

PLAN SLATE BELT



August Steering Committee Survey, Data Analysis and Mapping

Working Draft – 08/07/19

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• Portland • Roseto • Upper Mount Bethel • Washington • Wind Gap •



Charrette Agenda

- **Survey Responses – Top 5**
- **Data Analysis – Economic Analysis**
- **Mapping Analysis – Natural, Parks, Farmland, etc**
- **Discussion – Vision and Goals**

Full Presentation available at:
www.planslatebelt.org

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Survey Results

Process, Ranking and Top Five

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Discussion Results

Plainfield Township

- Sustainable Farmers
- Regionalize Public Services
- Infrastructure for Desired Land Use
- Barriers to Housing/Business
- Quality of Life
- Balance: Preservation, Industry, Growth
- Preserve Heritage and Natural Resources
- Farming as a Business

Upper Mount Bethel Township

- Re/development in Key Locations
- Broadband Access and Quality
- Quality of Life
- Fiscal Sustainability
- Intergovernmental Cooperation

Bangor Borough

- Smart Growth: Kind/Location
- Outdoor Recreation, Farmland, Open space
- Transportation: All
- Restrictions Business/Housing
- Business Development
- Unity & Cooperation
- Quality of Life
- Resistance to Change
- Transportation Management
- History and Heritage

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Discussion Results

Combined Priorities

- Sustaining Farming and Farms
- Improving Intergovernmental Cooperation
- Balancing Preservation and Development
- Barriers to Housing and Business
- Encouraging Technical Education
- Preserving Quality of Life
- Limited/No Broadband Access
- Resistance to Change
- Municipal Fiscal Sustainability
- Managing Transportation Infrastructure

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Survey Prompts

Rank the Following Priorities

- Sustaining farming as a business and way of life.
- Improving governmental efficiency and reducing tax burdens.
- Balancing land preservation, development, redevelopment, industry and jobs.
- Reducing barriers to housing and business development.
- Ensuring public schools prepare students for the future job market.
- Preserving the quality of life (safety, heritage, rural character and open space).
- Enhancing access to current and future technology infrastructure.
- Managing social, economic, cultural and demographic changes in the community.
- Improving municipal financial sustainability.
- Enhancing transportation infrastructure.

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Access Survey at

surveymonkey.com/r/SlateBeltCharrette

Rank the ten priorities from highest (1) to lowest (10)

Add priorities or comments

Slate Belt Post-Charrette Survey

Welcome Stakeholders!

The following ten priorities were identified during the recent Slate Belt Stakeholder Charrettes. We are circulating this survey to further refine this list. We ask that you rank each in order of priority. We have also made a comment box available for any other priorities you feel should be considered in the development of the multi-municipal comprehensive plan.


1. Please rank the following (1 = highest, 10 = Lowest):

- Sustaining farming as a business and way of life.
- Improving governmental efficiency and reducing tax burdens.
- Balancing land preservation, development, redevelopment, industry and jobs.
- Reducing barriers to housing and business development.
- Ensuring public schools prepare students for the future job market.
- Preserving the quality of life (safety, heritage, rural character and open space).
- Enhancing access to current and future technology infrastructure (internet, 5G wireless and broadband).
- Managing social, economic, cultural and demographic changes in the community and Slate Belt.
- Improving municipal financial sustainability.
- Enhancing transportation infrastructure (traffic and freight management, infrastructure funding, LANTAs access, safe routes to schools, sidewalks, regional trails, and bridges).

2. Please provide any additional priorities you feel should be considered in Plan Slate Belt:

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Done



Survey Results

Ranked Priorities

1. Balancing land preservation, development, redevelopment, industry and jobs.
2. Preserving the quality of life (safety, heritage, rural character & open space).
3. Improving governmental efficiency and reducing tax burdens.
4. Ensuring public schools prepare students for the future job market.
5. Sustaining farming as a business and way of life.
 6. Improving municipal financial sustainability.
 7. Reducing barriers to housing and business development.
 8. Enhancing access to current and future technology infrastructure.
 9. Managing social, economic, cultural and demographic changes in the community.
 10. Enhancing transportation infrastructure.

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Survey Comments

Unique Responses

Unique Topics	Times Mentioned	Sub Topics
Smart Growth	8	Development Location (2), Smart Growth (1), Rural Preservation (2), Farmland Preservation (1), Development near Sewer and Water (2)
Regionalism	7	Shared Services (6), Regional Cooperation (1)
Business Development	6	Quality Jobs (3), Green Businesses (1), Business Incubator (1), Tourism economy (1)
Warehouses	3	Prevent Warehouses (2), Encourage Warehouses (1)
Zoning	3	Improved Zoning (2), Zoning Enforcement (1)
Public Transit	3	LANTA Service (2), Park and Ride (1)
Garbage	2	Prevent garbage expansion (2)
Schools	1	Improve schools (1)
Bedroom Community	1	Improve it's desirability (1)
Parks and Rec	1	Improve parks and trails (1)
Sustainable Buildings	1	Increase number of sustainable buildings (1)
Mental/Public Health	1	Improve access to health services (1)

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Survey Results

Top 5 Priorities

1. Balance land preservation, development, redevelopment, industry and jobs.
2. Preserve the quality of life (safety, heritage, rural character & open space).
3. Improve governmental efficiency and reducing tax burdens.
4. Ensure public schools prepare students for the future job market.
5. Sustain farming as a business and way of life.

