



**Catawba
Regional**

**Comprehensive
Economic
Development
Strategy**

2017

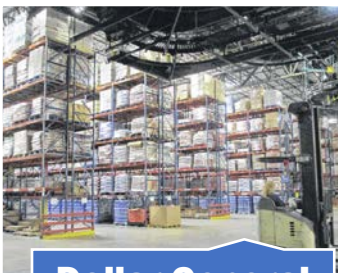


CEDS

Catawba Region

This document presents the most recent update to the Catawba Region's Comprehensive Economic Development Strategy (CEDS). The CEDS is a formalized planning process developed by the federal Economic Development Administration (US EDA) to promote an area-wide assessment of economic trends and infrastructure needs within multi-county districts such as the Catawba Region.

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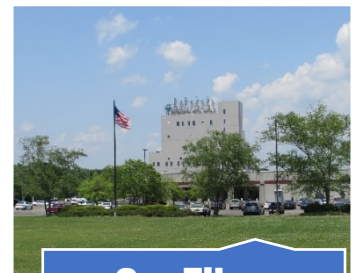
Dollar General
Union County



Red Ventures
Lancaster County



LPL Financial
York County



SunFiber
Chester County

INTRODUCTION

The Catawba Region is an area that encompasses the four South Carolina counties of Chester, Lancaster, Union, and York. Economic potential in this region is promising, due largely to the fact that location, existing development, labor force, educational institutions, and natural and cultural resources provide a sound foundation for economic growth. In order to take advantage of this potential and alleviate persistent problems with low-income levels and unstable employment patterns, a mutual effort is needed from both public and private sectors. Local governments working together through a coordinated economic district planning program is an important step in this direction.

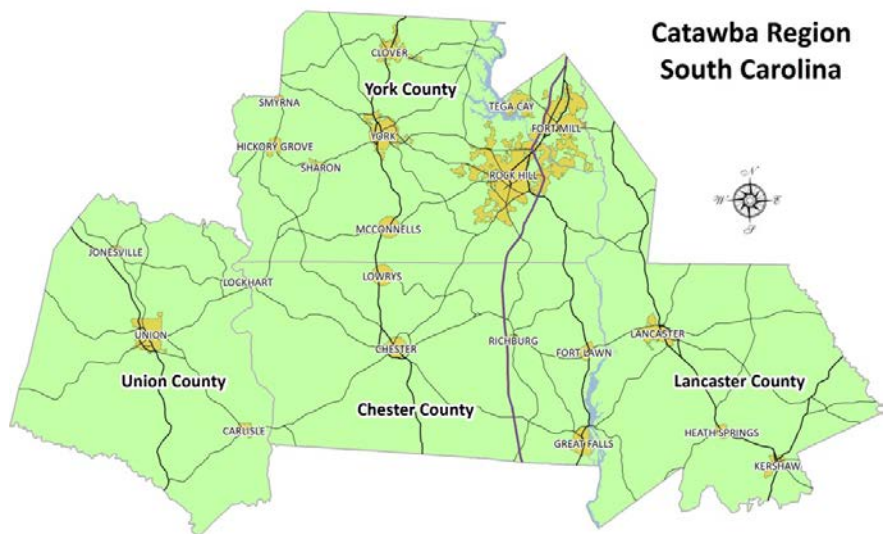
The Catawba Regional District Organization

The Catawba Regional Council of Governments (CRCOG) is one of ten regional councils in South Carolina. Established in 1971, the Council serves Chester, Lancaster, Union, and York counties.

Catawba Regional is a Council of Governments since more than half of its thirty-six member governing body consists of local government elected officials primarily from city and county councils. All Board members are appointed either by the respective county councils in accordance with a membership formula or, by the county legislative delegations. The Council is comprised of a 22 person professional staff with varied backgrounds in planning, economic and community development, and finance.

In 1976, the Catawba Regional Council of Governments was designated an Economic Development District by the federal Economic Development

Administration (EDA). Participation in this program has enabled local governments within the four counties to avail themselves of regional planning assistance for economic development as well as insuring access to EDA's grant assistance programs. These grant funds, in combination with other local, state, and federal financial resources, have helped this region develop a number of necessary facilities and infrastructure upon which current growth relies.



The Catawba Regional Council of Governments serves local governments and communities in many ways. Through use of the Council, local governments have an avenue to:

- Pool resources to support an organization with a professionally trained staff, thereby reducing the financial burden of maintaining permanent local staff or retaining consultants;
- Obtain and administer federal and state grants;
- Provide a forum through which to meet and exchange ideas;
- Promote economic development and community plans;
- Influence state and federal program funding decisions.

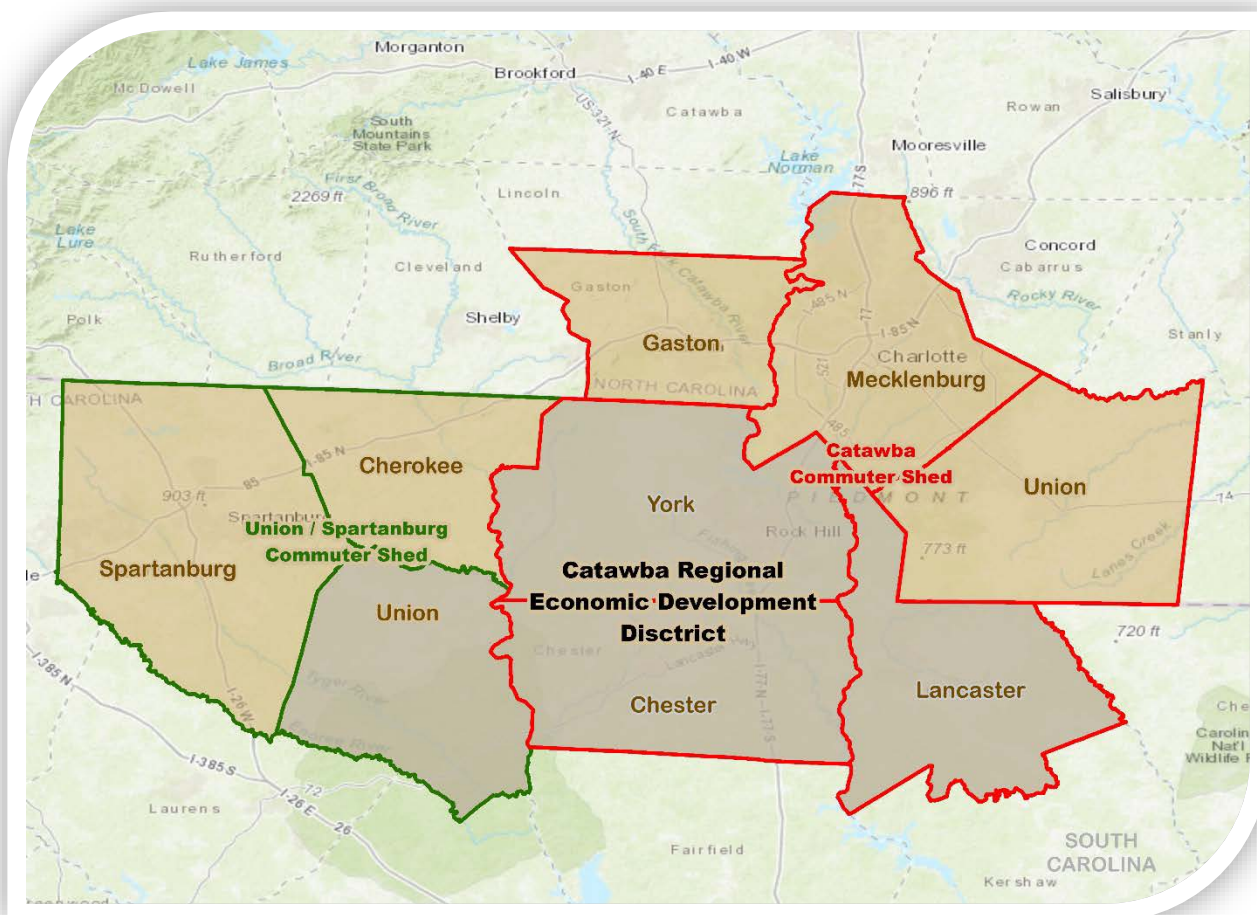
In 1983, the Council of Governments established an affiliated regional development corporation to help small businesses and industries access capital sources that are otherwise unavailable through conventional lenders. The Development Corporation utilizes the Small Business Administration's 504 Loan Program and the United States Department of Agriculture's Intermediary Relending Program to provide gap financing to business throughout the region. Additionally, the SC Department of Health and Environmental Control has contracted with Catawba Regional to be the state-wide fund manager for an Environmental Protection Agency funded Brownfield Cleanup Revolving Loan Program. Catawba Regional began a new SC Agribusiness Loan Fund (SC ALF) in late 2016 to loan funds to family farmers, agribusinesses, and aquaculture companies in 32 counties across the state. This fund augments a \$6.0 million EDA capitalized revolving loan fund that serves 26 counties of SC.

Catawba Regional Service Highlights

- Regional and Local Comprehensive Planning
- Community Development
- Workforce Innovation & Opportunity Act administration
- Grant Development and Administration
- Regional Census and Economic Data Clearinghouse
- Management, Technical Assistance, Information Dissemination, and Project Coordination
- Geographic Information System and FAA Certified UAV Drone services
- Recreation Planning
- Historic Preservation
- Transportation Planning
- Regional and Multi-state Cooperative Initiatives
- Environmental Assessment and Financing Initiatives



Economy of the District



The Catawba Region's Comprehensive Economic Development Strategy includes a wide range of demographic and socio-economic data paired with detailed analysis of the impact of the data presented; additionally the geographic scope of analysis includes counties outside the Catawba Region.

With an understanding that the economy of the Catawba Region District's four counties of Chester, Lancaster, Union and York is influenced by surrounding counties' economies, two additional regions and data sets are included in the scope of analysis:

- Union / Spartanburg Commuter Shed - includes the South Carolina counties of Union, Cherokee, and Spartanburg;
- Catawba Region Commuter Shed - includes the South Carolina counties within the Catawba Region and the North Carolina counties of Gaston, Mecklenburg, and Union.

Data Sources, Partners, and Analysis Strategy

In development of the Comprehensive Economic Development Strategy, Catawba Regional leveraged its ties to its four member counties, their economic development offices, as well as the numerous public and private state and federal data clearinghouses the Catawba District has built relationships with over the last several decades.

