

HOURGLASS First Friday Forum September 5, 2025





Marshall Snively President, Lancaster City Alliance

Helen Foster

Chief Marketing Officer, Willow Valley Communities



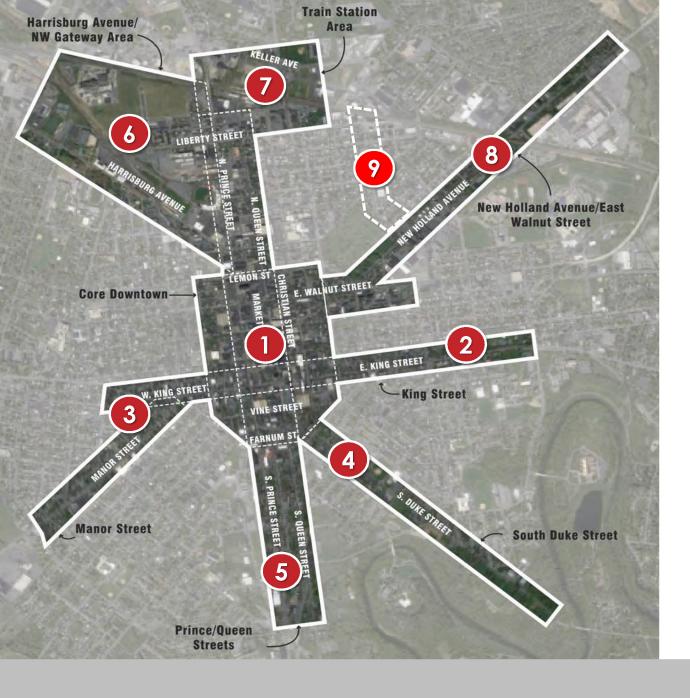






STRATEGIES

- 1. Expanding Success: Traditional Economic Development Investment
- 2. Embracing the Collaborative Economy: Cultivating Entrepreneurs
- 3. Leveraging the Brand: Marketing Lancaster City
- 4. Quality of Life: Reinforcing Commercial Hubs





PLAN FOCUS AREAS

Includes the Downtown Core, in addition to the commercial corridors and gateways (the "Commercial Hubs"), that extend outward from the Downtown Core. These *Commercial Hubs* were grouped into eight geographies:

- 1. Downtown Core
- 2. East King Street
- 3. West King Street/Columbia Avenue and Manor Street
- 4. South Duke Street
- 5. South Prince and Queen Streets
- 6. Harrisburg Avenue/Northwest Gateway
- 7. Train Station Area
- 8. New Holland Avenue/East Walnut Street
- 9. North Plum Street (*NEW*)

These eight areas are important as significant hubs of commercial activity serving the City's residents and businesses.

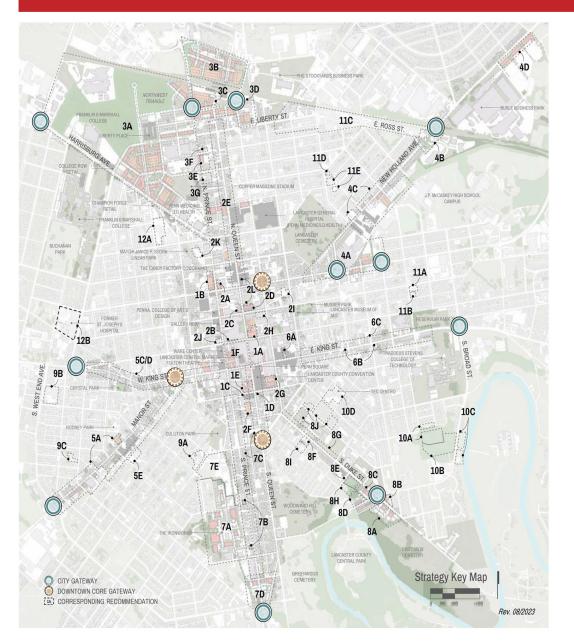


BUILDING ON STRENGTH

The Community-Owned Economic Development Strategic Plan for the City of Lancaster, PA (2015 – 2030)

INVESTMENT OPPORTUNITY SITES

City of Lancaster, PA



INVESTMENT SITES: KEY TO ILLUSTRATIVE PLAN (Left)

- * Site added as part of the 2018 Plan addendum.
- † Site completed, under construction, or under development as of August 2023.