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Economic Analysis

Location Quotient and Shift Share

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Economic Analysis

Location Quotient

- Measures the relative concentration of an industry in a given region.
- Identifies potential sources of competitive advantage, or areas of regional specialization
- Weaknesses:
 - Use of current data points only reflect a snapshot in time
 - Does not provide context or justification for existing conditions
 - Can be misinterpreted to mean “not enough” or “too many” of certain industry jobs

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Economic Analysis

Location Quotient

- Data used
 - Employment per industry (regional and national)
 - Total employment (regional and national)
- Location Quotient Range Color Coding:
 - **0 - .75 Low**
 - **.76 - 1.25 Normal**
 - **> 1.26 High = Baseline industry**

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Economic Analysis

Location Quotient - Slate Belt

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Industry Code	Industry Code Description	Northampton	Lehigh Valley	Nation
213	Support activities for mining	5.85	1.33	0.04
115	Support activities for agriculture and forestry	5.85	7.78	0.21
221	Utilities	3.45	0.97	2.08
562	Waste management and remediation services	2.65	4.10	5.01
315	Apparel manufacturing	1.86	4.06	14.75
334	Computer and electronic product manufacturing	1.60	1.66	1.62
485	Transit and ground passenger transportation	1.56	0.56	2.38
326	Plastics and rubber products manufacturing	1.38	1.30	1.62
312	Beverage and tobacco product manufacturing	1.25	0.20	1.21
488	Support activities for transportation	1.11	2.96	0.83
442	Furniture and home furnishings stores	1.04	0.52	0.40
327	Nonmetallic mineral product manufacturing	0.93	1.97	4.35
212	Mining (except oil and gas)	0.88	0.68	0.06
441	Motor vehicle and parts dealers	0.80	0.85	0.92
454	Nonstore retailers	0.79	0.79	1.51
425	Wholesale electronic markets and agents and brokers	0.77	0.31	0.19

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Economic Analysis

Location Quotient - Slate Belt

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Industry Code	Industry Code Description	Northampton	Lehigh Valley	Nation
447	Gasoline stations	0.75	0.83	0.75
813	Religious, grantmaking, civic, professional, and similar organizations	0.72	0.82	0.79
238	Specialty trade contractors	0.72	0.78	0.69
424	Merchant wholesalers, nondurable goods	0.70	0.89	1.27
322	Paper manufacturing	0.68	0.48	1.49
811	Repair and maintenance	0.58	0.61	0.70
333	Machinery manufacturing	0.57	0.72	0.84
332	Fabricated metal product manufacturing	0.57	0.56	0.60
522	Credit intermediation and related activities	0.55	0.48	0.35
561	Administrative and support services	0.54	0.58	0.45
532	Rental and leasing services	0.54	0.60	0.58
313	Textile mills	0.49	0.52	0.48
446	Health and personal care stores	0.46	0.51	0.58
325	Chemical manufacturing	0.44	0.59	0.69
236	Construction of buildings	0.43	0.45	0.35
711	Performing arts, spectator sports, and related industries	0.37	0.35	0.18

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Economic Analysis

Location Quotient - Slate Belt

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Industry Code	Industry Code Description	Northampton	Lehigh Valley	Nation
722	Food services and drinking places	0.35	0.39	0.35
624	Social assistance	0.35	0.33	0.37
444	Building material and garden equipment and supplies dealers	0.33	0.36	0.30
531	Real estate	0.33	0.30	0.15
623	Nursing and residential care facilities	0.33	0.34	0.45
621	Ambulatory health care services	0.32	0.26	0.34
541	Professional, scientific, and technical services	0.32	0.33	0.20
452	General merchandise stores	0.31	0.31	0.26
443	Electronics and appliance stores	0.31	0.21	0.26
519	Other information services	0.31	0.43	0.21
812	Personal and laundry services	0.29	0.25	0.29
453	Miscellaneous store retailers	0.29	0.31	0.31
484	Truck transportation	0.29	0.43	0.55
517	Telecommunications	0.28	0.30	0.20
451	Sporting goods, hobby, musical instrument, and book stores	0.17	0.13	0.14
331	Primary metal manufacturing	0.17	0.28	0.30

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Economic Analysis

- | | | | |
|--|---------------------------------|---|--|
| <ul style="list-style-type: none"> • Locally Strong <ul style="list-style-type: none"> • Apparel • Manufacturing • Mining • Agriculture • Whole Sale • Online Retail | <p>Location Quotient</p> | <ul style="list-style-type: none"> • Locally Weak <ul style="list-style-type: none"> • Tourism • Education • Medicine • Food Service • Professional Services | <ul style="list-style-type: none"> • Conclusions <ul style="list-style-type: none"> • Narrowly Focused • Not Capturing Growing Sectors of Regional and National • Bedroom Community |
|--|---------------------------------|---|--|

