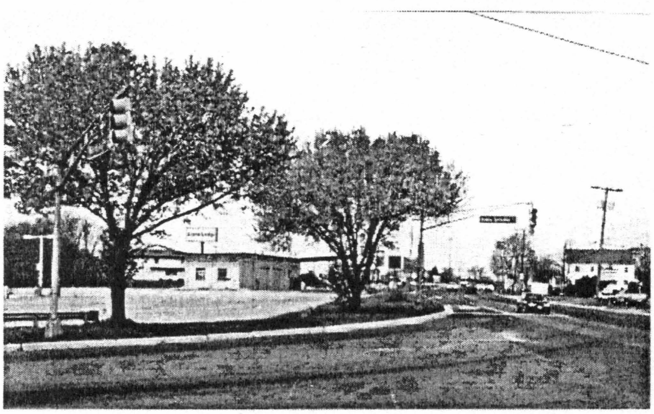
Pinelands
Rural Economic Development
Pilot Program



BUENA VISTA TOWNSHIP

ECONOMIC DEVELOPMENT STRATEGY

Final Report

Whiteman & Taintor

February 2000

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INTRODUCTION

This report for Buena Vista Township is a product of a larger regional economic development effort sponsored by the New Jersey Pinelands Commission. This effort, the Pinelands Rural Economic Development Pilot Program, is intended to explore how the smaller, rural communities of the Pinelands can bolster their local economies within the regional management framework of the Pinelands Act.

The analysis performed for Buena Vista is intended to produce both a short and a long-term economic development path for the Township. The short-term strategy will focus on the funding, regulations and other tools needed to make decisions regarding the development of the Route 40 Pinelands Town District lying just southeast of the Route 40 and Route 54 intersection. This area has the needed zoning, but does not have wastewater service. The lack of this service in the township has contributed to the relocation of one major employer and the potential uprooting of another employer, Wilmad Glass. The wastewater needs of these long standing local industrial businesses led the community to explore the need to provide sewer service along this corridor.

The longer term, and more general, strategy flowing from this effort will be one of defining the types of land uses that the Township wishes to encourage along this corridor and the general role that the study area should play in the life of the community. This strategy is designed to mesh with broader economic development efforts undertaken by the Township, the County, and other regional entities such as Atlantic County Economic Development Corporation 2000 and the South Jersey Economic Development District.

ECONOMIC DEVELOPMENT OBJECTIVES

Why is it that rural communities want and need more economic development? Typically, communities will seek economic development for the resulting property tax revenues, sales tax revenues (in jurisdictions allowing such taxes), a greater diversity of local job opportunities, and community character improvements (e.g., downtown revitalization.).

In the case of Buena Vista, the impetus for creating the Pinelands Town Zone along Route 40 was the potential departure of Wilmad Glass. This major employer and tax-payer needs to expand, but cannot do so without acquiring significant additional acreage for septic dilution. This led the community to consider the potential of bringing sewer service from neighboring Buena Borough southeast along Route 40 to service Wilmad and other properties within the corridor of land immediate to the highway. Initial attempts to bring sewer from the Borough were stymied by a lack of interest on the part of the Borough and uncertainty within the Township as to whether this was the right course of action. These factors led the Township to apply to the Pinelands Commission for inclusion in this planning project.

During the course of interviews and workshops held in the community in the fall of 1998, the following economic goals were defined:

Table 1: Community Economic Development Goals

1. Protect the rural character of the community
2. Protect Buena Vista's farms
3. Create new jobs
4. Provide an economic environment that lets people make a living
5. Provide a tax base that will support the services desired by residents
6. Encourage the creation of additional businesses that will provide services and goods to local residents
7. Make Buena Vista Township a place where property owners and business owners get a "fair shake" in terms of regulation
8. Encourage the community's youth to stay in the community when are ready to enter the workforce
9. Use the Township's economic development strategy to pull the community together and keep it together

These objectives, defined in loosely structured workshops, echo the findings and thoughts of other people from around the country who are working on rural economic development projects. These other perspectives allow for an expanded understanding of what it means to support successful rural economic development.

In an article entitled *Soul Searching: At What Cost Rural Economic Development,*[1] the author reviews the consequences of rural economic development in a number of communities—some that wished for economic change and others that did not. Conclusions that are important for all rural communities to consider and which have relevance for Buena Vista Township:

1. Change is certain. All communities will change. Of greatest importance to community character is whether local people guide and control change or whether it is forced upon a community from the outside.

2. Communities that seek and/or end up with large-scale change (e.g., a Saturn auto plant in the author's review), will find that the consequences are less certain than might have been expected. Despite promises and partnerships, newly sprouted corporate plants will adhere to the demands of stockholders and the market, not to the social or cultural norms of the host community. Fewer jobs may go to local residents than anticipated; less investment may occur than promised. Therefore, bigger is not always better.

3. Successful rural economic development will bring new people and new businesses. This influx of new people will change the culture of the host community. Tension between newcomers and old-timers characterizes many rural places experiencing economic growth.

In a related work concerning how rural areas should think about and analyze economic development, Thomas Michael Power writes that communities should move beyond the traditional economic model of *export* and *import* industries.[2] This model held a bias that local economies only benefited from industries that sold their products elsewhere. These firms brought new money into the local economy where it could circulate. Power emphasizes the rising importance of self-sufficient rural communities based on local, broad, service economies wherein most of the money stays in the community and circulates between residents and local businesses. This type of economy is enhanced by the presence of retirees or second home owners who bring their income from elsewhere and spend it in the local economy. He also argues that tourism represents an export industry that brings money into the community where it can largely benefit locally owned firms. (In contrast, traditional primary industries—lumber, manufacturing and mining, for example—send a large amount of the economic benefit out of the community to holding corporations and shareholders.)

Several guidelines therefore, seem appropriate to consider as Buena Vista explores the type of economic development that will most benefit the community.

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[1] Falk, William W. *Soul Searching: At What Cost Rural Economic Development?* Economic Development Quarterly. Vol.10:1. February 1996.

[2] Power, Thomas Michael. 1996. Lost Landscape and Failed Economies. Island Press: Washington, D.C.

Table 2: Guidelines for Positive Rural Economic Development

1. **Fiscal Impacts:** The revenues generated by new development will be sufficiently large to compensate for any costs—fiscal, political or social—associated with the development

2. **Job Diversity:** Greater community job diversity should occur from the development.

3. **Internal, Not External, Economic Benefits:** Economic development should encourage more funds to flow within the local economy rather than sending funds outside the community.

4. **Physical Appearance:** New development should enhance, not damage, the character and physical appearance of the community. The scale of new development should not damage community character.

5. **Revitalization:** Business area revitalization should occur.

6. **Local Control:** New development should be guided by local people and/or local government.

7. **Environmental Compatibility:** Economic development should sustainably exist with or even enhance the natural environment.

8. **Willingness to Welcome Newcomers:** The host community should be prepared to welcome the new people and new businesses that will result from the economic development effort.

9. **Agreement on the Need for Change:** The community is sure that the status quo is not acceptable and that new change will benefit the community as a whole.

QUANTIFYING COMMUNITY OBJECTIVES

When the goals from workshop participants and community leaders are combined with the guidelines noted above, a more refined set of measurable economic development objectives emerges. These objectives will be important yardsticks against which to evaluate different types of economic development opportunities.

Objective 1:
Protect and enhance the rural landscape of Buena Vista Township.

The Township's rural character is composed of many elements, but there are a limited number of factors on which public sector actions impact. The first is the landscape. Buena Vista's landscape supports its rural character primarily through the presence of significant acreage devoted to farming. Farm buildings and housing, and farming activities themselves also support the rural feel of the Township. The overall lack of high density housing and/or business development are also rural features. Finally, the presence of trees and vegetation throughout the Township gives the place a country, rather than suburban, feel. Each of these landscape elements can be managed to some degree in the course of economic development planning. For the purposes of this project, Buena Vista should follow several guidelines to protect rural character:

Table 3: Business Development Guidelines to Protect Rural Character

1. Business development will be contained within nodes or limited areas, and not allowed to spread in a linear fashion along Township roads.

2. All business development will minimize, if not avoid, the loss of farmland.

3. The Township's business strategy should seek to increase the opportunities for local farmers to market and sell their products, and to raise awareness of the importance of farming in the character of the Township and the region.

4. Architectural styles for new building and renovations should seek to strengthen Buena Vista's feel as a rural town, rather than an urbanizing community.

5. The scale of new development shall be in proportion to the surrounding landscape. Buildings should rise above two stories in only occasional circumstances where the surrounding landscape and building site can accommodate such height. Building massiveness shall be minimized on the side of the building facing the road or other easily visible spaces.

6. Wetlands and other sensitive ecosystems shall not be disturbed by business development.

Objective 2:
Economic development in the Route 40 Study Area should generate a minimum 10% increase in the tax base value of the community within 10 years.

As the most adaptable business development area in the Township, the effort to generate new development in the study area should generate a significant return for the community. Using a 1998 Township-wide property tax base of $237,092,850 (excluding $1.6 million in personal property tax on the phone company), a 10% increase in tax base value would equal roughly $23.7 million. Assuming an average assessed value of $50 per square foot for all new development in the study area, 474,000 square feet of new development would be needed to meet the goal of a 10% increase in taxable value.

The current total property tax rate in the Township is $2.373 per $100 of assessed valuation. The municipal share for local government services is roughly $0.32 per $100 of assessed valuation, which generates approximately $760,000 for local government services from the tax base of $237 million. The $23.7 million in new development value would provide about $76,000 in new revenues for local government, an increase of 2.5% over the current annual municipal budget of approximately $3 million.

Objective 3:
Costs for wastewater or other infrastructure investments related to this economic development effort and paid for by the Township will be kept well below the revenues that flow to the Township.

The Township should achieve a 10% increase in *net* revenues—i.e., revenues should ultimately increase 10% *after* all wastewater and other infrastructure costs are taken into account. Infrastructure costs will be partially offset by user fees and connection fees. Grants may also be obtained to reduce local government and property owner costs. In the short term, however, costs may exceed revenues, given the capital investment required and the capacity reserved for future growth. However, with these qualifications stated, it should be the Township's goal for the infrastructure investments to increase short-term revenues significantly, and therefore a 10% objective is defined.

Objective 4:
Economic development should generate a larger, more diverse base of jobs in the community.

The economic development strategies resulting from this project will seek to create a minimum of 200 full-time jobs within the study area, which represents 5% of the total jobs needed to support the local labor force of 3624 individuals. This objective is not intended to suggest that all of the workers employed in the resulting positions will be from Buena Vista, but rather that the goal is to offer at least 5% of the community's needed jobs within the Township borders

A related objective will be to create jobs with pay ranges spanning from minimum wage to levels 50% above the median income level for the community. This range of jobs will provide opportunities for young people and those needing to learn basic job skills as well as extending the opportunities to persons with professional and technical skills. The 1990 median household income for the community was $28,294. Assuming a 3% inflation rate over the last 10 years, the current median household income is approximately $38,000. The allocation of pay scales sought from study area development are as follows:[3]

Pay Range Category	% of $38,000 Median Household Income	Target Annual Pay Level	No. of Jobs at Pay Level
1	32% (minimum wage)	$12,000	50
2	50%	$19,000	50
3	100%	$38,000	50
4	150%	$57,000	50

[3] Median household is the central point in the range of household incomes in the community, and is thus a fair representation of current conditions in the community. An alternative benchmark for this analysis could be *per capita income*, which is total income divided by total population (i.e., including retired persons, children and others with little to no income). However, this measure is not as easy for the average person to conceptualize, and it produces a figure that is too low to have meaning as a wage target.

Objective 5:
Development of the study area should result in the creation of a recognizable and definable place.

This objective relates to the idea of using good design and planning to create more than a collection of tax revenue generating buildings and well paying jobs, but to also create a sense of place. People coming to this place should see it as unified and cohesive. People driving along Route 40 should slow down when passing through this place and be able to distinguish a space separate from the surrounding farmscape. Development resulting from this project should create a place that attracts residents and travelers to stop and linger, to walk around, to interact with others, and to shop and thus support the economic success of the area.

Summary

These goals and objectives will be used during the remainder of this project to assess the types of businesses that the community wishes to attract and to define incremental and measurable steps that the Township can take to reach its broader goals. The challenge that will face the community is finding a balance between maximum revenue generation, associated infrastructure costs and protection of community character. These objectives can also be used as a basis for measuring the progress in implementing the economic development strategies once the pilot program concludes.

PROFILE OF BUENA VISTA AND THE STUDY AREA

DEFINING THE GEOGRAPHIC SCOPE

Buena Vista Township consists of a number of small hamlets or villages around which the Township is defined. For everyday life, most residents identify with their immediate hamlet rather than with the broader Township. Therefore, residents say they live in Collins Lake, Newtonville, Richland or Milmay. During the course of Task 1 of this project, community leaders and residents were quite clear that the Route 40 Town District is the one area of the community with the most promise for additional economic development. The villages were generally considered to have sufficient development and the Route 54 corridor is a low priority for now. Figure 1 shows the location and boundaries of the Route 40 study area.

LOCATION AND TRANSPORTATION

The Township of Buena Vista is located along a transportation corridor linking Atlantic City and Philadelphia (see Figure 2). The main transportation lines of this corridor are the Atlantic City Expressway, the Black Horse Pike (Route 322) to the south of the Expressway, and the White Horse Pike (Route 30) to the north of the Expressway. The northern edge of the Township is just south of Route 322. A nine-mile drive along Route 54 connects the study area to the Expressway.

Route 40 is the predominant transportation corridor in the Township. It begins near the Delaware Memorial Bridge at the New Jersey–Delaware border and runs east to Atlantic City. Many Atlantic City bound travelers from the Philadelphia area and south avoid the tolls and congestion of the Expressway and take alternate routes such as Route 40.

Strategy Link

Buena Vista's location along Route 40 is an advantage for business development purposes. The study area is not, however, located near the Expressway exits. These locational facts will greatly influence the type of development that will occur in the study area.

Route 40 is a two-lane state roadway. Table 4 indicates its average annual midweek traffic volumes at various locations along its length.

Table 4: Route 40 Traffic Volumes

Location	Year	Two-Way Traffic Volume
Buena Borough, between Melini Ave. & Central Ave.	1993	7,530
Buena Borough, between Catherine Ave. & NJ 54	1993	9,300
Buena Vista Twp., Tuckahoe Road & NJ 54	1993	10,880
Buena Vista Twp., between Lorraine Ave. & Pine Road	1993	9,310
Hamilton Twp., between NJ 50 and CO606/CO668	1996	18,220

Source: New Jersey Department of Transportation

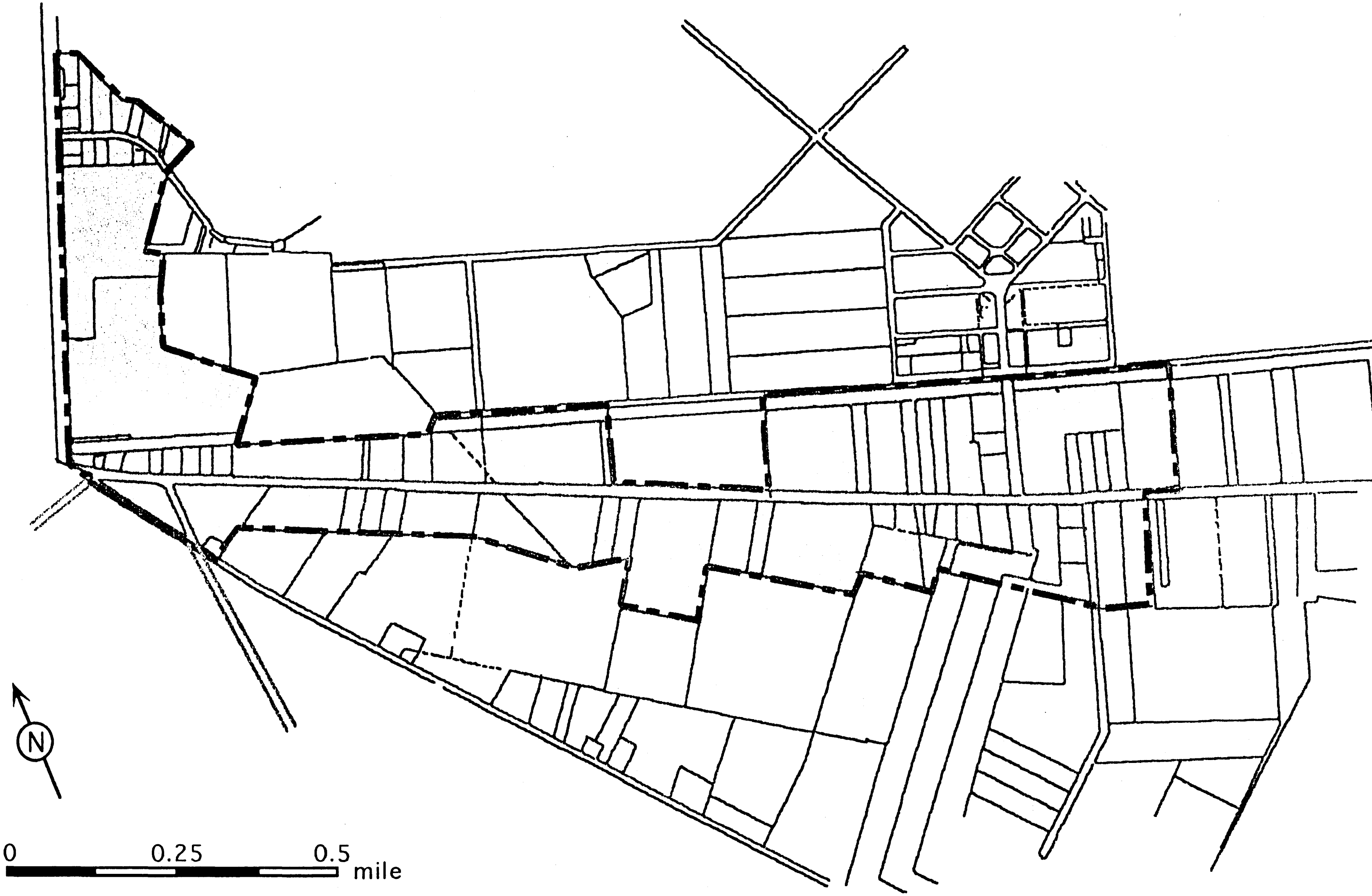
To place these traffic volumes in context, average daily traffic along some other area roadways are as follows:

NJ Route 54	
Buena Vista Township (at Weymouth Road)	11,250
Hammonton Town	15,000 – 20,000
Black Horse Pike (US 322)	
Folsom Boro	7,800
Hamilton Township	28,700 – 35,000
White Horse Pike (US 30)	
Hammonton	14,000 – 22,000
Egg Harbor City	14,000 – 15,000
Atlantic City Expressway (NJ 446)	
At Interchange 11, Mays Landing	9,800
At Interchange 12, US 40-322	8,700
At Interchange 17, Egg Harbor	42,400

Thus, Route 40 in Buena Vista Township carries traffic levels that are comparable to those of other major roadways in rural areas of Atlantic County, although lower than volumes in urban areas and along the Expressway.

