

**Working as the
Regional Planning
Commission and
MPO for the
Southern New
Hampshire Region**

Regional Economic Development Plan

for the
Southern NH Planning
Commission Region

VOLUME I



SNHPC

Regional Economic Development Plan

for the
Southern NH Planning
Commission Region



Adopted March 22, 2011

Prepared by the
Southern New Hampshire Planning Commission
and the
Regional Economic Development Plan Steering Committee

In cooperation with
the region's municipalities and the Greater Manchester Chamber of Commerce Metro
Center-NH Partnership



The preparation of this document has been financed by eight Collaborative Grants provided through
the New Hampshire Department of Transportation's I-93
Community Technical Assistance Program



Acknowledgements

The Southern New Hampshire Planning Commission would like to thank all the municipalities, volunteers and staff that provided valuable time, assistance and information in the development of this plan. In addition, the SNHPC would like to acknowledge and thank all the appointed representatives to the Regional Economic Development Plan Steering Committee for their contribution and input into the plan; the Greater Manchester Chamber of Commerce METRO CENTER-NH Regional Partnership (Steering Committee) for their role in supporting the plan; Public Service of New Hampshire (PSNH) which hosted the public workshops in the auditorium at Energy Park; and all the other participating agencies, consultants, and SNHPC staff who help guide the planning process.

Special thanks to all the following Municipalities:

Town of Auburn	Town of Bedford
Town of Candia	Town of Chester
Town of Deerfield	Town of Derry
Town of Goffstown	Town of Hooksett
Town of Londonderry	City of Manchester
Town of New Boston	Town of Raymond
Town of Weare	

Regional Economic Development Plan Steering Committee Members:

Charles Worster	Henry Bechard	Anthony Marts
Richard Snow	Bradley Benson	Dean Mehlhorn
Elwood Stagakis	Dan O’Neil	Scott Komisarek
Don Moskowitz	William Dermondy	Keith Moon
James Lagana	Dan Reidy	Jonathan Wood
Jean Methot	Ray Clement	Dani-Jean Stuart
Steve Young	Paul Goldberg	David Boutin
Ronald Poltak	Matt Monahan	Gretchen Gott
Shane Carter	Stuart Lewin	Scott Benson
	John Cole	

Municipal Staff:

William Herman, Town Administrator, Town of Auburn
 Richard Sawyer, Planning Director, Town of Bedford
 Sharon Carrier, Administrative Assistant, Town of Candia
 Cynthia Robinson, Planning Coordinator, Town of Chester
 Jerry Coogan, Planning Consultant for the Town of Deerfield
 Gary Stenhouse, Town Manager, Town of Derry
 George Sioras, Community Development Director, Town of Derry
 Stephen Griffin, (Former) Town Planner, Town of Goffstown
 Derek Horne, Economic Development Coordinator, Town of Goffstown



Carol Granfield, Town Manager, Town of Hooksett
Jo Ann Duffy, Town Planner, Town of Hooksett
Andre Garron, Planning and Economic Development Director, Town of Londonderry
Jay Minkarah, Economic Development Director, City of Manchester
Mark Brewer, Director, Manchester-Boston Regional Airport
Nic Strong, Planning Coordinator, Town of New Boston
Ernest Creveling, Economic Development Director, Town of Raymond
Naomi Bolton, Town Administrator (former planning coordinator), Town of Weare

Participating Agencies/Organizations:

William Sirak, Chair, Metro Center-NH
Michael Skelton, Vice President, Greater Manchester Chamber of Commerce
Erica Menard, Public Service of New Hampshire
Laurel Bistany, Director, Rockingham Economic Development Corporation
Stephen Heavener, Executive Director, Capital Region Development Council
Skip Ashooh, Manchester Economic Development Corporation
Roy Duddy and Chris Way, NH Department of Resources and Economic Development
Andrea O'Brien, Small Business Development Center

Consultants:

John Rhodes, Moran, Stahl & Boyer,
Site Selection and Economic Development Consultants
Dennis Delay, Consulting Economist
Dr. Keith Moon, Director, Southern New Hampshire University Center for
Entrepreneurship and Social Innovation

SNHPC Staff:

David Preece, Executive Director
Jack Munn, Chief Planner
Joseph Scala, Intern
Brian Deguzis, Intern
Alex Kammler, Intern

*Special Appreciation to the Following Eight Municipalities for the CTAP Collaborative
Grants which Funded the Development of this Plan:*

Town of Auburn
Town of Candia
Town of Chester
Town of Deerfield
Town of Derry
Town of Goffstown
Town of Hooksett
Town of Raymond



TABLE OF CONTENTS

Volume I

Glossary of Terms	6
Executive Summary	8
Introduction	12
Section 1- Current Economic Conditions and Trends	23
The Regional Setting.....	23
Snapshot of Current Economic Conditions.....	26
New Hampshire’s Economy	26
The SNHPC Region’s Economy	31
Section 2- Economic Issues, Challenges & Opportunities	69
Public Opinion Survey.....	69
Cluster Analysis: Target Industries	71
SWOT Analysis	100
Section 3- Shared Regional Vision.....	109
The Region’s Shared Vision/Economic Development Strategy.....	109
Core Goals and Key Actions.....	112
Section 4- Strategic Initiatives	129
Recommended Strategic Initiatives/Catalytic Projects.....	129
Certified Site Program	131
Best Planning Practices/Innovative Model Ordinances	136
Regional Incubator Development	137
Section 5- Priority Public Projects	159
Top Public Projects.....	161
Scoring Results.....	164

Volume II

Appendix A- Metro Center-NH Municipal Proclamations and Resolutions
Appendix B- Economic Development Public Opinion Survey
Appendix C- Economic Assets Profiles
Appendix D- Current Economic Data and Trends Report
Appendix E- Regional SWOT Report
Appendix F- Target Industry Analysis
Appendix G- Business Incubation Model Recommendations
Appendix H- Certified Site Proposal
Appendix I- Workshop Agendas and Notes
Appendix J- Economic Revitalization State Tax Credit Zones
Appendix K- Regional Utility Maps
Appendix L- American Recovery and Reinvestment Act (ARRA) Funding Information



List of Tables

Table 1- Work Site & Average Annual Employment Data, SNHPC Region (2008 and 2009)	25
Table 2- Population Estimates for the SNHPC Region (1990-2009)	25
Table 3- Economic Indicators	28
Table 4- SNHPC Region Population Projections, 1990-2030	35
Table 5- SNHPC Region Median Age by Community (2000)	36
Table 6- Annual Average Covered Employment SNHPC Region 2000-2009	40
Table 7- Employment Projections by Municipality, 2015-2040	41
Table 8- SNHPC Region Employment by Industry (2009)	45
Table 9- Manchester LMA Employment by Industry (2009)	52
Table 10- Fastest Growing Occupations in NH (2008-2018)	52
Table 11- Occupations Adding the Most Jobs NH (2008-2018)	53
Table 12- 2008 Median Area Family Income (MAI) Limits	55
Table 13- SNHPC Region Labor Force, 1998-2010	57
Table 14- SNHPC Region Commuting Patterns, 2000	58
Table 15- Residential Building Permits Issued by Community and by Housing Type SNHPC Region, 2000-2008	61
Table 16- Foreclosures by Municipality, 2010	62
Table 17- New Hampshire Residential Energy Usage (2007)	64
Table 18- New Hampshire Commercial Energy Usage (2007)	64
Table 19- New Hampshire Industrial Energy Usage (2007)	65
Table 20- SNHPC Household Heating Type by Percentage	65
Table 21- SNHPC Higher Education Institutions	66
Table 22- Economic Development Measures by Municipality, SNHPC Region	71
Table 23- Description of Potential Target Industries	85
Table 24- Major Manufacturers within the SNHPC Region	87
Table 25- Executive Summary with Recommendations	84
Table 26- Strengths	102
Table 27- Weaknesses	103
Table 28- Opportunities	103
Table 29- Threats	104
Table 30- SWOT Matrix 1	105
Table 31- SWOT Matrix 2	107
Table 32- Recommended Strategic Initiatives Catalytic Projects for the SNHPC Region	130
Table 33- Project Implementation Timeframe, Impact and Feasibility	131
Table 34- List of Top Public Projects Submitted by Municipalities in the Region	161
Table 35- List of Top Projects/Strategic Initiatives recommended by the Regional Economic Development Plan	164