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Economic Analysis

Shift Share

- Shows the sectors in which the region is over or under-competing the nation
- Helps to identify why employment has been growing or declining in local industry
- Separates national trends from unique regional factors
- Useful for targeting industries that may offer future growth opportunities
- Prevents inaccurate interpretation of raw employment and job growth numbers

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Economic Analysis

Shift Share

- Weaknesses:
 - Does not account for many factors including impact of business cycles and comparative advantage
 - Is a snapshot of two points in time, making results sensitive to the chosen time period
 - Does not indicate why certain industries are competitive – requires knowledge of local conditions

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Economic Analysis

Shift Share

- Data used:
 - Industry Employment (regional and national) (2016 & 2007) (10 years)
 - Total Employment (national) (2016 & 2007)
- Three components
 - National Share: Growth due to national or regional economy
 - Industry Mix: Growth within the Industry
 - Regional Competitiveness: Growth due to local conditions

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Shift Share - Slate Belt

Industry Code	Industry Description	SlateBelt Employment (2007)	National Share	Industry Mix	Expected Change	Regional Shift	SlateBelt Employment (2016)	SlateBelt % change	National % change
11	Agriculture, forestry, fishing and hunting	3	3.15	-0.36	2.80	0.20	3	0	-6.79
21	Mining	3	3.15	-0.64	2.51	0.49	3	0	-16.25
22	Utilities	290.5	305.25	-7.21	298.04	-107.54	190.5	-34.42	2.59
23	Construction	605.5	636.25	-110.45	525.80	-55.30	470.5	-22.3	-13.16
42	Wholesale trade	269.5	283.19	-7.09	276.09	247.41	523.5	94.25	2.45
51	Information	50	52.54	-1.82	50.72	-2.22	48.5	-3	1.43
52	Finance and insurance	196.5	206.48	-16.34	190.14	-21.14	169	-13.99	-3.24
53	Real estate and rental and leasing	89.5	94.05	-9.08	84.96	-7.96	77	-13.97	-5.07
54	Professional, scientific, and technical services	329	345.71	8.23	353.93	-106.43	247.5	-24.77	7.58

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Shift Share - Slate Belt

Industry Code	Industry Description	SlateBelt Employment (2007)	National Share	Industry Mix	Expected Change	Regional Shift	SlateBelt Employment (2016)	SlateBelt % change	National % change
55	Management of companies and enterprises	59	62.00	1.90	63.90	-62.40	1.5	-97.46	8.3
56	Administrative and support and waste management and remediation services	874	918.39	99.61	1017.99	-9.49	1008.5	15.39	16.48
61	Educational services	95	99.82	15.11	114.94	-64.44	50.5	-46.84	20.99
62	Health care and social assistance	785.5	825.39	97.50	922.89	-182.89	740	-5.79	17.49
71	Arts, entertainment, and recreation	62	65.15	6.20	71.35	-22.35	49	-20.97	15.08

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Economic Analysis

Shift Share - Slate Belt

Industry Code	Industry Description	SlateBelt Employment (2007)	National Share	Industry Mix	Expected Change	Regional Shift	SlateBelt Employment (2016)	SlateBelt % change	National % change
72	Accommodation and food services	610	640.98	81.85	722.83	-112.83	610	0	18.5
81	Other services (except public administration)	475.5	499.65	-25.92	473.73	29.27	503	5.78	-0.37
99	Industries not classified	0	0.00	0.00	0.00	n/a	0	n/a	83.14
31-33	Manufacturing	2182.5	2293.34	-394.26	1899.08	-559.58	1339.5	-38.63	-12.99
44-45	Retail trade	1395	1465.84	-52.44	1413.41	-128.91	1284.5	-7.92	1.32
48-49	Transportation and warehousing	360	378.28	9.10	387.38	23.12	410.5	14.03	7.61

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Economic Analysis

Shift Share

- **Locally Strong**
 - Wholesale Trade
 - Administrative Support
 - Waste Management
 - Transportation
 - Warehousing
- **Locally Weak**
 - Management
 - Education
 - Manufacturing
 - Professional Services
 - Food Service
 - Utilities
 - Construction
- **Conclusions**
 - Shrinking Job Base
 - Not Capturing Growing Sectors of Regional and National
 - Bedroom Community

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Subdivision & Land Development Data

Largest Approved Residential Projects, 2009-2018

Municipality	Project Name	Land Use Category	Residential Units
Wind Gap Borough	Water's Edge at Wind Gap	Apartment	200 (192 Apts & 8 Row)
Washington Township (NC)	Highlands East	Single Family Detached	18
Wind Gap Borough	Posh Properties (First Street S/D)	Single Family Detached	11
Plainfield Township	Mintbrook Farms	Single Family Detached	8
East Bangor Borough	Garafalo, Helen	Rowhouse	8
East Bangor Borough	Klump/East Bangor Methodist Church	Rowhouse	8
Upper Mount Bethel Township	Iorio, Laura	Single Family Detached	6
Wind Gap Borough	Albanese & Grimes Properties, LLC	Rowhouse	5
Washington Township (NC)	Meadow Creek Estates II	Single Family Detached	4
Slate Belt			268

