and search out trends. We threw a few questions out because they really did not reveal anything. But, with the help of the Hourglass Foundation, we were able to add some questions, which really got to some issues that are important to people in this county. Well, that's our side when we talk about the environment of truth. How about the other side? And the other side is what you hope for, people like myself, is when you talk to the people who are going to sponsor this survey; they understand that they have to accept the truth. And I was so fortunate that the Hourglass Foundation, and I say this, I have nothing to gain by saying this, early on said this to me: "You go seek the truth, and, whether it's good or it's bad, we will live with it, whether it's positive or negative, then we know and we can do something like that." When we were all young and we went out on dates, (maybe I shouldn't use this analogy) and you'd go out, and you'd tell your friend, "I'm going out on a date." And your friend says to you, "I think maybe you better brush first, because I think you're going to wilt the person you're going out on a date with." You didn't like that, but the truth of the matter is, after you did that, you went and brushed and did whatever you had to do, you were kissing sweet, and you were much better off by somebody telling you that. It's a heck of an analogy, but it does work a little bit.

Having said all that, we've gone there and done that, there are a couple of other things I should point out to you in what we're doing here, and that is, you're going to see a couple of things up there, and we're going to put what we call "frequencies", and we did different levels of analysis, and you're going to see the results of our survey. And all frequencies are is the answers to the specific questions that we asked. But we tried to go a little bit further with you, and we

did what we call “multiple varied analysis”. And what we did are things called cross-tabs and decision trees, and all that does is say, “Who are the people who said specific things?” But we do it in a statistical way. For instance, we know now, and I’ll do this really quickly, that people who have blond hair are most likely to have blue eyes. That doesn’t mean that everybody who has blue eyes has blond hair and everybody who has blond hair has blue eyes. But, statistically, there is a relationship. And so when you see me talk up here or you listen to me, I’m going to try to relate these relationships. By the way, this is why I have these cards. I hate cards, but there were just so many of these things that I didn’t want you to miss it.

The second thing you’re going to see is, when we ask questions, we ask two different kinds of questions, what we call “aided questions”, in which we help the people, we give them specific choices to make. And then we give them “unaided questions”, and that is sort of like an open-ended question. So you’re going to see that we ask two different kinds of questions up there. That person can go anywhere he wants with it, or we guide him a little bit with it.

And the last thing I want to leave you with is, lots of times people say, “Oh, the questionnaire was really long...” or whatever it happens to be. I have to tell you, my interviewers reported to us, and we have a variety of people who have been with us a long time, and they said in this particular case there were so many people who wanted to complete the questionnaires, we really didn’t have that rough of a time, because this is their county, and they really have something to say, and they welcome the opportunity to say it. So I want to tell you, that happened, and it happened a lot, within this project. So, I think you’re going to really enjoy what you’re going to hear. As you know, Chip and I are going to do a little dog and pony show here, and let’s see if I can start it off.

Here goes the first lot: one of the things that we have done in the last three years, and you can see here that this is a sort of a trend, this is 2002, 2000, 1998. We asked in an open-ended format, again that is open-ended questions, an unaided format, we asked them, “What did they like best about Lancaster County?” (Appendix 1-B) And you can see the order that they say things, keep on going. You can see it was the countryside, the farmland, the open space, and the atmosphere, was the thing they said. They could have gone anywhere with this, but that was how they responded. And we had 45.3%. You know, you look at these trends, and you say, 45.3%, I had 51%, 55%. Does this mean that people are not thinking that it is as important any more? Well, this is a little bit why Chip is going to come up here and explore these things. Because, there could be a lot of interpretations of that number, 45.3. It could be maybe people don’t see it any more. It could be we have more first-time people. It could be that we’re doing a really good job of preserving our land, or it could be that it’s gone, and therefore people don’t see it anymore. And that’s why you’re going to see Chip coming up, exploring, with you, the audience, what do you think. And that’s just a good illustration of doing that. So, we have it up here, and it’s interesting: who really does think the countryside, and maybe at first blush you might say, well, it’s the people that have been around here for a long time. But, when we did the statistical correlation, and by the way, when I say to you, you’re going to hear me say the term “more likely”, “less likely”. That doesn’t mean that everybody else doesn’t feel that way. It’s just that this group feels more likely or less likely. It was the people over 35 who felt strongly that way. So, some of the younger ages are feeling this way, it’s just not those people who have been around here for a long time. It is the people who have been here for approximately 20 years

or more. So, we're starting to see even the young people value the countryside. And you can see, "it's a nice place to live", "the people are friendly", "it's a small-town environment". It's some of those things that many of you value.

Well, if you're going to ask, "What do you like best?" we also like to ask the question, "What do you like least?" (Appendix 2-A) And again, this was what we refer to as an unaided question. People could go anywhere they wanted with this question. And then you can see what we had up here. This is "traffic", "poor road conditions", "congestion", we see again is 35% of the entire population of this 1,224 people. When you start getting numbers like that, you could be talking about 600 people saying that, or 500 people saying it, and you can start seeing "overdevelopment", "too residential", "too many malls", and "too many commercial stores". So, we're going to talk more, because you're going to see a pattern about this traffic congestion. You're going to see different kinds of responses to different kinds of questions on that.

This leads us into the next question. In dealing with the next question, we started getting fear. We asked the question, "What is the biggest threat to the quality of life in Lancaster County?" (Appendix 2-B) And you start seeing "overdevelopment" and we see it up there with 42%, and it matches up very well with 2000, and you see a pattern going through there. But now, you start looking at something a little bit different, and we start talking about drugs, we start talking about increased crime, we start talking about violence, and you start seeing guns, and you start seeing gangs. And you start seeing a pattern that's emerging here, so you start seeing "overdevelopment" and "loss of farmland" on one hand, and you start seeing "crime" on the other hand. Interestingly, who are the people who start thinking more about this crime or are willing to say that? And, quite honestly, the people who are more likely to say "violence" and "drugs" and this is what they fear, and "guns" and "gangs" were people who reside in the city and females. At this point, you can see it on a more graphic presentation, (Appendix 3-A) and you start seeing the gaps. What we did in some cases, we put it both in numerical and also in graphic presentation for you, just so you can get some sort of an enrichment between what is 30% and 60%, and you can start seeing visually the difference that happens between those. When you see a little star over here that means I fade and Chip enters.

**Chip Smedley:** I teach as well, and I sort of often think teaching is like throwing darts: you throw ideas out, and they stick, and people jump, and things happen. So that's pretty much what I'm going to do here tonight. One of the first things that came up was this question of over-development. We didn't really know if people understand what over-development is, and the good thing about this dart thing is, you guys elected to wear sort of bulls eyes of different colors. So, this is for the people who have purple tags on, to begin with anyway. What is over-development, as opposed to just regular development? Is it bothering you? Is it noisy neighbors? By the way, if you keep things short and sweet, the Hourglass bought you a box of Wilbur Buds.

#### **Audience Responses**

- *When we become overburdened, such as the school systems, sewer systems and the road systems. The housing developments are just packed in. There no longer is a landscape.*
- *It has a lot to do with, what is in my backyard. If it isn't in my backyard, I'm not bothered, however, if it impacts my yard and my property and it effects my lifestyle, than that is over-development.*

Sort of a related question, and this is the dart coming out, if the county is to continue to grow and prosper, isn't some level of overdevelopment necessary? And don't worry about subjective views. That's what we're here for, to try to give some sort of personal and human look at these numbers up here.

#### **Audience Responses**

- *Over-development can bring with it the issue of whether or not the discomfort was compensated for in some way. So much of the development produces benefits for one sector of the economy but not many others. The absence of the mechanism to balance leads to a sense of disenfranchisement, hopelessness and frustration, and I think therefore the name, "over-development".*
- *When the benefits equal the inconvenience, it is constructive development. If I find that I am being more inconvenienced than before it came, then it's over-development. This is my subjective view. I would suggest that is what bothers everyone. They call it over-development when it causes more trouble than its benefit.*
- *By over-development are you talking about housing generally? One way, to look at it is that your not over-developed as long as people still want to buy houses.*
- *Over-development also can impact highly on our natural resources and what we have here to offer the people who are building these developments such as clean water, air and those kinds of things. This is a very important item that more of us should be concerned about as we continue to develop our community.*

**Tom Lepson:** I think the next chart I put up here is quite revealing. (Appendix 3-B) And it's one that I think we need to take a real hard look at. And this talks about the quality of life in Lancaster County compared to five years ago, so we had a benchmark of people making comparisons. And if we take a look at the 2002 and 2000, I'm not necessarily looking at the trends, but I'm really looking at the responses. And we only have 15% of the total population who says things are "better" than they were five years ago. And then I have about half the people saying "about the same". And, by the way, who is saying "the same" is quite interesting, because who is saying "the same" is the people who live in the suburbs, who reside in the suburbs. By the way, when I say these cross-tabs I do, what I don't say is also important. For instance, if I say something like this, and there is no difference how women and men feel, there is no difference between how the young feel and how the older feel. So, in the absence of saying something, it means that all people feel the same way about an issue. But, in this particular case, what we found is that the people who live in the rural areas and live in the suburb areas are most likely to feel that the conditions are about the same. They haven't improved; they've stayed about the same, the quality of life. Now we get down to, I've got about 30% "to some degree, things are worse" than they were five years ago. And we really start seeing the difference between those who reside in the city and those who reside outside the city. Of course, those who said things are worse are most likely to either work in the city, reside in the city. We also see a difference between races, because those who are most likely to say things are "worse" are African-Americans or Hispanics who answered the surveys. So, we're starting to see a whole different population segment feel differently about an issue.

Now we get down to saying, "How well are we doing in some cases? Or How well are those in authority doing?" We have asked the question, have elected officials done enough to

protect the quality of life? (Appendix 4-A) Well, we have sort of one third, one third, and one third. We have 34% saying “yes”, but I’ve got 42% saying “no”, and I had 23% saying, “I’m not really sure whether they’re doing enough. Maybe I don’t have enough knowledge of doing that.” But I will tell you why they said yes. We asked the people who said “yes”, why do you feel this way? And they really said, “They’re doing the best that they can do, the elected officials.” Now, that’s their perception. And I want everybody to understand that when I have to deal with these things, I deal with perceptions. And that might be reality, but I live in a world of perceptions. The second thing that came in is, who said “no” and why did they say “no”? And the answer was that they said, “Because we see problems, and they’re not being addressed” or “Not enough is being done” or “I haven’t seen changes made”. They were the three responses why people felt they could say “no”. So they are the two views that people are putting forth out there.

We talked about the level of problem of loss of farmland, (Appendix 4-B, 5-A and 5-B) and you can see that we’ve asked this in all three surveys, and you can see there has been a consistency up there. There is really a consensus, where I’m getting up to about 95% saying that there is some sense that there is a problem out there, that we’re losing the farmland. And that goes back to your first slide, where we say, what is important to you here? What do you favor the most? What do you like the most? By the way, in answer to this, now you can see graphically what’s going on, and you can just see the immensity of that bar chart going up there. When we do a statistical analysis, and we said, who really feels this way? Well, this is the answer: everybody. It went right across the board. We have a problem, and people are recognizing that problem. The slowing down of loss of farmland, do you agree that we should slow it down? And you can see, again, that we have a strong consensus. These are from people who live in the city, who live outside the city, who live in the rural areas, who live also in the suburban areas, the boroughs; they all feel the same way. And all age groups feel the same way. There has got to be some slowing down in the loss of the farmland, in their opinion.

We went into traffic congestion. (Appendix 6-A and 6-B) If you remember, we talked about this, and we asked you, what don’t you like about Lancaster County? It was traffic. And, when we asked them how serious of a problem it happens to be, we have approximately two-thirds of the people up here saying it’s a serious problem. And then 36% say it’s a minor problem, but now I’m walking away with almost 95% of the people saying it’s a problem, we have a problem and traffic congestion is a problem. We’re going to talk a little bit about that and say, really, what is the problem here when you talk about congestion? We’re going to talk about that a little bit later, when we talk about going to work, and is going to work a problem, and how long it takes you to go into work. Is it work that we’re talking about, or is it social life that you do when you drive, going to get milk, going to go shopping, going to do those things. Is daily driving a problem? (Appendix 7-A and 7-B) Well, you can see a mixture here. I have about 14% who say it is rarely a problem. By the way, people who said it is rarely a problem or occasionally a problem, they tend to live in the suburbs, they tend to be female, and they tend not to have children. When we get down to “frequently a problem” or “always a problem”, what was interesting was who says that happens to be males and also those who reside in the city. So, people who live in the city are the ones who are most likely to have a feeling that we have a problem here all the time in my daily travels. This is really interesting: the length of time to get to work. We hear all these stories, but look at what I have up here: I have less than 75% of all the people we surveyed (which is a good sample, it really does reflect the county) who say, “I

can get to work within 20 minutes.” I have to tell you, the people who are above 30 minutes are more likely to be the people who live in the county but they work outside the county, so they are working someplace else other than the county, and their travel experience is outside the county, when it comes to work. Now, this gets interesting: the length of time it takes me to travel to work, is it a problem? (Appendix 8-A, 8-Band 9-A) And we start seeing 86.2% say no. So, the question is, are people having a hard time in their travels to work, or are they seeing the traffic congestion in their social life, when they travel to the malls, or they say, I’m going to go down to the convenience store, or whatever it happens to be, and this is something we certainly have to explore, because it’s not in the workforce, or going to work. Maybe we have an expectation of going to work that we know what we’re going to have. But, when we go out shopping, or when we go to the convenience store, when we do our daily travels, that’s when we start getting irritated about the traffic, because we’ve had three or four things up there saying we do have a traffic problem and a congestion problem, but it’s not necessarily to work.

**Chip Smedley:** They can’t explain what it is. You would think the drive time, morning and afternoon drive time, would be the problem. But they’re not, and yet traffic congestion is a problem. So, when do you think the problem is? It was very puzzling when we looked at these things, in terms of what you would expect and what happened. And, if you want to discuss what the problem is, what do you think could be done to alleviate the problem?

**Audience responses –**

- *I think probably when you are planning on going to work, you consider that time in there and in most cases you can travel the by-pass or get around the inner-city streets or congested areas. Probably the biggest inconvenience is when you want to do something in 15 or 20 minutes and it takes you 45 minutes because you got stuck in traffic somewhere. This probably happens in the early evening or late afternoon. That’s when most people are out there trying to get caught up on their daily errands plus you have two people from each family in the workforce today and this is when they have to travel to get things done.*
- *I have a feeling that this question was asked before they closed the bridge. This is going to be a whole new ball game. I also think that people who travel to any extent or have lived in other areas don’t feel that traffic is that bad here. If you’ve never left Lancaster County you are constantly exposed to traffic jams but if you lived in New York or Philadelphia and you constantly are in traffic that is backed up for 3 or 4 hours at a time it becomes a way of life and you carry that with you and you realize how good we truly do have it. I rarely ever get upset with traffic and basically, I don’t think it is that bad.*
- *I am a city resident, new to Lancaster Count. M my problem here is that traffic is set up to move through the city and the speed of it is way out of balance with what is posted as the speed limit and as a pedestrian it becomes a difficult situation as somebody who lives here, it is a nightmare. It starts at about a quarter to six in the morning and it doesn’t end until after midnight. Coming from a suburb of a large city you are kind of used to a lot of noise and you come to a smaller city and ask, why am I living with this horrendous noise of traffic and a speed at which in a major city, people would be stopped for? Traffic patterns here are more motorist-friendly and friendly for getting people through and out of the city, not into the city.*
- *I think the one-way streets in the city have caused this to occur therefore, the streets are not set-up to make the city a destination. Two-way streets would cause the city streets to be used as a destination rather than just a way to get through it. The other problem in the city is people just pulling up and putting their four-way flashers on and stopping their car when there is a parking space ten or twenty feet in front of them. Where are the police when this occurs?*

**Audience responses (cont'd) –**

- *My analysis of the situation simply is that we have to have something to grumble about. It it's not the weather why not traffic? Certainly in the past it really wasn't a problem at all because there was no traffic. The gentleman who mentioned coming from the city, city folks coming from Philadelphia or Washington, sort of laugh at people from Lancaster when we say we have a traffic problem. If we have to grumble about something - It might be hot, to cold, good grief I didn't allow enough time to get to work today, I'm in a hurry or I got up late. Again, we don't really have a problem, but we have to have something to grumble about.*
- *Since you mentioned that, I would certainly like to disagree. I think certain times when you are trying to get out of the mall or go east on Rt. 30 on a Saturday night, traffic certainly is dangerous. My question however is about, have you made any comparisons about people who take public transportation? Or ask people if public transportation were available, would they utilize it? Also, like in Harrisburg, where they have staggered work hours? Did you ask them what alternative means, without building new roads we might have to reduce congestion and also improving transportation?*

It seems that the one statistic that says that work isn't the problem, so these times could be various times when people are going to social events. Tom, did that include those questions?