Area 1: Downtown Core—Primary Opportunities

- 1A: Bulova Site †
- 1B: City Crossings Lot
- 1C: Southern Market
- 1D: Swan Hotel Corner
- 1E: Queen & Vine Site (LNP)
- 1F: Market District Sites
- 1G: Upper Floor Redevelopment (Throughout Downtown)

Area 2: Downtown Core—Secondary Opportunities

- 2A: HDC Property Infill
- 2B: Prince Street Garage Site
- 2C: Queen & Chestnut Infill (NW Corner) †
- 2D: RRTA Garage Air Rights
- 2E: North Queen Street Retail Commercial †
- 2F: West Vine/West Farnum Site
- 2G: Penn Square Garage Mixed-Use Opportunity
- 2H: Duke Street Garage Mixed-Use Opportunity*
- 21: IREX Surface Parking Lots Infill Development*
- 2J: Prince & Orange Mixed-Use Redevelopment*
- 2K: Linear Park Warehouses Adaptive Reuse/Infill*
- 2L: N. Queen Infill Development* †

Area 3: Harrisburg Avenue/Train Station Area

- 3A: Northwest Triangle †
- 3B: Train Station North (Keller Avenue Properties)
- 3C: Train Station West
- 3D: Train Station South (McGovern Avenue Properties)
- 3E: N. Prince Adaptive Reuse/Mixed-Use Infill Development*
- 3F: Prince & Ross Redevelopment Opportunity*
- 3G: Prince & Clay Warehouses Adaptive Reuse/Infill*

Area 4: New Holland Avenue

- 4A: Plum and Walnut Anchor 1
- 4B: Ross Street Gateway
- 4C: New Holland Avenue Infill
- +0. Now Holiana Avenue illim
- 4D: Burle Office Park Infill Development

Area 5: West King Street/Manor Street

- 5A: Manor Street Infill/Property Enhancements †
- 5B: Consolidated Parking Resources (Typ.)
- 5C: West King Infill Development/Property Enhancements †
- 5D: Upper Floor Redevelopment †
- 5E: Laurel Street Infill*

Area 6: East King Street

- 6A: Excelsior Building †
- 6B: East King Infill Development
- 6C: Façade/Property Enhancements

Area 7: South Prince/South Queen Streets

- 7A: The Ironworks
- 7B: South Prince Infill Development
- 7C: Façade/Property Enhancements †
- 7D: Rebman's Redevelopment †
- 7E: Conestoga Street Infill/Redevelopment Opportunity*

Area 8: South Duke Street

- 8A: Conestoga Plaza †
- 8B: Conestoga East
- 8C: Conestoga North
- 8D: Residential Infill Opportunity †
- 8E: South Duke Square
- 8F: South Duke Infill Development
- 8G: Outdoor Market
- 8H: S. Christian & Juniata Infill/Redevelopment*
- 81: S. Christian & Chester Infill/Redevelopment*
- 8J: Hillrise Residential/Mixed-Use Redevelopment*

Area 9: Southwest Neighborhoods*

- 9A: Union Street Adaptive Reuse/Redevelopment*
- 9B: Slaymaker Infill/Redevelopment*
- 9C: Ruby & Prangley Adaptive Reuse/Development* †

Area 10: Southeast Neighborhoods*

- 10A: Juniata & Stevens Residential Infill*
- 10B: S. Broad Mixed-Use Development*
- 10C: Sunnyside Gateway Mixed-Use Development*
- 10D: Cigar Factory/Tec Centro Infill/Redevelopment*

Area 11: Northeast Neighborhoods*

- 11A: Chestnut & Franklin Mixed-Use Infill/Redevelopment*
- 11B: Franklin & Marion Infill/Redevelopment*
- 11C; E. Liberty/E. Ross/Ice Industrial Adaptive Reuse*
- 11D: Hotel Fulton Redevelopment Opportunity*
- 11E: Fulton Market Mixed-Use Redevelopment*

Area 12: Northwest Neighborhoods*

- 12A: Charlotte Place Mixed-Use/Residential Opportunity*
- 12B: St. Joseph's Hospital Redevelopment Opportunity* † To learn more about Building On Strength, visit:
- lancastercityalliance.org/plan-overview-and-strategies