List of Figures

Figure 1- Comparisons of East Coast Locations	30
Figure 2- Population Growth in Hillsborough, Rockingham and Merrimack Counties	33
Figure 3- Rockingham and Hillsborough County Population Change by Age, 2000-2008	37
Figure 4- SNHPC Region Employment by Industry (2009)	42
Figure 5- Manchester LMA Employment by Industry (2009)	43
Figure 6- Salary Differentials Between Manchester, Nashua and Boston	54



Figure 7- Average Weekly Wage by Town for the SNHPC Region (2009) 55

Figure 8- SNHPC Commuting Trends..... 59

Figure 9- Trends in Building Permits by Unit Type for the SNHPC Region, 1990-2008 60

Figure 10-Average Utility Costs, 2009 and 2010 63

Figure 11-New Hampshire’s Healthcare Dashboard, 2009 68

Figure 12-Target Industry Selection Process 74

Figure 13-Consumption of a Regional Economy: “Economic Portfolio” 75

Figure 14-Description of Site Readiness Levels 76

Figure 15-Economic Activity vs. Distance to Limited Access Highway 77

Figure 16-Four Levels of Site Evaluation..... 78

Figure 17-Employment by Industry/Segment for the Three-County Area 79

Figure 18- Location Quotients by Industry/Segment for the Three-County Area..... 81

Figure 19- Employment for Manufacturing Industries for the Three-County Area, 2000 vs. 2008 83

Figure 20-Potential Target Industries and Required Resources 84

Figure 21-Ideal Development Sites 92

Figure 22- Recommendations for Implementing Target Industry Strategy Within the Region. 95

Figure 23- Plans for Northwest Business Park, Hackett Hill, City of Manchester 132

List of Maps

Map 1- Southern New Hampshire Planning Commission Region..... 12

Map 2- Merrimack Valley Region 24

Map 3- Boston-Worcester-Manchester, MA-RI-NH Combined Statistical Area 32

Map 4- SNHPC Region, Projected Population Distribution 34

Map 5- SNHPR Region 2008 Employment by Municipality 36

Map 6- Manchester LMA..... 51

Map 7- Higher Education Institutions in the SNHPC Vicinity 67

Map 8- Potential Retail Expansion Sites..... 88

Map 9-SNHPC Region Highway Access..... 91

Map 10-The Community Technical Assistance Program Dealing with Growth..... 141

Map 11-Existing Regional Development Corporations Surrounding Manchester 146

Map 12-Future Regional Development District Surrounding Manchester 147

Map 13-MTA System Map 153

Map 14-Capitol Corridor 157



Glossary of Terms

Brownfield - Property marked by the presence or potential presence of a hazardous substance, pollutant, or contaminant making expansion, redevelopment, or reuse of the site complicated. However, cleaning up and reinvesting in these properties protects the environment, reduces blight, and takes development pressures off greenspaces and working lands. *(U.S. Environmental Protection Agency)*

Business Incubator Program - Business incubation is often referred to as “the third leg of the stool” in economic development. The other two legs of the stool are business attraction strategies and business retention/expansion strategies. It is an approach that attempts to develop communities from within versus the more external approach of looking outside our communities for economic development opportunities by recruiting (large) outside employers. *(National Business Incubator Association [NBLA], 2004)*