**Tom Lepson:** I'd like to answer his question directly. Those questions weren't asked at this juncture, but this is we certainly, that is one of the things were trying to do, get feedback here, as I mentioned to you, Art. This research is evolutionary. It's trying to get to the next level, and it's something we'd consider.

**Chip Smedley:** One last comment from anyone.

**Audience responses –**

- *It would seem to me that if time is a problem, it is a problem for each individual. If you don't have enough time to get where you are going, you have to make an adjustment in your own life to provide for that. It's not the traffic volume or the infrastructure of the highway system, it is the time that you allot to do something*

An area of concern to the Hourglass, and certainly articles in your paper, we decided to explore an issue a little bit more in depth, and that's the environment. We looked at it a number of different ways, but basically it was air, and it was water. And it was two different levels. The first one was, "Does it directly cause some illness?" (Appendix 9-B) We can see that about 10% have said, yes, it did cause some illness of doing that. And, I will tell you, the biggest predictor of those who said yes, were where you live and educational level. And the people most likely to say, yes, it has caused either myself or my family illness, our environment here within the city, are those who reside in the city or, believe it or not, people with college degrees or professional degrees. And that might just be an awareness of what the environment happens to be. The survey certainly didn't go into doing that, but it does point in a direction of saying, there are really two types of people out there who are coming forth and saying, it really did cause some problems within my family.

The next one is more of a perception that we asked of people. That is, the quality of air, does it put us at risk? (Appendix 10-A) And you can see over her, we had some choices. By the



way, this is this closed-ended question we were talking about. This is the “aided” thing we were talking about. We gave some people some choices: “Our health is greatly at risk”, “Our health is slightly at risk”, or “Our health is not at risk”. And you start seeing that with 50% of the people up there, they’re saying the air is causing our health to be, to some degree, at risk doing that. So, who are these people? We have this 50% it happens to be up here. I will tell you, the people most likely, especially at “greatly at risk”, tend to be the people who, again, live in the city. So, we’re starting to see a little variation between where people reside. The other one was people who are either African-American or Hispanic feel that they are at risk because of the environment of the air. By the way, just so you don’t see anybody just arbitrarily saying, okay, we all just column-check and we all feel the same way, watch what happens when we take the other factor that one usually associates with the environment. This is the quality of water. (Appendix 10-B) “Our health is greatly at risk”, same kind of scale used, “Our health is slightly at risk”, or “Our health is not at risk”. So, here again I got 50% of people starting to say the water we have is putting me at risk. Then, we start seeing a whole different group of people who feel this way, and it was most likely who would say this (again, when I say these things, it doesn’t mean that other people don’t do it, it’s “most likely”), but again we found that females, when it came to this topic, were most likely to feel that they’re at risk. It was people, also, who work in the city, who feel we’re at risk, and, in some cases, again, I had African-Americans who feel that they are at risk. So they worry about how the environment is going to affect not only themselves but also their families.

Now we have another question about the availability, (Appendix 11-A) so now we have a whole different issue that we were talking about. One was to talk about the threat, the illness. Now we’re talking about the availability. And look at what happens up here. I must tell you that this study was done during our drought that we had, so it goes back to the point that, you were talking about the bridge going out, that this must have been done prior to the bridge going out, but this one was done during the drought. But what we have is 70% of the people saying that this is in some sense a problem, with 32% saying it’s a serious problem. People who are saying it’s a problem tend to be those who are residents that reside within the county. It tends to be the people in the rural areas, and it tends to be the people, also, who are higher in educational levels. They might not all fall into place, but they are the three people, statistically, that keep coming out and saying that we have a problem with the availability of water. There are other people, but these are the people most likely to say that.

This is a question that the Hourglass, I think, did a very nice job of putting on the survey, and this one is, and the key word is the “future”. (Appendix 11-B and 12-A) I would like to define this. We really didn’t say the “future”, we put it “five years”, so we weren’t talking 40 years out, and we’re talking five years. The question was, “How serious a problem will be the availability of water within five years?” You start seeing, we have a whole group of people who think it’s going to be a serious problem, and we have a whole group of people who think it going to be a minor problem. But I only have 17% who, at this point, perceive it not to be a problem. So, we’re starting to see the whole body of the population in this county who are starting to take a look and say, down the road, the vision is that this is going to be a problem. Then we start seeing who is most likely to do this, and they tend to be people who live in the rural areas, maybe have a well. They tend to be people who have lived in this county for 40 years. They tend to be females. It is this group of people who is most likely to sit up there and say this is a serious

problem. That's not to say that other people didn't do it. These are people who are starting to say, I see a problem. Especially, by the way, the biggest predictor was where you live, and it was the rural population who are starting to say, I see that we're going to have a real problem down the road in five years dealing with availability. You start seeing, when you start putting the graph up here, just how people are starting to hone in on this question of availability of resources and natural resources.

**Chip Smedley:** This is especially important in a county that boasts non-irrigated farmland and its productivity. So, I'm wondering what do you personally see as an indicator that this is happening? Have you had experiences involving this, or just some kind of personal attachment to this issue?

**Audience responses –**

- *Personally, I think the people who are concerned about it, are concerned because the governor declared a drought emergency. That kind of gets your attention. You use your water a little more frugally.*

**Chip Smedley:** There was a report in the *U.S. News and World Report* this summer that had a very special issue on water and its future, and it was not very optimistic.

**Audience responses –**

- *I think one of the biggest problems is trying to have the municipalities and the suburbs to realize how important our wetlands and groundwater recharges areas are. And, that it should almost be that it should be sacred and not build in these areas and maybe even make those areas better. That is one of the main problems causing the lack of water; that we are destroying our natural water resource areas.*
- *I have city water so that doesn't appear to a problem but you learn that you sort of want to conserve the water and not want to pay so much in your bill. However, I have a friend who lives in Lancaster Township and has a well and this summer they were really worried. They cut down to one shower for a family of three girls and parents in one day. Or went to somebody else's house to shower and to do their laundry, so you don't have to go out in to the country to find wells, they are within two or three miles from here.*
- *I have been sitting in on the drought task force advisory board and I can tell you that we voted not to rescind the drought emergency that the Governor went ahead and reduced to a drought watch. The number of months that we have been below normal versus the number of months that we have been above normal is staggering when you look at the stats. This rain has been a blessing but we are not out of the woods by a long shot.*

**Chip –** What would you say to someone who said this is just a weather anomaly? *It has been years that this deficit has been accumulating. The rain is great, but we haven't recovered yet.*

- *I think there is a misnomer that people who live in boroughs and cities that have municipal systems that have nothing to fear because the Susquehanna has been extremely low and other people upriver are taking out water as well and the people downriver would like to take out more water. I live in a borough that has a municipal system that serves over 20,000 people that pulls their water out of wells. Many municipal systems draw water from wells. So, if the farmer's wells are going dry, chances are the wells used by the boroughs can go dry as well. I think the long-term issue, especially with air and also with water is, what is the carrying capacity of the resources of this county in relation to future population growth and how much development can we support before these natural resources systems are so degraded that people leave? That could be a 20-year prospect or a 40-year prospect, but there is a carrying capacity here, that must be respected somehow.*

**Tom Lepson:** Obviously, what was on a lot of people's minds was growth, because when we talked about the threats, it was overdevelopment, it was growth. So the questions came up as feelings about future growth in Lancaster County. (Appendix 12-B) We posed a series of questions to people. This was one where we read these statements to them and asked them to respond. We said, "Restrictions should be put in place to limit and manage growth", "There should be no limits placed on growth", and "Restrictions should be put in place which allow no growth". So, we had three different extremes up there. You can see that 85% of the population that lives in the county feels that there should be some sort of restrictions put on this. What was very interesting about this is that this held true regardless of where people reside, whether it be in the city, in the suburbs, within the rural areas, within the boroughs. It held true regardless of what the person's age happened to be. It held true no matter how long one resided within the county, it could be less than 10 years or over 40 years. This thing was a universal opinion that was shared to us by almost all the population segments, no matter how we broke it down.

Now the question is, How well are we doing in managing growth? (Appendix 13-A and 13-B) We start seeing a pattern that emerged here, in which we have about 70% of the population feeling that we are only doing a fair job or a poor job at managing growth. The question became who really are the people who think we're doing a fair or a poor job at managing growth. It's quite interesting. They tend to be (and you always get surprised at these things) the people who reside within the city. That was most likely. So, let's go back a little bit, for fear of these cross-tabs, that I don't confuse people. I say that, remember, 8 to 1 of the people who live in the county, outside the city. So, when I say most likely, I still probably have more people in the county feeling that way. And, when I sit there and talk about minorities, and I talk about African-Americans, I talk about Hispanics, the county is still about 96% white Caucasians. So, even in whole numbers, it would not skew that, it is just that they are more likely to feel that way. So, here again, we start seeing these ratings, and we start seeing that, not only was it the people that live in the city was a predictor, it was also people who tend to be educated who at this point feel that we're not doing a good job. So, it's the people who have college degrees, the people who have professional degrees, who are more likely to sit there and say we're only doing a fair job or a poor job.

"Government's job in regulating growth." (Appendix 14-A and 14-B) We gave people some choices up there, that they strongly agree that "There should be more involvement", "It should be moderately increased", "Maintained as currently", "It should strongly be increased", "Mildly increased", "Maintain it", "Mildly decreased", or "Strongly decreased". So, I have a whole group of people, almost 50%, saying that government needs to get more involved. Now, I must tell you, we're very fortunate. Many people consider Lancaster, Harrisburg, and York a national test market. By the way, people do not see that river as the Atlantic Ocean or the Pacific Ocean, the bridge that we all go across to get here. We're very fortunate. If you come to my place, we have one of those two-way mirrors and hidden microphones. Believe it or not, we have the national Democratic Party and also the national Republican Party come to our facility, because they want to bypass Washington, D.C., they want to bypass Baltimore, and they come to

us. When I ask both of the leading people who do the polls, and they come up here and they do that, and they invite a lot of powerhouse people. One time, they brought ABC, CBS, NBC, the *New York Times*, and the *Wall Street Journal*. All those people come up to view what was going on, and they brought major union leaders. And I asked both political parties, why do you come here? And they said, no matter how it looks, it is still a conservative community, and we want to get the feelings of a conservative community. And when one starts thinking about a conservative community, they start thinking about maybe less government. But here we are having just the opposite. They are saying, we've got a situation that may call for more government. So, obviously people are looking in a serious light on this topic. Again, I don't evaluate things or why things are. So, who are some of the people who think we really need to increase this thing? It tends to be males. They tend to live in the city. By the way, we do see two minority groups, both the African-American group and the Hispanic group, saying, I think we need to have some greater involvement in this area of growth.

Now we get to mandating growth, (Appendix 15-A) and we talk about, should we mandate growth boundaries? We had 53% say Yes. We had 23% say No. By the way, we had one-quarter of the people who are not sure about doing that. At this point, a star pops up, and we talked to some people, we got them on the phone, and we asked them about "not sure" or "don't know", most of this came about because they really did not understand the mandated values. That's what our interviewers told us.

**Chip Smedley:** Actually, I'd like to start by asking Carol to read the question that was asked, because it makes an important distinction. "Lancaster County has developed a comprehensive plan that designates which lands are most suited for growth. These boundaries are currently voluntary, since each township, borough, or municipality is free to permit growth anywhere. Do you believe the growth boundaries as defined in Lancaster County's comprehensive plan should be mandatory for Lancaster County's municipalities?" So it's the difference between voluntary and mandatory. I sort of threatened to bring John Jarvis in and let him do his William Penn, Quaker rant on how they screwed up Pennsylvania, but I'll spare you that. Most of you probably heard that already. But, I'm wondering, how do you feel about mandated urban growth boundaries as opposed to voluntary?

**Audience responses –**

- *As I see what they have done, it is almost like a cookie cutter type thing where the engineers go from one municipality to the other and draw up the same type of agreements everywhere and I think we need to maintain the differences to attract people. I don't think we can have everything the same. I comment Pequea Township for standing up and saying they want to keep their township rural. I think we should be a little bit more individual, however, I realize that is not what everyone has agreed to do, but there has to be individuality.*

**Chip:** So are you for or against mandated boundaries? *I don't think it should be mandated. I think each community should be able to decide what they want to do.*

- *This is not an easy comment to make but I think I have to at least try to share my thoughts, so forgive me if I stumble. To me this is also an issue of individual and collective values. If this land were taken from them, declared to be sacred and not developed, conceivably there could be a group of individuals that could compensate them for that. If we could find a basis for everyone getting what they want, if there was some avenue to balance the collective losses with the collective gain and vice-versa. There would be transfers in both directions. We are all afraid that the next beautiful spot is going to be developed but we have no marketplace to protect it, at least one that works well. When I hear people say that we need*

### **Audience responses (cont'd.)**

*mandated growth boundaries, I feel more the frustration that says we do not have the marketplace we would want collectively. And, I think more often than not, collectively we say, yes we really wanted that but we had no way to express it. That to me falls to the appointed officials, and I wish them well.*

- *I don't know if you are allowed to go backwards, but I intend to. I want to challenge a bit the previous slides on the increase of government involvement. I would really strongly suggest that the word "increase" might really mean the word, "improve". It's hard to imagine that any developer or anyone who is trying to start any project in Lancaster County feels that government involvement needs to increase. It is not coordinated and it is 60 varied processes within each municipality. It is layer after layer of regulations. I would suggest that people who say moderately increase, are also thinking moderately improve as well. As for mandated growth boundaries, the absoluteness of mandated growth boundaries would create a danger, I think firm growth boundaries would be appropriate but I do think there needs to be some flexibility to take advantage of some opportunities as they would present themselves.*
- *I think that the problem we have here, particularly here in Lancaster County, is that we don't have proper vision. I don't believe there is anyone in this room has in mind to give up eating. On the other hand, we don't have 100-year visions and planning, but when we are talking about the prime agricultural land that exists here in Lancaster County, which is the number one agricultural non-irrigated land in the country, we are not looking at 100 years and preserving that prime farmland for future generations. There is no legislation, local or state, to protect and preserve that land. And, I think we owe it to future generations to preserve that land*
- *I think urban growth boundaries make sense. I think any one of us who looked at the rationale and studied the comparative cost of providing sewer and roads and so forth all over the county versus concentrating those resources in smaller areas and leaving other areas rural, can certainly see from a common sense point of view and an economic point of view, that this makes sense. If that means that some people will not be able to sell their 100 acres for \$5 million for development, instead they sell it for \$500,000 for farmland, than I guess there is an economic loss there, but, that is a part of having a society where we trade off advantages and disadvantages among all of us. Greed cannot be the only factor in the terms of making decisions; this is basically what we are talking about. Freedom is great. Economic freedom is wonderful. I think we all know examples of where it doesn't play to the public interest.*
- *I'll just make a quick comment. I believe that farmland preservation is a one-generation solution and not a forever and ever solution, personally. What is the next generation going to do to survive in farming? Now, that the people who have sold their rights and spent it?*
- *Well I think the real issue here is haphazard growth rather than planned growth. I think most everyone in this room would agree that haphazard growth has many major disadvantages when anybody can do whatever they want to and wherever they want to. I think those of us who really support the need to have a strong and vital economic growth in our community, really do look forward to the process of where it is a planned growth. Whether it is land set aside or if it is land planned for certain sorts of things. So, when you say mandated growth boundaries, obviously, the planned growth boundaries where we all buy in to it and go through a process, whether it is a planning commission in a municipality, is a very worthwhile process because the outcome of that is so much better than a haphazard approach.*