2030 OUTCOMES

- Create 300 new hotel rooms in the Downtown and Commercial Hubs
- See 2,500 new residential units of all types and price points
- Achieve 100,000 square feet of new and renovated retail/restaurant space in Downtown and Commercial Hubs
- Fill 300,000 square feet of office and flex space
- Realize \$1 billion in privately led investment
- See ongoing private investment that will outweigh public investment in economic development

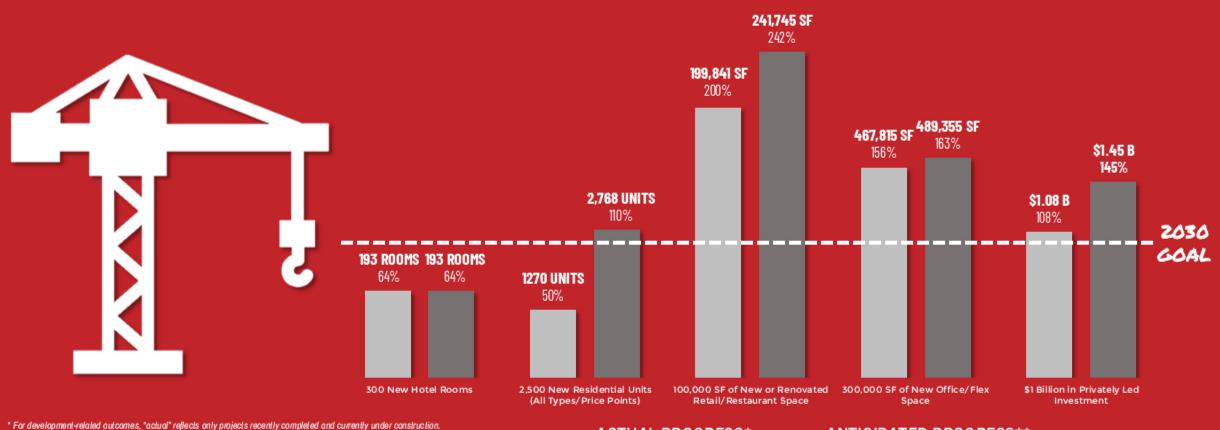


BUILDING ON STRENGTH

The Community-Owned Economic Development Strategic Plan for the City of Lancaster, PA (2015 - 2030)

2030 OUTCOMES DASHBOARD

'Bricks & Sticks' Progress Since July 2015 (as of May 30, 2025)





ANTICIPATED PROGRESS**



^{**} For development-related outcomes, "anticipated" reflects projects recently completed and currently under construction, and assumes planned and conceptual development projects will come to fruition.



Request for Proposals

South Queen Street Gateway Center Redevelopment City of Lancaster, Pennsylvania



Release Date: March 1, 2016

considered a great opportunity to bridge the gap between the Downtown Core and the southern half of Lancaster City. Queen Street serves as the main north corridor through the City and thus is the gateway into Downtown.

The northeast corner of the important intersection of Queen and Vine Streets is anchored by the Lancaster County Convention Center and Lancaster Marriott at Penn Square. Approaching seven years old, this convention center boasts

The intersection of Queen Street and Vine Street as well as the 100 block of South Queen Street has long been

Convention Center and Lancaster Marriott at Penn Square. Approaching seven years old, this convention center boas 94,000 SF of meeting space and a 300 room flagship hotel. Recently a 105 room addition to the hotel has been announced. Sharing this corner is the former home of abolishionist and Lancaster native, Thaddeus Stevens, and his Kleiss Tavern. Recently the facades were beautifully restored as well as over 100,000 compelling pieces of archeological evidence unearthed, many pointing to possible Underground Railroad activity. Under the direction of LancasterHistory.org, by the year 2020, this important anchor of Lancaster and national history will be completely transformed and open to the public.

Three major sites occupy the remaining corners and all have recently become available for redevelopment creating a unique and exciting opportunity for the City and the appropriate development team(s). While each site is owned separately, the owners share the same vision for this critical section of Downtown and the City; a vibrant mixed-use development with active first floor uses are key in the goal of expanding Downtown to the south.