A sampling of the data sets include:

- U.S. Economic Development Administration
- U.S. Census Bureau
- U.S. Bureau of Labor and Statistics
- WISERTrade (import / exports)
- Bureau of Economic Analysis
- Bureau of Transportation Statistics
- STATS America
- ESRI Business Analyst
- Center for Economic Studies
- Harvard Business School
- County Business Patterns
- Integrated Postsecondary Education Data System
- O*Net (job skills)
- Informentum



Catawba Regional's intimate knowledge of the region's historical, existing and emerging economic development trends in conjunction with the District's diverse areas of expertise provide a unique platform for analysis of the regional socio-economic factors presented.



Industrial Inventory and Cluster Analysis

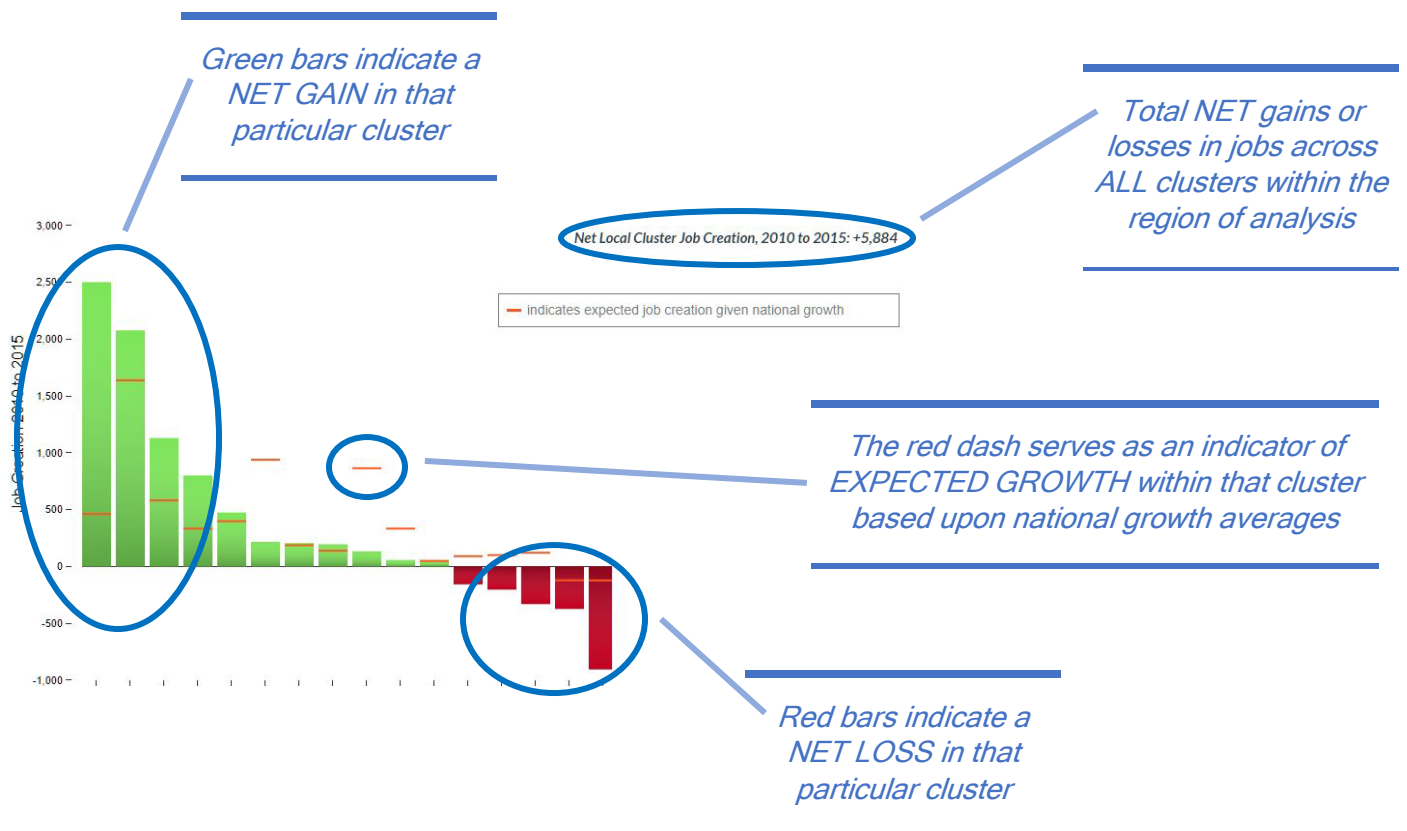
At the various geographies of analysis presented in the Economic Development Strategy, industries are clustered by NAICS codes. It is important to understand that NAICS codes are ***self reported*** by individual industries to the U.S. Census Bureau. At times this may mean that the code by which an industry identifies itself may not be intuitively associated with the employment center.

Additionally, clusters are broken out by two major reporting categories, traded and local:

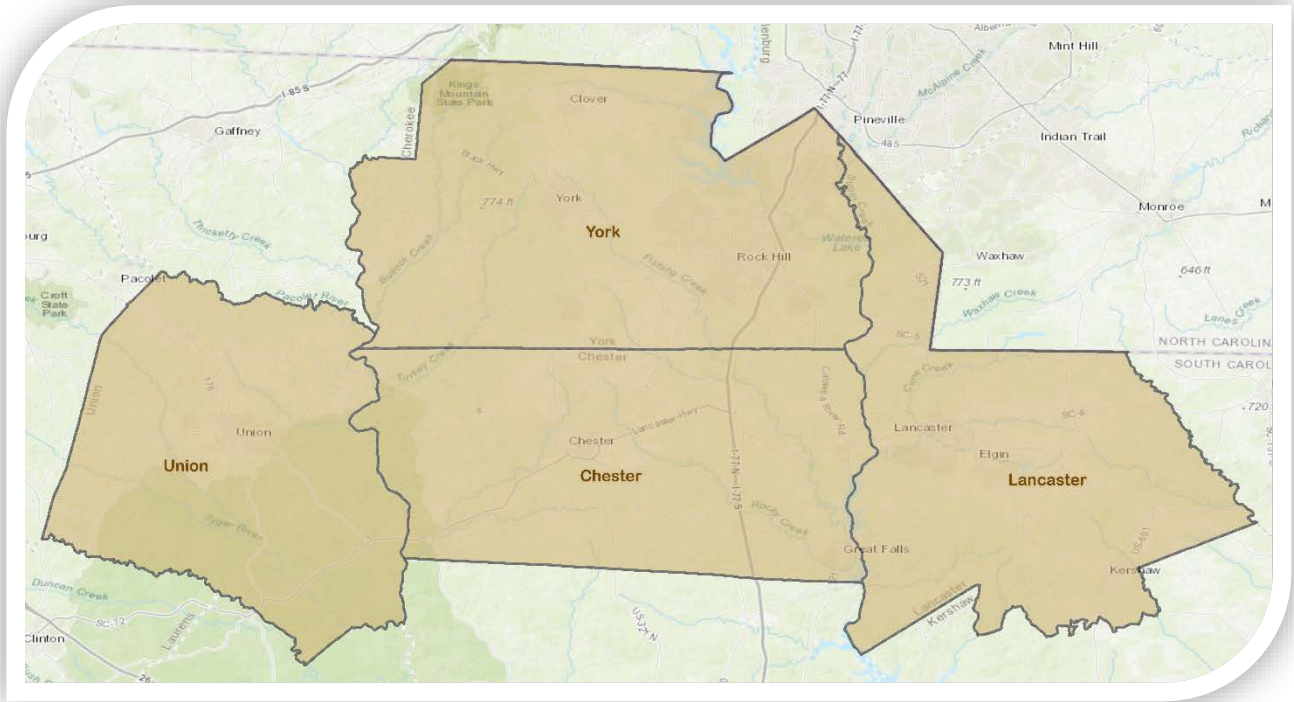
- **Local Clusters** - these are clusters of industries which typically provide goods and services that are created and either consumed or delivered ***within*** the region of analysis
- **Traded Clusters** - these are clusters of industries which typically export goods and services created within the region to be consumed or delivered ***outside*** the region

Please note that while we will look at both *Local Clusters* and *Traded Clusters* in *The Catawba Region* section of the strategy, for the purposes of presenting and analyzing the two commuter sheds we will only focus upon *Traded Clusters*. This is due to the fact that *Traded Cluster* industries tend to be larger in scale and typically provide broader income opportunity to which workers are willing to commute.

How to interpret Industry Cluster Charts



THE CATAWBA REGION



Population Growth

The Catawba Region experienced dynamic population growth between 2010 and 2015. A trend that continues on the region's 25.7% population increase between 2000 and 2010.

According to the U.S. Census Bureau, the population of the District increased from 365,901 persons in 2010 to 397,107 by 2015 representing a growth rate over the 5 year period of 8.5% with an annual rate of 1.69%, outpacing the United States average of 0.74%

for the same period. It is important to note, however, that growth has not been uniform across the region. A majority of growth experienced has been in the suburban / urban areas of York County and in the panhandle of Lancaster County while growth in the rural areas of Chester and Union counties has remained relatively flat.

The annual growth rate of 2.05% between 1998 and 2015 ranks the region in the top 5 percentile among similar large economic regions around the country.



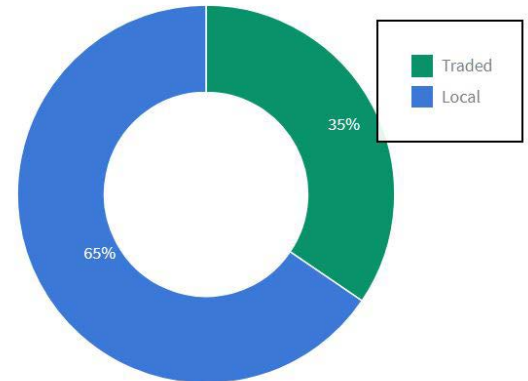
Industry Inventory and Analysis - Catawba District: Local Clusters

Throughout the Catawba Economic Development District, approximately 65% of the working population are employed within clusters classified as “Local.”