CEDS - A comprehensive economic development strategy (CEDS) is a federally approved comprehensive economic development planning process designed to bring together the public and private sectors in the creation of an economic roadmap to diversify and strengthen regional economies. A Planning Organization is typically charged and funded by the US Department of Commerce, Economic Development Administration (EDA) to develop a CEDS. *(U.S. EDA)*

Certified Site Program - A Certified Site Program facilitates economic growth by certifying that specific land parcels and buildings that have been approved by a municipality (i.e. sites that are zoned for industrial, office use or mixed-use) have met established specifications and guidelines which define whether a site is “ready” or more precisely “shovel ready” for development purposes. *(SNHPC Certified Site Program Proposal)*

Community Development Block Grant - The Community Development Block Grant (CDBG) program is a flexible program that provides communities with resources to address a wide range of unique community development needs. The CDBG program works to ensure decent affordable housing, to provide services to the most vulnerable in our communities, and to create jobs through the expansion and retention of businesses. It is a very important funding tool for local governments. *(U.S. Department of Housing and Urban Development)*

CSO - Combined sewer overflows (CSO) occur during periods of heavy rainfall or snowmelt when combined sewer systems exceed their capacity. While combined sewer systems are designed to overflow occasionally and discharge excess wastewater directly to nearby streams, rivers, or other water bodies, this discharge contains not only stormwater but also untreated human and industrial waste, toxic materials, and debris and is a source of pollution. *(U.S. Environmental Protection Agency)*

Economic Revitalization Tax Credit Zones - The Economic Revitalization Zone (ERZ) Tax Credit Program is a tool used as an incentive for businesses to create new jobs. Qualifying ERZ zone projects must create new jobs and expand the economic base for the state and are then eligible for tax credits to be used against Business Profit Tax and Business Enterprise Taxes. Projects can range from the creation of new facilities to the rehabilitation of existing structures. *(New Hampshire Business Resource Center)*

Foreign Trade Zones - A Foreign Trade Zone (FTZ) is an area in or near a U.S. Customs port of entry where foreign and domestic merchandise is considered to be outside of U.S. Customs territory. Certain types of merchandise can be imported into a Zone without going through formal Customs entry procedures or paying import duties. Customs duties and excise taxes are due only at the time of



transfer from the FTZ for U.S. consumption. If the merchandise never enters the U.S. commerce, then no duties or taxes are paid on those items. (*National Association of Foreign Trade Zones [NAFTZ]*)

Group quarters - Living quarters that are not classified as separate dwelling units. These living situations include dormitories, correctional facilities, group homes, nursing homes and most licensed care facilities. The population residing in them is called the group quarters population. The population living in group quarters is not included when measuring average household size (persons in households divided by total households). (*U.S. Census*)

Households - The number of occupied dwelling units. Households are divided into two categories of tenure: homeowners and renters. (*U.S. Census*)

Location Quotient - The Location Quotient Technique is the most commonly utilized economic base analysis method, comparing the local economy to a reference economy. In the process it attempts to identify specializations in the local economy. It is based upon a calculated ratio between the local economy and the economy of some reference unit. (*Florida State University Department of Urban and Regional Planning*)

SWOT Analysis – An acronym for *Strengths, Weaknesses, Opportunities, Threats* Analysis. It is a situation analysis tool in which internal strengths and weaknesses of an organization, and external opportunities and threats faced by it are closely examined to chart a strategy. (*BusinessDictionary.com*)

Target Industry Analysis or Cluster Analysis - The target industry study used for this plan involves both a macro level review of the three counties in the SNHPC Region along with a focus on the types of economic opportunities that are available for each community in the Region. Input into the study was derived from information provided by the Commission, local planners, published data sources, interviews with selected companies, and internet-based research. (*SNHPC Target Industry Analysis, 2010*)

Tax-Incremented Financing Districts (TIFs) - The financing of public improvements with the incremental taxes created either by new construction, expansion, or renovation of property within a defined portion (district) of the community. (*New Hampshire Office of Energy and Planning*)

TBtu - Trillion British Thermal Units.