With the recent availability of the former production facility owned by **LNP Media Group, Inc.**, there is a unique opportunity for larger scale catalytic development on a site that could accommodate any number of uses as outlined in the City's Economic Development Strategy (see section 2.03). This could include a hotel and additional meeting space to complement the Lancaster County Convention Center as well as office uses and/or residential. This site also enjoys several historic buildings with rich character that offer unique opportunities. The newer printer facility is of a solid foundation that could support several stories of redevelopment. This site also includes an open lot prime for additional new construction.

The **Southern Market Center**, owned by the City of Lancaster, is a historic gem that while divided into several office uses over the last decades presents a great opportunity to be brought back to its original "open plan." Formally a public market, this building could accommodate exciting uses including entertainment, retail, restaurant and offices. Ideally the first floor would be activated with retail, restaurant or other public uses.

The Lancaster County Convention Center Authority (LCCCA) owns the long vacant historic **Swan Hotel with adjacent parking lot and carriage house**. The first floor of the Swan Hotel has long been envisioned as a restaurant and the parking lot is ideal for new infill construction that could also incorporate the upper floors of the Swan and the carriage house.



Lancaster County Convention Center



Thaddeus Stevens Home/Kleiss Tavern

Lancaster

RFP

City Alliance

March 2016

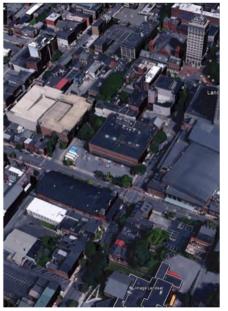
Exhibit A

Lancaster City Alliance **RFP**

March 2016

LANCASTER BLOCK RESIDENTIAL HOSPITALITY

1.02 Vision





Current Sites

Vision



Lancaster City Alliance RFP

March 2016



The Vision







- Founded 41 years ago in continuous expansion ever since
- Uniquely melds active adult living, plus resort-grade hospitality, plus Lifecare
- Two existing campuses on 215 acres, seven minutes south of downtown Lancaster
- Over 2,600 residents from 42 states and multiple countries







2019 Report



OUTPUT

The \$156.6 million in WVC related spending means that \$429,000 was spent EVERY DAY by WVC residents, visitors, and operations.

PERSONALINCOME

The \$77.3 million in total income generated by WVC operations and resident and visitor spending is the equivalent of \$387 for every household in Lancaster County.

EMPLOYMENT

The number of total jobs sustained by WVC operations and resident and visitor spending ranks WVC in the top 15 largest employers or the top 1% of companies in Lancaster County.

TAXES

Each household in Lancaster
County would need to be taxed
an additional \$163 per year to
replace the \$32.5 million in taxes
generated by WVC operations
and resident and visitor
spending.

Beyond **Southern Market** and **Mosaic**, Willow Valley Communities' family of brands includes ...

- The Marlin and Doris Thomas
 Memory Center (opening July 2026)
- SmartLife via Willow Valley







Why Lancaster City?

- Built to capacity at existing campuses in Lancaster County
- Vertical expansion with diversification of residential portfolio
- City charm, culture, and walkability
- Lancaster is consistently recognized as a BEST place to retire in the U.S.



Celebrating 225 years

1794 - 2019



An aerial photo shows the Southern Market Center building in the foreground and the LNP Production Building across West Vine Street in Lancaster on Tuesday. Towering in the background are the Greist Building, left, and Lancaster Marriott at Penn Square, Willow Valley will partner with Lancaster Equity to create a food hub in the market building and hopes to build a multistory mixed-use complex at the produc-

Willow Valley proposes residences at LNP building, food hub at Southern Market

TIM STUHLDREHER

TSTUHL DREHERGI NPNEWS COM

Willow Valley Communities has won national plaudits for its pair of campuses in West Lampeter Township, which together constitute Lancaster County's largest retirement community.

Now the organization is planning to enter Lancaster city with two projects that local officials are calling transformational.

Willow Valley has announced it plans to build a multistory mixeduse complex on the site of the former LNP Production Building at the northwest corner of South Queen and West Vine streets.

It will have up to 150 residential units for people age 55 and up, plus restaurants and retail outlets at street level, open to the public.