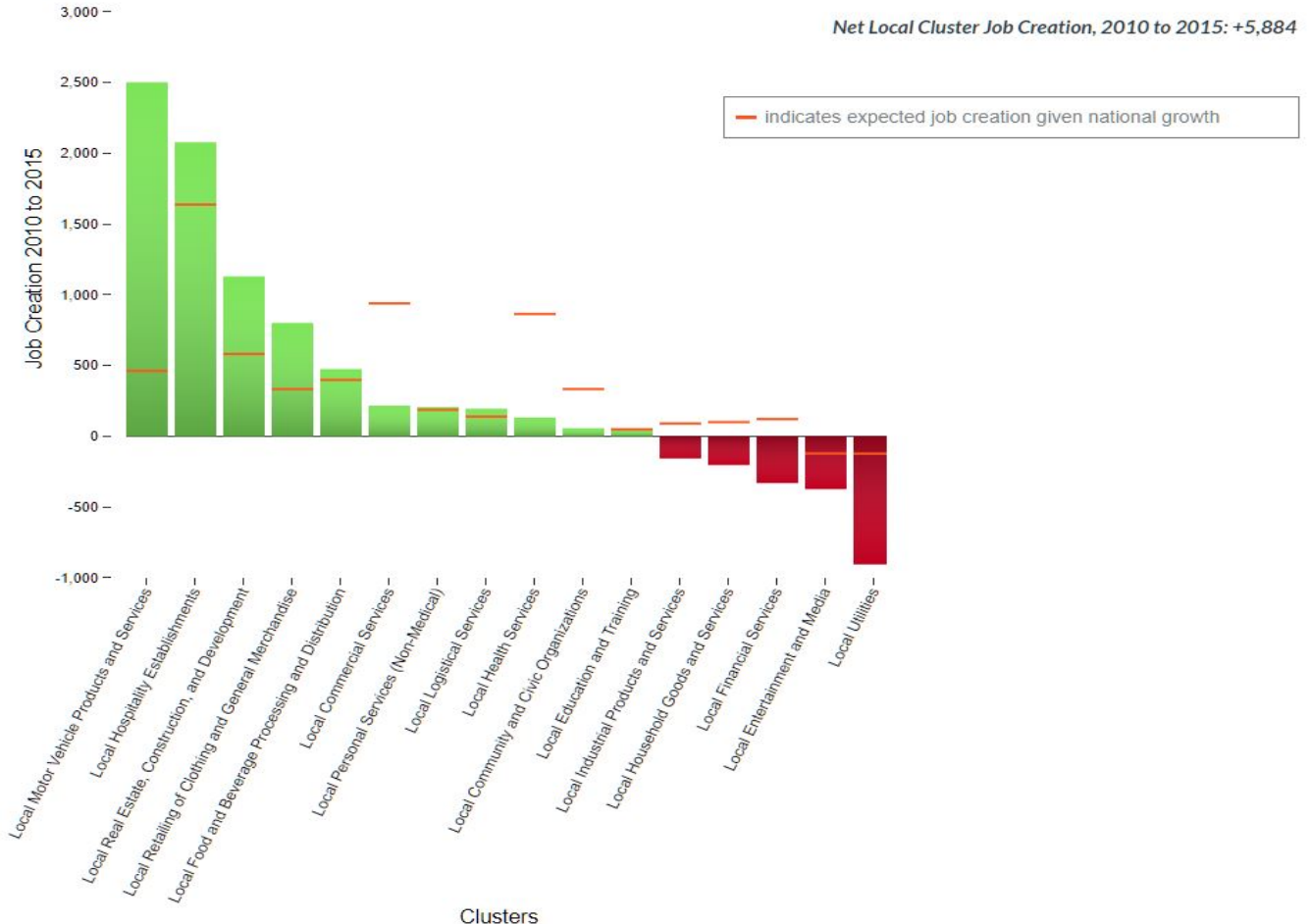
The most significant job creation within these Local Clusters between 2010 and 2015 were *Local Motor Vehicle Products and Services*, which added 2,503 jobs for a total employment of 6,247. This cluster includes automotive parts wholesaling and retailing as well as automobile service and repair centers.

Immediately following *Local Motor Vehicle Products and Services* are *Local Hospitality Establishments*, which added 2,079 jobs for a total employment of 11,907, and *Local Real Estate, Construction, and Development*, which added 1,131 jobs for a total employment of 7,284. The primary driving forces behind the growth in both of these clusters are increased population and tourism within the Rock Hill / Fort Mill area of York County and the Indian Land area of Lancaster County.

Traded vs. Local Clusters



Job Creation by Local Cluster, 2010-2015
Private Employment, Absolute Job Gains

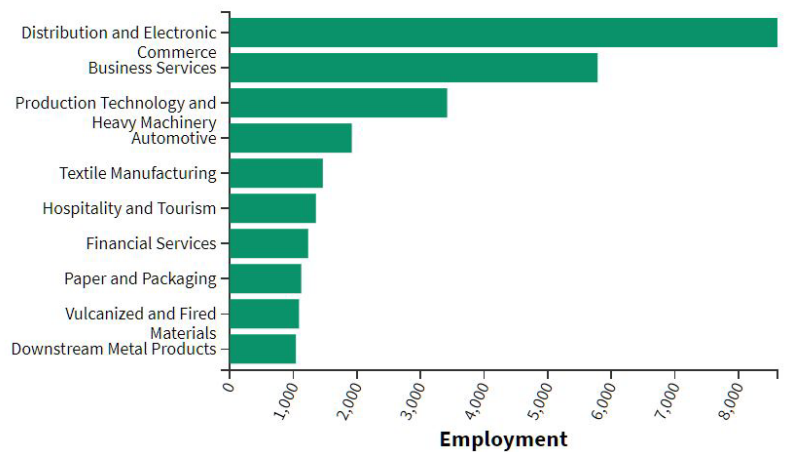


Industry Inventory and Analysis - Catawba District: Traded Clusters

The Traded Clusters within the Catawba District with the highest 2015 employment numbers in excess of 2,000 were *Distribution and Electronic Commerce*, *Business Services*, *Production Technology and Heavy Machinery*, and *Automotive*.

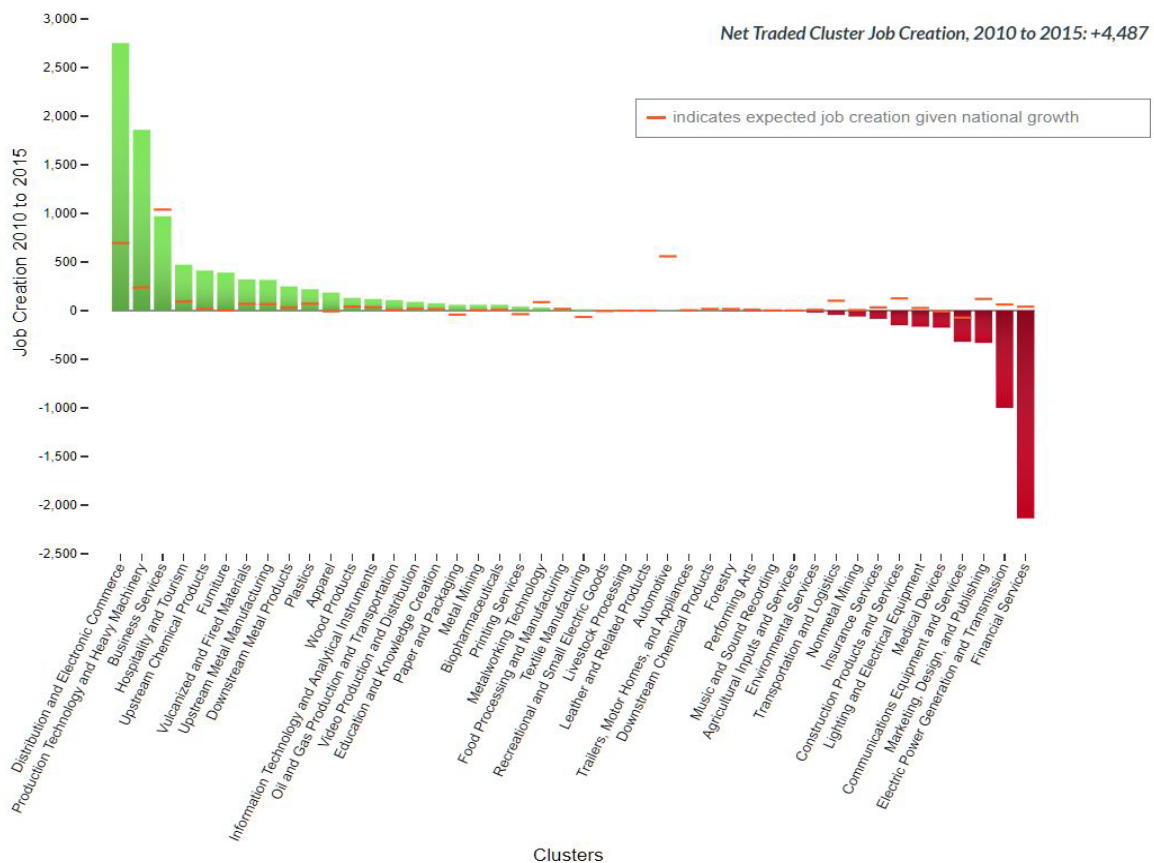
Within these, significant growth can be seen between 2010 and 2015 in all of these clusters with the exception of *Automotive*, which has remained flat during this period.

Top Clusters by Employment



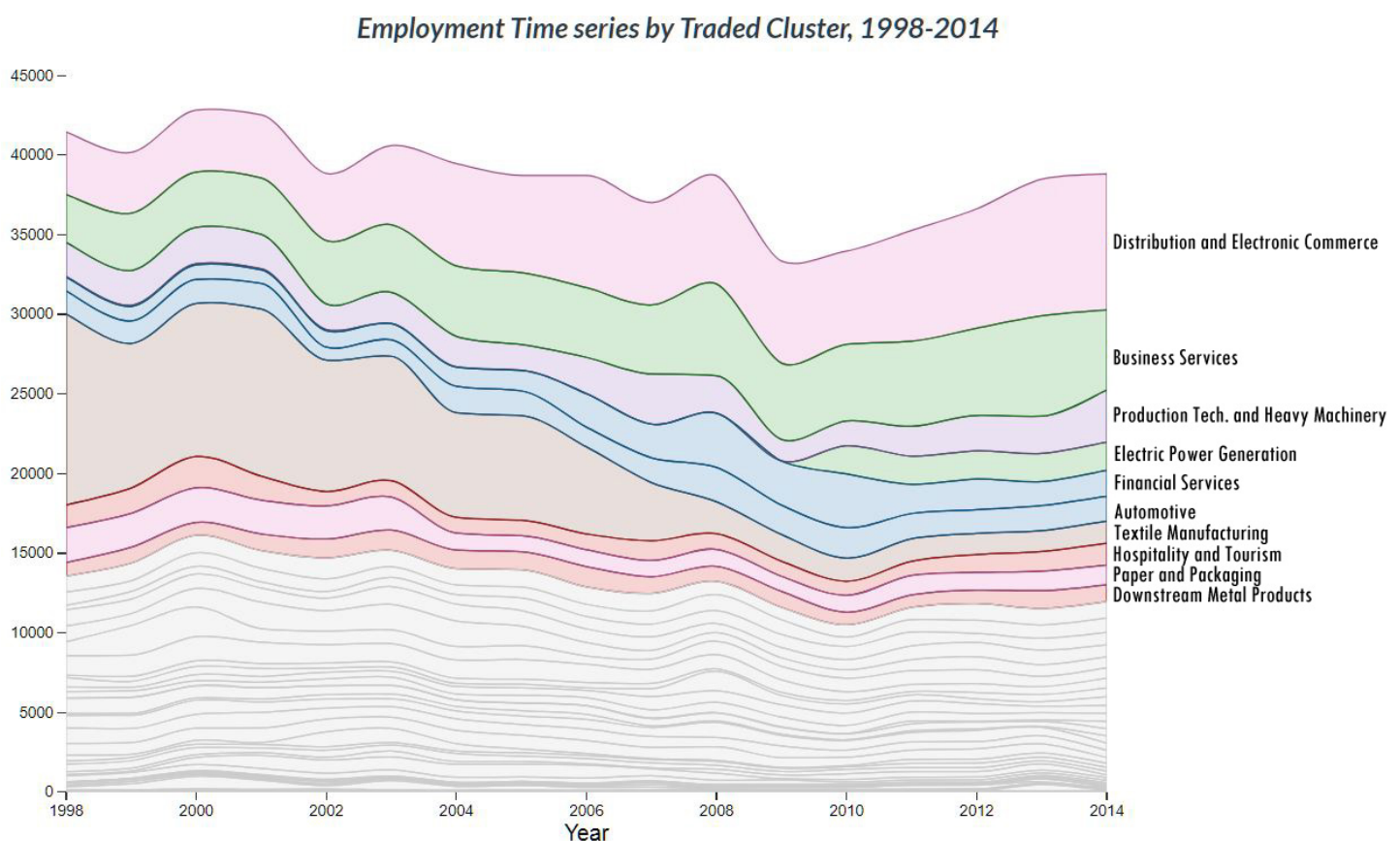
Distribution and Electronic Commerce created 2,752 jobs during the five year period, *Business Services* added 971 jobs, and *Production Technology and Heavy Machinery* added 1,860. Major areas of loss during this time include *Financial Services*, *Electric Power Generation*, and *Marketing, Design, and Publishing*. However, the District should see a reversal of losses in the *Financial Services* cluster as LPL Financial, located in Fort Mill, moves to full capacity with approximately 2,500 jobs within the cluster.