Total Housing Units - all dwelling units (occupied, vacant, and seasonal/vacation use)

Vacancy Rate - The vacancy rate is the number of vacant for rent or vacant for sale units available for year round occupancy as a percentage of the year round housing stock (occupied units plus vacant for rent or for sale units). Some vacancies are desirable to enable mobility and choice within the housing market. Therefore year round housing supply needs exceed the number of households. (*U.S. Census*)

Year-round Housing Stock - Occupied units plus those available for sale or rent for year round use. (*U.S. Census*)



Executive Summary

In 2009/2010, the Southern New Hampshire Planning Commission (SNHPC) received funding through the New Hampshire Department of Transportation (Community Technical Assistance Program – CTAP Collaborative Grant program) to prepare for the first time an economic development plan for the region. A total of eight municipalities stepped up and approved the use of these funds to develop this plan. These municipalities are identified in the Acknowledgements.

Funding for the development of this plan also enabled the SNHPC to provide staff support to the Metro Center-NH Steering Committee, including assistance in the development and implementation of several new economic development initiatives recommended as a result of this plan.

The purpose of the Regional Economic Development Plan (RED) is to offer a vision and to provide a framework for putting into place an economic development planning process for the region that can be carried out now and in the future. In addition, this plan sets forth core goals, key actions and priorities, including recommendations and new strategic initiatives, projects and programs to improve the region's economy and advance the health of the region and its municipalities.

Responsibility for implementing the RED will be carried out by the SNHPC and Metro Center-NH, working together the region's municipalities and the economic development organizations currently operating within the region. Implementation will also be coordinated with key federal and state agencies, including the Department of Resources and Economic Development. Ideally, the RED should be updated by the SNHPC every five years in accordance with the comprehensive planning requirements of RSA 36:47, III – thus the next major update should occur in 2015.

The methodology employed in the development of the RED is based upon strategic planning concepts and a product-driven approach to plan-building, which involved participation from the public and representatives of each of the 13 municipalities and Metro Center-NH serving on a Regional Economic Development Advisory Committee. The primary products or deliverables resulting from development of the Plan include:

- A Public Opinion Survey on Economic Development within the region;
- Published Economic Assets Profiles for each municipality;
- A Cluster or Target Industry Study of existing and future industry;
- A Summary of Important Regional Economic Data and Trends;
- A SWOT Analysis resulting in a Vision Statement -- Economic Development Strategy consisting of Core Goals and Key Actions;
- A Region-wide Inventory of Existing and Planned Public Utilities;
- A Region-wide Summary of AARA Stimulus Funding by Category and Municipality;
- Ranking of the Top Public Projects, Both Short and Long Term for the Region;
- A Business Incubator Study and a Recommended Regional Approach;
- A Certified Site Program Proposal;



- Best Planning Practices – Model Ordinances;
- Grant Writing assistance to municipalities to promote Economic Development;
- Assistance to Municipalities in Establishing Economic Revitalization Tax Credit Zones;
- A Recommended Approach and Framework for Establishing a Comprehensive Economic Development Strategy (CEDS) and an Economic Development District for the Region.

The RED is broken down into two volumes. Volume 1 serves as the main body of the Plan while Volume 2 is an appendix that contains many of the original documents from the list above. The first section of Volume 1 provides an extensive snapshot of current economic conditions in the SNHPC Region while the remaining sections offer economic development strategies and suggestions for the SNHPC Region.

The most important elements of the RED are the Core Goals and Key Actions and the Vision Statement -- the Economic Development Strategy for the Region, found in sections three and four of Volume 1, respectively. These strategies, goals and key actions are recommended to help establish a framework and to set forth a direction and roadmap for implementing both a comprehensive and continuous economic development planning program for the region. The RED also identifies a number of strategic initiatives or catalytic projects which, if implemented, will help to generate jobs and stimulate economic growth.