Across Vine Street, Willow Valley will partner with the nonprofit group Lancaster Equity to create a food hub at the C. Emlen Urban-designed Southern Market Center, as Lancaster Equity proposed last year.



The two projects would dramatically advance the revitalization of Lancaster's "South Gateway" along Queen Street.

"This is a win-win for the city," said Marshall Snively, president of Lancaster City Alliance, a nonprofit focused on economic development.

The senior-living complex is expected to create about 175 to 200 jobs, said John Swanson, CEO of Willow Valley Living, the management company for Willow Valley Communities.

The food hub could create around 30 full-time and 50 part-time jobs. WILLOW VALLEY, page A4

Willow Valley: Food hub, residences

Continued from A1

said Lancaster Equity President Dan Jurman. More will come from other uses that will be brought into the market - possibilities include offices, art venues, co-working and maker spaces, shops and an event hall.

Mayor Danene Sorace said the projects are exciting, and her administration looks forward to helping Willow Valley and Lancaster Equity "extend downtown's residences success further into our neighborhoods with new investment and new opportunities."

'Natural fit'

In an interview with LNP. Swanson called downtown Lancaster a and publisher of LNP, logical next step and a said Willow Valley's "natural fit" for Willow Valley.

Last year, U.S. News & World Report named Lancaster County the best place in the U.S. to retire. Lancaster city is officially "age-friendly" and has racked up numerous accolades for its arts, culture and culinary offerings.

More and more seniors are coming to appreciate the advantages of downtown living, Swanson said, and "we want to meet people where they want to be."

Willow Valley had been exploring potential locations in Lancaster for several years, Swanson said. In the course of evaluating LNP's production building site, it became aware of Lancaster Equity's plans for the market and realized the potential synergy, he historic house of attor-

nonprofit community the site's east side will be market creating a jobs development corpora- preserved and restored.

tion created to help implement the strategies of "One Good Job," the 2016 report of a mayoral commission that called for cutting poverty in half by 2032.

Willow Valley's project "was so compatible with what we were doing," Jurman said. The nonprofit is taking the place of private partners with whom Lancaster Equity initially planned to collaborate.

The 55-plus

LNP Media Group announced Willow Valley's pending acquisition of the property Monday at its 225th anniversary celebration. Robert M. Krasne, CEO of Steinman Communications project will make the site "an active and integral part of city life."

The timing of groundbreaking is contingent on completing the planning and design process and securing city approvals. Construction is expected to take about two years.

The company is planning one-, two- and three-bedroom apartments, plus a full range a food hall, commercial of resident amenities. The project cost, square footage and other details remain to be determined, Swanson said.

Residents will pay an entrance fee and monthly service fee. Parking will be offered at the Steinman Park Garage.

tenant. LNP's production "Our hope is to conbuilding will be demoltinue as a tenant ... (and) ished to make way for be a support to the enthe new structure. The trepreneurial activity," said Assets' co-director ney and judge Jasper Jonathan Coleman. Lancaster Equity is a Yeates (1745-1817) on

Jurman envisions the "pipeline," Not only will



Swanson

is CEO of

manage-

company

Willow Val-

ley Living.

ment

Food hub,

jobs pipeline

of 2020, Swanson said.

by the city redevelop-

approved a development

Willow Valley will pro-

vide the purchase funds

master lease on the

building. It will also han-

dle the renovations. The

building needs a lot of

work, including all-new

mechanical systems and

repointing of brickwork.

Lancaster Equity will

sublease about 10,000

square feet, where it

will build out and equip

kitchen and culinary job

Willow Valley will

manage and use or sub-

lease the rest of the

building. Office space

will be offered to Assets,

the nonprofit that is cur-

rently the market's sole

installments.

Swanson said.

training center.



Willow Valley be just and will hold a 29-year across the street, it plans to operate a shuttle service to its flagship cam-

> They're home to more than 2.400 residents from 37 states and employ more than 1.400 people, including more than 500 in food service. The shuttle will help to make employment there feasible for southside residents who may not have reliable transportation of their own.

"Everyone wins." Jurman said, "most importantly, city residents,"

Lisa Riggs, president of the Economic Development Company of Lancaster County, called Willow Valley's investment "monumental" and "an extraordinary validation of the vibrancy of Lancaster city."