Job Creation by Traded Cluster, 2010-2015 Private Employment, Absolute Job Gains



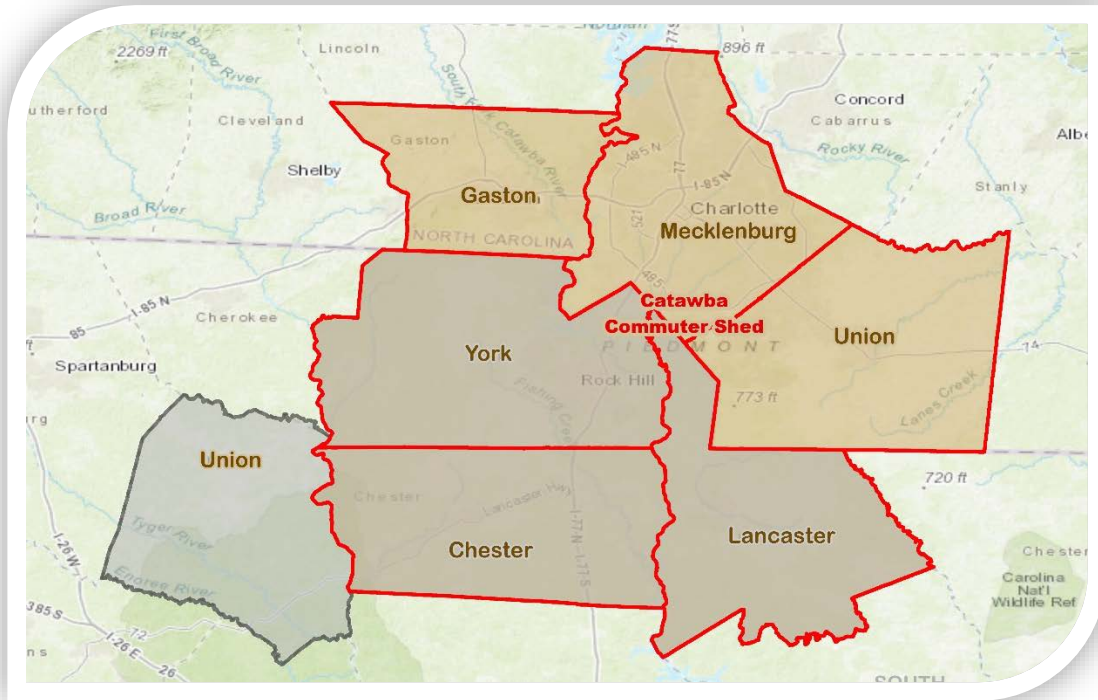
Between 1998 and 2014, employment within most of the major *Traded Clusters* within the district tended to track with overall employment trends during this same period showing a major decline between 2008 and 2009 at the apex of the great recession and a slow recovery between 2009 and 2014.

Notable exceptions include the relatively rapid transition away from *Textile Manufacturing*, which is illustrated by the dramatic downturn within that cluster between 1998 and 2010. *Electric Power Generation and Transmission*, emerged as a major *Traded Cluster* around 2009 and remained relatively flat between 2009 and 2014. It should be noted, however, that Duke Energy, the most significant employer in this cluster, implemented a cost cutting measure in 2015 that eliminated approximately 900 jobs that is not represented below but may, however, be noted in the preceding *Job Creation by Traded Cluster* illustration.



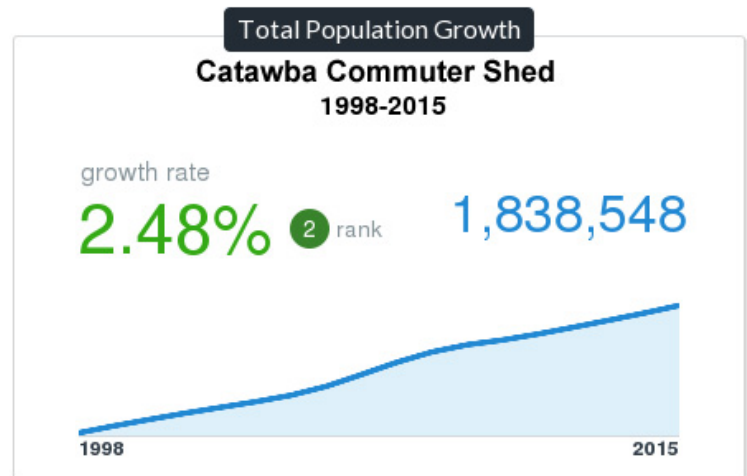
While the massive loss of the long held and regionally significant *Textile Manufacturing* jobs is still being felt today, growth in major clusters such as *Distribution and Electronic Commerce*, *Production Technology and Heavy Machinery*, and *Business Services* has led to a more diverse and evenly distributed employment pool within the Catawba Region District. Additionally, the significant downturn in *Textile Manufacturing* has begun to stabilize as investments in manufacturing facilities such as Keer in Lancaster County and Sunfiber in Chester County have retained total employment for the cluster within the district to 1,464. It should be noted, however, that by 2014, overall jobs within *Traded Clusters* remained below total *Traded Cluster* employment levels of approximately 43,000 jobs in 2000.

THE CATAWBA COMMUTER SHED



Population Growth

The Catawba Commuter Shed, consisting of the three South Carolina counties of Chester, Lancaster, and York along with the three North Carolina counties of Gaston, Mecklenburg, and Union, experienced even more substantial population growth between 2010 and 2015 than the Catawba Region Economic Development District.



According to the U.S. Census Bureau, the population of the Catawba Commuter Shed increased from 1,698,109 persons in 2010 to 1,838,548 by 2015, representing a growth rate over the 5 year period of 8.3% with an annual rate of 1.6 %, outpacing the United States average of 0.74% for the same period.

The annual growth rate of 2.48% between 1998 and 2015 ranks the commuter shed in the top 2 percentile among similar large economic regions around the country including the Jacksonville, FL, Raleigh, NC, and Greenville, SC economic areas.

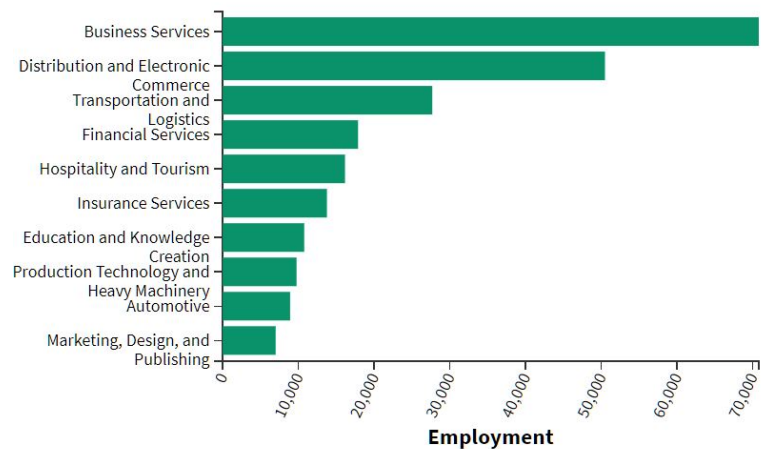
Industry Inventory and Analysis - Catawba Commuter Shed: Traded Clusters

The Traded Clusters within the Catawba Commuter Shed with the highest 2015 employment numbers in excess of 25,000 were *Business Services*, *Distribution and Electronic Commerce*, and *Transportation and Logistics*.