Strategy Link

The traffic volumes associated with Route 40 are typical of the volumes sought by auto-oriented businesses such as fast food, quick-lubes and similar businesses. It is likely that the market would press for these uses in the study area. The community must decide if such uses meet the Township's goals and objectives.



Pinelands Rural Economic Development Pilot Program
Route 40 Corridor – Buena Vista Township

Figure 1
Pinelands Town District

Pinelands Town District

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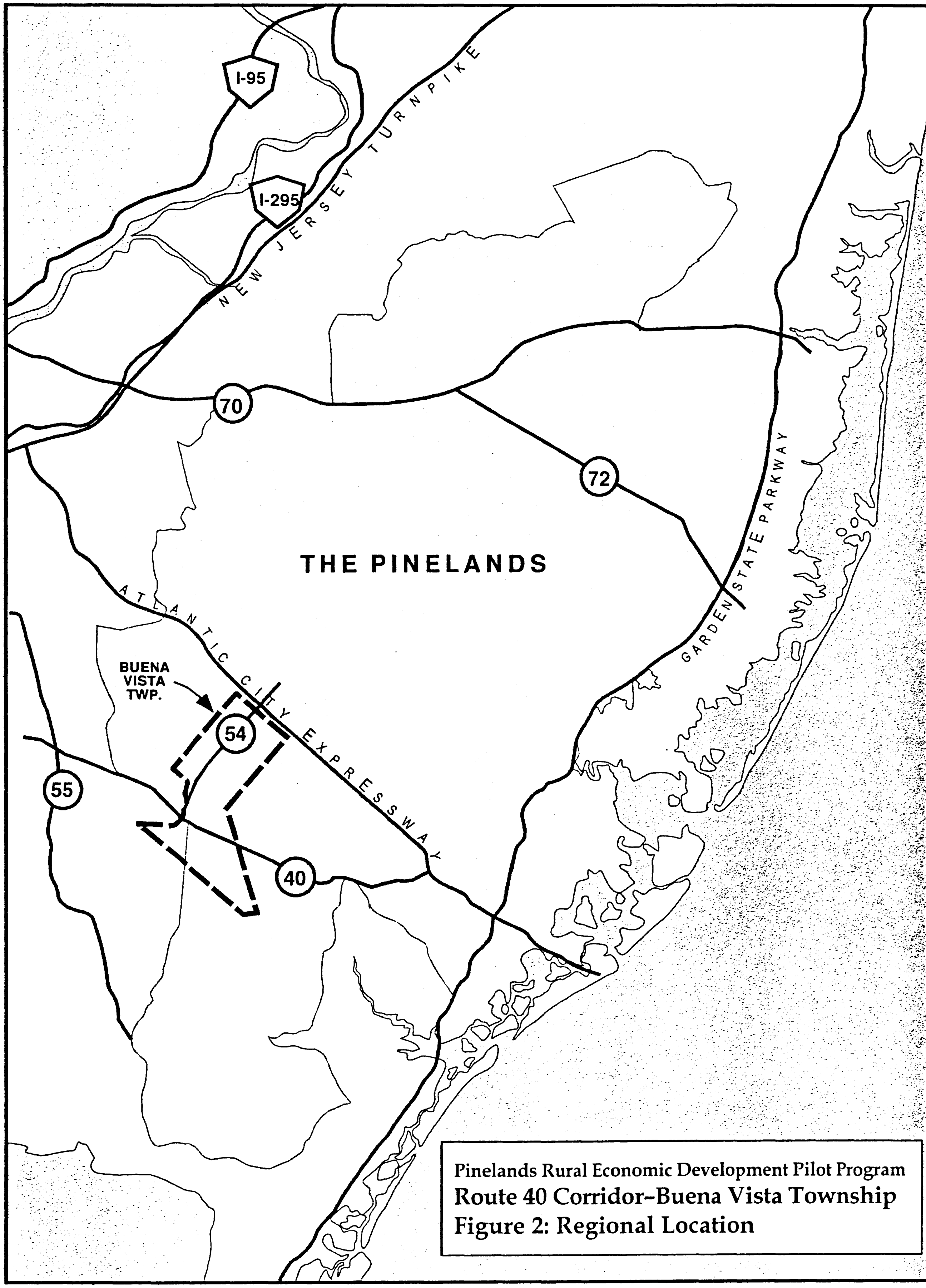


Pinelands Rural Economic Development Pilot Program
Route 40 Corridor–Buena Vista Township
Figure 2: Regional Location

Road Corridor Character

The character of Route 40 in the vicinity of Buena Vista is that of a high-volume country road. The road passes along hundreds of acres of farmland and low density rural development. Buena Borough is the transitional point for eastbound travelers before they enter Buena Vista Township. To the average traveler, Buena Vista Township's small amount of business development to the east of the Route 54 intersection appears to be an extension of Buena Borough. Densities drop off dramatically as one passes into the Township—largely due to the absence of sewers. The trip through Richland and into Mays Landing is largely farm-oriented with a sprinkling of small businesses. Densities increase as one approaches Mays Landing where the character shifts to that of a larger small town or suburbanizing area.

Strategy Link

The type of development that can and may occur in the study area will be defined by a variety of factors, including the nature of the surrounding landscape and development pattern. The study area's location at the border with Buena Borough currently gives it the feeling of a place at an edge, rather than as a center of any kind. Therefore, while it is the center of political life for the Township and also holds institutions such as the post office and a school, it has the character of a place that is subordinate to its neighbor. If Buena Vista residents want to elevate this place to a different level, then the development pattern and strategy must support that objective. Given the historical and physical linkages between the two communities, however, a more productive strategy may be to combine the Township's effort with the Borough so as to pursue a comprehensive development strategy for the Route 40/ Route 54 intersection.

LAND USE CHARACTER

Buena Vista is a Township struggling with the fiscal and community character consequences of being an outlying area to Buena Borough and a suburb of Vineland. The Township consists of a number of villages and neighborhoods which tend to strongly define residents' sense of where they live. These areas are Newtonville, Richland, Milmay, East Vineland, Collings Lakes, New Kuban, Lake Ann, Buena Acres and Pine Lake Estates. All are dispersed across the Township's 42 square miles. Township-wide, business development is located in the existing villages, in the emerging Route 40/Route 54 intersection area, and in dispersed, single lot locations along Route 40, Route 54, Tuckahoe Road or Lincoln Avenue.

The land use character of the study area is currently that of a mixed use, low density, semi-rural road. Businesses at the western edge in the Route 54 intersection characterize this area as an emerging auto-oriented commercial area, and include conveniences, a gasoline station, lodging (on the Borough side), a Burger King and a campground and amusement area. As one moves east, the land is either vacant or used for housing (see Figure 3). At the midpoint of the 1.5 mile corridor are the Township building and the Post Office. These uses are bounded by small forested lots and vegetated wetlands. The eastern end of the corridor is used for a mixture of homes and businesses. The Wilmad Glass Factory anchors the western end of the corridor.

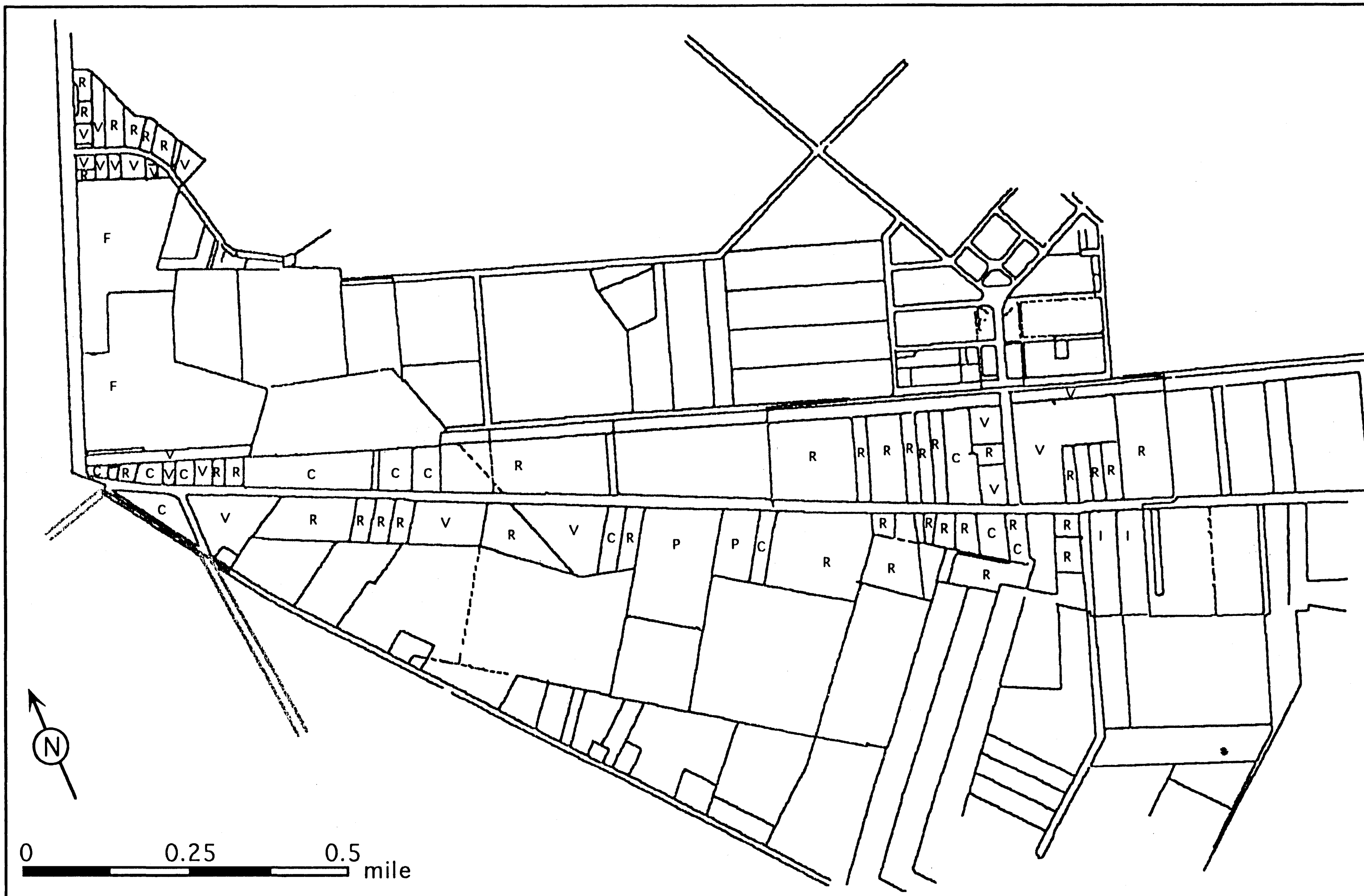
As shown in Appendix 1, the study area contains roughly 276 acres. The distribution of land currently within the corridor is summarized below in Table 5. The study area has a total of 83 parcels averaging 3.3 acres. Approximately 17% of the area (47 acres) is wetlands. Another 25% of the area (67 acres) has transitional soils, which pose development challenges without access to sewers.

Table 5: Summary of Land Uses in Study Area

Land Use Category	Area (Acres)	No. of Parcels
Commercial	28.64	15
Forest	47.98	2
Industrial	9.06	2
Public	27.98	3
Residential	109.77	37
Vacant	52.39	24
Totals	275.82	83

Strategy Link:

The low densities and dispersed mixed-use nature of the corridor leave open many more options for future development than if a more established development pattern were in place. The substantial amount of wetlands will continue to shape, and to some extent, limit the total development potential of the corridor. The presence of transitional soils makes the introduction of sewers critical to expanding the amount of developable land in the corridor.



Pinelands Rural Economic Development Pilot Program
Route 40 Corridor – Buena Vista Township

Figure 3
Existing Study Area Land Uses

Existing Land Uses
- R Residential
- C Commercial
- I Industrial
- F Farm
- V Vacant
- P Public

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ZONING SUMMARY

Pinelands regulations allow for any use not otherwise limited by environmental constraints (e.g., wetlands, stormwater, threatened or endangered species) in a designated village or town management area provided that:

1. Public service infrastructure necessary to support the use is available or can be provided without development in the Preservation Area District, Special Agricultural Production Area, or Forest Area.

2. The character and magnitude of the use is compatible with existing structures and uses in the village or town.

No houses or non residential uses can be located on a parcel of less than one acre, *unless served by a centralized waste water treatment plant.* In addition, any municipal variance that grants relief from density or lot area requirements for a residential or principal non-residential use must require the use of Pinelands Development Credits for all dwelling units or lots in excess of that permitted without the variance.

Roughly one third of Route 40 in Buena Vista Township lies within the Pinelands Town (PT) zone. Residential housing is not permitted as a principle use, but is allowed as a conditional use at a minimum density of 1 unit per acre under provisions for grandfathered lots and cultural housing. Non-residential uses allowed in the PT zone include:[4]

- Retail sales and service establishments
- Banks, offices, theaters, restaurants, personal service shops, appliance repair and similar services
- Garages and gasoline service stations
- Automobile, new and used car sales and service establishments (conditionally)
- Motels or hotels
- Commercial recreation facilities, fraternal organizations, and membership clubs
- Hospitals and clinics
- Animal hospitals or kennels
- Public or quasi-public buildings and uses
- State-accredited public or private educational facilities
- Churches, libraries and museums
- Detached single family dwellings
- Public service infrastructure
- Off-street parking and loading
- Signs
- Accessory uses customarily incidental to any permitted principal use
- The keeping of domestic farm animals

[4] This list is a summary from the Buena Vista Zoning Ordinance. That ordinance should be consulted for definitive statements of use regulations.

Uses allowed in nearby RDRI, RDRIC, PVRC, PVI, and FA2 zones along the remainder of the corridor are as follows:

- Home occupation (RDR1, PVR1, FA2)
- Agriculture (RDR1, RDR1C, PVR1, PVRC, FA2)
- Agriculture commercial establishments (RDR1, FA2)
- Road-side retail sales/ service establishments (RDR1C)
- Forestry (FA2)
- Low intensity recreation (FA2)
- Expansion of intensive recreation (FA2)
- Commercial (RDRIC, PVRC)
- Campgrounds (FA2)
- Resource extraction (FA2)
- Pinelands resource related industry (FA2)
- Other uses such a parks, playgrounds and community dwellings for the developmentally disabled (RDR1, PVR1)

Strategy Link

Local and Pinelands land use requirements leave most options open for the development of the corridor. This also means that the Township should carefully consider what types of uses will be more beneficial and whether there are uses that will have a negative impact on the community (e.g., single family homes with children will have a negative fiscal impact on the school budget). Negative land uses should be more carefully defined and restricted in the zoning.

INFRASTRUCTURE CAPACITY OF THE COMMUNITY

Currently, Buena Vista Township offers neither municipal water or municipal sewer service. Some properties adjacent to sewered portions of Buena Borough are served by water and/or sewer from the Borough. During 1999–2000, water service will be extended approximately 1/4 mile along Route 40 from Buena Borough as recommended by the State Department of Environmental Protection. As of the 1990 Census, 220 Township households were served by municipal water and 339 homes were served by municipal sewer.

While the Township has had conversations with the Borough regarding the potential of further extending sewer lines into the Township, no commitments have been made. The Borough's sewer system currently has a maximum capacity of 400,000 gallons per day, though the Sewer Authority is allowed to use only up to 300,000 gpd of that capacity due to discharge problems. Currently, the Borough is generating approximately 200,000 gallons per day. The Borough has plans to expand the service area of the system and wishes to reserve additional capacity for that expansion. Some discussions have occurred between the Borough and the Township regarding the potential for the Township to aid the Borough in its search for a more suitable discharge area.

Strategy Link

When compared with nearby communities such as Vineland, Hammonton, Landisville and Mays Landing, the absence of sewer service in Buena Vista is a serious competitive disadvantage, particularly in light of Pinelands water quality requirements for unsewered areas. Without sewer service, there are few reasons to consider a major business real estate investment in the Township.

Beyond these two basic service categories of water and sewer, the Township provides solid waste removal and recycling services, 911 service and most other basic local government services. The Township does not have a local police force, but the presence of the state police barracks and station provide high quality police protection at a fraction of the cost of maintaining a local force.

ECONOMIC COMPOSITION OF THE COMMUNITY

Due to the small size and rural nature of Buena Vista Township, the amount of available economic data on the community is limited. The following discussion is drawn from a number of sources, all of which have certain limitations. The U.S. Economic Census collects data on all firms within counties and aggregates that data for some municipal subdivisions within each county. Some of Buena Vista Township's areas are included in the census data while others are not. In addition, in cases where the number of businesses within a given economic sector is so few that a presentation of the data would essentially convey private information about a specific firm, those data are withheld. Private companies also collect information on business. American Business Information, Inc. is one such company. Its files for "Buena Vista" were extracted and are presented below. Another source called "PhoneSearch" was also used and its results were compared with the ABI information. When these various sources are woven together, they paint a fairly realistic picture of the Township's current economy, but it should be emphasized that there will be fuzzy aspects to that picture—not all firms may be inventoried and data may be wrong on some firms. Overall, for the purposes of this economic development project, this data does provide the structure needed to assemble a strategy.

According to data from American Business Information, Inc. and PhoneSearch, Inc., the businesses shown in Appendix 2 are currently operating in Richland, Milmay and Collings Lake. Because this information is organized by post office, which includes Buena Borough, some of the businesses lie outside the Township's boundaries. Nonetheless, they are included here because economic interaction does not recognize municipal boundaries and as such it is valid to inventory the range of businesses within and near the study area and Township.

Several points emerge from the information in Appendix 2. First, 200 businesses are listed as operating within and near Buena Vista. Using the employee ranges given for the majority of the businesses suggests that there are at least 1,600 employees at these firms, and might be as many as 2,000 to 2,400 employees. With data not recorded on all firms, a firm figure is not readily available.