Said Snively: "This type of local investment and partnership will be viewed as a model for other communities."

A Story of Restoration and Revitalization: Mosaic and The New Southern Market



NEW DEVELOPMENTS BY WILLOW VALLEY COMMUNITIES WILL SOON RE-ENERGIZE LANCASTER'S SOUTH GATEWAY.

Willow Valley Communities is one of the region's most renowned residential developers and operators with more than 2,400 residents at its existing communities just south of Lancaster City. With steady growth over the past 35 years and growing demand for walkable, urban living, the organization was encouraged to consider downtown expansion possibilities.

The former LNP production building presented the ideal site and the concept for Mosaic—a new, mixed-use residential building—was born. The vision for Mosaic grew stronger with the opportunity to partner with Lancaster Equity Community Development Corporation to restore Southern Market Center—a prized historic landmark, falling away after years of dormancy and decline.

Now under renovation, Southern Market
will triumphantly return to prominence as a
marketplace and community hub. Financed,
developed, and operated by Willow Valley
Communities and slated to open in early 2022, its
centerpiece will be a world-class food hall featuring
regional and international cuisines from ten, upand-coming Lancaster chefs, plus a full bar and
coffee shop. The building will also encompass
coworking space, retail, community rooms, and
permanent offices for ASSETS, Lancaster Equity,
and Willow Valley Communities.

Across the street, Mosaic will offer a socially connected, culturally rich way of life, with 147 two- and three-bedroom residences and exclusive amenities for those age 55 and above who desire vibrant city living. The new building's ground floor will feature restaurant and retail experiences open to the public. "Pre-selling" of Mosaic to prospective residents will begin this summer, with opening planned for 2025.

The complete revitalization of Southern Market is possible because of Mosaic—and together, these developments will breathe new life into one of Lancaster's most pivotal but underutilized blocks, bringing new destinations to live, work, and play, new jobs, elevated aesthetics, and economic vigor.

There is so much more to come. We'll see you soon at Queen and Vine!



WillowValleyCommunities.org SouthernMarketLancaster.com



SOUTHERN SMARKET

LANCASTER · CITY

Historical Overview

- "The grandest building in Lancaster City." Lancaster Newspaper, in the year of its construction, 1888
- C. Emlen Urban architect
- Designed as a farmers' market, operated for nearly 100 years
- Renovated in mid-eighties to house offices
- Designated mid-2010's as "underutilized"



Southern Market, Late 1940s early 1950



Innovation Goes Full Circle

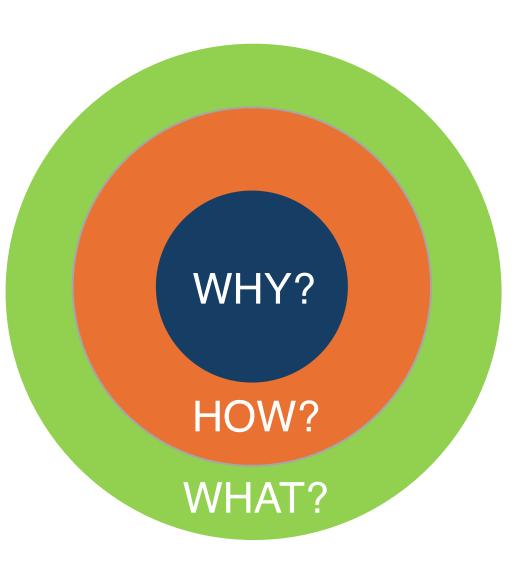


1888

WHY: They believed that nurturing Lancaster's entrepreneurial spirit is beneficial to everyone in the community

HOW: Creation of a community gathering place for selling produce and other goods by and to the community

WHAT: A community Farmer's Market



2022

why: We believe that nurturing Lancaster's entrepreneurial spirit is beneficial to everyone in the community

HOW: Transforming a historic landmark into a modern community hub & gathering place for all