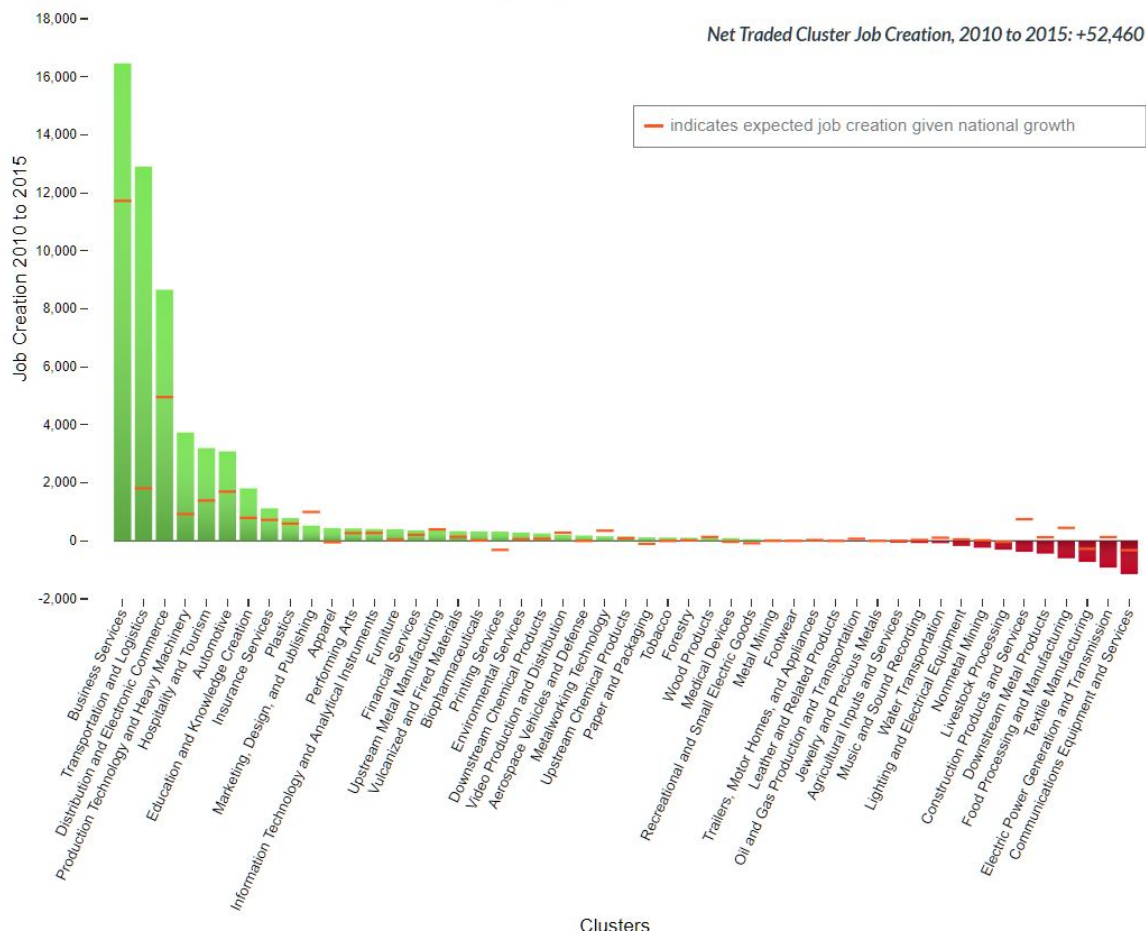
Within all three of these clusters, significant growth can be seen between 2010 and 2015.

Business Services, which includes headquarters, engineering, and business support services, created 16,463 jobs during the five year period, *Transportation and Logistics* added 12,905 jobs, and *Distribution and Electronic Commerce* added 8,657. Areas of loss during this time include *Communications Equipment and Services*, *Electric Power Generation and Transmission*, and *Textile Manufacturing*. It should be noted, however, that losses were offset by a net creation of 52,460 jobs.

Top Clusters by Employment



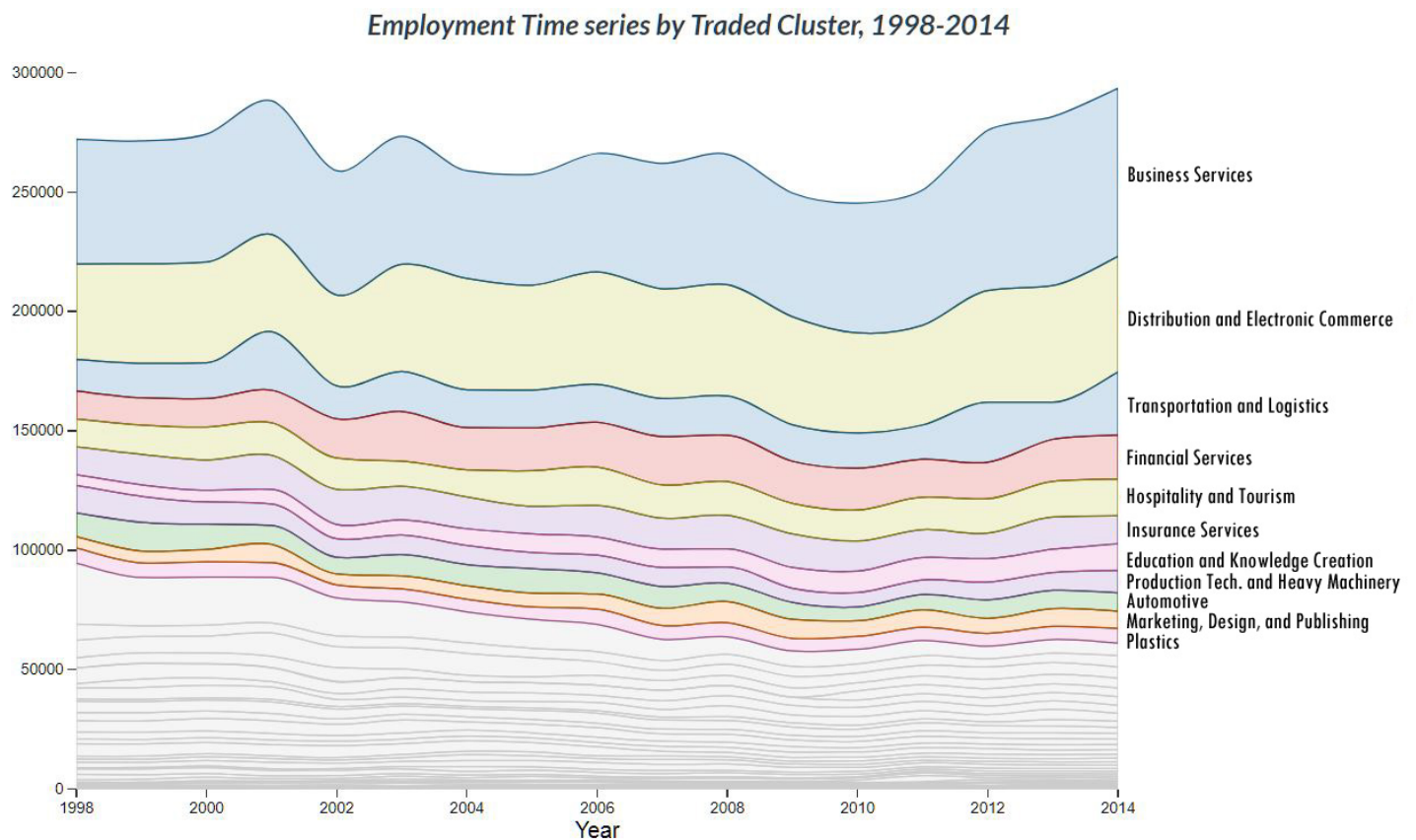
Job Creation by Traded Cluster, 2010-2015 Private Employment, Absolute Job Gains



Between 1998 and 2014, employment within several of the major *Traded Clusters* within the commuter shed tracked with overall employment trends during this same period showing a decline between 2008 and 2009 at the apex of the great recession and a slow recovery or flat growth between 2009 and 2014.

As underscored in the prior job creation section, clusters that recovered more rapidly and / or have seen significant growth since 2011 include *Business Services*, *Distribution and Electronic Commerce*, and *Transportation and Logistics*.

Business Services, *Distribution and Electronic Commerce*, and *Transportation and Logistics*, have notably not only recovered but have exceeded pre-recession employment totals in these clusters.

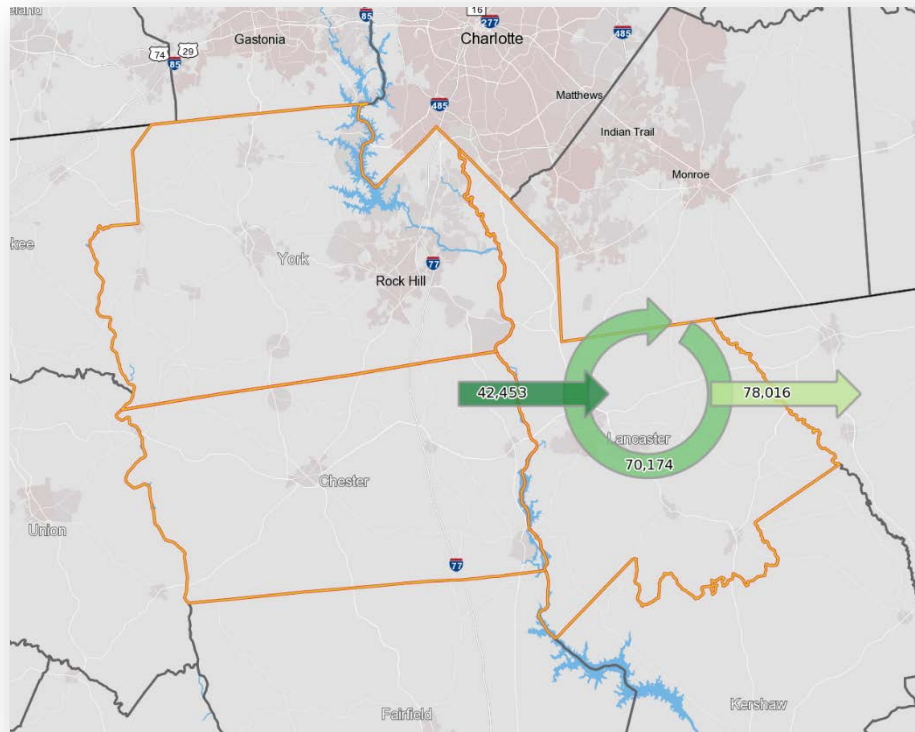


Total employment among all traded clusters within the commuter shed has returned to levels seen in year 2000 of approximately 275,000 jobs primarily led by growth in the previously mentioned clusters.



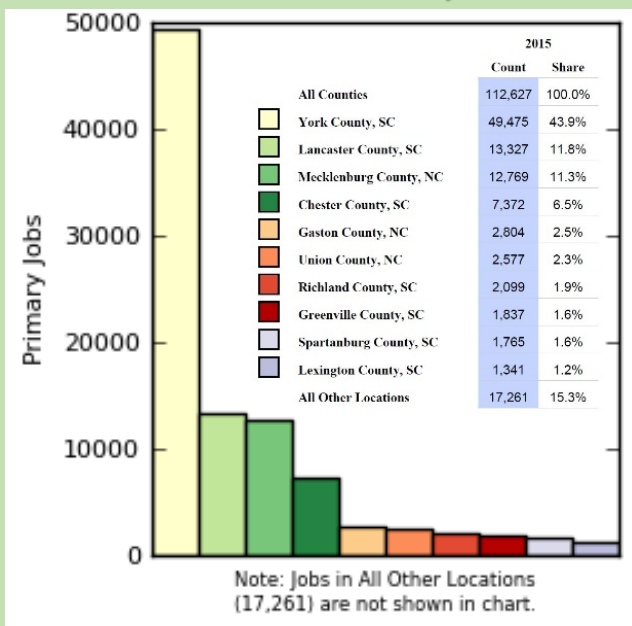
Commuter Patterns - Catawba Commuter Shed

For the purposes of determining commuter patterns within the Catawba Commuter Shed, two factors were explored: where individuals living in the three Catawba Regional Economic Development District counties that are part of the commuter shed work, and, conversely, where individuals working within the three district counties that are a part of the commuter shed live.