The immediate economic activity area surrounding and including Buena Vista Township is currently home to over 2,000 jobs, which cover a range of economic sectors from small businesses to firms with over 500 employees, and from farms to pharmaceuticals. The

Township lies within the pull of the broader economy of the Vineland Labor Market area, which is comprised of a population of over 80,000 persons. The Vineland area struggled through a difficult economic period over the last 10-20 years, but is beginning to rebound with a number of new large investments. These new investments are somewhat countered, however, by the downsizing or closure of a number of large employers in the labor area, particularly Millville. Buena Vista must find competitive niches in which it can work to attract a mixture of businesses that will generate needed tax revenues, create jobs and protect its small town character.

The largest employers are listed in Table 6. Of particular interest is the aggregation of pharmaceutical–related companies located in the immediate vicinity of Buena Vista. Comar, IGI, and Evsco Pharmaceuticals account for over 800 jobs in the area—50% of the area's total. In addition, Tomlyn and Nova Care are both involved in the pharmaceutical industries but declined to provide their employment levels. Wilmad, Richland Glass and Triton are glassware manufacturers, although Richland Glass recently moved to Vineland. Currently, the economic advantages offered by Vineland (e.g., lower sales taxes and other enterprise zone incentives, and infrastructure availability) are attracting local businesses.

Strategy Link:

A cluster of pharmaceutical–related firms is developing in the rural areas surrounding Buena Vista. This cluster might be built upon as part of the Township's strategy.

Table 6: Largest Employers in Buena Vista Area[5]

Name of Business	No. of Employees	SIC	Line of Business
Comar, Inc.	500–999	2834, 2844, 3089, 3231, 5099, 5113	pharmaceutical manufacturers, cosmetics manufacturers, plastics manufac., glass product manuf., importers and packaging wholesale
IGI, Inc.	250–499	2899, 2834, 5122, 5169, 5191	chemical manufacturers, exporters, and wholesalers; animal health products
Wilmad Glass Co	100–249	3231-98	glass prod. made- purchased glass
Buena Regional High School	100–249	8211	public school
Richland Glass	NA	3231-98	glass product manufacturer
Evsco Pharmaceuticals	50–99	2834, 3841	pharmaceutical and surgical instruments manufacturers
United Precasting Corp	50–99	3272, 5032	concrete manufacturer and wholesaler
Buena Vista Country Club	50–99	5812-23	banquet rooms
Triton Associated Industries	20–49	3229, 5023	glassware manufacturer and wholesaler
Henry Cifaloglio Inc.	20–49	4953-02	garbage collection
Milanesi School	20–49	8211-03	schools- elementary
RS Electrical Contractors Inc.	20–49	1731-01	electric contractors
Ye Olde Midway Inn	20–49	5812-08	restaurants- steak houses
Buena Athletic Club	10–19	7991, 7299, 7999	health club, health consultants
Kuban Education/Welfare Assoc.	10–19	8611	association
Premier Electrical Contractors	10–19	1731	electric contractors
Buena Tavern	10–19	5812-08	restaurants
Buena Vista Camping Park	10–19	7033-01	campgrounds
Buena Vista Country Club	10–19	7992-01	golf courses- public
Wawa Food Market	10–19	5411—03	convenience stores

Source: American Business Information, Inc. 1999

Table 7 is a list of the highest valued properties in Buena Vista Township. This table indicates the importance of larger manufacturers such as SP Industries (Wilmad Glass), Immunogenetics and United Precasting. It is also noteworthy that some of the highest taxpayers and employers in the Township are not traditional manufacturing industries. Buena Corporation (Country Club) and Merighi's Savoy Inn both represent recreation/

[5] Employment totals include all employees, regardless of location, if a company has its headquarters in Buena Vista. For example, Comar employs about 250 people in Buena Vista but has several hundred other facilities throughout southern New Jersey.

entertainment/service businesses. Cranberry Run is a retirement facility. Finally, it is important to emphasize that despite the size of the values associated with these top ten taxpayers, their $14 million total assessed value represents just 6% of the $237 million total property value in the Township. Residential property by far provides the majority (67%) of the property value in the community. Commercial property provides 7%, industrial provides 2%, and farmland provides 11% of total assessed value.

Table 7: Ten Highest Taxpayers in Buena Vista Township

Name of Business	Assessed Valuation
Buena Corporation.	$3,375,100
Dougherty Holding Co, Inc	$2,554,200
Immunogenetics	$1,525,700
Caselli & Pajic	$1,126,100
SP Industries	$1,186,000
Unimin Corporation	$1,066,100
Merighi's Savoy Inn, Inc	$922,500
Cranberry Run, Inc.	$893,700
Falasca, Aldo	$873,500
United Precasting Corp.	$850,000
Total	$14,372,900

Source: Buena Vista Tax Assessor's Office, 1998

Strategy Link:

The Township must keep its perspective broad as it considers the types of businesses that will offer the best tax base for the community. The objectives defined at the beginning of this report will be important as they emphasize the balance to be sought among value, jobs and community character. It is also important to keep in mind that unless substantial amounts of additional land in the community are devoted to business development – assuming adequate demand existed for such space – additional business development will provide fiscal support for the community, but will not radically change the Township's financial position.

DEVELOPMENT CAPACITY INVENTORY

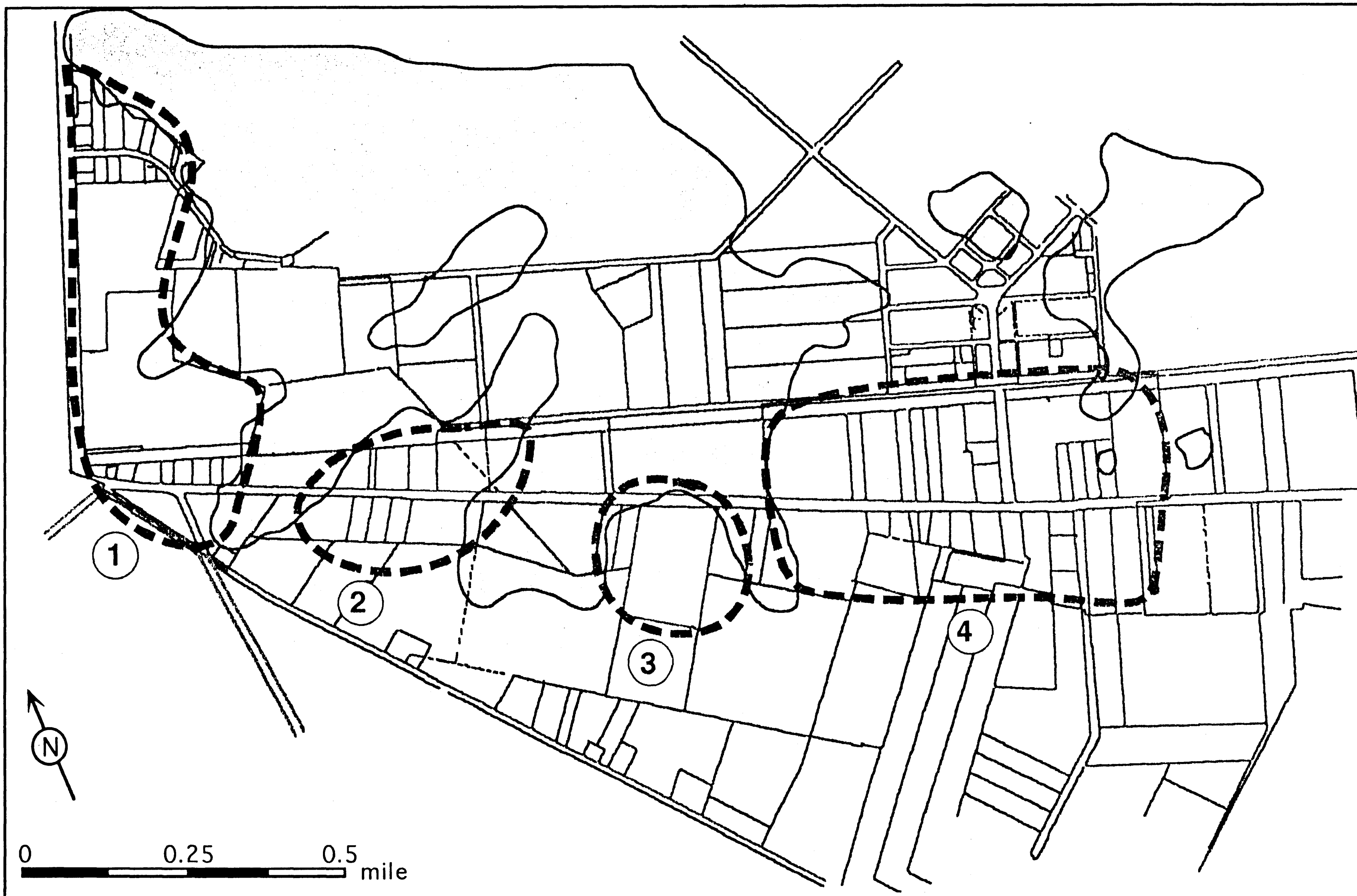
In order to assess the best mix of uses and best revenue generating strategy for the community, a development capacity analysis was performed. Using land use, assessors, wetlands, soils and zoning maps and databases, estimates were made of the amount of land that could be developed within the PT zone. It must be emphasized that estimates presented in this analysis are approximations based on available information and large-scale mapping; and will need to be field verified.

The calculation of buildable area for each parcel is based on area measurements of wetlands, wetland buffer zones and transitional soils. For example, if a certain parcel is half covered by wetlands, it is considered to be 50% buildable. If a parcel lies completely within wetlands its buildability is listed as 0%. Transitional soils limit development only in unsewered conditions, where a parcel must have roughly 1/3 of an acre outside the transitional soils area in order to be buildable. Under the sewered scenarios, transitional soils do not limit development.

SUMMARY

Buena Vista has sufficient land to support a significant amount of development in the coming years. The provision of sewer service or some other wastewater service is likely to be critical to maximizing both fiscal benefits and to create a place with densities sufficient to become a new center.

The current economic profile of the community suggests no obvious directions for future economic development, other than building on the emerging pharmaceutical cluster. In other words, the economic strategy pursued by the Township in the study area can go in any of number of directions: for example, retail, office or industrial development. Potential directions for the Township are reviewed later in this document.



Pinelands Rural Economic Development Pilot Program
Route 40 Corridor - Buena Vista Township

Figure 4
Pinelands Town Subareas

Development Subarea

Wetlands (est.)

Whiteman & Taintor 1999

OVERVIEW OF THE REGIONAL ECONOMY

In what economic environment does Buena Vista exist? This section steps back from the specifics of Buena Vista and reviews the regional economy to identify trends and opportunities that might clarify the Township's strategic direction.

PRIMARY REGIONAL ECONOMY: INLAND SOUTH JERSEY COUNTIES

The analysis that follows is drawn from secondary data and information provided by the New Jersey Department of Labor, primary analysis of federal and state economic statistics, and interviews with economic development and real estate professionals in the South Jersey region.[6]

The analysis is divided into a "primary regional economy" and a "border regional economy". The primary regional economy is the South Jersey economy of which the Pinelands is a part. Information on the performance of this immediate region is presented to provide a framework for the economic trends in the seven county region that might have an impact on Buena Vista. The analysis first presents information on the inland portion of southern New Jersey and then the coastal portions. This is followed by a brief comparison of the South Jersey economy to the state economy as a whole.

The border regional economy is the primarily urban economic area of Philadelphia, Trenton and Wilmington. These areas have sufficient economic size and force that trends affecting them will also impact the Pinelands. This regional analysis is not intended to suggest that the type of growth occurring around the Pinelands is necessarily desired or appropriate within the Pinelands. However, it is only with an understanding of the larger economic context that smart local choices can be made.

Southern New Jersey

The inland area of southern New Jersey is a five-county region comprised of Burlington, Camden, Gloucester, Salem, and Cumberland counties. County Business Pattern data for the 1987-1995 time period indicate that employment growth has been strongest in the services sector of the economy. This sector also contains the greatest number of jobs as a percentage of total employment, with 34% of all jobs in 1995. Employment in the services sector increased by 23% from 1987 to 1992, and by 11% from 1992 to 1995. This is substantially greater than the change in total employment, which decreased by 1% from 1987 to 1992, and increased 6% from 1992 to 1995.

By 1995, there were over 440,000 jobs in the region. The 1987 to 1992 time period accounts for both an economic boom in the mid 1980s and a recession in the early 1990s. While the service sector experienced a 23% increase in employment during this turbulent period, other sectors did not fair as well. Agricultural employment increased by 9.2%, but only accounted for the addition of 200 jobs as compared to the addition of 25,672 jobs in the service sector. Employment decreased in construction (-25%), manufacturing

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[6] Sources: County Business Patterns (1987-95 data); and New Jersey Labor Market Information (1997-99 data).

(-14%), and transportation (-6%). Other sectors remained relatively stable with small gains and losses: mining (1.9%) wholesale trade (-0.7%), retail trade (-0.9%), finance, insurance and real estate (+0.1%).

The period of economic recovery from 1992 to 1995 allowed for some sectors to return to or exceed 1987 employment figures, but several sectors still had lower employment levels than in 1987, despite experiencing gains since 1992. Wholesale and retail trade experienced 8.5% and 3.3% increases, respectively, in employment from 1992 to 1995, which allowed both sectors to exceed 1987 employment levels. Employment in construction and transportation increased during the 1992 to 1995 time period, but have yet to return to 1987 employment levels. The services and agriculture sectors continued to grow from 1992 to 1995 with 11% and 7% increases, respectively. The finance, insurance and real estate sector declined by 3.4%. Manufacturing and mining remained relatively constant.

Table 9: Employment in Inland Counties of South Jersey, 1987-1995

Major	Number of employees			Change	
Economic Sector	1987	1992	1995	1987–1992	1992–1995
Agriculture	2,122	2,317	2,472	9.2%	6.7%
Mining	429	437	399	1.9%	-8.7%
Construction	26,313	19,458	21,307	-26.1%	9.5%
Manufacturing	93,378	75,062	75,039	-19.6%	0.0%
Transportation, Public Utilities	29,929	25,519	27,164	-14.7%	6.4%
Wholesale Trade	34,868	34,610	37,550	-0.7%	8.5%
Retail Trade	97,849	96,920	100,097	-0.9%	3.3%
Finance, Insurance, Real Estate	27,777	27,798	26,841	0.1%	-3.4%
Services	110,915	136,587	151,836	23.1%	11.2%
Totals	423,580	418,708	442,705	-1.2%	5.7%

Inland South Jersey has continued to experience economic growth since 1995. The following discussion is based on New Jersey Labor Market Information, a publication by the State. Employment in the region reached a record high during the first nine months of 1998, averaging 757,800. This is a 2.1% increase over the same period in 1997 and comparable to the increase at the state level.

Strategy Link

Inland South Jersey is growing strongly in the construction, wholesale and services sectors. While there will be opportunities in all sectors, these three should be given particular attention by Buena Vista.

Recent Change and Prospects[7]

Eighty-six percent of the region's jobs were concentrated in the Camden Labor Area (Burlington, Camden and Gloucester counties) in 1998. Payrolls in this area increased by 2.9%. Nonfarm employment also grew by 2.6% in the Vineland-Millville-Bridgeton Labor Area, adding 1,500 new jobs.

Sizable gains were experienced in 1998 in the trade (4,100) and services (9,000) sectors. Most of the new trade jobs have been attributed to the opening or expansion of large regional or national chains (e.g., department stores such as Boscov's, Target and Kohl's; food stores such as Shop Rite and Genuardis; and restaurants such as Cracker Barrel, Applebees, On the Border, Macaroni Grill, and Don Pablo's.)

Although new jobs were distributed around the broad-based services division, growth was concentrated among providers of business, health and social services. Growth in business services is associated with temporary help agencies, telemarketers and data processing firms. Hospitals and outpatient facilities were most often the source of new jobs in the health services division, but even these areas were subject to cutbacks due to consolidations. Employment gains in social services were in the areas of job training, individual/family social services and assisted living centers. Employment in the finance, insurance and real estate (FIRE) division also increased. More than half of the jobs in the FIRE sector however, (900 of the 1,600 new jobs) were created at Cendant Mortgage in Mt. Laurel within Burlington County.

Employment in southern New Jersey's goods-producing sector was basically unchanged. From 1997 to 1998, manufacturing experienced a loss of 900 jobs, but was offset by a gain of 1000 jobs in construction.

The region's employment growth is expected to keep pace with the state in 1999. It is projected that most new jobs will be in the service-producing sector. The following business actions will have significant impacts on the economy of inland southern New Jersey counties:

- Kvaerner planned to renovate the Philadelphia Naval Shipyard to build cargo ships at the location. Recently, Kvaerner announced that it was selling its shipping business, but has indicated an intention to ensure commitments to this property. The company had expected to hire about 1,000 workers for its Philadelphia shipyard in early 1999. Although the facility is located in Pennsylvania, nearly 40% of the employees commuted from the Camden Labor Area when it was operated by the Navy, and it is likely that a similar portion of Kvaerner's employees would also come from this area. This could also result in additional jobs at New Jersey firms which supply the ship builder.

- Camden Iron and Metal closed is scrap metal export facility in September 1998 due to reduced sales to the Asian market. This resulted in a loss of 100 jobs but the facility may reopen once demand for scrap metal recovers.

[7] Source: New Jersey Labor Market Information, Employment Outlook in New Jersey's Labor Areas (Annual Review and Outlook Series).

- Vineland has seen a number of new investments. The regional mall recently doubled its size to 1 million square feet. Rite Aid and CVS drug stores both expanded and two new hotels are opening.

- Millville has lost over 1300 jobs since 1997 through the closure or downsizing of Prudential Insurance, Lawson Mardon Wheaton Glass, Ball Foster Glass, Dallas Airmotive and United Health Care. The community has regained some of these losses with the location of 210 employees in the T-Fal Corporation cookware plant. The company plans for a 50% expansion next year.

Strategy Link

The Inland South Jersey economy is most active around the fringes of the Pinelands – Camden, Burlington, and Gloucester counties. Of particular relevance to Buena Vista is the Vineland economic area. Regional growth sectors that might be considered for Buena Vista include business services, support health services, data processing, telemarketing, back office operations, and retirement facilities.

South Jersey Coastal Counties

The coastal region includes Atlantic, Cape May, and Ocean counties. As is true for the inland region, the services sector experienced the greatest employment growth between 1987-1995, and accounted for almost 50% of the 234,000 total jobs in this region in 1995. Total employment decreased by 1% from 1987 to 1992, and increased by almost 8% from 1992 to 1995.