**Chip:** *It sounds like this theme of coordination is an issue.*

- *The lure of Wilbur Buds was just too great. There has been a lot of talk about land values and how that drives planned growth and some of the concern about growth boundaries is that if my land is outside, than I won't get the same value. Communities where they have done mandated growth boundaries, such as Boulder, Colorado, you can't buy a house for less than \$400,000 because they*

**Audience responses (cont'd.) –**

*said, “There are no more”. The concern has always been if we mandate growth boundaries this will increase the cost of housing and there will be no affordable housing available. Having said that, I have some real concern that we have the idea that we always compensate and we pay for takings, which I feel is appropriate, but we never factor in the givings. What I mean by that is if a highway is built and my land is worth \$10,000/acre and if the interchange goes next to my property, it will be worth \$100,000 or \$200,000/acre, no one says I have to give the government back the \$90,000 or \$190,000 that I received because they built me an interchange. But, we do say that the land that the taxpayers did take must be paid \$10,000/acre because I took something from them. So at some point in time that has to start to come in to the mix when we start to do growth boundaries. If you are on one side of the line, some of what you got has to go back in to the overall community process. If a township can't put factories on their farmland, they need to get taxes from somebody who can put factories on their land. If I can't sell my farm then I need to be compensated by the guy who can sell his farm. There are government regulations that created the value and the worth, not the fact that my great great-grandfather was smart enough to know that they were going to build a landfill and they would need to expand it someday and suddenly I became a multi-millionaire.*

**Tom Lepson:** The next question might look like apple pie. It had to go a certain way. “Favor cooperation among local townships and boroughs.” (Appendix 15-B) And we have 86%. But, do you know what, you have to put this in the light. As you know, Pennsylvania is a commonwealth, and we share that with Virginia and New York and a few other places. Of course, we're the best of the commonwealths; we all know that. But I want to tell you something. I've done research in every commonwealth there is, and I think we absolutely are the most proud that we are a commonwealth. We see school boards all the way down the road. We do have a fiercely independent thing about government. But somewhere something happened that says 86% of us favor some sort of cooperation, and maybe even with our government, we need to be doing something in cooperation.

We didn't think we had enough controversial issues, so we put education in. That'll get everybody, right? But it's certainly a major part of any community, and it also defines, as one said, the vision of that community. There is probably no other factor than education that is going to define what a community is to be now and in the future, as far as labor force, as far as what the children are going to be, or providing professionals within that community. So we asked some questions, and one of the things we asked was the quality of education in public schools. (Appendix 16-A) I must tell you, the real question we asked about this was of your school district. This is a composite. We did, within the report that sits back there, break it down to the school districts. You quickly see that there is a real variation in how people think the quality of education is in this community by school district. (Appendix 16-B) When I get up here, and I start seeing this Superior rating, and I start seeing this Adequate rating, and I see an Inadequate rating, there are some really defined groups that feel we are Superior, and there are some defined groups that think we are Inadequate. And that's really extreme, when you start talking about education. The people who think we really have superior education within their school district tend to live in the suburbs or live in rural areas. They tend to be people who already have an education, are college-educated. They tend to be married. And, by the way, they tend to be white. The people who go the other way and say we have some problems, that it's inadequate, the school districts' quality of education, they tend to live in the city. They tend to be African-American. And, by the way, they also tend to be younger. When I say younger, I'm talking

about 35 down. That's younger to me. So, I'm not talking about 18-year-olds, 19-year-olds. I'm talking about those who are certainly of family age, and they're seeing things. So we really have a bipolar look within the school districts within the county.

We explored this a little bit more. And that is, do you have children in the public schools? (Appendix 17-A) We had 33% who said yes and 66.8% who said No. Interestingly, we did some select runs with the computer, and tried to bring in how they rated their school districts by the fact of whether they have children. There was a tremendous variation, in that those people who had children were very much more likely to give a Superior rating. As a matter of fact, it turned out that 40% of those who had children were going to give a Superior rating. (I'm talking about the composite now.) But those who did not have children, only 16% of them were willing to give the school districts a Superior rating. So, if they had children they are much more saying it is Superior than those who did not. By the way, did not doesn't mean I never had children. It means I don't have children living at home. So that could be retired people, people like myself whose children are no longer living at home (who are enjoying it).

Level of activity with local schools: (Appendix 17-B) we asked them how active, because we want to find out how active they are. By the way, we cross-tabbed back to all these other questions. So, it almost becomes like a demographic for us. We had, very active, we only had 14% who said they were Very Active in their school district. And 23% said they were Somewhat Active. Of course, they're all putting their own definition on what is Somewhat and what is Very Active. We had 17.8% say Not Very Active. And then we had Not Active At All being 43%. Now, interestingly, we went back and did that same computer run, and we found out that the people who are Very Active were much more willing to say that their school district is performing in a Very Superior way. As a matter of fact, it was 43% compared to 14% of those people who were Very Active in the school district and those who were not. It was a willingness to say, my school districts provides a superior education. We start seeing knowledge doing this.

Well, one of the questions we want to find out is, do people really know how public schools are funded in the state of Pennsylvania? (Appendix 18-A) So, we asked that question, and how knowledgeable are you about how schools are funded in Pennsylvania? And we see there are only 13% who said they are Very Knowledgeable. We had 45% who said they are Somewhat Knowledgeable, and we had 40% who really confessed up to the fact that they are Not Knowledgeable at All. Interestingly, we do the exact same pattern, and the exact same pattern emerged. Those people who know how schools are funded were, believe it or not, more likely to say a Superior rating in their schools. They were that much more knowledgeable about just what is happening in their school district. By the way, those people who were knowledgeable tend to be college graduates. They tend to live in the suburbs. The people who were not knowledgeable tend to live in rural areas, tend to live in Lancaster County a very long time of 40 years or more.

Then we get down to another of an evaluation question, how fair is the funding? (Appendix 18-B) When we started taking a look at this, we found out that 30% of the people thought public school funding policies put forth in Pennsylvania are fair. Those who said No were 37%. Then we have a whole group of people who weren't sure. You know what is really interesting here? The people who said No are the people who are educated. It's the people who

have college degrees, the people who have professional degrees. They are the people who most likely would do that. By the way, they also were males. And then we had a group of people in Lancaster City who really do not feel that how funding is done is fair. So we are starting to see some variations of how people feel within this county, and you starting seeing there is a whole different look from those who live in the rural areas and live in the city. It's a whole different look about how whites feel versus Hispanics and African-Americans feel. And there are variations that are going on here, but we're both looking at the same issues.

Now, we've been talking about the county. Our questionnaire switched at this point. Our questions to the people started talking about the city. Now, you're going to see some interesting variations that take place between how people feel about the county and feel about the city. So, when we talked, the first thing we want to know is the frequency of visiting Lancaster City. (Appendix 19-A, 19-B and 20-A) You can see that the frequency has gone up a little bit from 2000 to 2002. I occasionally go in 27.6%; I Seldom Go In is 32.4%. We had 7% who said I Don't Go Into the City. By the way, the people who are most likely to frequently go into the city, who suggested that, tend to be younger people. They tend to be single, never been married. So, basically, it's that single, young group who are occasionally going into the city.

Now, I thought you might be interested in this table, so we did a special one for you. We asked that question of all respondents, but we broke it out by different areas. And you can see the rural population, the boroughs, and the suburbs, as to where they reside. So we broke the question out about the frequency of going into Lancaster City or visiting Lancaster City. You can see it's a real variation between rural population and suburban population. We have a group of people who are just not going downtown, and you can see even in Occasionally and Seldom, you start seeing this pattern emerging, with the rural population versus the suburban population. What it says is that not all people are equal and view things the same way within this county. What they like best about downtown Lancaster, (Appendix 20-B) and you can see here, Central Market, they like shopping, they enjoy the restaurants, the historical aspects of the city, they like the buildings. By the way, the people who like Central Market tend to be females, and they tend to live in the suburbs. And that's who really likes the Central Market.

As you will recall, when I first started this, started talking about this conversation, we asked a question about the quality of life in Lancaster County. So we asked the same thing about the quality of life in Lancaster City compared to five years ago, (Appendix 21-A and 21-B) and you started seeing Much Better, Somewhat Better, About the Same, Somewhat Worse, and Much Worse. And we start seeing, in fact this whole group of people down here, 41%, who are sitting here saying, compared to five years ago, the quality of life in the city is worse. I only have 13% that do that. By the way, the group that was most likely to feel that life is not as good; it's worse, tend to be the people who do live in the city.

Remember that we talked about the biggest threats to Lancaster County, one of the things we talked about was overdevelopment, and then I got into crime. But, when I started talking about the city, (Appendix 22-A and 22-B) we started seeing a whole different pattern emerging, and that is increased crime, drugs, violence, gangs, guns. And overdevelopment happens to be down here, and then we have divisions in racial background. But we start seeing this thing in increased crime, we start seeing drugs, we start seeing violence. By the way, this was an open-



ended question. People could go anywhere they wanted and have any kind of response that they wanted to this question. I must tell you that the group that really feels the strongest about this #1 was females. They had this concern about this increased crime. The other ones were African-Americans and Hispanics. And there were people who live in the city.

“Feelings of Safety in Lancaster City”. (Appendix 23-A and 23-B) We have people who feel “Very Safe”, “Somewhat Safe”, “Somewhat Unsafe”, and “Not at All Safe”. An interesting pattern emerged here, but we do, you see, have a group of people who feel Not Safe. But something interesting happened here. It was the people who lived in the city who felt the city was the safest. It was the people who lived out in the rural area, who by the way never visit the city, if you remember that cross-tab, who say that they didn’t. You know, we had people give us comments like, “Never been there in ten years”. But it all deals with perceptions, is what I’m saying. So, the people who live in the city are the ones who are most likely to feel it is a safe place to live. Those who never go there have this perception that it is not a safe place to live.

This slide says “The future of Lancaster City impacts Lancaster County: (Appendix 24-A and 24-B) Strongly Agree, Agree, Undecided or Disagree”. But I have almost three-quarters of all the respondents. This is one of the most defining questions that were on the questionnaire. That is, the role in the relationship of the city to the county. And I have 75% of the people agreeing that this city impacts the county and defines much of the county. And what was really interesting is that same thing held true whether people lived in the rural areas, they lived in the suburban areas, they lived in the boroughs, or they lived in the city. So, right across, no matter where they lived in their residential thing, they thought the city impact on the county was quite significant, and it really will impact them in defining what the county happens to be.

Revitalization certainly was an issue, and this is one of the new issues that Hourglass took a look at. And that is, how important is the downtown revitalization. (Appendix 25-A) You can see that it was almost universal that people thought, to some degree, it was important. And 53% thought it was Very Important. Very important is a very strong feeling. And I had that. The part that was really interesting about this is that everybody, across the board demographically, felt this way. Everybody across the board residentially felt this way. The group of all, however, the group that really thought it is very important, are people who live in the city and people who work in the city. And that means people also who come down from outside the city, and they reside there. When we had “Satisfied with the Progress of the Revitalization”, (Appendix 25-B) those who are satisfied with how well the revitalization is coming along, we find that 6% are Very Satisfied, 50% are Somewhat Satisfied. But I got another 50% here who are Somewhat Dissatisfied. And I can tell you that the #1 predictor as to whether they are dissatisfied or not is where they live, and those people who live in the city are most likely to feel that it is not progressing to their satisfaction. Most critical to the success of the downtown revitalization, (Appendix 26-A) and this was an interesting thing, it really boiled down to two different things: it boiled down to economic development, and it boiled down to crime. And most of what we saw with the crime was a lot of people in the city saying, it’s not enough. That, if you’re going to revitalize downtown, that you put in economic development, we bring new businesses in. They’re saying that, if you don’t make this a crime-free place, it doesn’t matter how much economic development you do. It is not going to be completely revitalized. But it was for the people who live in the city who were saying one of the success

factors, critical success factors, one of the key drives to success, is going to be how you deal with crime in downtown.

“Willing to Pay More Taxes to Support Revitalization”, (Appendix 26-B) and we had, believe it or not, this is talking about more taxes, in an area that some people describe as conservative. But I have 25% who said, yes. By the way, the key predictor as to whether they said yes or not was where people lived. The group that was most likely to say, yes were the people who lived in the suburbs, not necessarily the city. The people who said No lived in the rural communities.

**Chip Smedley:** This is your last chance to get a crack at that stuff. These are sort of different questions. One is, you always hear about this Lancaster City impacting Lancaster County thing, people talk about it. Why? Can somebody tell me that? Why? How?

**Audience responses –**

- *Well, I think that there is still some sense that we want to go back to the way it was in the 1950's. Center city was the place to go and do things. Part of it is there is still nostalgia there for understanding what it once was and if it was revitalized it would be the center again. So part of it is the nostalgia but beyond that obviously there is a lot of commerce and economic development based in the city and what people believe is the city and a lot of jobs associated with the city. There are a whole lot of people who come in to town to work. Everyday they are seeing what goes on in the city and they feel they want to be part of it. I guess technically you could build a wall around the city and the county would still survive, but it wouldn't be a very nice place to live.*
- *Whether it is Lancaster County or Lancaster City, any area needs a core and the developments around it whether they are suburbs of Lancaster or New York or Chicago, need that core where you can put your cultural things. If every little community tries it, none of them are big enough to do it, but if you make a core and put certain things there it can draw and support all of the other communities around it.*
- *I think over a period of time you have seen home ownership drop in the city. At this present time there are 50% homeowners and 50% renters. This is a serious problem when you study other statistics over the country. We do not have the kind of jobs that we had here years ago that people could really try and get ahead and allowed those people to buy one of those properties. We really need to try and help those people buy homes. There are beautiful homes in the city that are being used for 6 or 8 apartments. When you get to 60% of your city residents being renters, I think you are getting in to a serious problem that needs to be corrected. I think we need to provide jobs in the city for the people that can't get out of the city. We need a transportation system that allows them to get to and from work at various hours. Even though we have a bus system, I don't believe it adequately serves the needs of these people at all hours. They can get to work but they can't get home at some hours or shopping.*
- *When I moved here 25 years ago I looked at Lancaster City as the county seat and that was important, the County Courthouse, the county seat. I remember when the real estate agent was working with me and trying to acclimate me to the streets, she said, Peggy put your hand on Lancaster City and think of each of the fingers as the main arteries coming into the city, not going out of the city. That has always impressed me. When you think of Manheim Pike, Lititz Pike, each of your five fingers. So, I think even though people, who live way out may not come in to the City, the City is respectable that you can come in to it. I remember the wonderful brown-bag days, where you would go down on Friday and have programs or just sit on a wall and have your lunch. Those are the things that would get families to come back in, so I think it is important whether you are a city dweller or not, it is the county seat which gives it some importance.*
- *Specific to your question, I think revitalization of the City in some ways will help alleviate some of the*

**Audience responses (cont'd.) –**

*pressure on sprawl. It will create more quality housing, which will reduce the demand on supply on some of the outlying areas. But, also think about how many medical clinics have now been built outside of the city. At one time those types of things would not be anywhere other than the city. The housing for those type of services is going to be placed somewhere where they can be accessed. I think this has really driven sprawl.*

- *Of course there is the obvious connection for a lot of us who live in a township who own property or work in the city and those economic ties and the contact with people. I think one of the advantages of having an urban center area is the diversity of the people that are there. Our boys went through the city school district and we feel despite some of the problems that are there, we feel that they gained a great deal of life experience by going through a diverse school district. When they go out in the world today they aren't likely to work in a place that is 90% white- Anglo people. Most of this world is a diverse world and I think there is a benefit to our young people and people of all ages to have that opportunity in the cities, to mix with a more diverse group of people and to have the cultural experiences.*

That actually gets into the next question. You know, when you go to places, you come away with a certain feel. The city is now involved in some projects they hope are going to leave people with a positive feeling when they come to the city. When you go visit places, why do you go back? What draws you there again and again? What sort of feeling do you take away? I'm trying to end the evening on a positive note here. Why do you return to places, and what do you think Lancaster should do in order to try to generate these similar feelings among people who come and live here?