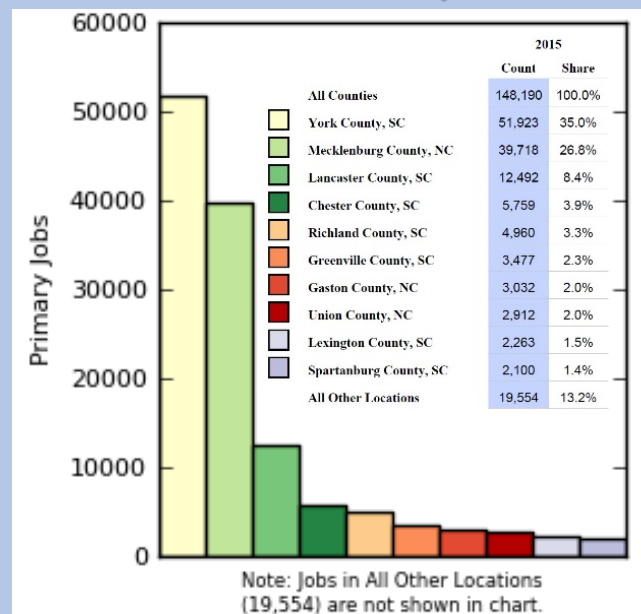


For those individuals living or working within the counties of York, Chester, and Lancaster in 2015, there were 70,174 individuals who both worked and lived within those SC counties, 78,016 who lived in York, Chester, or Lancaster County and commuted out for their primary job, and 42,453 who lived outside these counties yet commuted in for their primary job.

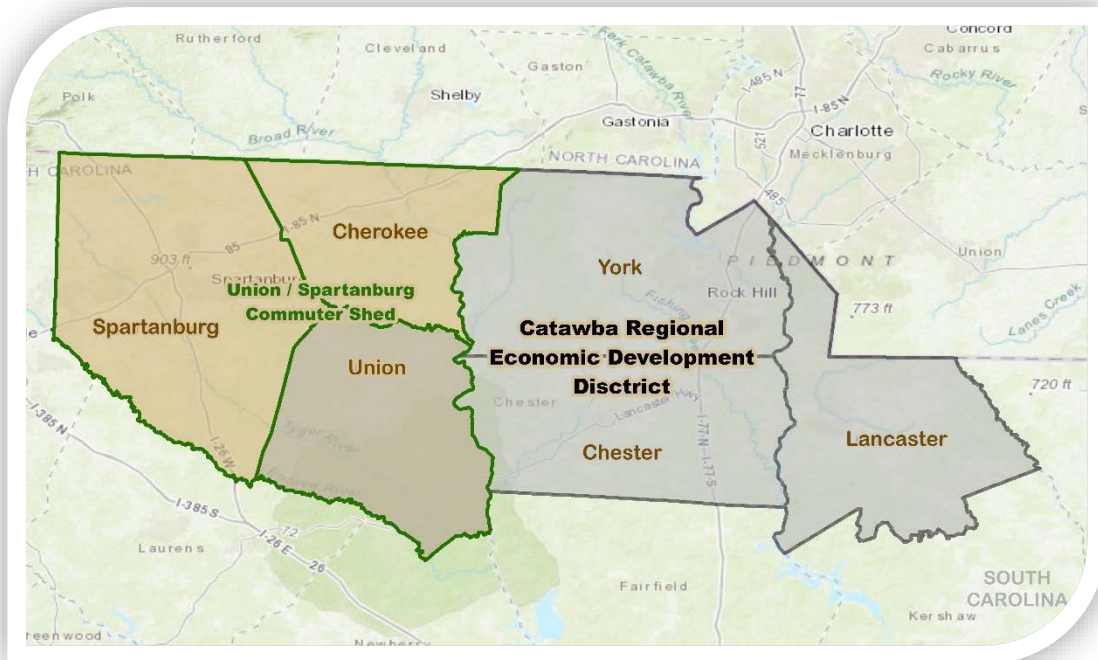
Where those working within Chester, Lancaster, and York County, SC live



Where those living within Chester, Lancaster, and York County, SC work



THE UNION / SPARTANBURG COMMUTER SHED



Population Growth

The Union / Spartanburg Commuter Shed, consisting of the three South Carolina counties of Union, Cherokee, and Spartanburg experienced moderate population growth between 2010 and 2015.

According to the U.S. Census Bureau, the population of the Union / Spartanburg Commuter Shed increased from 369,211 persons in 2010 to 381,273 by 2015 representing a growth rate over the 5 year period of 3.3% with an annual rate of 0.65%, which fell short of the United States average of 0.74% for the same period.

The annual growth rate of 0.85% between 1998 and 2015 ranks the commuter shed in the top 40 percentile among similar large economic regions around the country including the Jacksonville, FL, Raleigh, NC, and Greenville, SC economic areas.

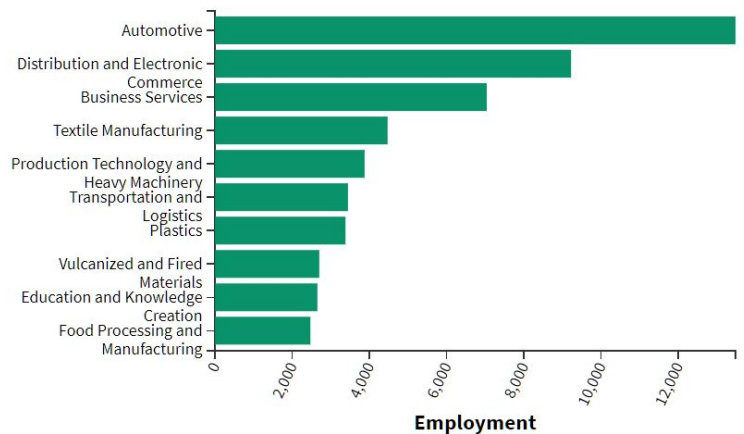


Industry Inventory and Analysis - Union / Spartanburg Commuter Shed: Traded Clusters

The Traded Clusters within the Union / Spartanburg Commuter Shed with the highest 2015 employment numbers in excess of 5,000 were *Automotive*, *Distribution and Electronic Commerce*, and *Business Services*.

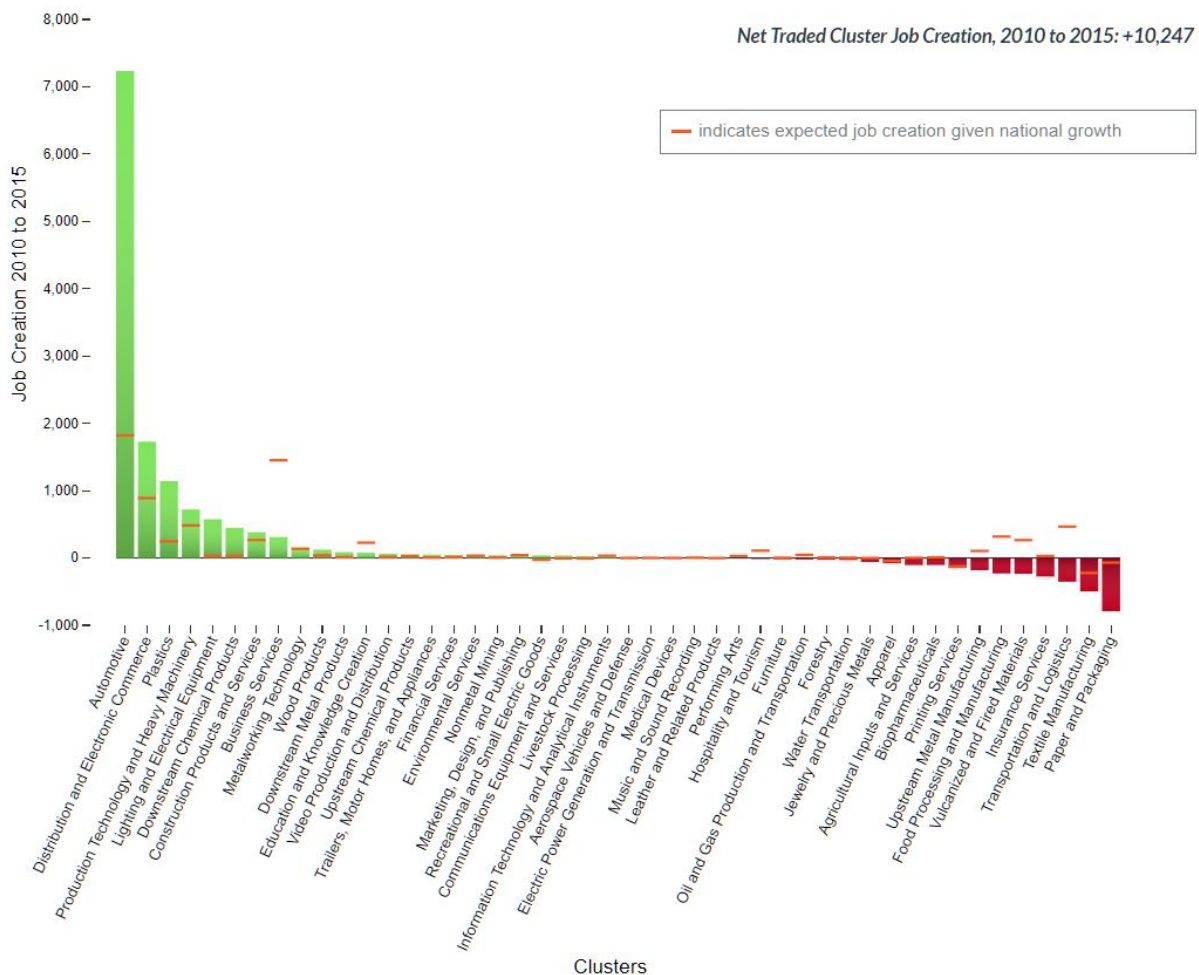
Within these, extraordinary growth can be seen between 2010 and 2015 in the *Automotive* cluster and significant growth with *Distribution and Electronic Commerce*.

Top Clusters by Employment



Automotive created 7,236 jobs during the five year period primarily driven by BMW and its supporting industries, *Distribution and Electronic Commerce* added 1,727, while *Business Services* added 310. Areas of loss during this time include *Paper and Packaging*, *Textile Manufacturing*, and *Transportation and Logistics*. It should be noted, however, that losses were offset by a net creation of 10,247 jobs between 2010 and 2015.