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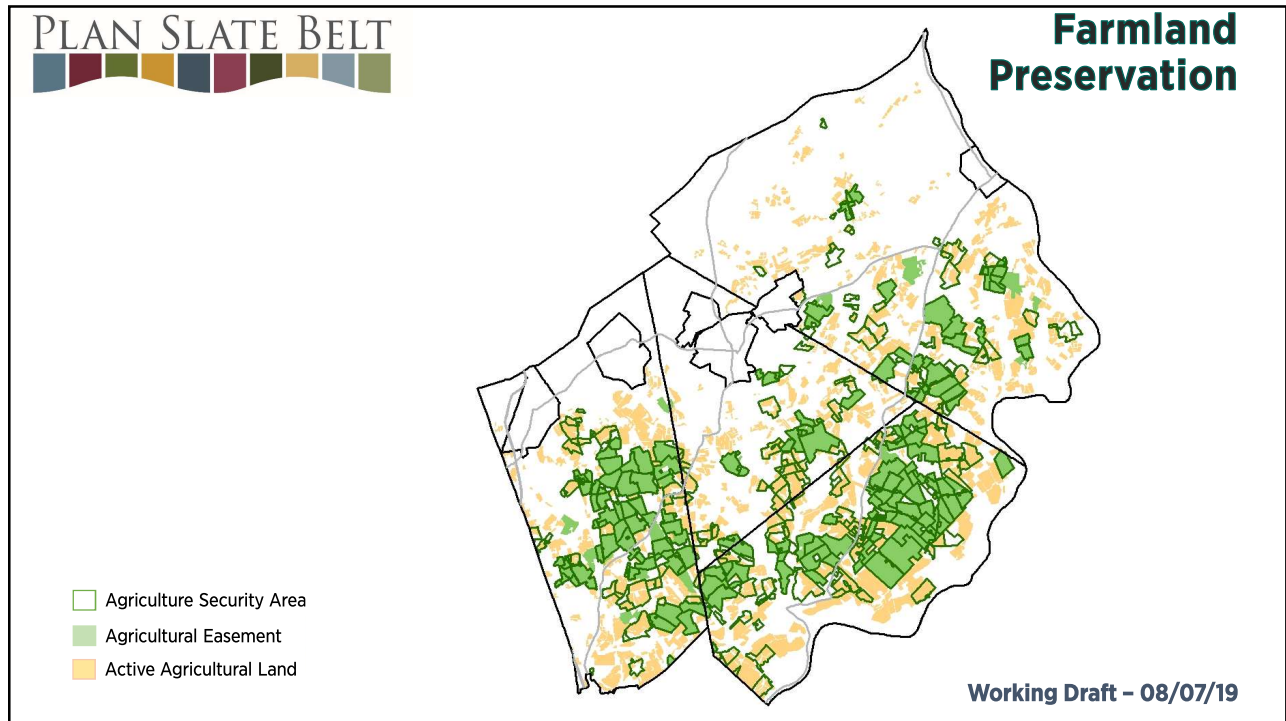
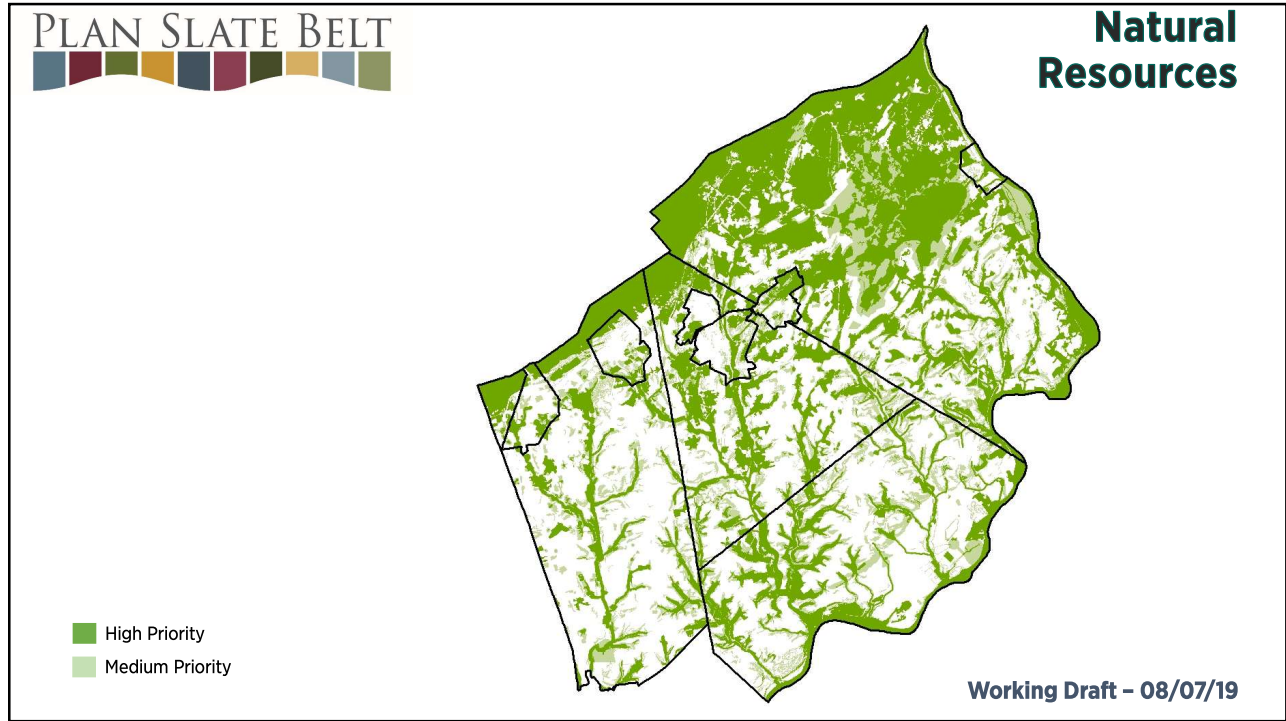