Employment in the agriculture sector increased by 500 jobs from 1987 to 1992, a 38% increase. The only other sector experiencing a gain from 1987 to 1992 was transportation and public utilities (8.9%). The sectors with the most significant losses during this period include construction (-41%), manufacturing (-18%) and finance, insurance and real estate (-11%). Smaller losses were also experienced in mining (-7%), wholesale trade (-5%), and retail trade (-4%).

Table 10: Employment in the Coastal Region, 1987-1995

Major Economic Sector	Number of employees 1987	1992	1995	Change 87 to 92	92 to 95
Agriculture	1,084	1,502	1,351	38.6%	-10.1%
Mining	228	211	155	-7.5%	-26.5%
Construction	17,072	10,160	12,462	-40.5%	22.7%
Manufacturing	15,430	12,597	13,640	-18.4%	8.3%
Transportation, Public Utilities	10,079	10,973	11,085	8.9%	1.0%
Wholesale Trade	7,024	6,652	7,893	-5.3%	18.7%
Retail Trade	56,975	54,768	59,529	-3.9%	8.7%
Finance, Insurance, Real Estate	13,861	12,277	11,793	-11.4%	-3.9%
Services	98,251	108,454	116,871	10.4%	7.8%
Total	220,004	217,594	234,779	-1.1%	7.9%

From 1992 to 1995, the construction and manufacturing sectors experienced a 23% and 8% increase, respectively, in employment, but did not return to 1987 employment levels. Following the substantial increase in agricultural employment prior to 1992, the sector lost 200 jobs (10%) from 1992 to 1995. Wholesale and retail employment increased by 19% and 9%, respectively, resulting in 1995 employment in that exceeded 1987 levels. Employment in mining and finance, insurance and real estate continued to decline during this period.

The state-generated Labor Market data since 1997 includes Monmouth County in addition to Atlantic, Cape May and Ocean counties. This region experienced its sixth straight year of employment growth in 1998 as nonfarm wages and salary advanced. Nonfarm payrolls rose to a record average and increased by 1.4% from 1997. The region's pace of job creation in 1998 was somewhat less than the State.

Job gains in 1998 were concentrated in the services (4,300) and trade (3,200) industry divisions. The most notable advances were in wholesale trade, food stores, eating and drinking places, and health and business service establishments.

The Atlantic Coastal region experienced a slight decline in the goods-producing sector due to the completion of construction projects and several factory closings in the Monmouth-Ocean Labor Area.

This region's job growth is expected to be modest in 1999. Job creation is projected to occur in the trade, health, and business service establishments. A potential area for decline is the manufacturing sector in the Monmouth-Ocean Labor Area due to corporate downsizing and consolidation. Regional economic highlights are as follows:

- The 460,000 square-foot former Whitehall–Robbins pharmaceutical plant in Hammonton may be partially reopened by a new set of investors who recently purchased the facility.
- The New Jersey Manufactures Insurance Company announced plans to build a branch office in the Hammonton Industrial Park. Construction is expected to begin the latter half of 1999 and take approximately one year to complete. the new building could potentially house 300 employees.
- The casino industry is expanding to Atlantic City's marina district, and is projected to create 20,000 jobs (the degree of resulting decline in other casinos, and consequently the net job impact, is unknown).

Strategy Link

The coastal counties of South Jersey exhibit particular strength in agriculture, construction, and wholesale trade. For Buena Vista, fruitful avenues for exploration include the farm support and processing sectors, construction, construction support and ware housing distribution. The strength of the coastal tourism economy also generates traffic along Route 40; this traffic is a source of potential economic activity. Finally, the retirement services sector emerges as a growing area of activity.

South Jersey Growth Sectors

Using County Business Pattern data from 1987 to 1995, a detailed review was conducted of the primary economic sectors of agriculture, construction, manufacturing, wholesaling and business services in the five counties closest to the study area: Atlantic, Burlington, Cumberland, Cape May, and Gloucester. This analysis was conducted to examine whether any of these primary sectors have pockets of strength that might be targeted for Buena Vista Township.

Most of the primary sectors have lost employment in South Jersey since 1987. Table 11 lists those industries that showed growth exceeding 5% per year. The data illustrate that the strongest growth occurred in construction, textiles, lumber, furniture, rubber, instruments, glass, transportation equipment, and the wholesaling sectors associated with all of these industries. Service sectors with strong growth include amusement and recreation, personnel supply and "back office" operations (credit reports, mailing and reproduction, and computer data processing). These results were consistent in each of the five South Jersey counties reviewed.

Table 11: Detailed Sectoral Growth Analysis for Selected Counties, 1987 to 1995

SIC Code	Sector	Employment 1987	1992	1995	% Change 1987–92	1992–95
ATLANTIC COUNTY						
15	General Contractors	1534	750	998	-51%	33%
16	Heavy Construction contractors	609	491	750	-19%	53%
22	Textile Manufacturing	375	65	375	-83%	477%
24	Lumber Manufacturing	117	79	102	-32%	29%
30	Rubber Manufacturing	880	880	1091	0%	24%
37	Transportation equipment	604	102	209	-83%	105%
38	Instruments and related products	74	65	175	-12%	169%
502	Furniture wholesaling	65	94	132	45%	40%
503	Lumber, construction wholesaling	248	178	267	-28%	50%
509	Misc Durable goods wholesaling	65	150	229	131%	53%
733	Mailing, reproduction, stenographic	57	96	136	68%	42%
734	Services to buildings	302	253	402	-16%	59%
736	Personnel supply services	642	268	487	-58%	82%
799	Misc amusement, recreational	556	661	947	19%	43%
BURLINGTON COUNTY						
15	General Contractors	2273	1422	1695	-37%	19%
16	Heavy Construction contractors	1116	745	551	-33%	-26%
25	Furniture Manufacturing	334	170	328	-49%	93%
30	Rubber Manufacturing	539	271	451	-50%	66%
32	Stone, Clay and Glass Products	719	352	594	-51%	69%
37	Transportation equipment	1203	337	615	-72%	82%
42	Trucking and warehousing	3020	2940	3441	-3%	17%
48	Communication	946	901	1562	-5%	73%
501	Motor vehicle wholesaling	1279	1575	2049	23%	30%
502	Furniture wholesaling	265	274	422	3%	54%
504	Sporting goods wholesaling	175	65	1748	-63%	2589%
506	Electrical goods wholesaling	1244	1001	1522	-20%	52%
509	Misc Durable goods wholesaling	508	330	478	-35%	45%

511	Paper products wholesaling	296	388	706	31%	82%
512	Drugs wholesaling	175	58	345	-67%	495%
513	Apparel wholesaling	148	119	168	-20%	41%
514	Groceries wholesaling	755	1608	2092	113%	30%
516	Chemicals wholesaling	286	390	510	36%	31%
519	Misc nondurable goods wholesaling	570	667	811	17%	22%
70	Hotels and lodging	1052	972	1397	-8%	44%
731	Advertising	223	285	401	28%	41%
732	Credit reporting and collection	160	149	248	-7%	66%
799	Misc amusement, recreational	470	872	1154	86%	32%
CAPE MAY COUNTY						
39	Misc Manufacturing	0	65	114	(n.a.)	75%
42	Trucking and warehousing	99	162	232	64%	43%
508	Machinery, equipment wholesaling	101	88	132	-13%	50%
514	Groceries wholesaling	420	469	681	12%	45%
79	Amusement and recreation	334	313	454	-6%	45%
CUMBERLAND COUNTY						
20	Food Manufacturing	2207	2580	3140	17%	22%
32	Stone, Clay and Glass Products	5471	6484	8112	19%	25%
323	Products of purchased glass	1681	1677	2157	-0.2%	29%
35	Machinery, except electrical	361	362	944	0.3%	161%
37	Transportation equipment		561	813		45%
39	Misc Manufacturing		196	254		30%
42	Trucking and warehousing	1540	2185	2714	42%	24%
507	Hardware wholesaling	131	150	173	14%	15%
738	Miscellaneous business services	1405	381	443	-73%	16%
739	Misc business services	1405	381	443	-73%	16%
7399	Business services, n.e.c.	378	171	208	-55%	22%
GLOUCESTER COUNTY						
15	General Contractors	992	732	892	-26%	22%
16	Heavy Construction contractors	249	375	375	51%	0%
24	Lumber Manufacturing	76	114	172	50%	51%
25	Furniture Manufacturing	269	109	185	-59%	70%
26	Paper	175	170	222	-3%	31%
30	Rubber Manufacturing	414	455	831	10%	83%
38	Instruments and related products	221	214	260	-3%	22%
42	Trucking and warehousing	1359	1324	1567	-3%	18%
503	Lumber, construction wholesaling	399	425	640	7%	51%
504	Sporting goods wholesaling	126	534	677	324%	27%
506	Electrical goods wholesaling	81	189	221	133%	17%
507	Hardware wholesaling	111	129	169	16%	31%
511	Paper products wholesaling	78	74	192	-5%	159%
514	Groceries wholesaling	717	854	1096	19%	28%
736	Personnel supply services	364	485	923	33%	90%
737	Computer and data processing	375	81	129	-78%	59%
79	Amusement and recreation	309	528	713	71%	35%

The Regional Border Economy to the Pinelands

The Pinelands project area is located within a two-hour drive from major urban centers such as Philadelphia. The economies of Delaware and Philadelphia are reviewed below to briefly examine trends in these "border economies."

Delaware

Delaware fared far more favorably during the 1987 to 1995 time period than did most areas of New Jersey. Total employment increased by 11% from 1987 to 1992 and by almost 7% from 1992 to 1995. The gains from 1987 through 1992 are unusual because they occurred during the recession. The services sector accounted for the greatest number of jobs in 1995 (31%), but retail trade and manufacturing also generated substantial employment comprising 21% and 20% of total jobs.

Construction was the only sector to experience a significant loss in employment from 1987 to 1992. Wholesale trade employment decreased by more than 8% from 1992 to 1995. Manufacturing employment remained relatively constant during both periods, in contrast to New Jersey where larger losses were experienced. The most significant increase in employment during both periods was in the finance, insurance and real estate sector, with a 45% gain from 1987 to 1992 and a 21% gain from 1992 to 1995.

Table 12: Employment in Delaware, 1987-1995

Major	Number of employees			Change	
Economic Sector	1987	1992	1995	1987–1992	1992–1995
Agriculture	1,195	1,517	1,721	26.9%	13.4%
Mining	47	130	195	176.6%	50.0%
Construction	19,485	16,719	17,170	-14.2%	2.7%
Manufacturing	66,926	66,605	65,631	-0.5%	-1.5%
Transportation, Public Utilities	13,116	13,829	14,209	5.4%	2.7%
Wholesale Trade	17,330	17,740	16,214	2.4%	-8.6%
Retail Trade	56,166	62,197	67,097	10.7%	7.9%
Finance, Insurance, Real Estate	24,462	35,402	42,809	44.7%	20.9%
Services	74,111	89,384	98,989	20.6%	10.7%
Total	272,838	303,523	324,035	11.2%	6.8%

Philadelphia

For the purpose of this analysis, the Philadelphia region includes Bucks, Montgomery, Delaware and Philadelphia counties. Gains and losses in the various sectors and total employment are more similar to those experienced in New Jersey than those experienced in Delaware. Total employment was relatively stable between 1987 and 1992 and increased by about 5% from 1992 to 1995. The services sector accounted for 43% of total employment in 1995, and experienced the greatest gains in employment of any sector during both periods.

Losses were experienced in mining (-47%), construction (-25%), manufacturing (-14%), and wholesale trade (-9%) between 1987 and 1992. Mining and wholesale trade increased from 1992 to 1995 but still remained below 1987 employment levels. Finance, insurance and real estate and the service sectors were the only areas that experienced consistent gains from 1987 through 1995.

Table 13: Employment in the Philadelphia Region, 1987-1995

Major Economic Sector	Number of employees 1987	1992	1995	Change 87 to 92	92 to 95
Agriculture	4,700	6,095	6,072	29.7%	-0.4%
Mining	1,303	692	752	-46.9%	8.7%
Construction	68,753	51,228	51,154	-25.5%	-0.1%
Manufacturing	270,383	231,676	216,626	-14.3%	-6.5%
Transportation, Public Utilities	65,684	66,286	70,424	0.9%	6.2%
Wholesale Trade	95,176	86,154	93,053	-9.5%	8.0%
Retail Trade	261,715	247,668	256,349	-5.4%	3.5%
Finance, Insurance, Real Estate	124,674	128,473	139,602	3.0%	8.7%
Services	493,277	574,299	626,978	16.4%	9.2%
Total	1,385,665	1,392,571	1,461,010	0.5%	4.9%

Conclusions

The service sector provides the greatest number of jobs in both the primary and border economies. Employment in this sector continued to increase during the 1987 to 1995 period and is projected to increase in the future within New Jersey.

Manufacturing employment experienced a decline in all areas except Delaware where it remained stable. Manufacturing employment in Delaware is a greater percentage of total employment than in the other comparison areas.

Employment in the construction sector decreased from 1987 to 1992 in all areas. However, employment increased in this sector from 1992 to 1995 in southern New Jersey, but remained relatively unchanged in Delaware and Philadelphia.

The finance, insurance and real estate sector fluctuated in southern New Jersey areas, while gains occurred in Delaware and Philadelphia. Employment in this section in Delaware almost doubled from 1987 to 1995, while most of southern New Jersey experienced a loss from 1992 to 1995.

Employment in wholesale and retail trade increased in southern and coastal New Jersey and in Philadelphia since the recession, while wholesale trade decreased in Delaware.

Mining and agriculture have been rather small portions of the economy in both the primary and border economies. However, agricultural employment continued to grow in Delaware from 1992 to 1995 while other areas experienced a loss during this period following the gains from 1987 to 1995.

DYNAMICS OF THE LOCAL MARKETPLACE

In order to understand the local and regional dynamics of the commercial real estate market and the potential for business growth, interviews were conducted with local realtors, economic development organizations, and municipal officials in surrounding communities. These representatives not only provide an important perspective on the local and regional economy for this project, but serve as points of contact for businesses that wish to expand existing operations within New Jersey. Thus, their perspective and knowledge on development trends provide insight as to the type of information that is distributed through these organizations to the business community.

Interviewees were asked questions regarding the activities of their organization; the types of businesses that they believe have increased recently or could increase in the future; the types of businesses that may be interested in locating within the smaller communities of the Pinelands; and factors that influence business location decisions. The following individuals participated in telephone interviews:

Name	Organization
Tim Behr	Atlantic 2000 (Atlantic County Economic Development Corporation 2000)
John Peterson & Whitney Vox	Atlantic County Department of Regional Planning & Development
Professor John DeYoung	Atlantic County Small Business Development Center
Francine Sikking	Coldwell Banker
Joe Pantalone	Adams, Rehmann, and Heggan (engineers for the Town of Hammonton)
Jamie Hermann	J&R Real Estate
Gordon Dahl	South Jersey Economic Development District
Jay O'Donnell	Southern New Jersey Partnership for Economic Development
Jim Lelli	Vineland Economic Development Director

Vineland and Hammonton

Generally speaking, local and regional officials feel that the overall south New Jersey region is in the midst of strong economic times. New business growth and company expansions are occurring in areas outside of the Pinelands, especially along the coast, and in areas designated as Urban Enterprise Zones (Vineland, specifically). Those contacted feel there has been a substantial increase in the number of distribution firms, food processors, and manufacturers.

Vineland is an Urban Enterprise Zone. This designation combined with its highway access and the skilled work force has resulted in a tremendous increase in nonresidential development. The City has seen an increase in light manufacturing, food processing, distribution centers, and call centers/back office operations.

A new industrial park consisting of 28 lots (an average of 5 acres in size) was recently developed by the City of Vineland. All sites are infrastructure ready and include fiber-optic cable. Four lots were sold within a two-month period for $15,000 per acre. The City is considering an increase in the sales price due to how quickly the first few lots sold. The City expects to develop two additional industrial parks in the future which will be 200 acres and 105 acres in size. Vineland will target the marketing of these sites to food processors and glass manufacturers through direct mailings and networking at conferences.

Vineland has also experienced an increase in retail and service development. The regional mall recently doubled in size from 500,000 to 1 million square feet. The Downtown's Special Improvement Designation has allowed Rite Aid and CVS to expand operations. An 80-unit hotel, Wingate Inn, recently opened and a new Holiday Express catering to business travelers is expected to be constructed soon.

Strategy Link

Vineland's local economy is growing strongly – one interviewee said it is the best growth period in 60 years. Why isn't Buena Vista growing on its own? Interviewees support two hypotheses by Township leaders: the absence of sewers and the presence of Pinelands regulations. Other factors include road access, and population/business density.

The Town of Hammonton, following a State-imposed development moratorium from 1987-1994 due to noncompliance of its sewer treatment plant, has recently begun the process of enhancing its economic base. Hammonton is located within the Pinelands and like Buena Vista Township, is designated as a Pinelands Town. Unlike Buena Vista Township, however, Hammonton has full sewer and water service. Most surrounding areas are not designated to handle higher density development. Hammonton is thus an "island" for development potential within an area that contains a large amount of publicly owned land or land that is otherwise protected or limited to development.

A sewer extension project to Hammonton's industrial park made the 185 acres of available land more suitable for development. Hammonton's location along the Atlantic City Expressway halfway between Philadelphia and Atlantic City is a marketing tool and an asset for business. The Town is attempting to attract food and beverage distribution facilities, light manufacturing and office uses within the industrial park. It is hoped that the increase in these types of businesses will encourage spin off development along the White Horse Pike and within the downtown. Wal-Mart recently located in Hammonton due to its centralized location, highway access, population, size, and market potential.

Strategy Link

Hammonton – located inside the Pinelands – demonstrates that growth can occur in sewered areas in the Pinelands. The Township's sizable industrial land offerings, however, put it in a class separate from Buena Vista's relatively small study area. Buena Vista must find its own niche.

Potential within the Pinelands

The communities within the Pinelands Pilot Program share many of the amenities that have prompted an increase in economic activity in non-Pinelands communities, such as access to transportation corridors, available land and a desirable labor force. However, each of the individuals interviewed stated that the Pinelands regulations and review process hamper the development potential of these areas. While many of these interviewees may only have a limited experience with the Pinelands area and with the Commission itself, it is important to note that these individuals are the points of contact for many businesses. Therefore, their perceptions (accurate or not) are passed on to potential businesses that may have otherwise been interested in one of the Pinelands communities. Each of the individuals contacted stated that infrastructure and regulations are the primary factors businesses evaluate when making a location decision. Businesses seek sites that are immediately available for development. This means sites which are the least impacted by local, regional and state regulations and already have infrastructure in place. Consequently, many businesses do not consider locating within Pinelands communities because business development officials direct them to sites that do not possess these limitations.