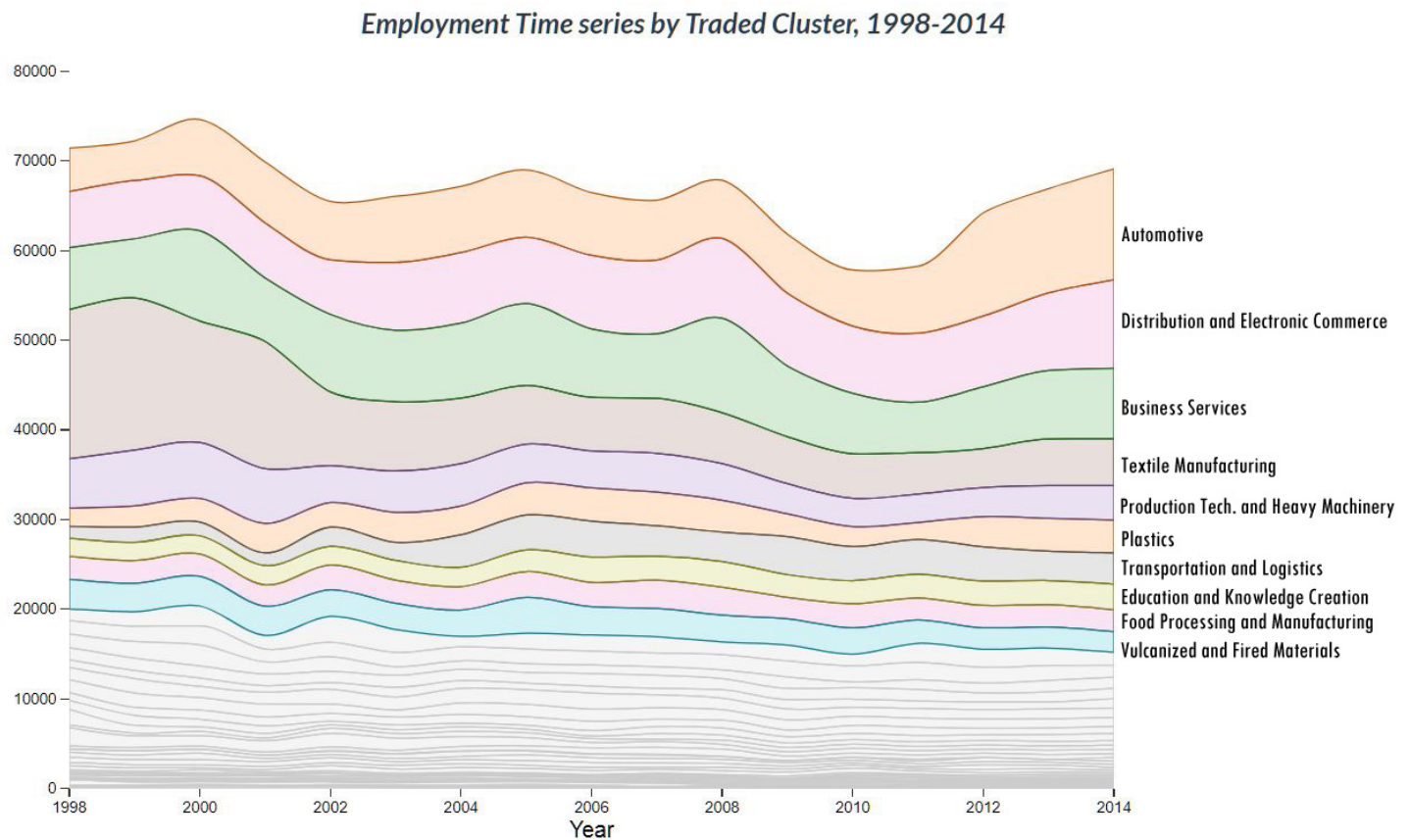
Job Creation by Traded Cluster, 2010-2015
Private Employment, Absolute Job Gains



Following a rapid decline in *Textile Manufacturing* between 1998 and 2002, employment within several of the major *Traded Clusters* within the commuter shed tracked with overall employment trends during this same period showing a sharp decline between 2008 and 2010 following the great recession and a slow recovery or flat growth between 2009 and 2014.

A notable cluster during this period of recession and recovery is the *Automotive* cluster. *Automotive* saw a sharp decline between 2008 and 2011 but has seen a rapid recovery between 2011 and 2014 as illustrated below. As underscored in the prior job creation section, the *Automotive* cluster continued its recovery through 2015 as BMW continued to expand, adding approximately 1,100 jobs in that year.

Distribution and Electronic Commerce has steadily rebounded, although has not fully recovered to pre-recession job levels.



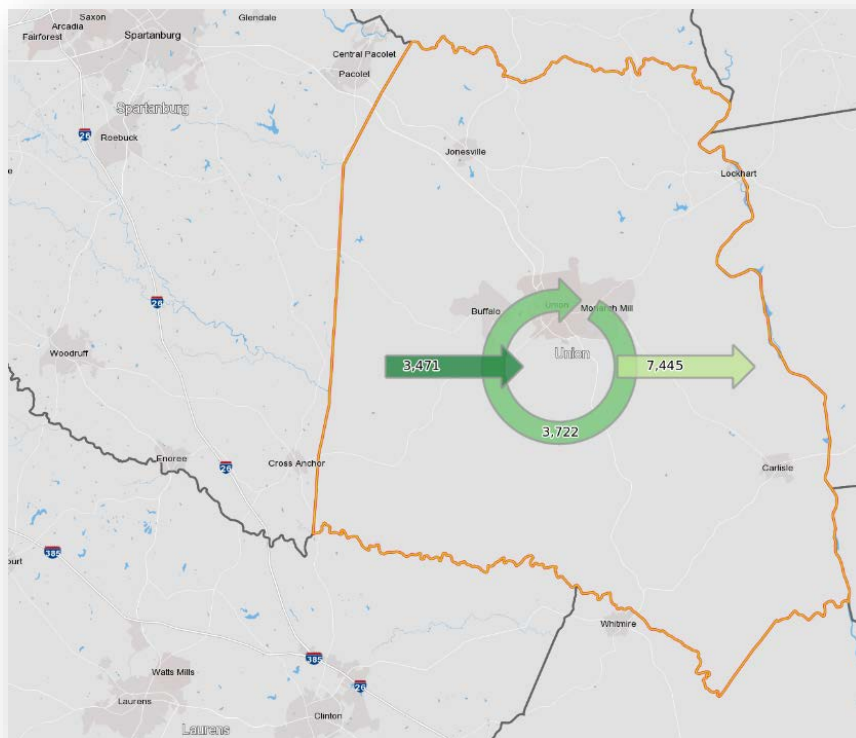
Total employment among all traded clusters within the commuter shed has not returned to levels seen in year 2000 of approximately 75,000 jobs. However, continued growth in 2015 within *Automotive* and *Distribution and Electronic Commerce* in particular point toward continued overall recovery and return to 2000 levels with a more diverse overall economy as the commuter shed moves away from *Textile Manufacturing* as a major employment base.

Commuter Patterns - Union / Spartanburg Commuter Shed

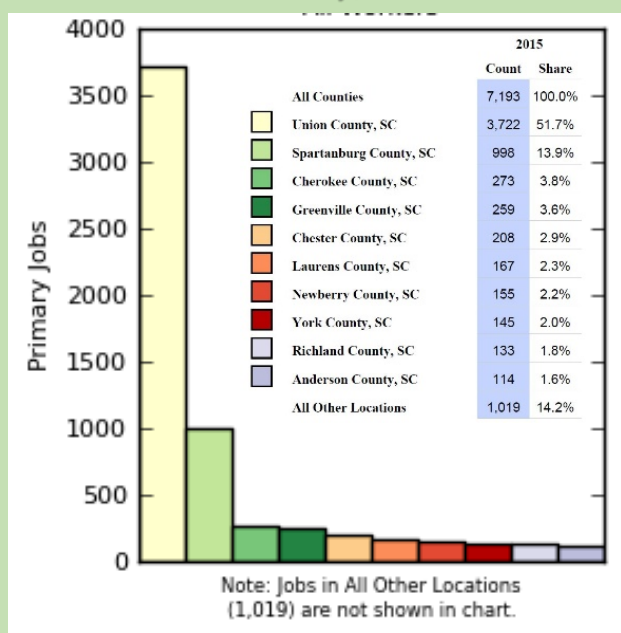
Union County, SC is the only county within the Catawba Regional Development District that falls within the Union / Spartanburg Commuter Shed.

For the purposes of determining commuter patterns within the Union / Spartanburg Commuter Shed, two factors were explored: where individuals living in Union County work, and, conversely, where individuals working in Union County live.

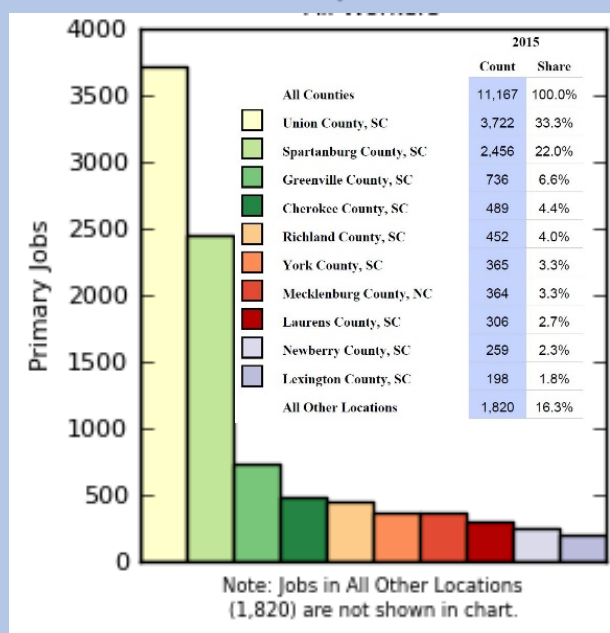
For those individuals living or working within Union County in 2015, there were 3,722 individuals who both worked and lived within the district, 7,445 who lived in the district and commuted out for their primary job, and 3,471 who lived outside the district yet commuted in for their primary job.



Where those working within Union County, SC live



Where those living within Union County, SC work



SWOT Analysis

The Catawba Region Economic Development District comprises two distinct geographies, each with its own strengths and challenges. These distinctive sectors include vibrantly growing and urbanizing areas, such as Rock Hill / Fort Mill within York County and northern Indian Land within Lancaster County coupled with historically rural agricultural areas such as Union and Chester Counties. In recent years, there have also emerged areas of transition such as the Richburg / I-77 Exit 65 area of Chester County, the Indian Land HWY521 area of Lancaster County, and the US HWY176 corridor in Union County. These areas have begun to transform and grow as major industries, such as GiTi Tire in Richburg have developed. This transition highlights the need to proactively and strategically plan at the local and regional level to leverage strengths and opportunities and address weaknesses and threats.