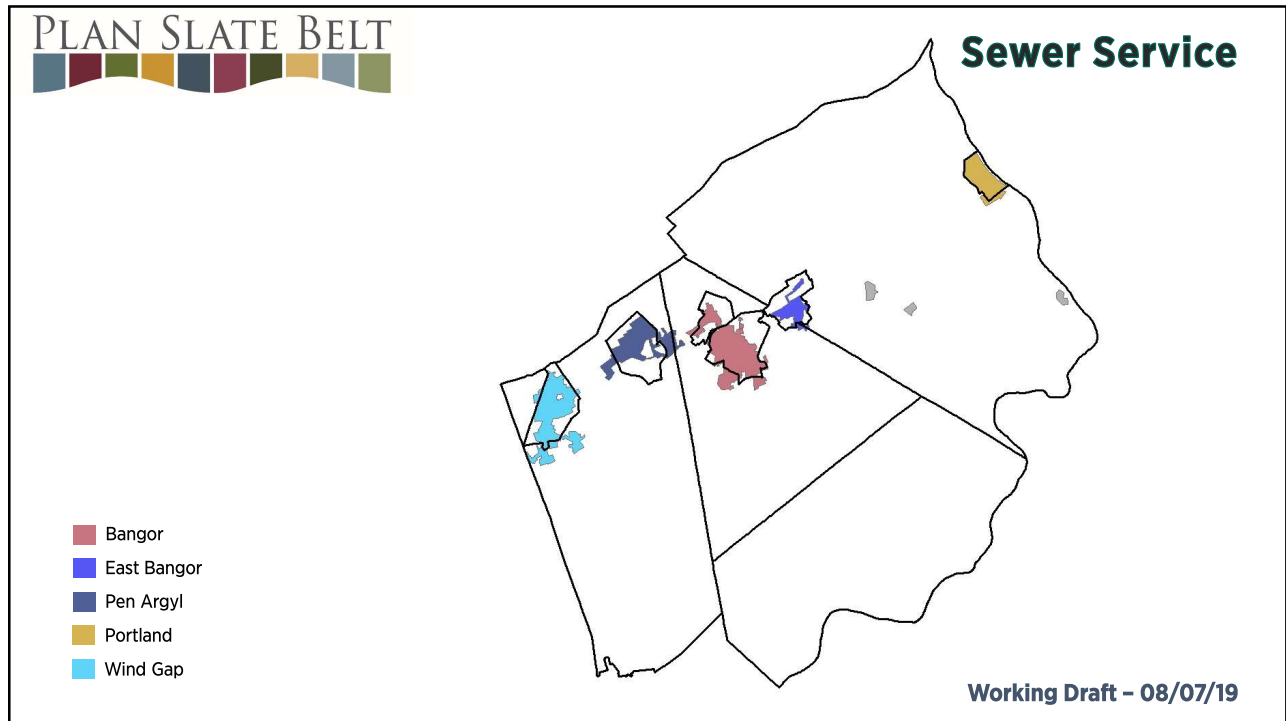
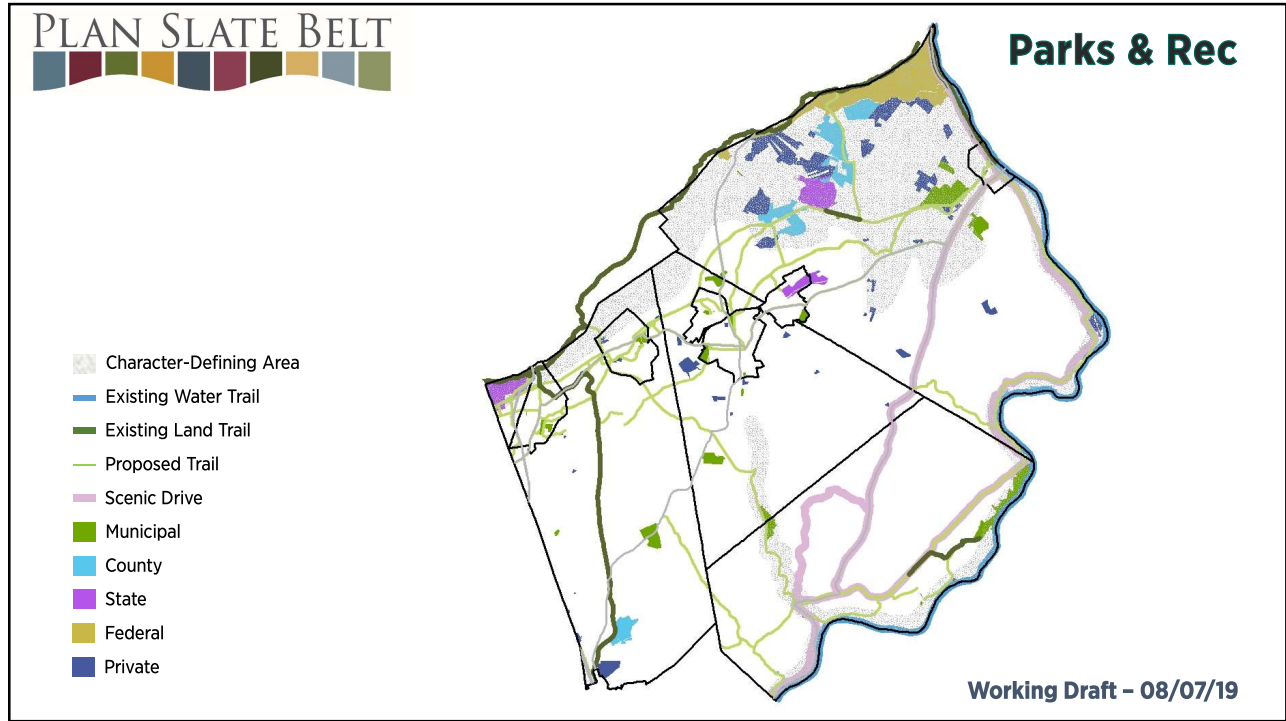