**Audience responses –**

- *It's got to be more than and 8 to 5 city. I think the reason you see young people coming in, they are not coming in the city to go shopping. They are coming in to go to the Chameleon Club, a restaurant or a bar. When I visit Seattle and walk around at 11:00 or 12:00 at night there are stores and restaurants open. When I go to Charlotte, South Carolina where everything shuts down at 6:00, I say where is the nearest place open and they say well, if you drive across town, I think there is a place over there somewhere. When this happens, I don't go back. So despite the progress that we are making with the Convention Center and several other things, if we only have the things that operate from 8:00 to 5:00, people are not going to come back.*
- *I think with such a large community such as our County, there must be a center. A center includes the synergy of the library, the courts, the financial center, an intellectual center for schools. All of these things make up the synergy, which makes us a city to serve the county around us. For instance, I don't think you could put half of these things in Hempfield Township. I don't think it would work. They belong in the city and the city has to be served with the resources to serve the rest of the County and the counties around us.*
- *I want to build off of what Mike said, not only is it this feeling of vitality that continues after 5:00. To me it is not only that but the built environment which makes a large difference. This weekend I was in two very different and stark places. Both of them operated literally around the clock. One was Rittenhouse Square in Philadelphia, which had spectacular architecture, which was operating around the clock and I felt very comfortable in. The other was a hotel, convention, shopping environment that existed inside a cloverleaf within two miles of the Meadowlands and I wasn't a happy camper. I was not interested in being there and I couldn't wait to get the heck out of there and come back to a place like Lancaster where things may still be closing at 5:00, however, we have a vitality during the day and we have architecture that is pretty much the most stunning on the east coast. And, that doesn't mean it has to be stunning old architecture, it could be stunning new architecture as long as it is well thought out and designed and placed well with the context of the built environment.*

**Audience responses (cont'd.) –**

- *There was a study done some decades ago that identified Lancaster City as an ideal place for a mini-convention center, that pointed out that it was in walking distance from the main line of the Pennsylvania Railroad, unlike many other areas around the country where it was men taking their wives along to the conventions and the wives had to be bused great distances for them to find something entertaining. Lancaster City itself had plenty of built environment that was attractive, it was pedestrian friendly, which we have to keep emphasizing, because all the other cities that you see around the country, where they have been made pedestrian friendly, where they have closed off the streets, seem to be doing well. I think we could do that. In addition to the obvious attraction of Lancaster City, which still exists, there is the close-by Amish countryside attraction too. The one big regret is that when the Northwest Corridor was developed they never took advantage of the railroad line that ran downtown that could have been converted to a trolley line from a hub parking area. The people could have ridden the trolley line. That would have given us a turnover population of spenders with a reason to come downtown.*
- *I had someone from Habitat for Humanity tell me and this might be a telling of who is coming in to the city because he went through ten people before he got one who would agree to work 500 hours for a house. When they found out that they personally had to work 500 hours to get a house, off they would go. It happens that he is a Jamaican immigrant who is taking advantage of this opportunity. However, the people of our city or live within the city borders could care less. If it's not given to them, they don't want to do it. I thought this was a very telling anecdote of who is coming to the city with all of the social agencies we have and what we are seeing in our schools. I don't know how you deal with the problem, but this is the type of people who are coming in to our city, but it isn't the type of people who built this county. This is not the attitude that built this county, but it's what we've got right now and it concerns me and it is probably one of the key issues that we are going to have to face in this revitalization issue whether we like it or not. Partial truths.*
- *I think part of that is, the fact that you have immigrants coming in that feel more comfortable in their own kind of surroundings. There is comfort in the city; this is the beginning for many of them, just as it was a beginning for many immigrants that came here in the early 1700's and on. So, I think we have to think of it as a beginning for many, and we have to deal with it as their beginning in this new world and the city is a comfort. And, providing the comfort that will allow them to extend and enhance their living conditions and education, it is the most important thing.*
- *I guess this is not the most profound statement, but if not for any other reason, I doubt if anyone of us that goes beyond 50 miles of this region, say I am from East Lampeter Township or West Hempfield Township. We say we are from Lancaster. That means a lot as people have some sense of what that place is that we claim to be our home. And, if for no other reason we have to all say this is our home and we don't call it Manheim Township, and so I think that it is an important reason to keep this sense of place, as it is important.*
- *Dan, what do they say to you when you tell them you are from Lancaster? They say, they know exactly where you are from. It is one of the most beautiful places in the country. I would like to get back there. Every time this is what they say.*
- *I think the whole idea is that we keep talking about the revitalization of Lancaster. I travel from city to city throughout this area. I've been looking at Harrisburg and they look at the next city and think they are so much farther ahead; York looks at the next city and thinks the same thing, Reading and Lancaster. They are all about in the same boat. The downtown revitalizations seem to be about at the same stage, except I think Lancaster is a step ahead. Just the other night my wife and I went to the Fulton Opera House and just after the show we were just staring at the beautiful architecture surrounding us and thinking how lucky we are. Today, a friend and I were driving through downtown and he asked, how's that restaurant? And, I said, spectacular. How's this one? 3 or 4 star. Restaurant after restaurant in the immediate area of downtown Lancaster. We have so many good eating-places, that we put other cities around us to shame. The only thing we lack is to bring affordable shopping back*

**Audience responses (cont'd.) –**

*downtown, to get the people of Lancaster County back downtown again. When they talk about retail being in the Watt & Shand building on the first floor, my only hope is that it will be affordable shopping to entice those people back in to the city and fill our streets with warm bodies again. First step, take a wild chance, and put the lunch counter back in to the basement of the Watt & Shand building. I think we are so far ahead of so many of the other cities and this is something we shouldn't overlook.*

**Tom Lepson:** I have some parting words for you. Then, we can open it up, if you want to. You know, I talked about a lot of issues here. And obviously they beg for some action, for this in itself is not enough. They beg for some more examination. Not too long ago, Carol and I were fortunate enough to do a major project for the Catholic Church, and we examined all 127 churches in the diocese around here, and we did 13 college campuses. And they have a great CEO named Bishop Detillo. Some of you may be familiar with Bishop Detillo. I started talking to him about this environment of truth that I started off this conversation with, and I started talking to him about that, and he got so impressed that he said, "I want you to go and talk to my 250 priests about talking about the truth." And I quickly refused. My father is 90 years old, and I thought this would be the one that would really put him in the ground, if he found out that I talked to priests about the truth, 250 of them. So, I turned him down on his offer. But he went to talk to them, and he said to them, "Listen, we did this study, and we did everything we could to make it scientific. We did everything we could to be objective. And this, quite honestly, is going to be the benchmark for our church having the best spiritual relationship with our God, whatever that happens to be for each individual in this parish." I can only tell you, and I really mean this, I get myself in some awkward situations sometimes, where associations really don't necessarily agree with us. This didn't happen for me this time. The Hourglass Foundation came to me and said, "Tom, I want you to be objective. I want you to seek the truth." And I think what we have here tonight is a really good benchmark, and obviously the other two studies. But this one, when it puts it all together, we start seeing trends, we start exploring new issues, where action can be taken, and for some more serious research. But we do have a great benchmark. We can walk out of here and take some action with it. They did it the right way. They really did it the right way. And what I got up here I really believe in. You really start to have a reflection of what people think within this county. I thank you for inviting me.

## CLOSING REMARKS



**Joan Henderson:** Thank you, Tom. On behalf of The Hourglass board, I would like to say thank you to each of you who have come this evening. And I want you to fill out the assessment, if you would, and write down what you think about our great experiment tonight. We've tried to break it up, tried to have some interaction, really to be able to listen to you. It's helped us in

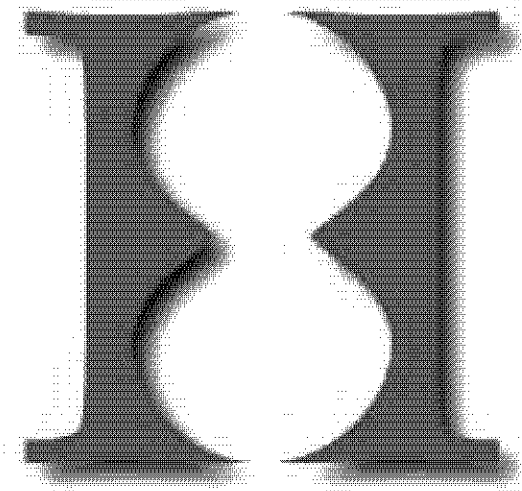
some ways identify potential courses of action. I think we are more curious, Tom, about transportation at this point than we have any kind of answer. So, I think we might be looking at exploring the transportation issue more fully. I also would like to thank Chip. Thanks for your going around and drawing out the audience and being our candy Pez dispenser for tonight. We really are appreciative that each of you who spoke did so. The goal of The Hourglass is really to stimulate positive debate, informed debate, to generate community conversation. So, we are hopeful that you will begin reflecting on this information. Please take the summary that is in the back. There is a short summary that has some of the highlights covered this evening.

We also would like very much for you to give us, if you did not have the opportunity to sign in, to give us your e-mail address, your contact information. We are now putting more and more on our web site. We would like to stay in contact with you more frequently. I know that one of the goals of this survey is to be a tool of communication between the voter, the citizen, and elected officials. And we are hopeful that this is a useful tool to our government leaders in making decisions that truly are respectful of the differences that we heard tonight. We really heard that we don't think alike in Lancaster County, and our diversity is increasing in the way we think. I think that maybe, Commissioner Shaub, did you want to say something about the survey?

**Commissioner Shaub:** Thank you so much. It really wasn't about the survey, but I did want to address the Hourglass. I just want to commend the group so much for what you have added to our community. It is so refreshing that we have a group of people that bring ideas, promote discussion, and put it in a format that is very open for our citizens to participate. And I, particularly with some of the issues that we've dealt with in the past, I want to thank you for bringing these things to the forefront. It makes us aware, and hopefully helps us make better decisions as we move into the future. So thanks a lot for your effort in setting up these forums for us to have these discussions and dialog. I really appreciate it.

**Joan Henderson:** I really do thank you for coming this evening. Please do collect information from the back, and I believe we're finished.

H O U R G L A S S



F O U N D A T I O N

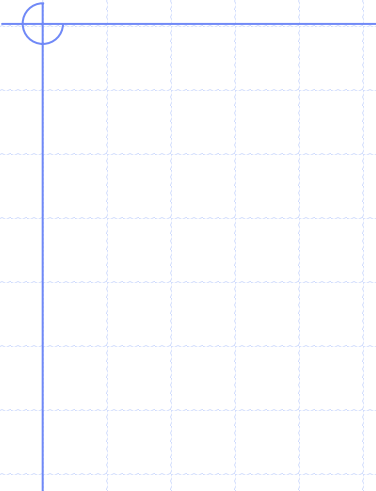
H O U R G L A S S



F O U N D A T I O N

*Quality of Life  
in Lancaster County  
2002*





<b>Gender</b>	<b>Sample (1224) 2002</b>	<b>2000 Census</b>
<b>Male</b>	<b>47.5%</b>	<b>47.8%</b>
<b>Female</b>	<b>52.4%</b>	<b>52.2%</b>
<b>Age (18 and over)</b>		
<b>18-24</b>	<b>12.5%</b>	<b>12.5%</b>
<b>25-34</b>	<b>17.1%</b>	<b>17.1%</b>
<b>35-44</b>	<b>21.4%</b>	<b>21.5%</b>
<b>45-54</b>	<b>17.8%</b>	<b>18.1%</b>
<b>55-64</b>	<b>11.4%</b>	<b>11.7%</b>
<b>65 and over</b>	<b>19.8%</b>	<b>19.1%</b>
<b>Refused</b>	<b>0.1%</b>	

# Like Best about Lancaster County

## Best Liked Characteristics

## Percentage

2002      2000      1998

Countryside/farmland/open spaces/rural atmosphere      45.3%      51.6%      55.5%