It should be noted that these negative perceptions of the regulatory environment for economic development in the Pinelands may not reflect actual experience in several communities. For example, a considerable amount of development has occurred in Galloway and Egg Harbor Townships (benefitting from strong growth pressures around Atlantic City as well as inclusion in designated Regional Growth Areas), and the Town of Hammonton has also been able to attract economic development by providing fully serviced sites. These examples underscore the fact that economic development can occur in the Pinelands with the right combination of access, infrastructure and regulations.

Strategy Link

Pinelands communities are in direct competition with non-Pinelands South Jersey communities offering business development space. The presence of Pinelands regulations is perceived as a competitive disadvantage. Communities must take steps to change these perceptions, or overcome them by finding other creative incentives that will help to offset that disadvantage. The key is to create sites that are ready for development.

Generally speaking, interviewees had either no or few opinions regarding Buena Vista. This appears to be due to the area's current lack of infrastructure and the absence of any effort to market it. When asked what the business potential could be if sewer service was provided, some interviewees were able to provide examples for potential market directions, but many still felt that the Pinelands regulations were a deterrent to business development even if sewer service was possible.

Under the assumption that sewer service could be provided and the Pinelands regulations were not so "cumbersome," interviewees felt there was a potential to target small manufacturing operations, craftspeople, and convenience stores. Small manufacturers find southern New Jersey a more desirable location than Philadelphia and Northern New Jersey due to lower land and labor costs. Craftsmen and contractors who specialize in unique products such as furniture and other woodworking may be interested in studio space within the smaller Pinelands communities. One interviewee said that events such as the Flower Show in Philadelphia attract craftspeople based in locations throughout the country and provide communities with an opportunity to market themselves to a larger consumer base. People are generally willing to travel and pay premiums for unique items, which would be an ideal market for Pinelands communities. This is also consistent with the preservation of the Pinelands as a unique place.

Buena Vista – Route 40 Corridor

Several interviewees feel that Buena Vista's location along the Route 40 corridor provides an opportunity to attract businesses that cater to through traffic. Fast food restaurants and other travel conveniences were cited as examples.

Small manufacturing firms were also mentioned as potential businesses due to the good labor market available within Buena Vista. In addition, existing firms along Tuckahoe Road may be interested in expansion if attractive sites were available.

COMPETITIVE ANALYSIS

This section reviews information on a variety of factors that help to make a place competitive for new business investment. The competitive market within which Buena Vista is operating is clarified, and the question of how Buena Vista can differentiate itself in the South Jersey marketplace is addressed.

Factors Driving Rural Economic Growth

In 1994, researchers from the US Department of Agriculture, conducted a literature review on the causes of rural growth. The review, *Factors Associated with Growth of Local and Regional Economies: A Review of Selected Empirical Literature*, determined that the results from the 35 studies examined varied too much to identify a discrete set of variables that can always be expected to produce local economic success.

This finding led to a more definitive multiple regression study and article entitled, *Rural Economic Development: What Makes Rural Communities Grow?*[8] According to this study, the factors most strongly related to local and regional economic growth in rural areas are attractiveness to retirees, right-to-work laws, excellent high school completion rates, high public education expenditures, and access to transportation networks. During the course of a literature review performed for that effort, a number of other economic development factors were explored. When combined with those from above, a punch list of the types of issues that should be considered in the course of preparing a rural economic development strategy can be developed (see Table 14).

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[8] Aldrich, Lorna and Lorin Kusmin. *Rural Economic Development: What Makes Rural Communities Grow*. Economic Research Service, Agriculture Information Bulletin No. 737. U.S. Dept. of Agriculture. September 1997.

Table 14: Rural Development Factors

Priority Factors	
• Attractiveness to retirees	• Right-to-work laws
• High levels of high school graduates	• Good public education expenditures
• Access to airport within 50 miles	• Access to interstate highway system
Policy Factors	
• Taxation	• Public spending
• Public capital stocks	• Branch banking laws
• Availability of industrial revenue bond financing	
Other Factors	
• Wage levels	• Population age distribution measures
• Unemployment levels	• Unionization levels
• Proximity to higher education institution	• Labor force quality
• Proximity to metropolitan areas	• Per capita or family income
• Population size and density	• Urbanization
• Minority population concentration	• Temperature and precipitation
• Energy prices	• Industry mix or concentration
• Availability and price of land	• Labor productivity
• Local fire protection ratings	• Small business activity

Source: Kusmin, Lorin D. *Factors Associated with Growth of Local and Regional Economies: A Review of Selected Empirical Literature.* Staff Report AGES-9405,U.S. Dept. Agr., Econ. Res. Serv., March 1994.

Buena Vista's Competitive Position

Based on the interviews, the above noted study, and consulting team observations, a number of factors that clearly affect Buena Vista's competitive position can be identified. The first step in defining a competitive strategy is to define the competition.

The most immediate competitor for Buena Vista Township is Vineland and the nearby communities of Millville and Bridgeton. Each of these communities lies outside the Pinelands and offers land that is ready for development. In addition, Vineland's Urban Enterprise Zone designation gives it tax incentive advantages that no other community can match. Hammonton will also be a competitor for industrial firms given the Town's new industrial park. How can Buena Vista compete with these places? The answer depends on what it is that Buena Vista is competing for. If the Township competes for large-scale industrial users, the relatively small lot sizes and lack of services will doom its efforts. If it competes for uses that require immediate access to either high traffic volumes or an interstate highway, Buena Vista loses. If it competes on tax rates, it loses.

However, if Buena Vista defines a strategy that builds on its rural character strengths, then Vineland, and to a lesser extent, the other communities, are in much less competitive positions. So Buena Vista needs to offer affordable, serviced land set in an appealing rural location. Likewise, if Buena Vista is seeking to attract businesses that have a more localized market—Burger King, for instance—then it is irrelevant whether Vineland is next door or not.

Hammonton is within the Pinelands and lies just 12 miles to the north. What does Hammonton have that Buena Vista does not? Again, larger tracts of serviced land in a traditional industrial park setting. Hammonton also has a larger population and an established downtown. Buena Vista's rural setting is distinctive.

DIRECTIONS FOR THE STUDY AREA

Based on the above analysis and consulting team experience, the study area might follow one of several paths. This section presents four alternative development scenarios: one scenario is based on a continuation of existing development trends including continued reliance on on-site septic systems, while the other three scenarios assume that a public wastewater collection and treatment system is provided. Using these scenarios allows for an evaluation of the public costs and benefits of sewering Buena Vista's Pinelands Town district.

METHOD AND ASSUMPTIONS

Definition of Pinelands Town District Subareas

As a first step in analyzing development potential in Buena Vista Township's Pinelands Town district, the environmental characteristics of the district were reviewed. Two branches of a stream (labeled "Deep Run" on the USGS topographic map, Buena quadrangle) reach south to Route 40, while a third extends west to Route 54. Because of the low topographic relief in the area, these headwaters are surrounded by extensive wetlands areas. These wetlands systems were overlaid on parcel maps, and the percentages of wetlands and transitional soils were estimated for each parcel. Existing land uses were also mapped from data provided by the Pinelands Commission.

The combination of wetlands and existing development define four distinct subareas within the district:

- Subarea 1, at the westerly end of the district, consists of the area immediately around the intersections of Harding Highway (U.S. 40), Blue Anchor Road (N.J. 54), Tuckahoe Road (C.R. 557) and Cumberland Avenue, as well as the land extending northwards along Route 54 to the boundary of the Town zone. This is a diverse district in terms of existing development and parcelization: it includes some of the most intensely developed land in the PT district surrounding the Route 40/54 intersection, two large farm parcels fronting on Route 54 (one of which is used as a campground), and a number of small residential and vacant parcels along Fursin Avenue at the northerly end of the district. The subarea has a total area of about 76 acres, of which nearly 83 percent (63 acres) is either vacant or farmland.

- Subarea 2, to the east of the main stem of Deep Run, includes several commercial parcels on the north side of Route 40 (including Pietro Foods), and residential and vacant parcels on the south side of the road. This subarea has a total area of 52 acres, of which approximately 12 acres are vacant.

- Subarea 3, with 37 acres, is the smallest of the subareas. Located on the south side of Route 40 between two wetlands areas, it includes the school parcel, the Township building and the post office, as well as a residential parcel and a portion of a small commercial parcel. The land on the northerly side of Route 40 is entirely wetland, and is not included in the Pinelands Town management area or zoning district.

- Subarea 4 extends from east of the post office to about 700 feet east of Oak Road. It is the largest of the subareas (111 acres) and also has the lowest percentage of both wetlands and transitional soils. Much of this land is already developed for a mix of residential, commercial and industrial uses, including Wilmad Glass and Buena Plumbing.

The acreage calculations and estimates of buildable land area are presented in Table 15. Note that in this table, "buildable" area refers only to the environmental characteristics, and does not indicate whether or not a parcel is partially or fully developed.

As is evident in Table 15, the amount of buildable land increases in each area and under each land use category when sewers are introduced. Sewers allow parcels that are predominantly transitional soils to be developed and lot sizes can be smaller since septic dilution is not required. While the latter won't affect developable acreage, it will affect the number of businesses that can be sited.

It should be emphasized that the figures in Table 15 are estimates and that the actual buildability of each site will need to be determined on a site-by-site basis. Other factors that may need to be considered include wetlands buffer zones and on-site stormwater retention.

Table 15:
Buena Vista Township Pinelands Town District Subareas

Subarea #:	1	2	3	4	TOTAL
Total Acreage	76.10	51.782	37.34	110.6	275.82
Wetlands Percent					16.53%
Transitional Percent					25.37%
Buildable Percent (unsewered)	37.26%	12.92%	76.03%	87.55%	58.10%
Buildable Acres (unsewered)	28.35	6.69	28.39	96.83	160.26
Buildable Percent (sewered)	87.02%	67.77%	76.03%	90.89%	83.47%
Buildable Acres (sewered)	66.22	35.09	28.39	100.52	230.23
Vacant and Farm					
Wetland	9.27	3.19	6.21	2.57	21.23
Transitional	33.32	6.11	0.00	0.00	39.43
Remaining	20.21	2.48	0.00	17.02	39.71
Total	62.80	11.77	6.21	19.59	100.37
Buildable without sewers	20.21	2.48	0.00	17.02	39.71
Buildable with sewers	53.53	8.58	0.00	17.02	79.14
Residential					
Wetland	0.61	9.31	0.08	5.41	15.41
Transitional	1.35	15.61	0.00	3.70	20.65
Remaining	6.18	3.52	1.57	62.44	73.70
Total	8.14	28.44	1.65	71.54	109.77
Buildable without sewers	6.18	3.52	1.57	62.44	73.70
Buildable with sewers	7.53	19.13	1.57	66.14	94.36
Commercial and Industrial					
Wetland	0.00	4.19	0.73	2.10	7.02
Transitional	3.20	6.28	0.00	0.00	9.48
Remaining	1.63	0.70	1.10	17.37	20.80
Total	4.83	11.17	1.83	19.47	37.30
Buildable without sewers	1.63	0.70	1.10	17.37	20.80
Buildable with sewers	4.83	6.98	1.10	17.37	30.28
Other (Public or Unknown)					
Wetland	0.00	0.00	1.93	0.00	1.93
Transitional	0.00	0.40	0.00	0.00	0.40
Remaining	0.33	0.00	25.73	0.00	26.06
Total	0.33	0.40	27.65	0.00	28.38
Buildable without sewers	0.33	0.00	25.73	0.00	26.06
Buildable with sewers	0.33	0.40	25.73	0.00	26.46

Land Uses, Development Intensities and Impact Measures Used in the Scenarios

Use Categories

At this level of analysis it is not appropriate to attempt to specify detailed land uses. Therefore, the development scenario model uses five generalized categories of land uses: retail, office, light industry, retirement facility, and residential.

The "retail" category is further broken down into four subcategories for illustrative purposes. "Village commercial" represents small-scale shops and mixed-use buildings typically no greater than 2,000 square feet per structure and on lots as small as one-half acre. This type of use would have a pedestrian orientation and be located in a village center. "Strip shopping center" represents a larger-scale, auto-oriented center containing several businesses. The typical scale for this use would be a building of 10,000 square feet on an 8-acre parcel. The "fast food" use category is included because this type of use, oriented to through travelers along Route 40, would appear to have the strongest market at this time, but would also have distinctive impacts in terms of traffic (high levels of turning movements) and wastewater generation. Typical floor areas would be under 5,000 square feet, with lot areas of about one acre. Finally, "general retail" represents larger-scale, free-standing retail uses, ranging from convenience stores or food stores such as Rite-Aid or Wawa to restaurants or larger discount stores. Parcel sizes for these stores could be in the five-acre range, with floor areas up to 40,000 square feet.

The residential category is subdivided into two subcategories: "single-family residential" assumes the development of single-family homes on lots of one acre, while "village residential" represents single-family or multifamily development at an average density of 10 dwellings per acre. It is important to note that residential uses are not permitted as of right in the Pinelands Town zone and those that are permitted as a conditional use are required to have a minimum density of one dwelling unit/acre. Such uses exist, however, along the Route 40 and Route 54 corridors in Buena Vista's PT district, and would be necessary for the success of a village-based economic development strategy. This strategy also notes that single family developments that result in high numbers of school children will bring higher fiscal costs than other types of development, and thus the residential recommendations in this strategy are oriented toward senior housing and smaller housing units.

Table 16 presents the assumptions used in the analysis for development intensity, and Table 17 lists the assumptions regarding market values, traffic generation and wastewater generation. The rationales for these estimates are described in the following discussion.

Table 16: Estimated Intensities for Commercial and Industrial Uses

Uses	Floor Area Ratio* – Unsewered	Floor Area Ratio – With Sewers
Village Commercial	0.018	0.300
Strip Shopping Center	0.018	0.150
Fast Food	0.009	0.200
General Retail	0.018	0.150
Office	0.018	0.200
Light Industry	0.065	0.300
Retirement Facility	0.009	0.150

*FAR is the ratio of the total building floor area to the area of the parcel.

Table 17: Development Impact Assumptions

Generalized Land Uses	Unit	Market Value Per Unit	Tax Rate per $100 Value (1997)	Trip Generation (trips/day)*	Wastewater Generation (gals./day)*
Village Commercial	Sq. Ft.	$35	$0.320	30	125
Strip Shopping Center	Sq. Ft.	$40	$0.320	40	125
Fast Food	Sq. Ft.	$40	$0.320	200	240
General Retail	Sq. Ft.	$60	$0.320	40	125
Office	Sq. Ft.	$45	$0.320	15	125
Light Industry	Sq. Ft.	$15	$0.320	7	35
Retirement Facility	Sq. Ft.	$50	$0.320	10	320
Village Residential	Dwelling Unit	$104,000	$0.320	10	450
Residential	Dwelling Unit	$139,000	$0.320	10	450

*For commercial and industrial uses, trip generation and wastewater generation are indicated per 1,000 square feet of floor area.

Development Intensity

Attainable development intensities for land that is not served by a public wastewater treatment system are based on analyses provided by the Pinelands Commission, using NJDEP wastewater generation ratios and the Pinelands nitrate-nitrogen dilution standard of 2 parts per million.

Development intensities for parcels served by sewers are based on typical densities along rural and suburban highway corridors and, where applicable, in traditional village areas.

Values

The values in the model for the various use categories were determined based on a variety of sources:

- Tax assessment data are available on-line for all New Jersey communities. These data were reviewed for parcels along the Route 40 corridor in Buena Vista Township to establish typical values for existing residential and commercial uses in the corridor.

- Assessed values were collected from the same source for several chain stores throughout New Jersey: Rite-Aid (86 locations), Dunkin' Donuts (13), Wawa (222), Friendly's (30), McDonald's (142), Wal-Mart (12) and Home Depot (7). These particular chains were chosen as being representative of the kinds of stores that might locate along a highway similar to Route 40 in Buena Vista.

- The average single-family residential value of $139,000 is an estimate of typical values for new construction. This estimate was based on 1997 average sales prices for single-family homes in Buena Vista, adjusted by the 1990 ratio of the upper quartile value to the median value in Township (because new homes are likely to have higher values than average for the community), and then increased by 5% to reflect several years of appreciation in real estate values.

- "Village residential" values were estimated as 75% of the typical value for new single-family houses, or $104,000. (In 1990, the average value of attached single-family dwellings was 85% of the average value of detached single-family dwellings; however, as noted above, it is assumed that new single-family homes will have significantly higher values than average.) Although unit values for the "village residential" category are significantly lower than for the single-family category, the higher densities result in much higher values per acre for village housing.

Absorption Levels and Rates

Estimates of potential retail and office absorption rates in Buena Vista Township were made in part based on regional labor market forecasts and in part on judgment about the ability of the Township to attract certain types of development.

The New Jersey Department of Labor publishes annual *Regional Labor Market Reviews* for each of three regions in the State. The Atlantic Region encompasses Atlantic County (including Buena Vista Township and Buena Borough) as well as Cape May, Ocean and Monmouth Counties; while the Southern Region includes neighboring Cumberland County (with Vineland and Millville), along with Gloucester, Camden, Burlington, Mercer and Salem Counties. The January 1998 *Atlantic Region Labor Market Review* projected Atlantic County's job growth over the 1994–2005 period to be 2,320 jobs in the retail trade sector, and 32,390 jobs in the service sector. Assuming average employment densities of 0.5 employee per 1,000 square feet of retail floor area and 3 employees per 1,000 square feet of office or service industry floor area, these employment forecasts would translate to 4.64 million square feet of retail space and 10.8 million square feet of office or service industry space development in Atlantic County over the 11 year period (these figures would include additional casino development in Atlantic City).

What is Buena Vista Township's "fair share" of this development and employment growth? One approach is to prorate the total growth according to the Township's share of the County's population (this assumes that the Township's population and economic growth will be proportional to the County's). In 1990 Buena Vista's population was 7,655, or 3.4 percent of Atlantic County's 224,327 residents. Applying this percentage to the development estimates above would result in estimated growth potential in the

Township of approximately 160,000 square feet of retail space and 370,000 square feet of office and service space.[9]

A different approach was used to estimate industrial development. County projections suggest that overall industrial employment will decline in the future. While this trend may hold true County-wide, it is probable that communities offering appropriately zoned, affordably priced vacant industrial will see construction. The smaller industrial projects such as those that Buena Vista will seek to attract may provide a competitive niche. Therefore, a general assumption was made that there is sufficient market demand for one 25,000 square foot industrial/warehouse building per year for the next ten years.