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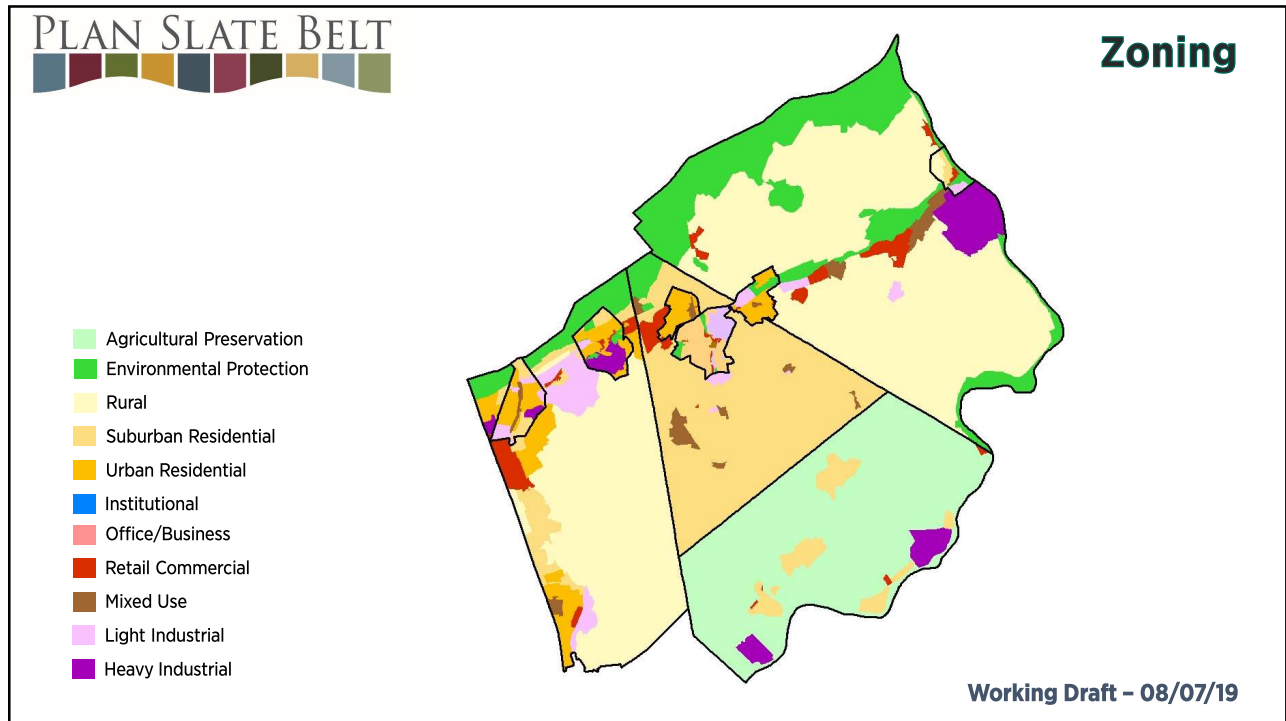