Nice place to live/good place to raise a family      20.8%      16.6%      25.9%

People/friendly people      19.9%      15.1%      20.4%

Small town environment      12.3%      9.8%      16.6%

Proximity to large metro areas/accessibility      7.2%      7.9%      10.8%

# Liked Least about Lancaster County

## Least Liked Characteristics

## Percentage

2002

2000

1998

Traffic/poor road conditions/congestion

35.2%

40.7%

35.2%

Over development/too much residential housing

25.0%

24.5%

23.8%

Too many malls/too many commercial stores

3.8%

4.9%

8.5%

Crime

3.0%

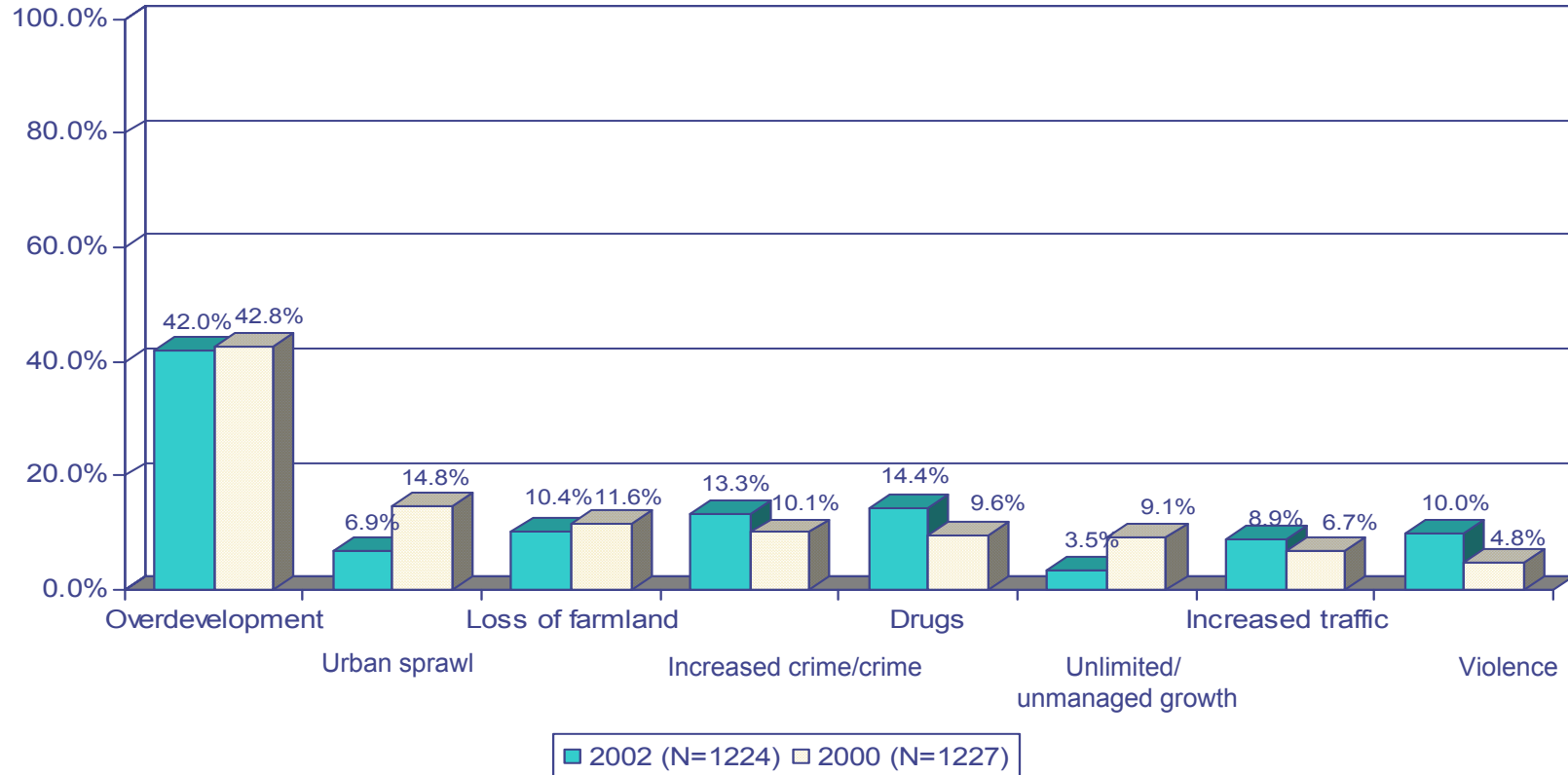
4.0%

7.1%

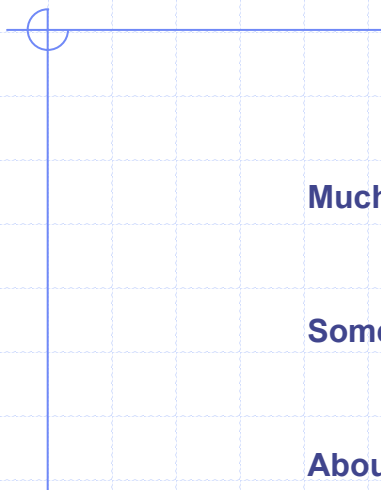
## Biggest Threats to Quality of Life in Lancaster County

	Percentage	
	2002	2000
Over development	42.0%	42.8%
Drugs	14.4%	9.6%
Increased Crime	13.3%	10.1%
Loss of farmland	10.4%	11.6%
Violence	10.0%	4.8%
Increased traffic	8.9%	6.7%
Urban sprawl/building	6.9%	14.8%
Guns	5.1%	
Gangs	5.0%	

## Biggest Threats to Quality of Life in Lancaster County



# Quality of Life in Lancaster County Compared to Five Years Ago



	Percentage	
	2002	2000
Much better	3.8%	2.5%
Somewhat better	13.2%	16.0%
About the same	48.1%	44.9%
Somewhat worse	23.6%	29.7%
Much worse	7.6%	3.9%
Uncertain	3.7%	3.0%

## Elected Officials Doing Enough to Protect the Quality of Life

Percentage

2002

Yes 34.6%

No 42.3%

Unsure 23.0%

## Level of Problem of Loss of Farmland

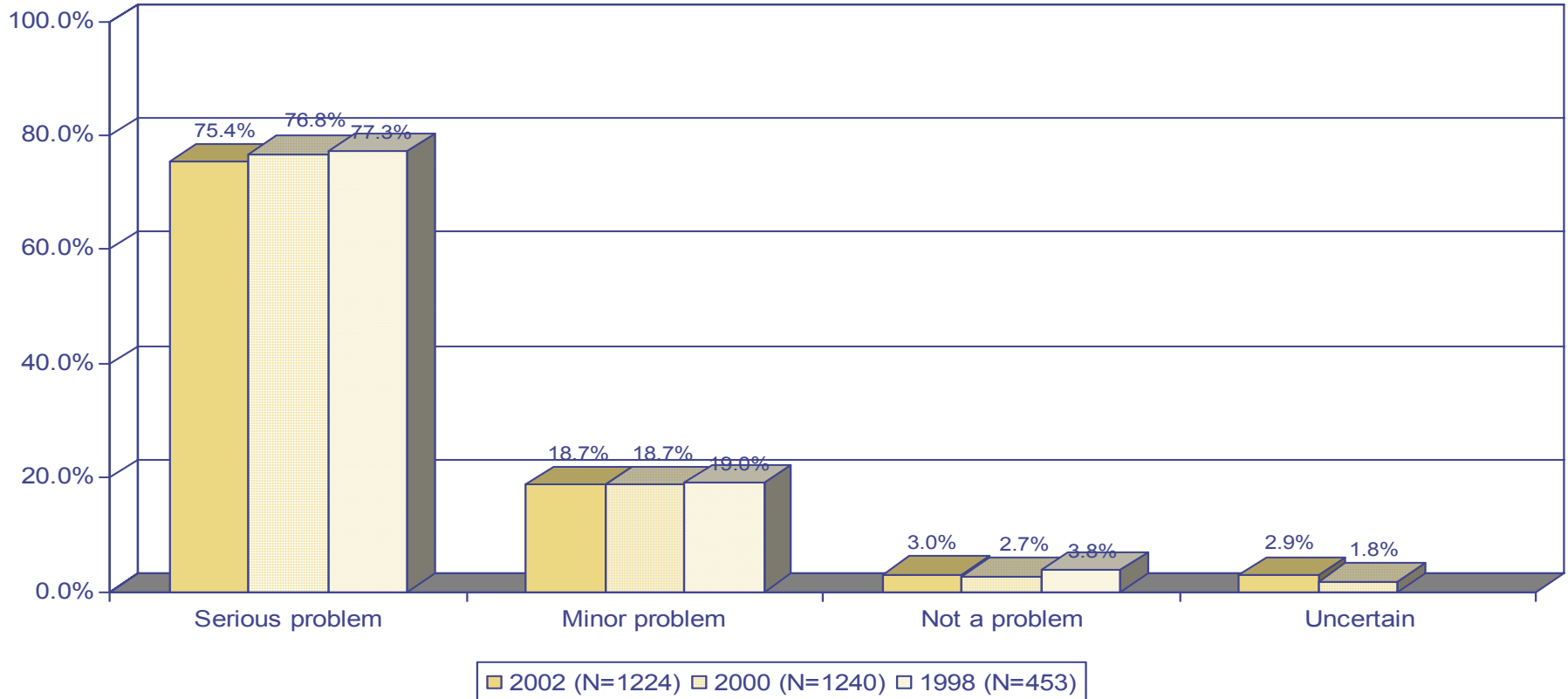
Seriousness of Problem	Percentage		
	2002	2000	1998
A serious problem	75.4%	76.8%	77.3%
A minor problem	18.7%	18.7%	19.0%
Not a problem	3.0%	2.7%	3.8%
Uncertain	2.9%	1.8%	0.0%



# Lancaster County Quality Of Life

## Level of Problem of Loss of Farmland

# Loss of Farmland



# Slowing Down Loss of Farmland

Agreement	Percentage	
	2002	2000
Yes	89.8%	91.7%
No	9.2%	8.3%

# Traffic Congestion

## Seriousness of Problem

## Percentage

2002

2000

Serious problem

56.4%

69.0%

Minor problem

36.8%

27.3%

Not a problem

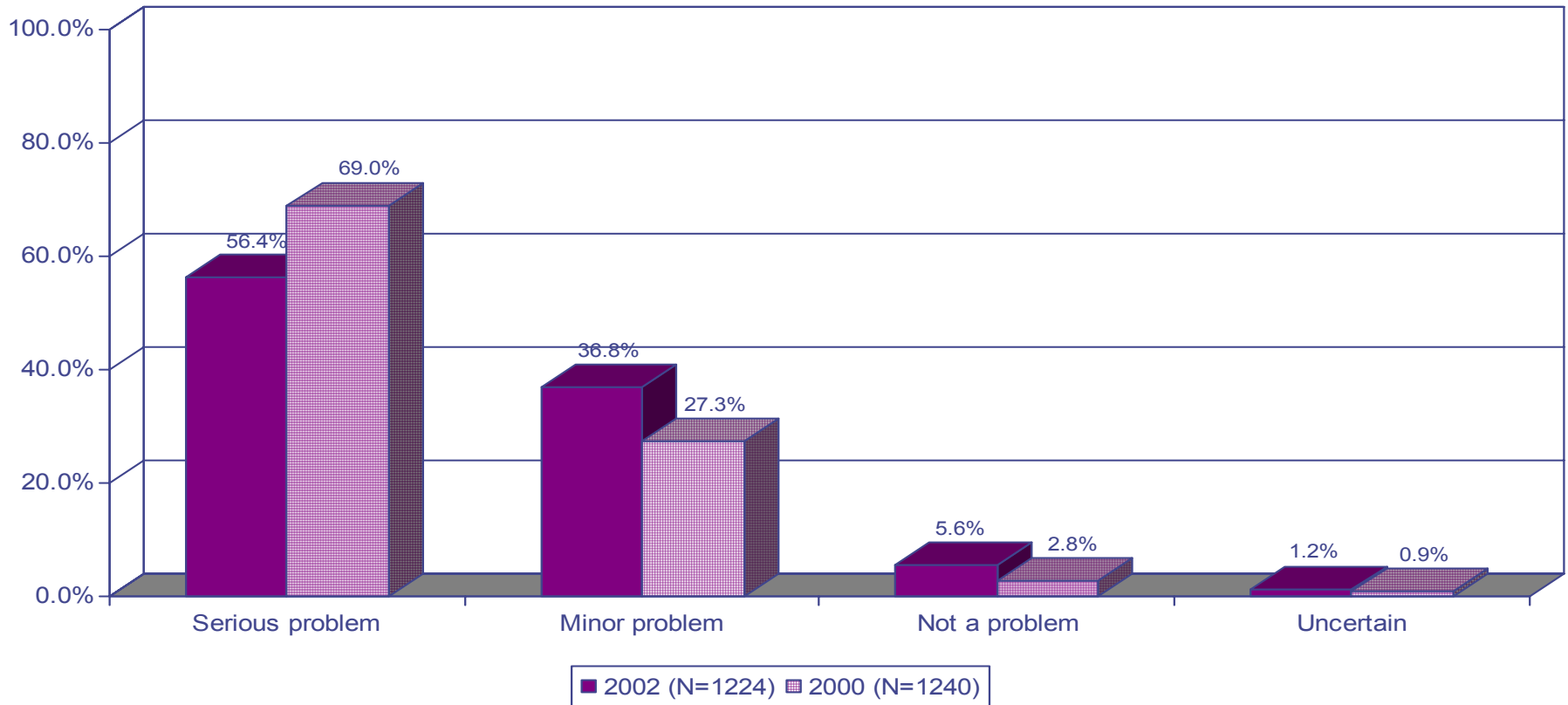
5.6%

2.8%

Uncertain

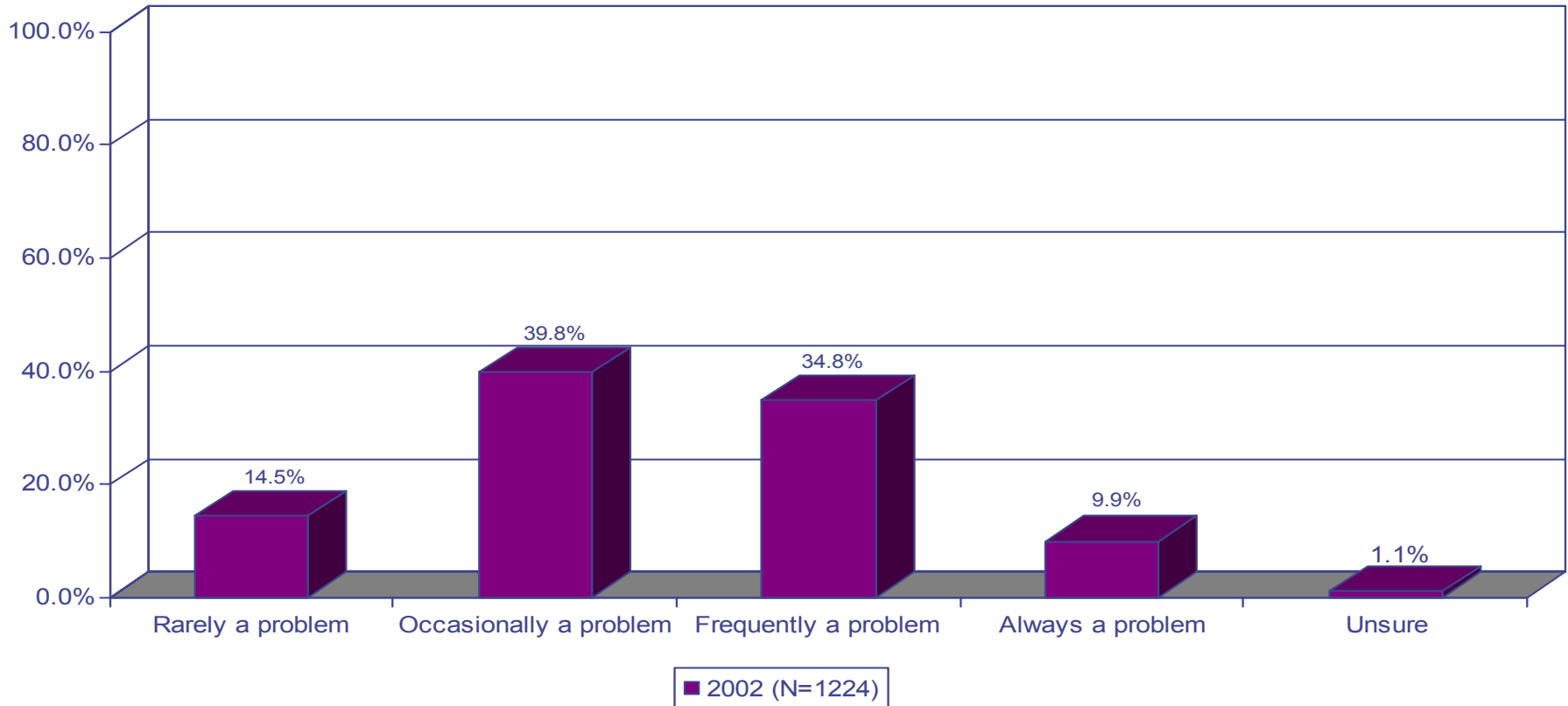
1.2%

0.9%



# Daily Driving a Problem

<b>Degree of Problem</b>	<b>Percentage 2002</b>
Rarely a problem	14.5%
Occasionally a problem	39.8%
Frequently a problem	34.8%
Always a problem	9.9%
Unsure/Don't know	1.1%