These generalized estimates of growth potential were then reviewed in detail, compared with the uses existing in the Route 40 corridor area and judgments about the Township's market area, and then refined as indicated in Table 18.

Table 18: Absorption Rate Assumptions

Uses	10-Year Absorption	Annual Absorption	How It Could Happen
Village Commercial	50,000	5,000	Mixed-use: two 2,000+ sf buildings per year
Strip Shopping Center	20,000	2,000	One 10,000 sf. shopping center every five years
Fast Food	50,000	5,000	One store per year
General Retail	50,000	5,000	One building per year
Retail (all types)	170,000	17,000	
Office	150,000	15,000	One building per year
Light Industry	250,000	25,000	One building per year
Retirement Facility	60,000	6,000	Two 30,000 sf facilities: one every five years
Total Nonresidential	630,000	63,000	

The scenarios that follow present a buildout projection for the study area under four scenarios. Given the amount of land available, the levels of buildout represented in these scenarios will not be reached within the next ten years, which is the timeframe noted for Objective #2 (see page 5).

Wastewater

Estimates of wastewater generation are derived from the minimum standards for facilities published in the New Jersey Department of Environmental Protection's "Standards for Individual Subsurface Sewage Disposal Systems" at N.J.A.C. 7:9A–7.4.

[9] These estimates may be high because Atlantic City offers economies of scale and agglomeration not found in Buena Vista Township. On the other hand, there are also many areas of Atlantic County that do not have the zoning, vacant land or infrastructure to absorb more growth. Since it is not clear to what extent these factors may balance each other, the population-based approach provides acceptable order-of-magnitude estimates of demand for space.

Traffic

Trip generation estimates are based on factors published by the Institute of Transportation Engineers in *Trip Generation*, 5th edition (1987).

SCENARIOS

Scenario 1 - Unsewered

The first scenario represents the baseline case: continued incremental development without community wastewater collection and treatment. This scenario involves the smallest amount of land and potential development for several reasons:

- First, it is assumed that without sewers, development will be severely limited on transitional soils, i.e., those areas where the depth to the seasonal high water table is less than five feet.

- Second, the potential density of development on a parcel is much less without sewers because more land is required to adequately dilute wastewater. Based on calculations provided by the Pinelands Commission, it is assumed that retail and office uses with on-site septic systems will be limited to a floor area ratio of less than 0.02 (the "floor area ratio" or "FAR" is the ratio of the total building floor area to the area of the parcel on which the building is situated).

- Third, the lack of infrastructure does not foster increased development interest along the Route 40 corridor. Therefore, it is assumed that future development occurs only on land that is now vacant or farmland; that is, no redevelopment of existing residential or commercial properties to a higher density is assumed.

Thus, compared to a scenario with sewers, less land is available for development, the typical density of development on the available land is lower, and it is unlikely that existing developed properties will be converted or redeveloped to a more intensive use.

The area allocated to each use and in each subarea is listed in Table 19, and the resulting floor areas are presented in Table 20. These figures represent development of vacant land only, not land that is currently in another land use.

Table 19: Scenario 1 – Unsewered Land Use Allocation at Buildout (acres)

Uses	Land Allocated to Uses Within Each Subarea of the Corridor (Acres)				Total Land Allocation (Acres)
	Subarea 1	Subarea 2	Subarea 3	Subarea 4	
Village Commercial	-	-	-	-	-
Strip Shopping Center	-	-	-	-	-
Fast Food	5.0	2.5	-	-	7.5
General Retail	10.0	-	-	-	10.0
Retail	15.0	2.5	-	-	17.5
Office	-	-	-	-	-
Light Industry	5.2	-	-	17.0	22.2
Retirement Facility	-	-	-	-	-
Subtotal Nonresidential	20.2	2.5	-	17.0	39.7
Village Residential	-	-	-	-	-
Residential	-	-	-	-	-
Total	20.2	2.5	-	17.0	39.7

Table 20: Scenario 1 – Unsewered Development Potential at Buildout (square feet of gross floor area)

Uses	Subarea 1	Subarea 2	Subarea 3	Subarea 4	Total
Village Commercial	-	-	-	-	-
Strip Shopping Center	-	-	-	-	-
Fast Food	1,960	970	-	-	2,930
General Retail	7,840	-	-	-	7,840
Retail	9,800	970	-	-	10,770
Office	-	-	-	-	-
Light Industry	14,750	-	-	48,190	62,940
Retirement Facility	-	-	-	-	-
Total Nonresidential	24,550	970	-	48,190	73,710
Village Residential	-	-	-	-	-
Residential	-	-	-	-	-
Total Residential	-	-	-	-	-

Scenario 2 – Sewered-Infill

The second scenario focuses on setting aside the land within the district for job-generating, high-value office and light industrial uses. The rationale for this scenario is that the lower costs of land in a less congested, but easily accessible location will make Buena Vista competitive for small office, research and light industrial uses. If the Township offers serviced land, the region's economic development promoters and realtors will make that news known to firms seeking land in South Jersey.

The scenario assumes that public wastewater collection and treatment are provided to all parcels in the PT district, but that the resulting boost to development is not great enough to spur conversion or redevelopment of existing developed properties. This scenario thus has two differences from the undeveloped scenario:

- Development on transitional soils is assumed to be more intensive, increasing the total land available for development from 40 acres under the unsewered scenario to 79 acres with sewers.
- The potential density of development is assumed to be significantly greater. Without the requirement for on-site septic disposal and wastewater dilution, floor area ratios could respond to market demands, and are assumed to be in the range of 0.15 to 0.20 for highway-oriented retail and service uses, and 0.30 for village commercial and light industrial uses.

Given the large amounts of industrial land located in nearby Vineland, it is to be expected that buildout under this scenario will take place at a moderate pace. In order to bring firms to Buena Vista, sewers must be in the ground and ready to go before the Township will be competitive.

This scenario envisions that the western end of the Route 40 corridor (i.e., the southern portion of subarea 1) would transition to auto-oriented uses with high standards for landscaping and design. The parcels in that area are too small to accommodate industrial or office uses of any size.

The area allocated to each use and in each subarea is listed in Table 21 and the resulting floor areas are presented in Table 22.

Table 21: Scenario 2 –Sewered Infill Land Use Allocation at Buildout (acres)

	Land Allocated to Uses Within Each Subarea of the Corridor				Total Land
Uses	Subarea 1	Subarea 2	Subarea 3	Subarea 4	Allocation
Village Commercial	-	-	-	-	-
Strip Shopping Center	-	3.0	-	-	3.0
Fast Food	5.0	-	-	-	5.0
General Retail	5.0	5.6	-	-	10.6
Retail	10.0	8.6	-	-	18.6
Office	15.0	-	-	2.0	17.0
Light Industry	23.5	-	-	15.0	38.6
Retirement Facility	-	-	-	-	-
Subtotal Nonresidential	48.5	8.6	-	17.0	74.1
Village Residential	-	-	-	-	-
Residential	5.0	-	-	-	5.0
Subtotal Residential	5.0	-	-	-	5.0
Total	53.5	8.6	-	17.0	79.1

Table 22: Scenario 2 – Sewered Infill Development Potential at Buildout (square feet of gross floor area)

Uses	Subarea 1	Subarea 2	Subarea 3	Subarea 4	Total
Village Commercial	-	-	-	-	-
Strip Shopping Center	-	19,600	-	-	19,600
Fast Food	43,560	-	-	-	43,560
General Retail	32,670	36,460	-	-	69,130
Retail	76,230	56,060	-	-	132,290
Office	130,680	-	-	17,420	148,100
Light Industry	307,490	-	-	196,280	503,770
Retirement Facility	-	-	-	-	-
Total Nonresidential	514,400	56,060	-	213,700	784,160
Village Residential*	-	-	-	-	-
Residential*	5	-	-	-	5
Total Residential*	5	-	-	-	5

* Residential development is indicated in number of housing units, not square feet.

Scenario 3 – Sewered-Redevelopment

Scenario 3 is identical to Scenario 3 except that it assumes that the regional demand for commercial space is strong enough to spur redevelopment of existing residential parcels along the Route 40 corridor.

The area allocated to each use and in each subarea is listed in Table 23 and the resulting floor areas are presented in Table 24.

Table 23:
Scenario 3 – Sewered Redevelopment Land Use Allocation at Buildout (acres)

	Land Allocated to Uses Within Each Subarea of the Corridor				Total Land
Uses	Subarea 1	Subarea 2	Subarea 3	Subarea 4	Allocation
Village Commercial	4.0	-	-	-	4.0
Strip Shopping Center	-	3.0	-	-	3.0
Fast Food	7.0	-	-	-	7.0
General Retail	5.0	5.0	-	-	10.0
Retail	16.0	8.0	-	-	24.0
Office	15.0	2.0	2.0	-	19.0
Light Industry	23.0	-	-	15.0	38.0
Retirement Facility	-	-	-	-	-
Subtotal Nonresidential	54.0	10.0	2.0	15.0	81.0
Village Residential	-	8.0	-	17.0	25.0
Residential	-	-	-	-	-
Total	54.0	18.0	2.0	32.0	106.0

Table 24:
Scenario 3 – Sewered Redevelopment Development Potential at Buildout
(square feet of gross floor area)

Uses	Subarea 1	Subarea 2	Subarea 3	Subarea 4	Total
Village Commercial	52,270	-	-	-	52,270
Strip Shopping Center	-	19,600	-	-	19,600
Fast Food	60,980	-	-	-	60,980
General Retail	32,670	32,670	-	-	65,340
Retail	145,920	52,270	-	-	198,190
Office	130,680	17,420	17,420	-	165,520
Light Industry	300,560	-	-	196,020	496,580
Retirement Facility	-	-	-	-	-
Total Nonresidential	577,160	69,690	17,420	196,020	860,290
Village Residential*	-	80	-	170	250
Residential*	-	-	-	-	-
Total Residential*	-	80	-	170	250

* Residential development is indicated in number of housing units, not square feet. Village residential equates to a mixture of small apartments, senior housing and condominiums.

Scenario 4 - Retirement Services

Scenario 4 creates a retirement-oriented village in the study area that is focused on one or more projects that offer life care facilities, a range of residential options and nearby medical care. In addition, the area would be designed to allow for easy, non-automotive access to local businesses through a paved trail system connecting the study area. Public sector investments (such as a senior center, a recreation center or educational facility) could be added to make the area appealing. These facilities would benefit the entire Township.

The rationale for this scenario is the growing demographic need for retirement communities that are integrated within regular communities, as well as the Pinelands' generally seasonable climate. This option builds on the success of the Cranberry Run retirement facility and the presence of the golf courses. Wastewater treatment will be necessary. While this option offers the most residential development of the four scenarios, the targeting of seniors will mean that residential uses will be positive net revenue generators for the community, since no school children will be associated with these developments.

The area allocated to each use and in each subarea is listed in Table 25, and the resulting floor areas are presented in Table 26.

Table 25: Scenario 4 – Retirement Services Land Use Allocation at Buildout (acres)

Uses	Land Allocated to Uses Within Each Subarea of the Corridor				Total Land Allocation
	Subarea 1	Subarea 2	Subarea 3	Subarea 4	
Village Commercial	3.8	-	-	-	3.8
Strip Shopping Center	3.1	-	-	-	3.1
Fast Food	5.7	-	-	-	5.7
General Retail	-	7.7	-	-	7.7
Retail	12.6	7.7	-	-	20.3
Office	5.0	-	-	12.2	17.2
Light Industry	-	-	-	38.0	38.0
Retirement Facility	9.2	-	-	-	9.2
Subtotal Nonresidential	26.8	7.7	-	50.2	84.7
Village Residential	25.0	-	-	-	25.0
Residential	-	-	-	-	-
Total	51.8	7.7	-	50.2	109.7

Table 26: Scenario 4 – Retirement Services Development Potential at Buildout (square feet of gross floor area)

Uses	Subarea 1	Subarea 2	Subarea 3	Subarea 4	Total
Village Commercial	49,660	-	-	-	49,660
Strip Shopping Center	20,260	-	-	-	20,260
Fast Food	49,660	-	-	-	49,660
General Retail	-	50,310	-	-	50,310
Retail	119,580	50,310	-	-	169,890
Office	43,560	-	-	106,290	149,850
Light Industry	-	-	-	496,580	496,580
Retirement Facility	60,110	-	-	-	60,110
Total Nonresidential	223,250	50,310	-	602,870	876,430
Village Residential*	250	-	-	-	250
Residential*	-	-	-	-	-
Total Residential*	250	-	-	-	250

*Residential development is indicated in number of housing units, not square feet. Village residential equates to a mixture of small apartments, senior housing and condominiums.

Scenario Comparison

The following tables summarize the results of the analysis for the four scenarios. As indicated in Table 27 and Table 28, Scenario 4 utilizes the greatest amount of land (nearly 110 acres) and also results in the largest increases in total floor area and residential dwelling units. The potential growth under Scenario 3 is almost at the same level as for Scenario 4. In contrast, under Scenario 1 (unsewered) only about 40 acres are utilized, and the potential nonresidential floor area development is less than one-tenth of the other three scenarios.

Table 27: Scenario Comparison – Land Use Allocation at Buildout (acres)

Uses	1. Unsewered	2. Sewered–Infill	3. Sewered–Redevelopment	4. Retirement Focus
Village Commercial	-	-	4.0	3.8
Strip Shopping Center	-	3.0	3.0	3.1
Fast Food	7.5	5.0	7.0	5.7
General Retail	10.0	10.6	10.0	7.7
Retail	17.5	18.6	24.0	20.3
Office	-	17.0	19.0	17.2
Light Industry	22.2	38.6	38.0	38.0
Retirement Facility	-	-	-	9.2
Subtotal Nonresidential	39.7	74.1	81.0	84.7
Village Residential	-	-	25.0	25.0
Residential	-	5.0	-	-
Total	39.7	79.1	106.0	109.7

Table 28: Scenario Comparison – Estimated Development Potential at Buildout (square feet of gross floor area)

Uses	1. Unsewered	2. Sewered–Infill	3. Sewered–Redevelopment	4. Retirement Focus
Village Commercial	-	-	52,270	49,660
Strip Shopping Center	-	19,600	19,600	20,260
Fast Food	2,930	43,560	60,980	49,660
General Retail	7,840	69,130	65,340	50,310
Retail	10,770	132,290	198,190	169,890
Office	-	148,100	165,520	149,850
Light Industry	62,940	503,770	496,580	496,580
Retirement Facility	-	-	-	60,110
Total Nonresidential	73,710	784,160	860,290	876,430
Village Residential*	-	-	250	250
Residential*	-	5	-	-
Total Residential*	-	5	250	250

*Residential development is indicated in number of housing units, not square feet. Village residential equates to a mixture of small apartments, senior housing (not including retirement facilities), and condominiums.

Scenario 4 also creates the most financial benefit to the Township, as indicated in Table 29 and Table 30. Again, Scenario 3 generates almost as much valuation and tax revenue, while the revenues from Scenario 1 are only about 7 percent of the Scenario 2 levels and 3 percent of the levels for Scenarios 3 and 4.

Table 29: Scenario Comparison – Estimated Values at Buildout

Uses	1. Unsewered	2. Sewered–Infill	3. Sewered–Redevelopment	4. Retirement Focus
Village Commercial	$-	$-	$1,829,450	$1,738,100
Strip Shopping Center	$-	$784,000	$ 784,000	$810,400
Fast Food	$117,200	$1,742,400	$2,439,200	$1,986,400
General Retail	$470,400	$4,147,800	$3,920,400	$3,018,600
Retail	$587,600	$6,674,200	$8,973,050	$7,553,500
Office	$-	$6,664,500	$7,448,400	$6,743,250
Light Industry	$944,100	$7,556,550	$7,448,700	$7,448,700
Retirement Facility	$-	$-	$-	$3,005,500
Subtotal Nonresidential	$1,531,700	$ 20,895,250	$23,870,150	$ 24,750,950
Village Residential	$-	$-	$26,000,000	$ 26,000,000
Residential	$-	$695,000	$-	$-
Total	$1,531,700	$ 21,590,250	$49,870,150	$ 50,750,950

Table 30:
Scenario Comparison – Estimated Non-School Municipal Tax Revenues at Buildout

Uses	1. Unsewered	2. Sewered–Infill	3. Sewered–Redevelopment	4. Retirement Focus
Village Commercial	$-	$-	$5,854	$5,562
Strip Shopping Center	$-	$2,509	$2,509	$2,593
Fast Food	$375	$5,576	$7,805	$6,356
General Retail	$1,505	$13,273	$12,545	$9,660
Retail	$1,880	$21,357	$28,714	$24,171
Office	$-	$21,326	$23,835	$21,578
Light Industry	$3,021	$24,181	$23,836	$23,836
Retirement Facility	$-	$-	$-	$9,618
Subtotal Nonresidential	$4,901	$66,865	$76,384	$79,203
Village Residential	$-	$-	$83,200	$83,200
Residential	$-	$2,224	$-	$-
Total	$4,901	$69,089	$ 159,584	$162,403

As is to be expected, those scenarios with the greatest development intensity also generate the highest levels of traffic, as indicated in Table 31. For comparison, in 1993 two-way traffic volumes along Route 40 in Buena Vista Township were in the range of 9,300 to 10,900 vehicles per day.

It should be noted that the figures in this table represent "trip-ends" and not necessarily new vehicles on the road. For example, if a passing vehicle turns into a fast-food restaurant (a use with a high trip-generation rate) and then leaves again, the restaurant is responsible for two "trip-ends" (i.e., one arrival and one departure), which adds to congestion along the roadway but does not necessarily increase total traffic volume along the road. While almost all the trips generated by residential and industrial uses are new to the area, retail and (to a lesser extent) office developments tend to attract and divert traffic that is already on the road.

Table 31:
Scenario Comparison – Traffic Generation (trip-ends per day) at Buildout

Uses	1. Unsewered	2. Sewered–Infill	3. Sewered–Redevelopment	4. Retirement Focus
Village Commercial	-	-	1,568	1,490
Strip Shopping Center	-	784	784	810
Fast Food	586	8,712	12,196	9,932
General Retail	314	2,765	2,614	2,012
Retail	900	12,261	17,162	14,245
Office	-	2,222	2,483	2,248
Light Industry	441	3,526	3,476	3,476
Retirement Facility	-	-	-	601
Subtotal Nonresidential	1,340	18,009	23,121	20,570
Village Residential	-	-	2,500	2,500
Residential	-	50	-	-
Total	1,340	18,059	25,621	23,070

Table 32 presents the estimated wastewater volumes generated under each of the scenarios. Clearly, Scenario 4, with its heavier emphasis on residential uses, would generate the greatest volume of wastewater, more than three times the volume attributable to Scenario 2, which has little residential development and lower retail intensities. These figures include only new wastewater generation, not wastewater generated by existing uses that tie into the new system.