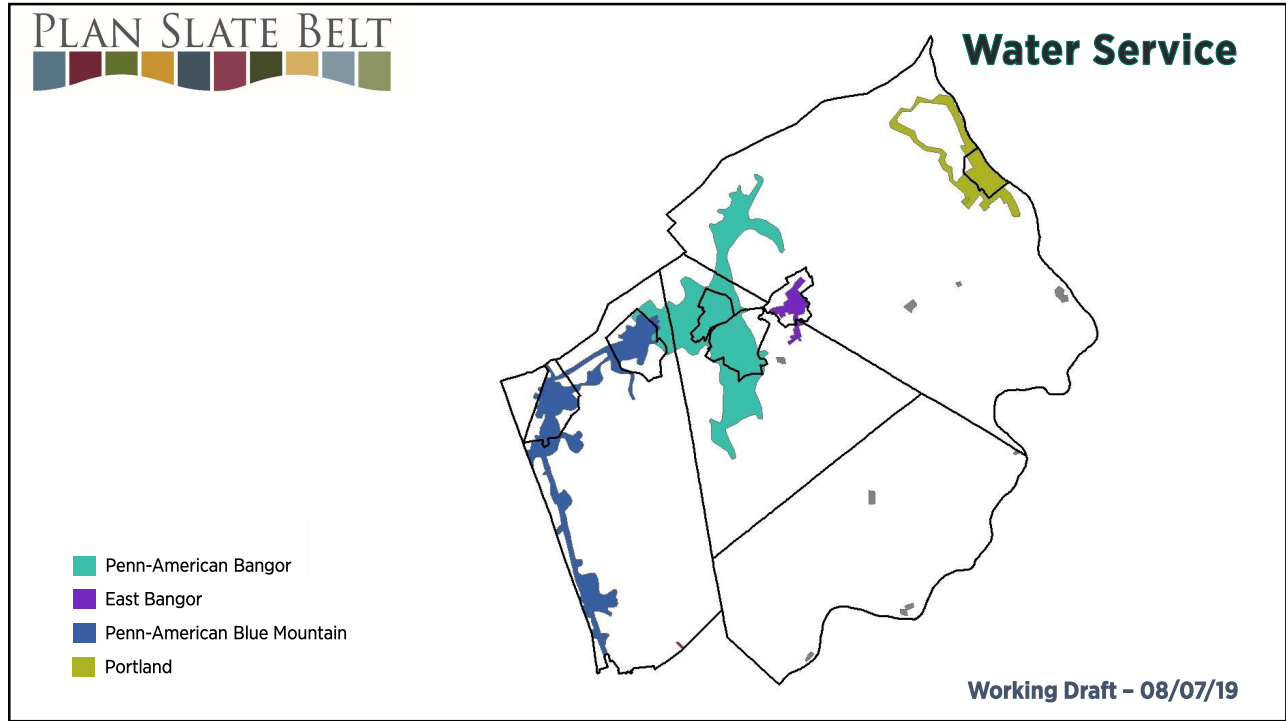
Natural, Farmland, Parks, Sewer, Water, Zoning, Land Use and Transportation