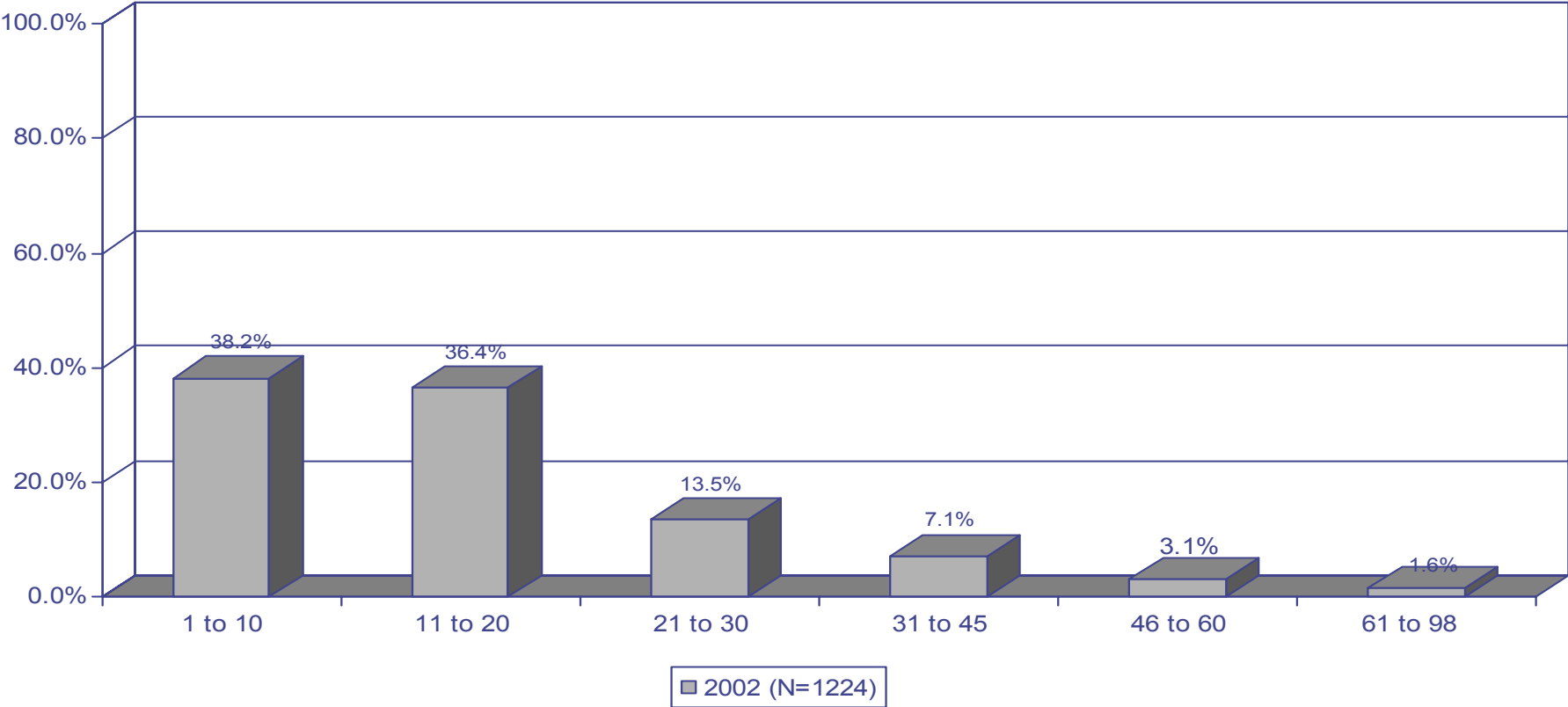
## Length of Time to Get to Work

Length of Time to get to work	Percentage	
	2002	2000
10 minutes and under	38.2%	38.9%
11-20 minutes	36.4%	32.6%
21-30 minutes	13.5%	14.3%
31-45 minutes	7.1%	8.5%
46-60 minutes	3.1%	1.8%
Over 60 minutes	1.6%	0.7%
Varies		1.6%

# Lancaster County Quality Of Life

## Length Of Time To Travel To Work

# Traffic Congestion





# Length of Time a Problem

Length of Time a Problem

Percentage

	2002	2000
Yes	12.3%	14.3%
No	86.2%	84.3%
Don't know/not sure	1.5%	1.4%



# Illness Caused by Environmental Factors

**Suffer Illness  
Caused by Environment**

**Percentage**

**2002**

**2000**

**Yes**

**11.4%**

**14.7%**

**No**

**88.6%**

**85.3%**

# Quality of Air

## Degree of Risk

## Percentage 2002

**Our health is greatly at risk**

**5.6%**

**Our health is slightly at risk**

**45.7%**

**Our health is not at risk**

**44.4%**

**Don't know/not sure**

**4.4%**

# Quality of Water

**Degree of Risk**

**Percentage  
2002**

**Our health is greatly at risk**

**8.9%**

**Our health is slightly at risk**

**41.6%**

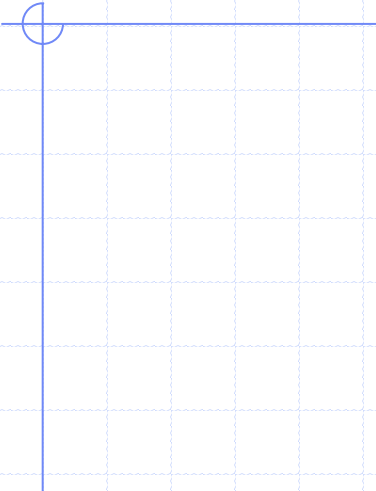
**Our health is not at risk**

**45.3%**

**Don't know/not sure**

**4.4%**

# Availability of Water



Degree a Problem	Percentage of Total Sample
Serious problem	32.4%
Minor problem	40.1%
Not a problem	22.3%
Uncertain	5.2%

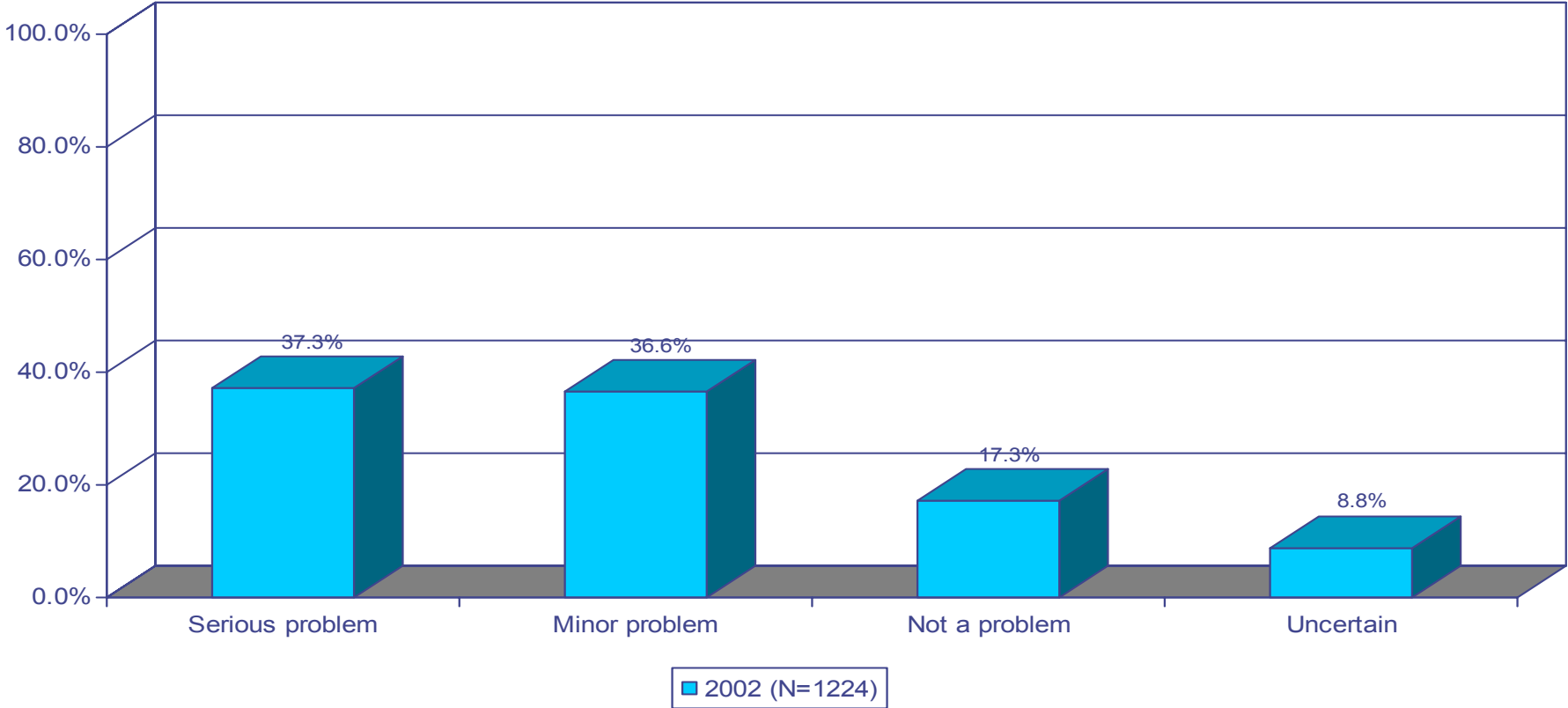
## Availability of Water a Problem in Future

Degree a Problem	Percentage of Total Sample
Serious problem	37.3%
Minor problem	36.6%
Not a problem	17.3%
Uncertain	8.8%

# Lancaster County Quality Of Life

## Availability of Water Problem In Future

# Environmental Concerns



# Feelings About Future Growth in Lancaster County

## Growth Statements

## Percentage

	2002	2000	1998
Restrictions should be put in place to limit and manage growth	85.2%	90.7%	82.6%
There should be no limits placed on growth	7.6%	5.1%	9.8%
Restrictions should be put in place which would allow no growth	6.2%	4.2%	7.6%

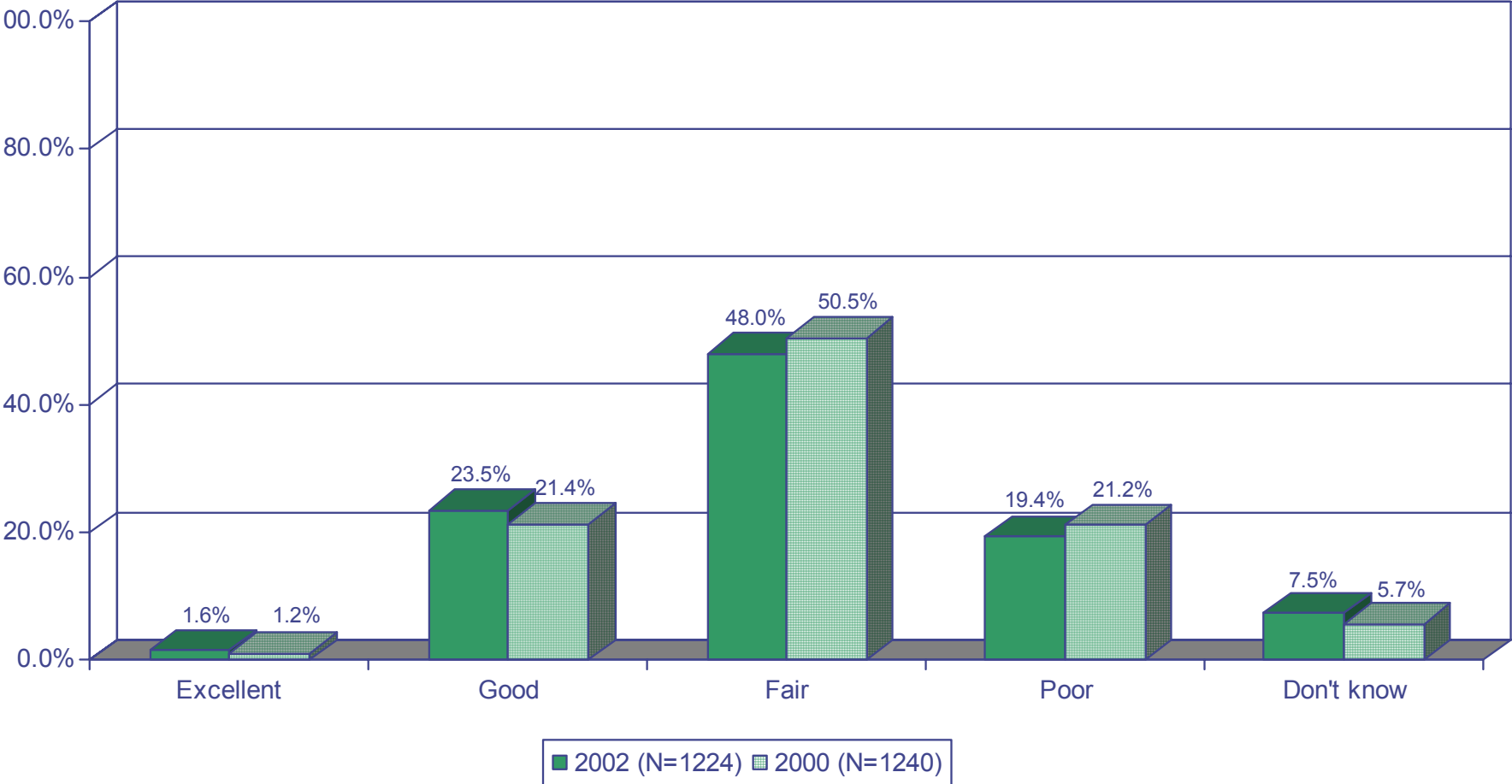


## Ratings of How Lancaster County is Doing in Managing Growth

How Well Managing Growth  
Percentage

	2002	2000
Excellent	1.6%	1.2%
Good	23.5%	21.4%
Fair	48.0%	50.5%
Poor	19.4%	21.2%
Don't know/not sure	7.5%	5.7%

Ratings of How Lancaster County is Doing in Managing Growth



## Government Involvement In Regulating Growth

Level of Involvement

Percentage

2002

2000

**Strongly increase**

**14.5%**

**12.8%**

**Moderately increase**

**33.9%**

**35.3%**

**Maintain current**

**39.5%**

**27.0%**

**Moderately decrease**

**6.7%**

**7.9%**

**Strongly decrease**

**3.3%**

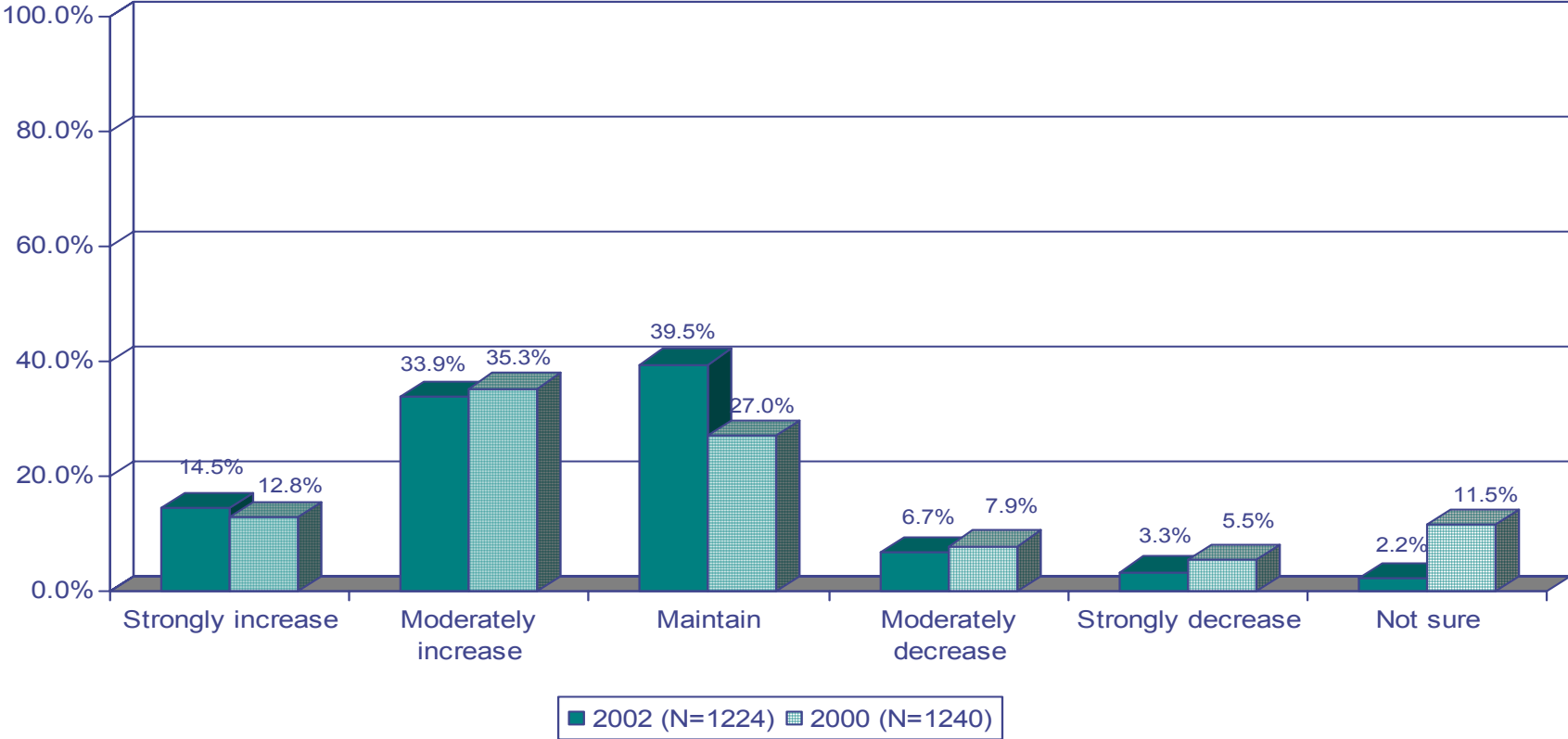
**5.5%**

**Not sure**

**2.2%**

**11.5%**

Government Involvement In Regulating Growth



# Mandated Growth Boundaries

Mandate Growth Boundaries

Percentage

2002

2000

Yes

53.8%

49.8%

No

23.5%

26.2%

Don't know/not sure

22.7%

24.0%



# Favor Cooperation Among Local Townships and Boroughs

Favor Cooperation	Percentage	
	2002	2000
Yes	86.4%	90.4%
No	7.7%	5.2%
Don't know/not sure	5.9%	4.4%