Table 32:
Scenario Comparison – Wastewater Generation (gallons per day) at Buildout

Uses	1. Unsewered	2. Sewered–Infill	3. Sewered–Redevelopment	4. Retirement Focus
Village Commercial	-	-	6,534	6,208
Strip Shopping Center	-	2,450	2,450	2,533
Fast Food	703	10,454	14,635	11,918
General Retail	980	8,641	8,168	6,289
Retail	1,683	21,546	31,786	26,947
Office	-	18,513	20,690	18,731
Light Industry	2,203	17,632	17,380	17,380
Retirement Facility	-	-	-	19,235
Subtotal Nonresidential	3,886	57,690	69,857	82,294
Village Residential	-	-	112,500	112,500
Residential	-	2,250	-	-
Total	3,886	59,940	182,357	194,794

Comparing the estimated wastewater generation for the four scenarios at the subarea level reveals the possibilities for different wastewater strategies for each subarea. As indicated in Table 33, even in the scenarios with high total wastewater generation, the volumes tend to be much greater at the two ends of the corridor than in the central portions. As a result, the Township might consider a strategy combining on-site septic systems in the middle of the corridor with public solutions at the ends—for example, linking Subarea 1 to the Buena Borough system and creating a small treatment system for Subarea 4. This type of approach is discussed further in the next section of the report.

Table 33: Estimated Wastewater Generation for Each Scenario, By Subarea

Scenario	Subarea 1	Subarea 2	Subarea 3	Subarea 4	Total
Scenario 1	1,967	233	-	1,687	3,886
Scenario 2	43,885	7,008	-	9,047	59,940
Scenario 3	52,107	44,711	2,178	83,361	182,357
Scenario 4	157,839	6,289	-	30,667	194,794

STRATEGIC DIRECTIONS FOR BUENA VISTA

A FRAMEWORK FOR RURAL ECONOMIC DEVELOPMENT

Rural America has seen significant change over the last several decades. One of the major characteristics of this change is familiar to the general public: a reversal in the trend of outmigration from rural areas to urban areas with the resulting *renaissance* of some rural areas. The renaissance has been driven by a number of factors:

- Rural retirees providing new life, new income and new housing demand in rural areas
- Families going back to small towns
- Internet-connected home occupations blossoming
- The boutiquing of farming (i.e., niche markets appeared which gave small farmers the opportunity make a living. Examples of these markets include buffalo, llamas, specialized cattle breeds, ginseng, hemp, organic fruits and vegetables, and many types of herbs and plants that are supporting the alternative health movement.) In Buena Vista, farmers are growing specialty vegetables for the New York and Philadelphia ethnic Asian markets.
- Back office operations of insurance, credit card and other financial service companies
- Mail order companies such as Lands End and Gateway Computers
- Shipping and distribution companies such as Airborne Express
- Tourism

Over the last few decades, much attention has been given to the ways in which rural areas grow and decline and there are a number of current techniques that rural areas are using successfully to achieve economic growth. The following table summarizes rural economic development approaches that are relevant to Buena Vista and to the Pinelands.

Table 34: Rural Development Techniques

Technique	Notes on Technique
1. Just Wait it Out	There are times when no amount of public sector action can overcome a tidal wave of economic change driven by regional or global forces. At times, the best strategy is to wait until the economy changes and the flood of negative trends abates.

2. Offer Infrastructure and Wait for the Market

Although it can be a long wait, it is common for communities to invest in the necessary infrastructure to accommodate economic growth and then wait for the companies to come. In some respects, this approach makes great sense since industry will often not come until the infrastructure is in place. This is especially true in areas where there is weak market demand. Long-term carrying cost for a community can be substantial

3. Provide a Land Use Framework and Wait for the Market

Related to the above point is the strategy of developing a land use framework to shape development well before there is market demand. This ensures that when development arrives, it can be managed appropriately.

4. Sponsor Public Owned Business Parks or Other Real Estate

In this case, the local or regional government buys land or buildings, creates serviced sites or buildings and works to attract tenants or buyers. The up-front commitment from government is substantial and the carrying costs for the facility can become politically difficult if the market does not respond strongly and quickly.

5. Public Buys a Business

Some communities have actually searched out and purchased a business in order to provide local jobs and stimulate more investment. In one case, shares were sold to the general public for $10 a piece. In the end, these funds and grant dollars allowed the town to buy a small furniture company, bring it to town and help it become profitable.

6. Tax Subsidies

Enterprise Zones are the most recent examples of the long standing technique of lowering property and income tax levels to attract business. Despite the many tales of companies that invest, take the subsidy and then leave, many areas continue to offer tax subsidies and they work. Recent enterprise zone regulations limit the number of *one night industrial investments* and target new business investment to regions of states that are most in need of economic growth. The combination of offering job training assistance with state income tax subsidies makes the deal even more appealing for relocating businesses. Vineland is a large urban enterprise zone.

7. Beneficial Taxation Programs	Tax increment financing and business improvement districts are both common techniques whereby property taxes are targeted for improvements within specified areas. TIFs hold down overall taxes on properties within a given area by maintaining the taxation level existing at the time of investment for the new business and using the incremental taxes flowing from the new investment to help the business pay down long-term debt. BIDs assess a special tax within a given area and the revenues flowing from that tax are spent only within the targeted area. Businesses pay more taxes, but they see a direct proportional benefit from their taxes.
8. Advertise/Create an Image	Often communities suffer from being unknown. While most rural places cannot afford an advertising campaign per se, most can afford to become more active in state and regionally sponsored economic development advertising. One of the spin-off benefits of tourism is that it brings people to the community and thus creates more general awareness of the place. Increasingly, rural business investment is initiated by people discovering the place through pleasure travel. Other options for creating awareness are the Internet, direct mail, attendance at business trade shows, coop advertising and working with a writer to place articles in strategically selected publications.
9. Clustered Economic Growth	A cluster strategy normally builds on one or two existing strong business sectors which already show some diversification within the local economy and have ties to growing economic sectors in the broader economy. There is demonstrated evidence that clustered businesses have many advantages over competitors operating in isolated circumstances.
10. Rural Networks	Rural networks are deliberately constructed systems of business support that address the needs of local businesses. They can involve cooperative purchasing systems, shared space, research and development support from local universities, and many other resources.
11. Amenity Driven Development	This model is driven by the desire of retirees, geographically free workers and businesses to find locations that offer a high quality of life. Public sector investments in recreation facilities, lakes, trails, downtowns, school systems and the protection of open space all enhance amenities that are appealing to investors.

12. Retirement Regions	Rural retirees are a major economic trend. Some areas of the country area focusing all their energies on attracting retirees because they bring income, generate few local service demands and energize local real estate markets. Communities must offer a good mixture of appealing climate, cultural activities, recreational amenities and affordable housing to compete for retirees.
13. Tourism Regions	Tourism is becoming an increasingly powerful economic force in rural areas. This is due to the general growth in tourism around the world and the fact that tourism is a business sector over which public sector investment, marketing and management can have a great influence. Often it is the public sector that offers the *product* (e.g., national parks, museums, historic sites, etc.) that draw the travelers.

While this is not an exhaustive list, it does suggest the variety of ways in which communities can foster rural growth. The type of approach a community takes depends on available resources, grant writing savvy, and the particular assets and challenges facing the place. For the purposes of this study, it is assumed that a mixture of some of these techniques will be most appropriate for Buena Vista.

Critical Strategic Factors

The analysis presented above suggests several key themes that the Township should at least consider, if not directly incorporate, in its economic development strategy:

1. The study area is limited in size and is stretched out along 1.6 miles of Route 40. The linear shape of the area limits the types of uses that can occur. For example, a major industrial park is not an option

2. While the study area is close to the Atlantic City Expressway, it is not close enough to offer a location that can take maximum advantage of the Expressway or which can draw traffic from the Expressway. Thus, the Expressway is an asset, but a minor asset.

3. Buena Vista lies adjacent to an area experiencing strong economic growth—Vineland. According to local economic development professionals, the critical factors preventing growth in the study area are first, the lack of sewers, and secondly a perception that the Pinelands regulations are too onerous to tackle unless absolutely necessary. Since ample serviced sites are nearby, both inside and outside the Pinelands, Buena Vista's sites are not competitive.

4. Route 40 traffic levels—midweek 10,000 to 12,000 trips—are high, but not high enough to create a *"miracle mile"* type of retail area.

5. The land lying along Route 54 in the PT zone offers the greatest development potential as it consists of over 50 acres of vacant, contiguous, buildable land.

6. If sewers were present, it is most likely that the market would see opportunities for more fast food restaurants and other auto-oriented businesses.

7. An important aspect of this strategy is to define what type of place the community wishes the study area to become. Should it, or one subarea, become a village center? Should it be an attractively designed strip shopping area? Should its focus be on industrial and office activity? Should it present an image distinct from Landisville?

8. One of the key ingredients to many successful rural economic development efforts is offering the appealing small town environment that retirees, families and businesses associate with rural life. Buena Vista has a number of small villages, but only Richland feels like a distinct place. If the Township created a new village, it might then offer the classic rural appeal.

9. With whom is the Township competing for business investment? The answer depends on the type of investment sought by the community. For industrial and larger office development, Vineland is clearly a competitor. The enterprise zone and other incentives offered by that community will be difficult—perhaps impossible—for Buena Vista to match. Therefore, Buena Vista should not attempt to attract the types of firms that Vineland is attracting. Generally speaking, Buena Vista does not have the capacity to accommodate very large businesses. A threshold for marketing might be set at businesses of 200 or fewer employees. Buena Vista does offer qualities that Vineland cannot match. The Township will attract the smaller light industrial or office business that is seeking the following qualities: a rural setting, no traffic congestion and easy access for workers who live in Vineland or along the Expressway corridor. In addition, Hammonton will be a competitor. Again, Buena Vista must compete with its rural character.

10. Buena Vista must offer wastewater disposal options of some type if it is to attract sufficient business investment to make its economic development effort worthwhile. The development capacity analysis demonstrates that buildout of the corridor in an unsewered fashion will generate less than $5000 in additional, non-school, tax revenues.

11. Buena Vista's strategy should perhaps take a broader view of the potential future development of the immediate region. As Vineland continues to grow, there will be new development pressures to areas northeast of the City in Landisville, Minotola and Buena Vista. Although the majority of Buena Vista lies in the Pinelands, its lands to the west and the adjoining western communities are outside the Pinelands. What type of development pattern might Buena Vista encourage that will in the long run be compatible and sustaining to the development pattern that is likely to emerge along the Township's western border?

12. Buena Vista has a cluster of pharmaceutical related firms within and near to the Township. The Township also continues to share some of the regional cluster of glass industries.

13. Buena Vista Township has a strong base of agriculture. Ideally, the Township's economic development strategy should attempt to capitalize on and support this sector.

14. Regional growth is also occurring in the construction, wholesale and service sectors. More specific categories include business services, support health services, data processing, telemarketing, back office operations and retirement facilities.

15. Atlantic City traffic along Route 40 offers an opportunity for the community to provide more tourism-oriented services. The Township's position as a gateway community also offers a potential opportunity for the community to act as an interpretive gateway for travelers. For example, an interpretive facility might focus on the agricultural heritage and economy of the Pinelands. In addition, the Township's golf courses might also form the base for a tourism promotion effort.

16. Assumptions regarding the ability of the local real estate market to absorb new development suggest that the study area has more land available than could be absorbed for business development over the next ten years. There appears to be sufficient demand in the residential sector to absorb the excess land. If the right types of residential development is chosen, then the fiscal impact to the Township could be positive. Under current zoning, however, housing is not allowed in the Pinelands Town district.

BUENA VISTA'S PATH

This analysis has defined the parameters within which economic development is most likely to occur. It has also examined local and regional economic trends to find potential opportunities for the community. Based on this work, the following menu of strategic directions appears feasible for Buena Vista Township. The menu concept is used because different components of the list can be mixed and matched, although some ideas go together better than others.

Land Use Options

1. **Light Industry/Office Option**: Focus on light industrial and office with retail in high traffic, high visibility frontage areas. This option allows for retail development to occur but with a clear site priority given to light industry and office uses. In other words, retail uses should not be allowed to push light industry and office from sites that are well suited for those latter uses. The housing element of this option would be for small apartments targeted for families with no or few children in order to minimize the impacts on the school system. This option corresponds to Scenario 3 – Sewered–Redevelopment (page 49) in the land use scenarios.

2. **Mixed Use Option:** Mix village/pedestrian-oriented development with a senior housing and service theme and light industrial and office uses. This option incorporates the idea of a *place* or *center* within the Study Area but in a fiscally positive manner. It would create pedestrian systems and more strongly support any tourism-oriented efforts to be undertaken by the Township. It also includes equal amounts of light industry and office development. It corresponds to Scenario 4 – Retirement Services (page 50).

Wastewater Options

1. Work with Buena Borough to hook into the Borough's system at the western end of the study area in order to allow for short-term development to occur. Design the development in a manner that keeps volume below 50,000 gpd.

2. Install a package plant in Subareas 2 or 3 to serve the elementary school and development in Subarea 2. Fifty thousand gpd capacity should be sufficient.

3. Install a package plant in Subarea 4 to serve development in that area. Capacity of up to 100,000 gpd might be necessary to meet existing and new demand.

Transportation and Circulation

1. Apply for funds to install sidewalks and streetscape improvements along Route 40.

2. Consider realigning the Cumberland Road/Route 40 intersection to the east of the Route 40/54 intersection and extending a new road north to service backlands in Subarea 1.

3. Consider widening Route 40 to provide a turning lane. The Township should also consider whether reverse frontage roads would be appropriate under certain

circumstances. Overall, road capacity will be an issue that must be addressed as development proceeds.

4. Develop a trail system running throughout the corridor to service workers, residents and visitors.

Public Investments

1. Create a system of trails and interpreted nature areas in the wetlands to the north of Route 40. Obtain grant funds for public purchase of this land.

2. Build an interpretive center/visitor center (to make Route 40 traffic slow down and look around in the study area) on public land in Subarea 3. Focus the center on the Pinelands and its agricultural heritage and economy.

3. Create a farmers market facility within one of the development areas. This facility would feature products from local farmers and provide a stronger reason for people to stop in the Center.

4. Under land use scenarios that involve senior housing and services, incorporate a public-accessible recreation center in the development. This center should include facilities such as a pool, aerobic equipment, weight training equipment, and racquet courts.

Regulatory and Zoning Issues

1. Work with the Pinelands Commission to find a way to expedite project review within the study area. Consideration should be given to pre-approval for uses that are defined in the Township's economic development strategy. The Pinelands Commission has considered a similar *pre-approval* process for Woodbine which addresses most potential development problems ahead of time and thus reduces the applicant's permitting time and cost.

2. Consider allowing apartments, senior housing and/or condominiums within the PT district.

Marketing

1. Work with existing pharmaceutical and related companies to identify services or ancillary businesses that would benefit their businesses and would be attracted to the study area. Also identify any specific needs within this industry that the Township might be able to meet with the design and operation of its PT District and business areas.

2. Work with regional economic development organizations to encourage them to promote the Buena Vista study area to relocating and expanding businesses.

3. Hold a design competition for graduate students at planning, landscape architecture, and architecture schools in the region to assemble ideas for a senior-oriented development along the corridor. Student assistance can be obtained as part of a class project, on a consulting basis (for a small fee), or in response to a reward (e.g., a $2,000 scholarship prize).

4. Work with the owner of the vacant lands in Subarea 1 and issue a developer RFP for a senior-oriented village development.

5. Install a visitors center as part of the village development. Use this vehicle to promote the Township and its opportunities.

6. Find a visible site within the study area and near senior housing that could be planted as a grand experimental garden for flowers, herbs and vegetables with management and maintenance by seniors and area farmers. Use this as a tourism draw, interpretive experience and advertisement for local farmers.