Strengths

- Uniquely geographically positioned between Charlotte, NC, Columbia, SC, and Greenville, SC
- Transportation Network
- Major existing Industries / Corporate Operations
- South Carolina I-77 Alliance
- Local Economic Development operations

Weaknesses

- Education / Workforce skills in rural areas of district
- Lack of Industrial Spec Buildings
- Shrinking Industrial site inventory
- Lack of industrial diversity within rural areas of District
- Workforce housing deficit in portions of the region

Opportunities

- Marketing of Region
- Leveraging impact of major industrial development
- Education and Workforce Development
- Proactive planning for growth and development
- Further partnering with EDA throughout the region

Threats

- Not planning for growth
- Air and water quality
- Sustaining ROI
- Potential downturn in consistent and ongoing funding to assist in regional economic development endeavors
- Not focusing on diverse needs of region: rural -vs- urban

Plan of Action

Areas of Transition and Future Growth Potential

The economic landscape in the Catawba Region continues a transformation that began three decades ago with the beginning of the decline of the textile industry. While manufacturing continues to be a major employer in the region, the impact of a global economy is reshaping economic expansion. The days of low-skilled, labor-intensive manufacturing are largely over as that type of industry has moved offshore or technology has

automated processes and production. What remains is a growing manufacturing base that is greatly automated and requires a technically trained, highly skilled local workforce.



While large scale manufacturing operations continue to locate regionally, much of the new manufacturing is anticipated to be smaller entrepreneurial firms that will require a computer literate, technically trained workforce, along with access to capital. Other sectors that will drive where future



economic expansion takes place include major distribution facilities, information-based support technologies and marketing services, and research and development facilities.

The Catawba Region has many of the necessary pieces to encourage and accommodate future economic growth. The region will need to pay particular attention to certain factors

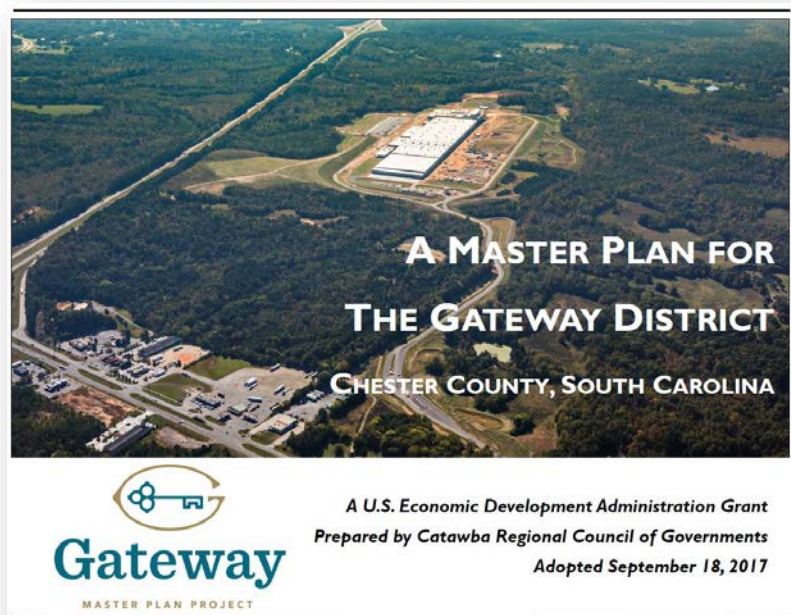
such as making sure worker retraining programs are targeting skills relevant to current and future employer needs, maintaining necessary public infrastructure to support growth, increasing the quality of the local educational system particularly in rural areas, preserving the natural environment, and expanding cultural opportunities.

It is noteworthy that EDA grants funded key capital improvement projects in all four of the region's counties and have helped to offset the continuing loss of the regions textile related manufacturing jobs. The Catawba Regional Council of Governments has effectively layered multiple funding sources, including EDA, CDBG, SC Rural Infrastructure Authority, etc. to facilitate economic development and infrastructure improvements throughout the region.

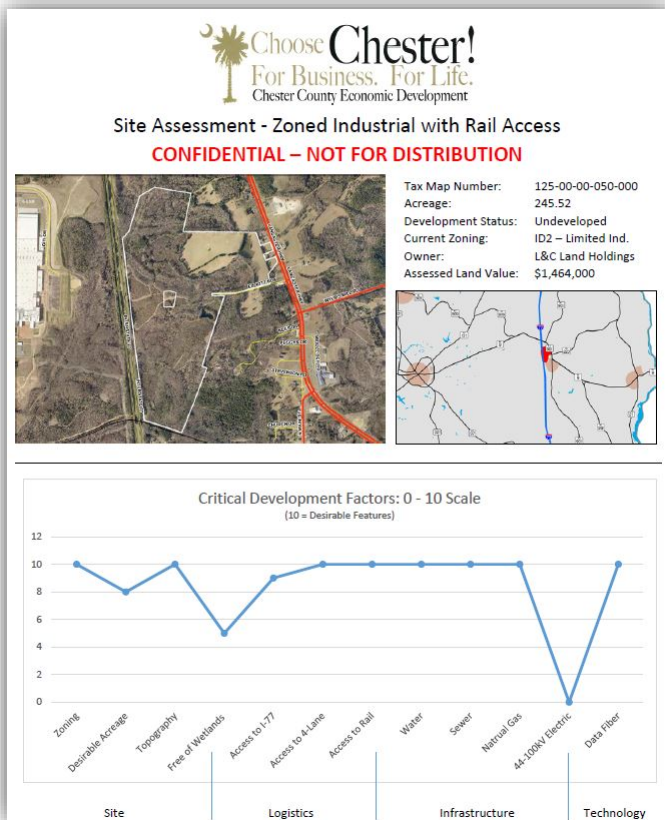
Planning for the Future and Resiliency

While areas of the Economic Development District have flourished for quite some time, several of the more traditionally rural areas of the region have recently experienced rapid growth while others are at the genesis of growth.

Through the cooperative efforts of local government, local economic development organizations, the Catawba Regional Council of Governments, and the U.S. Economic Development Administration, the practice of proactively planning for future growth has accelerated in recent years throughout the region.



Through these planning efforts, growth may be guided and managed at the local level in an effort to ensure conducive, diverse and sustainable economies in these emerging areas. Planning efforts are built upon substantial private and public input combined with traditional planning principles and advanced GIS modeling. These efforts, coupled with regional hazard mitigation planning, have an eye towards guiding growth, insuring infrastructure and service delivery pressures and threats are addressed, and economic development diversity is encouraged in an effort to create a resilient economy in which to work and live.

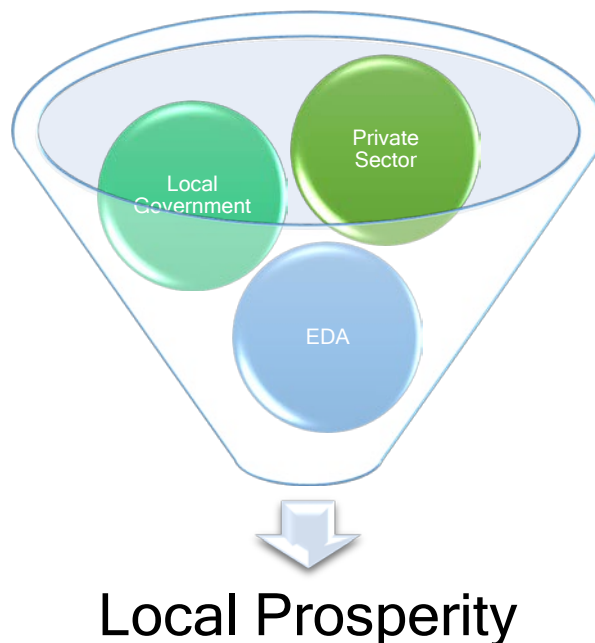


While many of these planning projects would normally be cost prohibitive for smaller jurisdictions, the Catawba Regional Economic Development District has been able to leverage its ties to state, federal, and local public and private entities to lessen the burden on local government. This often times yields a cost-sharing model consisting of private economic development groups, EDA grants, and local money. This practice not only reduces the financial burden for the local government but also encourages participation and input on the project from both public and private sector alike.

The Master Plan for the Gateway District and Industrial Site Assessment for Chester County were two recent projects funded in this manner that were specifically designed to guide growth and insure a

resilient and diverse local economy. Both of these projects were funded through a partnership between EDA, Chester County, and the Chester County Development Association, a private economic development group consisting of major industrial, financial, business, land owners, and utility providers in Chester County.

Counties throughout the Economic Development District have expressed interest in similar work as they too identify and respond to growth pressures and look to market and develop more diverse areas across the region.



Addressing the Needs of the District

In an effort to continue meeting the economic development needs of the district, the Catawba Regional Economic Development District will continue to focus upon building relationships to bridge economic funding and planning needs throughout the district.

Promote Diverse Job Creation and Lowering Unemployment

- **Promote and participate in local planning efforts aimed at job creation and retention**
- **Assist expanding and upgrading local infrastructure critical to industrial development**
- **Participating in the financing of new and expansion of existing businesses and agribusinesses**
- **Serve as the convener of public / private partnerships to promote coordinated strategies and secure state and federal grant funds**
- **Sponsor job training and retention programs through the federal WIOA program**
- **Assist local government with increasing the quality of life through proactive planning**

Assist Local Governments in their Industrial Recruitment Efforts

- **Continue encouraging and brokering public / private partnerships in economic development efforts throughout the district**
- **Undertake special economic research and development studies**
- **Educate local governments on available assistance through the Catawba Regional Council of Governments and the Catawba Regional Development Corporation**

Assist State and Local Governments with Air and Water Quality Preservation

- **Continue to work with SC DHEC through the Catawba Regional Air Quality Coalition**
- **Participate in local and regional transportation and blueway planning efforts**
- **Support local planning and economic development programs through technical assistance and direct support of local planning staff**
- **Continue statewide Brownfields assessment, cleanup, and redevelopment efforts**

Regional planning and assistance efforts do not happen in a vacuum. Effective and implementable economic development planning and assistance only takes place when major stakeholders related to the economic vitality of the region are convened in an effort to address existing needs and future requirements.

Catawba Regional is in the unique position to convene the stakeholders necessary to implement successful planning, funding, and development efforts. Through relationships built over the past 50 years within the region and across the state, Catawba is capable of bringing the necessary public and private stakeholders to the table to successfully catalyze efforts throughout the diverse district.



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Catawba Regional Council of Governments



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