# Quality of Education in Public Schools

Quality of Education

Percentage of  
Total Sample

2002

Superior

24.3%

Adequate

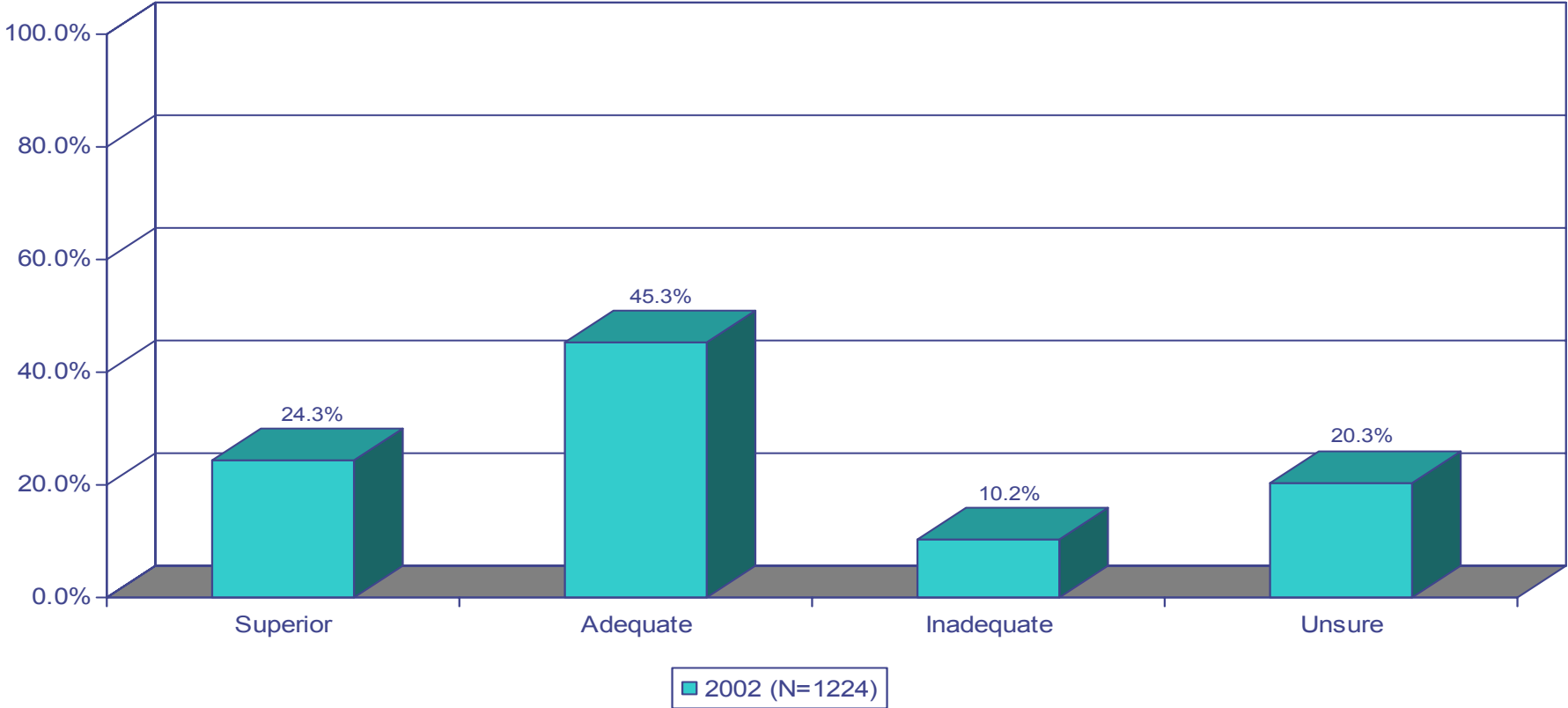
45.3%

Inadequate

10.2%

Unsure

20.3%





# **\_Have Children in Public Schools**

**Have Children in Public Schools**

**Percentage of  
Total Sample**

**2002**

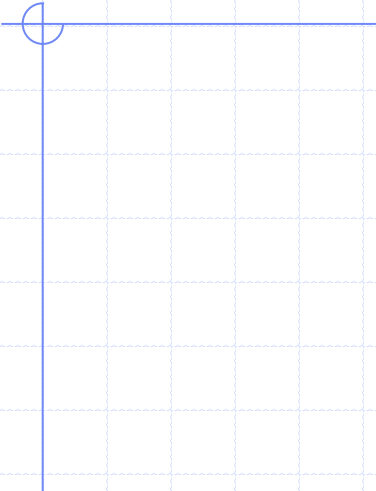
**Yes**

**33.2%**

**No**

**66.8%**

# Level of Activity with Local Schools



<b>Level of Activity With School</b>	<b>Percentage of Total Sample 2002</b>
<b>Very active</b>	<b>14.4%</b>
<b>Somewhat active</b>	<b>23.8%</b>
<b>Not very active</b>	<b>17.8%</b>
<b>Not active</b>	<b>43.9%</b>

# Level of Knowledge about Funding

**Level of Knowledge of School Funding**

**Percentage of  
Total Sample  
2002**

**Very knowledgeable**

**13.6%**

**Somewhat knowledgeable**

**45.2%**

**Not very knowledgeable**

**40.8%**

**Unsure/Don't know**

**0.3%**

# Fairness of Public Education Funding

**Public School Funding is Fair**

**Percentage of  
Total Sample  
2002**

**Yes**

**29.7%**

**No**

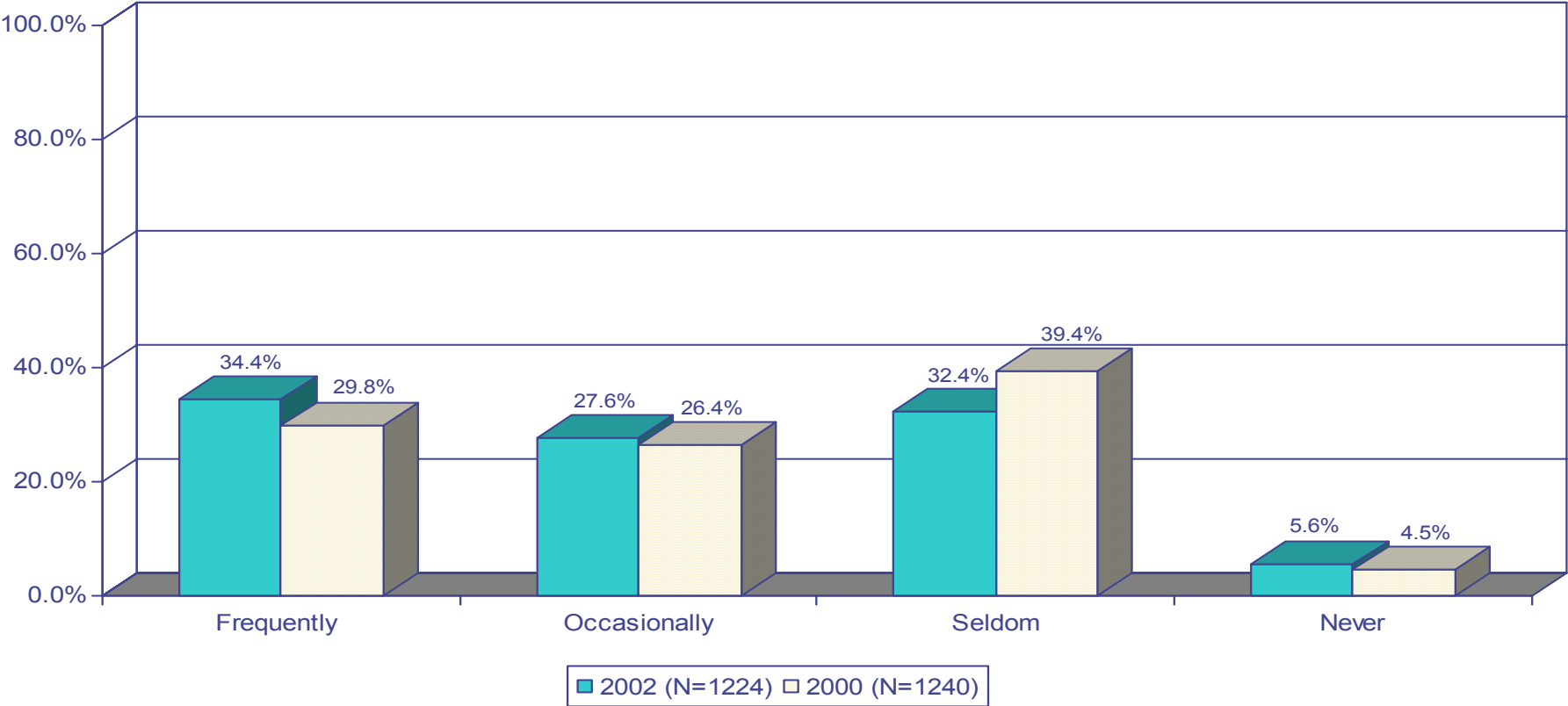
**37.4%**

**Unknown**

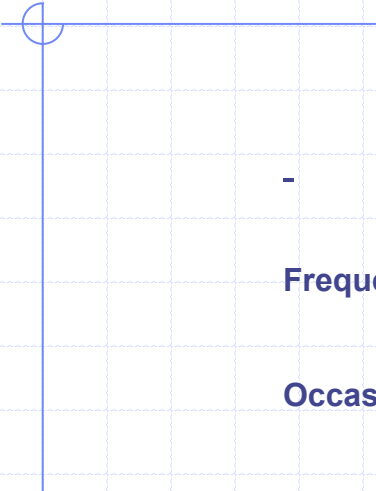
**32.8%**

## Frequency of Visiting Lancaster City

	2002	2000
-		
Frequently	34.4%	29.8%
Occasionally	27.6%	26.4%
Seldom	32.4%	39.4%
Never	5.6%	4.5%



# Frequency of Visiting Lancaster City



-	Rural	Borough	Suburbs
Frequently	17.2%	24.6%	34.3%
Occasionally	30.2%	26.9%	32.5%
Seldom	44.7%	43.3%	27.5%
Never	7.9%	4.7%	4.7%

# Like Best about Downtown Lancaster



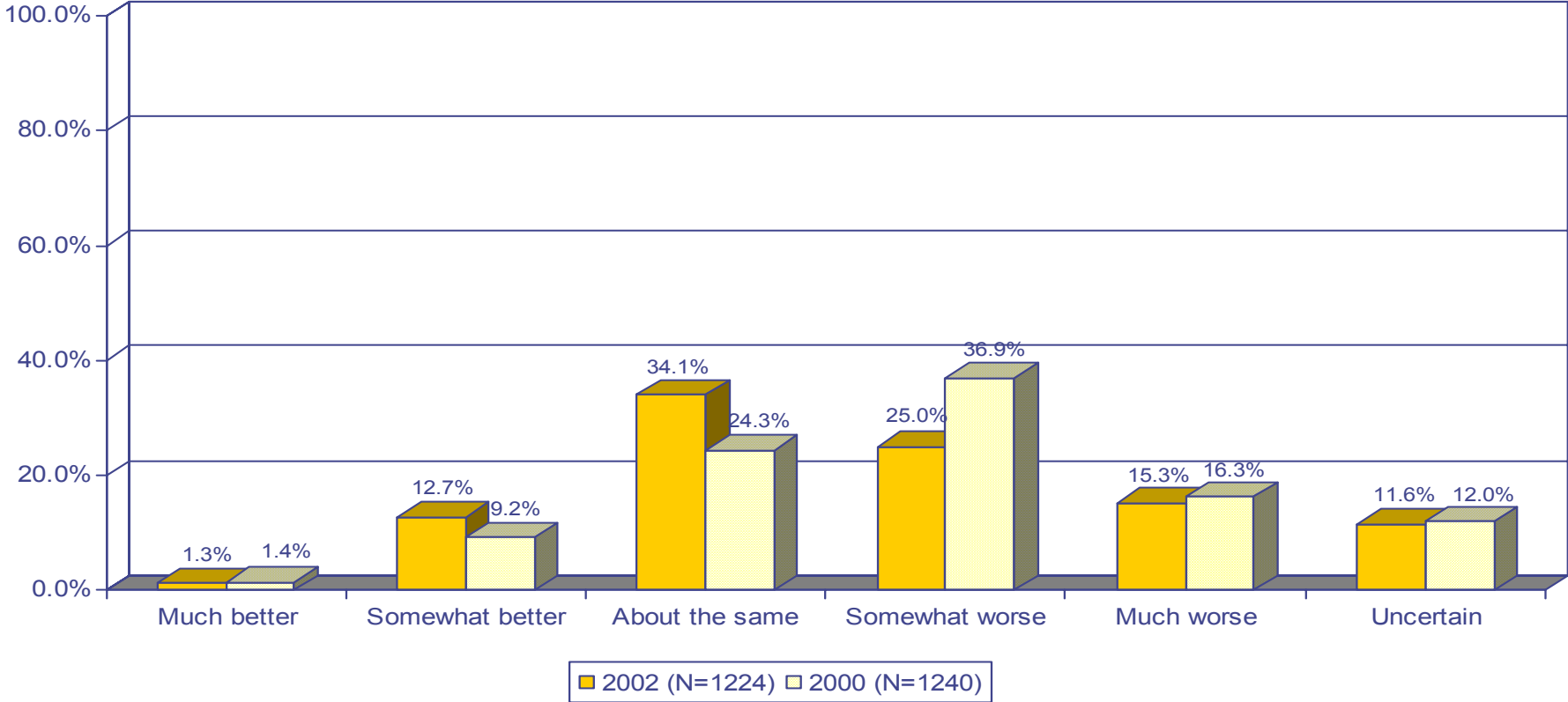
<b>Central Market</b>	<b>16.5%</b>
<b>Shopping</b>	<b>13.7%</b>
<b>Enjoy restaurants/pubs</b>	<b>7.5%</b>
<b>Historical aspects</b>	<b>6.7%</b>
<b>Buildings</b>	<b>4.0%</b>
<b>Fulton Opera House</b>	<b>2.5%</b>
<b>Lots of diversity</b>	<b>2.4%</b>