WHAT: A world-class food hall with globally inspired cuisine

Non-Profit Collaborative Partners



Owner / Community Catalyst



Developer / Operator



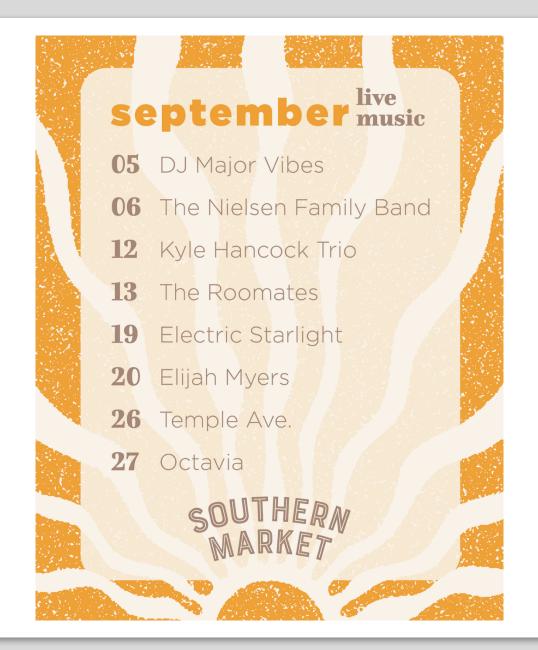




The Food Hall

- 13 chefs serving local and international cuisines
- Bar 1888: 30-seat bar serving six rotating beer selections from PA microbreweries, plus wine and craft cocktails
- Lynn and Gray Coffee Co. opened September 3
- Four chef vendors have been with Southern Market since its opening in 2022
- Four vendors have added other locations outside Southern Market, and two have opened solo establishments





SEPTEMBER WEEKLY EVENTS

WED 7PM	TRIVIA NIGHT
THU 7PM	9/04 MUSIC TRIVIOKE 9/11 MUSIC BINGO 9/18 TRIVIA! AT THE MARKET: EMO MUSIC TRIVIA 9/25 MUSIC TRIVIOKE
FRI 8PM	LIVE MUSIC
SAT 8PM	LIVE MUSIC



LANCASTER . CITY





Workspaces

- 19 mezzanine office spaces
- Three currently available
- Five "original" tenants with us since opening in 2022
- Short- or long-term lease options
- Rent includes secure WiFi and access to 2nd floor kitchenette and group meeting rooms
- Secure access 24-hours/day, 7 days/week







Southern Market Events

377 events were hosted at Southern Market in 2024!

- Three event spaces, plus opportunity for full market rental
- Drinks and catering provided by Bar 1888 and chef vendors
- WiFi and A/V capabilities
- Support from in-house event manager
- Easy set-up and clean-up







Ideally Located At Queen & Vine

17 West Vine Street – the site of LNP's former print production building in the heart of Lancaster City





Mosaic

- Mosaic is an expansion of Willow Valley Communities' existing operations in Lancaster County
- Rising 20 stories, Mosaic will encompass 146 luxury residences, exclusive amenities, and restaurants and retail spaces that will be open to the public
- Mosaic exclusively offers active adult living (55+), with the assurance of Lifecare from Willow Valley Communities
- When complete, it will represent approximately 8% of Willow Valley Communities' total residential portfolio in Lancaster County



Mosaic

- Assigned resident parking at adjacent Steinman
 Parking Garage, connected by covered skybridge
- 16 apartment styles beautifully appointed and ranging from 1,592 to 3,338 sq. feet
 - 2 bedroom
 - 2 bedroom + den
 - 3 bedroom + den
- All amenities on Willow Valley Communities' suburban campuses are open to Mosaic residents





Mosaic video



Summary of Onsite Amenities

1st Floor

Porte Cochere/ Lobby

Indoor/Outdoor Restaurant & Lounge

THE PEARL – Spa & Wellness

Indoor Pool

Business & Conference Center

2nd Floor

Urban Oasis

Casual Café and

Plaza

Fitness Center &

Cycle Studio

RED ROSE Ballroom

Library

Resident Storage/ Package Handling

Bicycle Storage/ Repair

3rd Floor

Wine Cellar/Tasting Room

Game Room/

Lounge

Screening Room

Kids' Lounge

Dog Park/Pet Salon

Mosaic Garden

Resident Wellness Clinic

Walkway to Garage

16th & 17th Floors

INKWELL Rooftop Bar & Outdoor Terrace

Club Lounge









INKWELL Rooftop Lounge (16th Floor - Exterior)