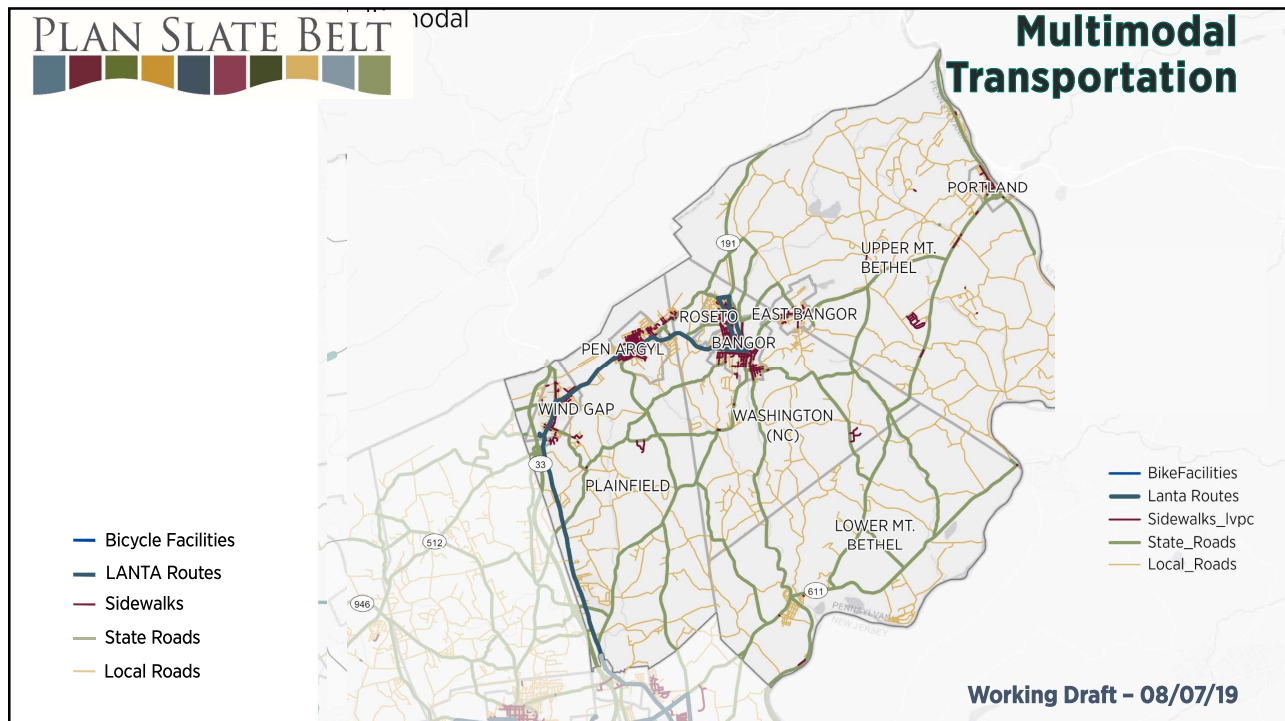
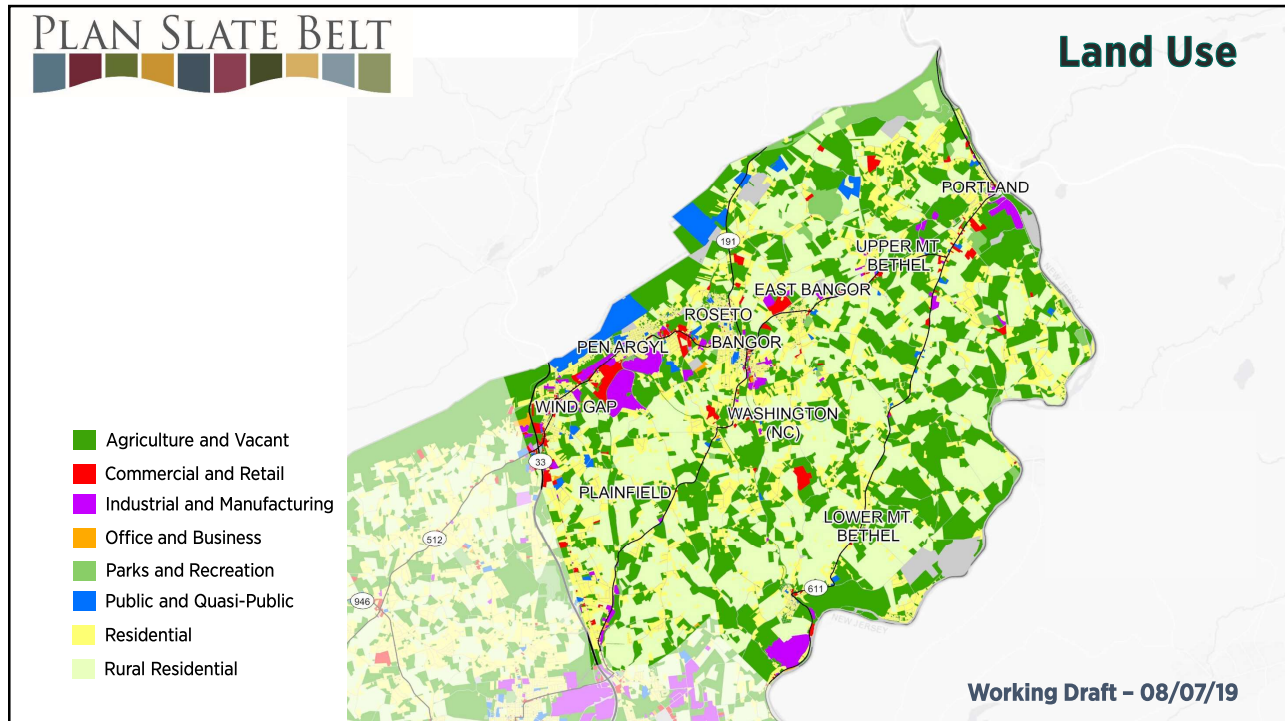
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Discussion

Draft Vision and Goals

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Survey Results

Top Priorities

1. Balance land preservation, development, redevelopment, industry and jobs.
2. Preserve the quality of life (safety, heritage, rural character & open space).
3. Improve governmental efficiency and reducing tax burdens.
4. Transportation and infrastructure investment.
5. Sustain farming as a business and way of life.
6. Ensure public schools prepare students for the future job market.

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