# Quality of Life in Lancaster City Compared to Five Years Ago

	Total Sample		Lancaster City Residents	
	2002	2000	2002	2000
Much better	1.3%	1.4%	3.4%	1.6%
Somewhat better	12.7%	9.2%	15.4%	16.8%
About the same	34.1%	24.3%	30.6%	30.4%
Somewhat worse	25.0%	36.9%	25.5%	32.8%
Much worse	15.3%	16.3%	18.8%	14.4%
Uncertain	11.6%	12.0%	6.0%	4.0%

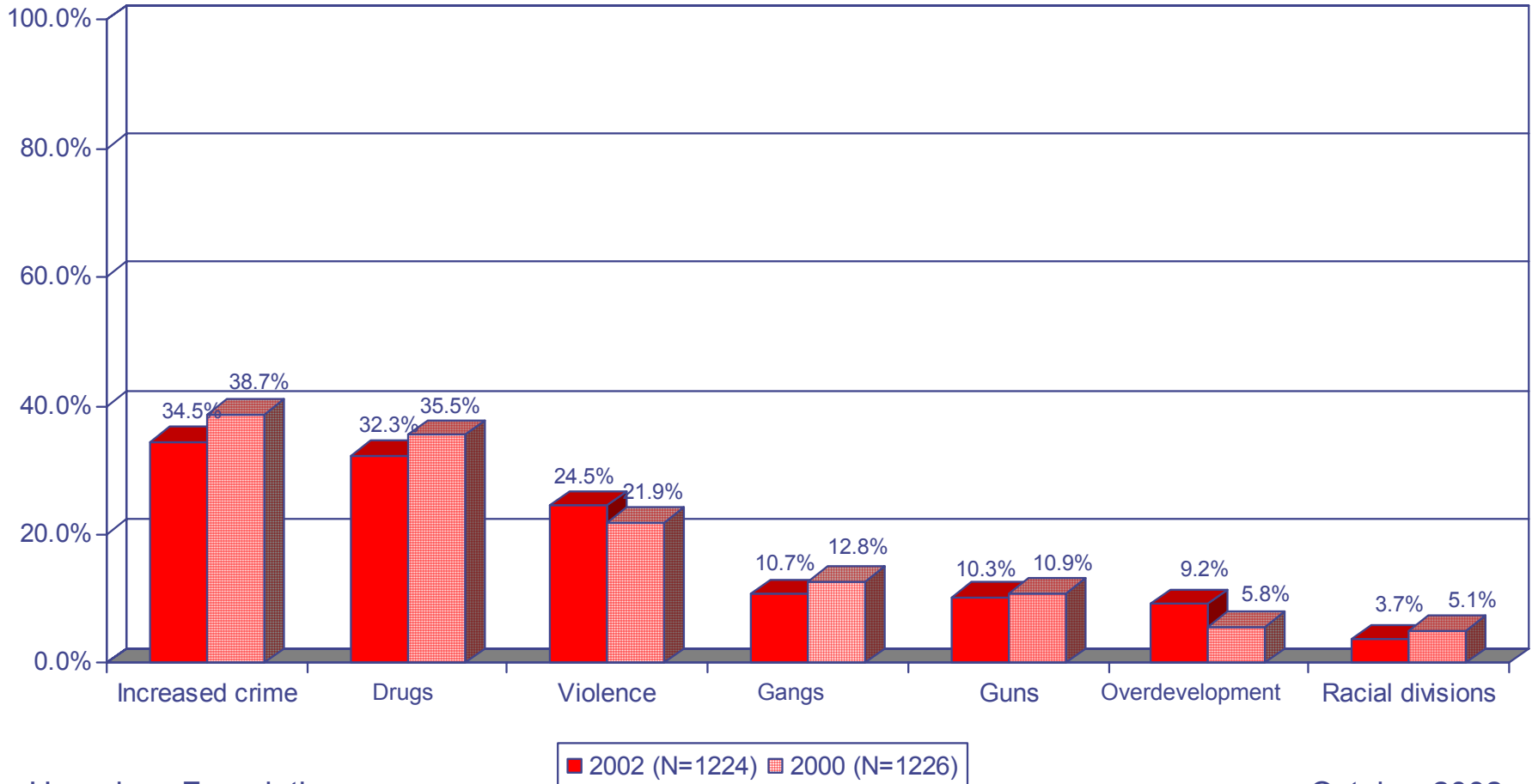
Quality of Life in Lancaster City Compared to Five Years Ago



## Biggest Threats to Quality of Life in Lancaster City

	Percentage	
	2002	2000
Increased crime	34.5%	38.7%
Drugs	32.3%	35.5%
Violence	24.5%	21.9%
Gangs	10.7%	12.8%
Guns	10.3%	10.9%
Over development	9.2%	5.8%
Racial divisions	3.7%	5.1%

## Biggest Threats to Quality of Life in Lancaster City



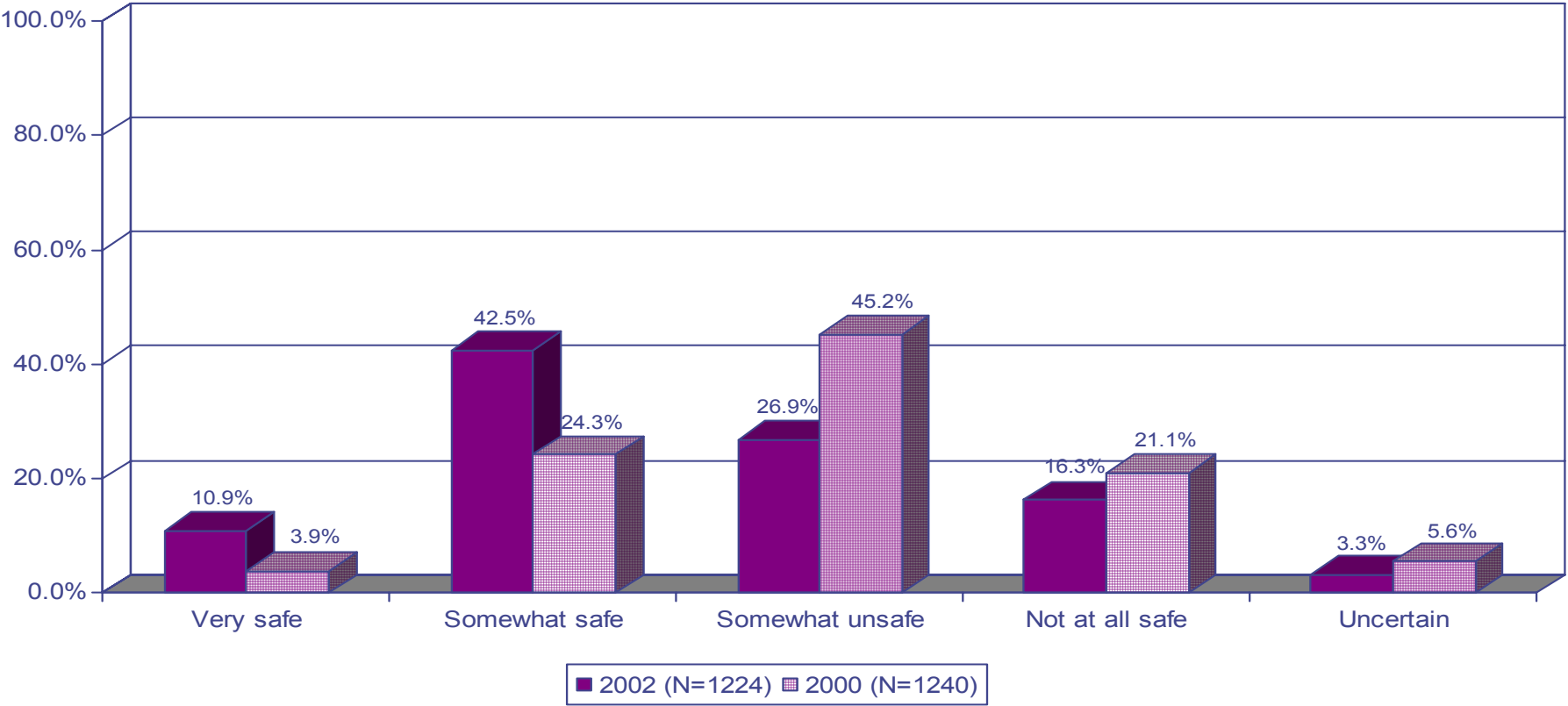
## Feeling of Safety in Lancaster City

	Total Sample		Lancaster City Residents	
	2002	2000	2002	2000
<b>Very safe</b>	<b>10.9%</b>	<b>3.9%</b>	<b>19.8%</b>	<b>16.8%</b>
<b>Somewhat safe</b>	<b>42.5%</b>	<b>24.3%</b>	<b>48.6%</b>	<b>50.4%</b>
<b>Somewhat unsafe</b>	<b>26.9%</b>	<b>45.2%</b>	<b>18.1%</b>	<b>23.2%</b>
<b>Not at all safe</b>	<b>16.3%</b>	<b>21.1%</b>	<b>10.7%</b>	<b>8.8%</b>
<b>Uncertain</b>	<b>3.3%</b>	<b>5.6%</b>	<b>2.8%</b>	<b>0.8%</b>

# Lancaster County Quality Of Life

## Feeling of Safety in Lancaster City

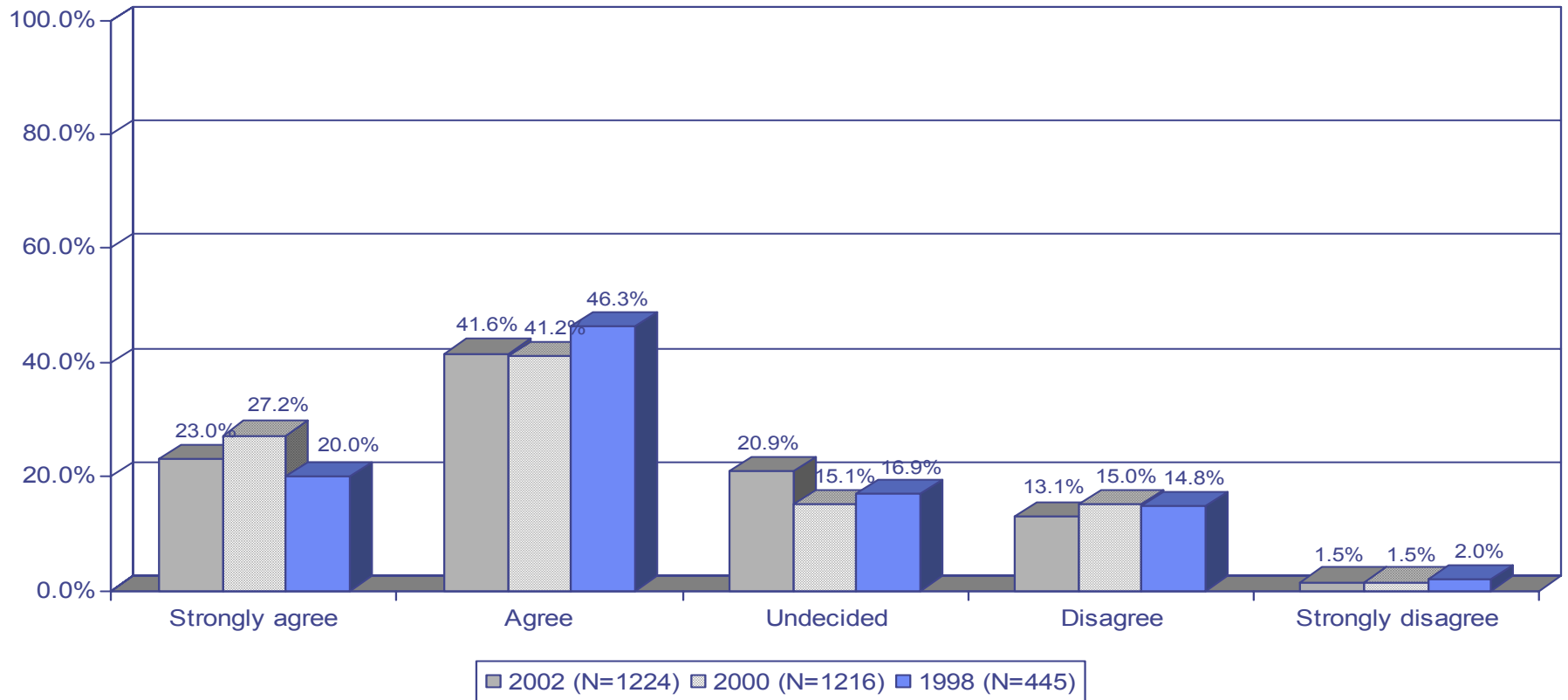
# Quality of Life in City



# The Future of Lancaster City Impacts Lancaster County

<b>Level of Agreement</b>	<b>Percentage 2002</b>
<b>Strongly agree</b>	<b>23.0%</b>
<b>Agree</b>	<b>41.6%</b>
<b>Are undecided</b>	<b>20.9%</b>
<b>Disagree</b>	<b>13.1%</b>
<b>Strongly disagree</b>	<b>1.5%</b>

## The Future of Lancaster City Impacts Lancaster County





# Importance of Downtown Revitalization

Percentage of Total Sample 2002

**Very important**                      **53.3%**

**Somewhat important**              **36.8%**

**Not important**                        **8.4%**

**Unsure/Don't know**                **1.0%**

**Refused**                                **0.4%**

# Satisfied with Revitalization Progress

Percentage of Total Sample 2002

**Very satisfied** 6.0%

**Somewhat satisfied** 49.8%

**Somewhat dissatisfied** 27.2%

**Very dissatisfied** 10.5%

**Refused** 2.1%

**Unsure/Don't know** 4.3%

# Most Critical to Success of Downtown Revitalization

Percentage 2002

Keeping community/neighborhood free of drugs and crime	13.6%
More stores	7.8%
Businesses that are successful	7.7%
More of a draw to get people to come downtown	6.9%
Keep it clean/clean it up	5.6%
Making Watt and Shand building into Convention Center	5.0%
Make the downtown streets safer	4.2%
Fixing up old buildings	4.2%

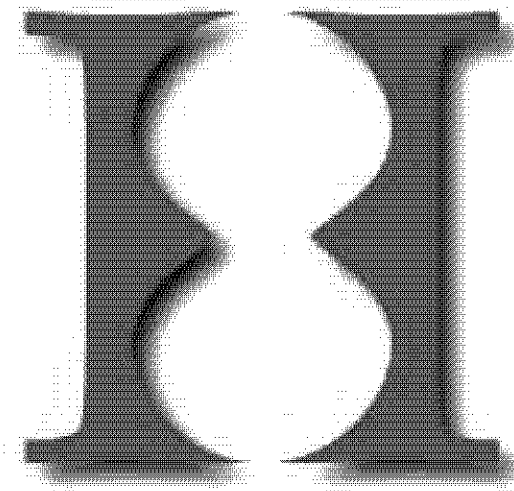
# Willing to Pay More Taxes to Support Revitalization of The City

## Percentage of Total Sample

	2002	2000
Yes	25.7%	24.6%
No	60.8%	57.5%
Don't know/Not sure	13.5%	17.9%



H O U R G L A S S



F O U N D A T I O N