APPENDIX 1:
INVENTORY OF PARCELS IN THE STUDY AREA

Parcel Number	Owner	Land Use	Acres
Commercial Parcels			
05-04001-0000-00055	?	?	0.4
05-04001-0000-00045	Hess Realty Corp.	C	0.42
05-04001-0000-00048	Buena Vista Twp.	C	1.06
05-04001-0000-00050	Reilly, C.	C	0.73
05-04001-0000-00054	Pietro Food, Inc.	C	6.98
05-04001-0000-00056	Lillia, R.	C	2.22
05-04001-0000-00057	Archetto,	C	1.97
05-04001-0000-00067	Falasca, A.	C	4.4
05-05301-0000-00003	Dattel, S. Dattel Realty	C	1.76
05-05301-0000-00007	Dixon, L.	C	0.43
05-05301-0000-00011	RS Electrical Contractors	C	2.04
05-05301-0000-00014	Bracaiello, L.	C	0.38
05-05301-0000-00017	Jones, L.	C	1.4
05-05401-0000-00001	Grewal, S.	C	2.62
05-05402-0000-00009	Hampton, G.	C	1.83
	Total		28.64
Forest Parcels			
05-04001-0000-00039	Labo, R.	F	18.47
05-04001-0000-00040	Casselli, J.	F	29.51
	Total		47.98
Industrial Parcels			
05-05201-0000-00014	SP Industries	I	4.28
05-05201-0000-00015	SP Industries	I	4.78
	Total		9.06
Public Parcels			
05-04001-0000-00011	Basile, J.	P	0.33
05-05301-0000-00001	Buena Regional School	P	23.8
05-05301-0000-00002	Buena Township	P	3.85
	Total		27.98
Residential Parcels			
05-04001-0000-00001	Grant, Mary	R	0.78
05-04001-0000-00003	Graff, R.	R	0.25
05-04001-0000-00007	Loschenko, W.	R	1.55
05-04001-0000-00008	Hatki, R.	R	1.06
05-04001-0000-00009	Fabulian, P.	R	0.59
05-04001-0000-00010	Fabulian, U.	R	1.15
05-04001-0000-00038	Usatschew, R.	R	0.32
05-04001-0000-00041	Casselli. J.	R	0.34
05-04001-0000-00046	Iacovelli, N.	R	0.19

05-04001-0000-00047	Iacovelli, A & L	R	0.52
05-04001-0000-00052	Baker, Louise R.	R	0.53
05-04001-0000-00053	Sooy, D.	R	0.86
05-04001-0000-00058	Buena Vista Twp.	R	14.07
05-04001-0000-00061	Yebernetsky, P.	R	10.62
05-04001-0000-00062	Dellabarca, N.	R	1.86
05-04001-0000-00063	Damico, M.	R	4.78
05-04001-0000-00064	Buena Plumbing	R	1.96
05-04001-0000-00065	Buena Plumbing	R	1.98
05-04001-0000-00066	Buena Plumbing	R	2.01
05-04001-0000-00069	Palmieri, R.	R	1.02
05-04306-0000-00018	Ehlen, H.	R	9.49
05-04306-0000-00019	McIntosh, A.	R	1.55
05-04306-0000-00020	McIntosh, D.	R	1.36
05-04306-0000-00022	Satiri, V.	R	1.19
05-05301-0000-00004	Barbartotto, N.	R	12.32
05-05301-0000-00005	Tribbett, A.	R	0.88
05-05301-0000-00006	Main, M.	R	5.44
05-05301-0000-00008	Kobelo, D.	R	0.74
05-05301-0000-00009	Zub, W.	R	1.1
05-05301-0000-00010	Charles, A.	R	1.38
05-05301-0000-00013	Williams, C.	R	0.96
05-05301-0000-00015	Houston Land Holding Corp.	R	5.47
05-05301-0000-00016	Collini, L.	R	0.84
05-05301-0000-00030	Jones, L.	R	3.54
05-05301-0000-00045	Radcliffe, R.	R	1.05
05-05402-0000-00002	Kejzman, H.	R	5.78
05-05402-0000-00003	Dorofee, T.	R	1.25
05-05402-0000-00004	Hensel, R.	R	1.35
05-05402-0000-00005	Cimarosse, A.	R	1.35
05-05402-0000-00007	Zanghi, D.	R	4.64
05-05402-0000-00010	Irene, V.	R	1.65
	Total		109.77
Vacant Parcels			
05-04001-0000-00002	Manzano, G	V	0.22
05-04001-0000-00004	Scarpa, F.	V	0.59
05-04001-0000-00005	Poslusanyj, B.	V	0.14
05-04001-0000-00006	Scarpa, F.	V	1.35
05-04001-0000-00012	Basile, J.	V	0.76
05-04001-0000-00032	Takotey, Z.	V	0.57
05-04001-0000-00033	Andryca, A.	V	0.47
05-04001-0000-00034	Hejko, A.	V	1.03
05-04001-0000-00035	Takotey, Z.	V	0.5
05-04001-0000-00036	Dozok, P.	V	0.5
05-04001-0000-00037	Buena Vista Twp.	V	0.47

05-04001-0000-00044	Casselli, J.	V	7.74
05-04001-0000-00049	Casselli, J.	V	0.44
05-04001-0000-00051	Casselli, J.	V	0.77
05-04001-0000-00059	Pajic, N.	V	0.74
05-04001-0000-00068	Buena Corp.	V	1.7
05-04001-0000-00070	Buena Corp.	V	1.53
05-04306-0000-00001	Buena Corp.	V	11.52
05-04306-0000-00002	Buena Corp.	V	0.74
05-04306-0000-00003	Brunozzi, S. & J.	V	2.81
05-04306-0000-00021	Fagotti, S.	V	1.29
05-05402-0000-00001	Tamburro, R.	V	5.46
05-05402-0000-00006	Woschenko, M.	V	4.84
05-05402-0000-00008	Zanghi, D.	V	6.21
	Total		**52.39**
	Grand Total		275.82

APPENDIX 2:
PROFILE OF BUSINESSES IN THE BUENA VISTA AREA

Business Name	# of employees	SIC Code	Business Description	Location
A-pro Services		0		Buena
Ace Services		76290000		Buena
Advertising Gallery	1 to 4	51990000	advertising specialties wholesaler	Buena
American Business Co		73890007		Buena
American Movers Inc		42120000		Buena
Applause Musical Products	1 to 4	50990000	musical instruments wholesalers	Buena
Asselta Joseph R Accountant		87210000		Buena
Atlantic Overhead Door	5 to 9	5211	door& gate operating devices	Buena
Baruffi Bros Inc		17710002		Buena
Bernadette's Hair Hut	1 to 4	72310000	beauty salon	Buena
Bertonazzi H Electrical Contractor		17310000		Buena
Boulevard Air Inc.	5 to 9	17110003	sheet metal work contractors	Buena
Brunini Terrace Swim Club	5 to 9	79970000	swimming pool, private	Buena
Budget Lodge	1 to 4	70110000	hotel	Buena
Buena Athletic Club	10 to 19	7991, 7299, 7999	health club, health consultants,	Buena
Buena Plumbing Inc		17110003		Buena
Buena Reg School Dist Concession Stan		82110000		Buena
Buena Regional Schools High School	100 - 249	82110000	public school	Buena
Buena Regional Schools Milanesi School		82110000		Buena
Buena Self Storage	1 to 4	42250003	storage- household and commercial	Buena
Buena Tavern	10 to 19	58120000	restaurants	Buena
Buena Terrace Apartments		65130000		Buena
Buena Vista Camping Park	10 to 19	70330000	campgrounds	Buena
Buena Vista Country Club	10 to 19	79920000	golf course	Buena
Buena Vista Country Club	50 to 99	58120000	banquet rooms	Buena
Buena Vista Market	1 to 4	54990006	delicatessens	Buena
Buena Vista Twp Clerk's Office	1 to 4	91210004	government offices	Buena
Buena Vista Twp Court Clerk	1 to 4	92110004	city government- courts	Buena
Buena Vista Twp Tax Assessor	1 to 4	93110004	city government- finance and taxation	Buena
Buena Vista Twp Tax Collector	1 to 4	93110004	city government- finance and taxation	Buena
Business and Industrial Electric	1 to 4	17310000	electric contractors	Buena
Cactus Co.	5 to 9	51930000	florist and nursery retail and wholesale	Buena
Cedar Avenue Baptist Fellowship	1 to 4	86610000	church	Buena
Cifaloglio Henry Cesspool Cleani		50820000		Buena
Comar, Inc.	500-999	2834, 2844, 3089, 3231, 5099, 5113	pharmaceutical, cosmetics, plastics., glass product manuf., importers and packaging materials wholesale	Buena
Contini Food Service Management Co		87410009		Buena
Country Palace	1 to 4	58130001	bar	Buena
Cranberry Run Clubhouse	1 to 4	79970000	clubs	Buena
Cranberry Run Inc.	5 to 9	65150000	mobile home park	Buena
D B Products Inc		50850000		Buena
D&D Stables	1 to 4	5159, 7999	horse dealers, riding academies	Buena
Dandrea Produce Co.	5 to 9	51480001	fruits and vegetables- wholesale	Buena
Designing Woman Contemporary		56210000		Buena

Fa				
Di Donato's Villa Caterers		73890012		Buena
Dickinson Alan Accountant		87210000		Buena
Dom Zanghi and Sons Inc.	1 to 4	17940003	excavating contractors	Buena
Econo Lodge	5 to 9	73890012	hotel & motel, conference center	Buena
Evsco Pharmaceuticals	50-99	2834, 3841	pharm. and surgical instruments	Buena
Fanucci Real Estate Inc.	1 to 4	1521, 6531	general contractors, real estate agent	Buena
Fifty Four Diner	1 to 4	58120000	restaurant	Buena
First Choice Medical Billing	1 to 4	87210000	billing service	Buena
First Class Video	1 to 4	78410002	video tapes - renting & leasing	Buena
Five Bros. Inc	5 to 9	55410000	service station	Buena
Formisano Farms Produce	5 to 9	51480000	fruits & vegetables wholesale	Buena
H Bertonazzi Electrical Contr.	1 to 4	17310001	electric contractors	Buena
Hansbury, Jack	1 to 4	87210000	accountant	Buena
Head to Toe	1 to 4	72310002		Buena
Henry Cifaloglio Inc.	20 to 49	49530002	garbage collection	Buena
I-ron-x Industries		34460003		Buena
IGI, Inc.	250-499	2899, 2834, 5122, 5169, 5191	chemical manufacturers, exporters, and wholesalers. animal health products	Buena
J & A Insurance		64110000		Buena
Jennings Edwin Contractor		15410000		Buena
Jerry's Body Shop	1 to 4	75320001	automobile body repairing	Buena
Jersey Panel Corp		0		Buena
Jones Antiques	1 to 4	76410012	antiques- repairing and restoring	Buena
Kuban Education/Welfare Assoc.	10 to 19	86110000	association	Buena
Latona Country Club	1 to 4	79920000	public golf course	Buena
Let's Learn Daycare	1 to 4	83510000	child care service	Buena
Lisas Country Hair Hut		72310002		Buena
Marandino, Jack	1 to 4	87210000	accountant	Buena
Marble Works Inc.	1 to 4	50320002	marble- natural (wholesale)	Buena
McGyver Service	1 to 4	7699, 1799	motorcycle repair, sandblasting	Buena
Midway Inn		58120022		Buena
Milanesi School	20 to 49	82110003	schools- elementary	Buena
Miller Truck Leasing		75380001		Buena
Moorings at Sweetwater	1 to 4	65130000	apartments	Buena
Newcomb Sports Therapy		80490024		Buena
Not Just Pets		59990013		Buena
Nova Skin Care	NA	51220000	pharmaceutical wholesaler	Buena
Occhiolini,David	1 to 4	87210000	accountant	Buena
Pavillion Pizza		58120021		Buena
Pedroni Fuel Co		29110000		Buena
Post Offices Buena	5 to 9	91990000		Buena
Premier Electrical Contractors	10 to 19	17310000	electric contractors	Buena
R & H Auto Brokers		55210000		Buena
R S Electrical Contractors Inc		17310000		Buena
R&A Auto Works	1 to 4	7532, 7538	auto repair, auto body repair	Buena
R-C Enterprises		42260000		Buena
Realty One Associates		65310000		Buena
Restaurant Equipment Corp		50460002		Buena
RS Electrical Contractors Inc.	20 to 49	17310001	electric contractors	Buena
Rumors Rib Room	1 to 4	58120008	restaurants	Buena
S P Industries L P		50230002		Buena
Safe Tech		38210000		Buena
Scottish Inn		70110001		Buena
Signs & Lettering	1 to 4	27520000	printers	Buena
Signs & Lettering by Rich	1 to 4	39930000	sign manufacturer	Buena
Square Deal Flower Mart	1 to 4	59450001	craft supplies	Buena
Summers Lester R Inc Trucking		0		Buena
Ted's Taxidermy	1 to 4	76990012	taxidermists	Buena
Tomlyn Products		28340000	pharmaceutical preparation	Buena
Top Cat Painting & Maintenance	1 to 4	17210000	painters	Buena
Triton Associated Industries	20-49	3229, 5023	glassware manufacturer and wholesaler	Buena
U-Haul Co.	1 to 4	75130003	truck renting and leasing	Buena
United Precasting Corp	50-99	3272, 5032	concrete product manufacturer	Buena

			and wholesaler	
VCR Express II	1 to 4	76220000	video recorder repair	Buena
Vet's Body Shop		52310001		Buena
Warner & Co.	5 to 9	87210000	accountants	Buena
WaWa Food Market	10 to 19	54110003	convenience stores	Buena
West Farm Real Estate		65310000		Buena
Wilmad Glass Co	100 to 249	32310098	glass prod. made- purchased glass	Buena
Ye Olde Midway Inn	20 to 49	58120008	restaurants- steak houses	Buena
Young Electronics Inc		36250000		Buena
Zip's Tavern Inc.	1 to 4	58130001	bars	Buena
Active Paging Systems		50650020		Collings Lakes
Amos Inc		50720011		Collings Lakes
Armano John J Jr Attorney At Law		81110000		Collings Lakes
Attractions Travel Agency		47290001		Collings Lakes
Balloons By Cathleen Nicole		59470021		Collings Lakes
Bud & Larrys Napa Auto Parts		35590013		Collings Lakes
Castleford Industries Ltd Inc		0		Collings Lakes
Collings Lakes Video		78410000		Collings Lakes
Collings Lakes Volunteer Fire		92240001		Collings Lakes
Coming Attractions Video Store		73890025		Collings Lakes
Landscape Irrigation Professionals I		7820001		Collings Lakes
Napa Auto Parts		35590013		Collings Lakes
Schaser Jack Rev		86610000		Collings Lakes
Tri-cell Supply Co		50320000		Collings Lakes
Wawa Food Markets		54110006		Collings Lakes
Barnegat Atlantic Resources Inc		0		Milmay
Benson Printing Co Inc		27590010		Milmay
Bertuzzis Market		54310000		Milmay
Bombara Electric Inc		17310000		Milmay
Buena Vista Group Home		0		Milmay
Chiarello F Charles Co		50650000		Milmay
Conrail Track Department		0		Milmay
E J Woodsman Shop		52610003		Milmay
Janney Ronald Electrical Cont		15410000		Milmay
Johns Garage		75320003		Milmay
Lincoln Agency		0		Milmay
Merri Mac-metric Inc		30890000		Milmay
Micro Net Inc		0		Milmay
Mid Atlantic Business Services		87210000		Milmay
Mid State Paging Inc		48120004		Milmay
Milmay Bible Church		86610000		Milmay
Mirror Images		28420001		Milmay
Mizpah Fire House		92240000		Milmay
Palmonari J V Inc		34410000		Milmay
Paramount Homes		17410000		Milmay
Pickle Factory The		24310000		Milmay
Post Offices Milmay		91990000		Milmay
Rainbow Square Dance Club		79110002		Milmay
Rone Frank L Ii Attorney		81110000		Milmay
Saint James A M E Church		86610000		Milmay
South Jersey Precision Tool & Wold Inc		30890000		Milmay
Als Mini Mart		54990006		Newtonville
Atlantic Human Resources Inc H		0		Newtonville
Bass Henry L Rev		86610000		Newtonville
Bethlehem Missionary Baptist Church		86610000		Newtonville
Charles Haircuts & More		72410002		Newtonville
First Union Baptist Church		86610000		Newtonville
General Store The		54110000		Newtonville
Modern Miracle School		82110000		Newtonville
Mt Pisgah Tabernacle		86610000		Newtonville
Post Offices Newtonville		91990000		Newtonville
Tds Insulation Co		17420004		Newtonville
A J Sikking Construction		15410000		Richland
Alison Co		0		Richland
Brassies Place		58130001		Richland
Buena Family Practice Center		80110005		Richland
Buena Regional Schools Basic		82110000		Richland

Skills Pr		
Buena Regional Schools Board Of Educat	82990000	Richland
Buena Vista Liquors Inc	59210000	Richland
Carlos Servicenter	55410000	Richland
Crossings At Richland The	54110006	Richland
F & R Safety Products	39930000	Richland
Faraway Farm Veterinary Hospital	7420000	Richland
First Baptist Church	86610000	Richland
Giacomos	58120000	Richland
Mallory D V Rev	86610000	Richland
Menzoni Preziosi & Robbins	87210000	Richland
Mikes Bar	58130001	Richland
National Tax Service Inc	72910000	Richland
Orlandini Tile Supplies Inc	50320002	Richland
Post Offices Richland	91990000	Richland
Richland Auction	73890002	Richland
Richland Carpet Co	17520003	Richland
Richland General Store	52510000	Richland
Richland Glass Co Inc	32310098	Richland
Richland Recreation Park	79990006	Richland
Richland Volunteer Fire Hall	79110000	Richland
Richland Wallpaper & Window Treatment	57140000	Richland
St Augustine Monastery	82110000	Richland
St Augustine Preparatory Sch	82110000	Richland
Trophies Unlimited	59990005	Richland
Tuckahoe Enterprises Inc	2520000	Richland
Uncle Mikes Pizzeria	58120021	Richland
V & G Satellite Inc	96610000	Richland

Source: American Business Information, Inc. 1999

APPENDIX 3:
ECONOMIC DEVELOPMENT ASSISTANCE RESOURCES

The Southern New Jersey Partnership for Economic Development provides assistance to seven counties. It promotes the Southern New Jersey region as a whole by providing site selection services and disseminates economic data to businesses on a regional basis. Potential businesses wishing to expand or relocate in southern New Jersey examine the region when making a location decision and are less interested in municipal boundaries. The organization generally works with businesses which employee 25 to 200 people. These businesses contact the Partnership as a result of targeted advertisements, direct mailing and marketing directed to site location specialists.

The South Jersey Economic Development District, with offices in Vineland, assists communities in attracting business development by assembling grant packages for the development of infrastructure, industrial parks, and other resources. It also provides loans for specialized business assistance programs to companies in Atlantic, Cape May, Cumberland, and Salem Counties.

The Greater Atlantic City branch of the New Jersey Small Business Development Centers located in Atlantic City offers a wide range of services to existing small business owners and to those considering starting their own business by providing counseling, workshops, and loans from the Small Business Administration. The program is a cooperative effort of the private sector, the educational community and government agencies. Clients are assisted in determining the feasibility of their cash flow projections, financial statements, and marketing strategies.

Atlantic County Economic Development Corporation 2000 (known as Atlantic 2000) was established as a non-profit agency in 1994 and works with local agencies on financial packages for business recruitment and retention. The office is based in Atlantic Community College in Mays Landing. The staff of Atlantic 2000 follow up on new business leads and package relevant economic and demographic information targeted to meet the specific needs of those business leads. Once the leads become tangible, staff assist in coordinating local and state permit and approval processes and in identifying other resources. The organization markets itself to businesses as the "one-stop shopping" contact for assistance in establishing businesses in Atlantic County by assisting with loans, permitting and identifying other necessary information (such as labor, training, and financing).

The Atlantic County Department of Regional Planning and Development is in many cases, the contact for economic development for communities that do not have the staff to support their own operations. The Atlantic 2000 committee has taken over many of the responsibilities that this department once addressed.

In 1998, Atlantic 2000 petitioned the New Jersey Economic Development Authority (NJEDA) with support from the Pinelands Municipal Council to implement a Pinelands Incentive Priority Program (PIP) in order to provide selected Pinelands communities with priority status for selected programs available through the New Jersey EDA. The special designation would be similar to the Urban Aid Designation already in effect through the NJEDA and would allow selected Pinelands communities to qualify for most of the NJEDA's programs at the lowest interest rates available. NJEDA expressed interest in the Atlantic 2000 proposal, but first requested further information on the demand for commercial borrowing in specific Pinelands communities and the degree of interest in those communities for commercial expansion in order to determine the type of financial assistance required by businesses. To date, this information has not been provided to the NJEDA.

Whiteman
& Taintor