In summary, the Core Goals of the Plan aim to:

- Strengthen the Manchester-Boston Regional Airport;
- Continue to place a high priority on highway improvements and alternative modes of transportation in the region;
- Continue to improve public transit and multi-modal transportation strategies;
- Place a high priority on upgrading, expanding and funding water and wastewater systems, including a regional approach in the provision of these services;
- Continue to remain “well connected” through telecommunication and broadband services;
- Seek balanced growth and a broadened tax base;
- Strengthen the region’s workforce and vocation training programs;
- Strengthen the region’s colleges and universities with emphasis on importance of increasing the number of college graduates that stay, work and live within the Region;
- Work to promote and implement alternative and lower cost forms of energy and green technologies in the region;
- Support key economic development actions that will have regional benefit;
- Implement programs to support the start-up of small companies and incubator resources;
- Work with Metro Center-NH and the professional real estate and brokerage community to promote utilization of available sites and buildings and to expand and attract target industries to the region;



- Pursue funding opportunities to support Metro Center-NH, SNHPC, local municipalities, and stakeholders in promoting the core goals and strategic initiatives of the RED.

The 12 strategic initiatives, in order of recommended priority by the Regional Economic Development Advisory Committee include:

- Continue efforts in implementing the NH Capitol Corridor Passenger Rail;
- Continue and expand CTAP Funding & Services to Municipalities;
- Conduct a Feasibility Study to Establish a Regional Public Transit Authority;
- Expand the I-93 Commuter Bus Service Project;
- Develop a Regional Incubator Development;
- Develop a Certified Site Program;
- Develop a Comprehensive Economic Development Strategy (CEDS).

Other priority strategies include:

- Implement Best Planning Practices/Innovative Model Ordinances to expedite planning review processes and create a Certified Site Program;
- Expand SNHPC's Regional Brownfields Program;
- Conduct a College/University Economic Impact Study for the Region;
- Prepare a Comprehensive Region-wide Sustainability/Energy Plan;
- Prepare a Comprehensive Water/Wastewater Plan for the Region.

One of the most important recommendations of this Plan is that a new Economic Development District and a new CEDS (Comprehensive Economic Development Strategy) planning area be established, working in partnership with the Central Regional Planning Commission and the SNHPC. This new Economic Development District would include all the municipalities located in Merrimack County (including the Town of Hooksett in the SNHPC region), and the following five municipalities located in Hillsborough County within the SNHPC Region: Bedford, Goffstown, Manchester, New Boston and Weare.

The towns of Auburn, Candia, Chester, Deerfield, Derry, Londonderry and Raymond would continue to be part of the existing Rockingham County Economic Development District.

This Plan also identifies and ranks a number of key public projects (public facility and infrastructure) which are considered by the Regional Economic Development Advisory Committee to be of regional significance. The identification and ranking of these projects (both under construction and planned to be constructed) are included in this plan because this provides a window to what a CEDS plan would be charged to produce is such a process is established for the region in the future. It is hoped that planning funds from the US Department of Commerce, Economic Development Administration (EDA) will become available to the Central and the SNHPC planning commissions so that an official and federal recognized CEDS can be prepared. This is a prerequisite in order for a municipality to apply for and receive public facility investment funding through the EDA. CEDS planning



money could also help fund and sustain future SNHPC regional economic development planning efforts.

Central and key to this vision is the need for continued support and participation in the Metro Center-NH initiative for regional economic development. The Regional Economic Development Plan encourages the continued collaboration of all 13 municipalities within the region on economic development issues and projects for the betterment of the region. At the regional scale this partnership seeks economic prosperity through increased planning and funding for economic development, transportation/public infrastructure improvements, and public and private investments in community development, job growth, entrepreneurship, education, energy, smart growth, affordable housing, and the region's youth. At the municipal scale this partnership supports balanced growth and development with broadening the local tax base and respects and strengthens quality of life, community character and the environment. Economic development is not an easy task and requires a commitment of time and resources. Participation in Metro Center-NH requires an understanding that advancing economic growth and development is a shared regional responsibility as well as a necessity among all stakeholders and municipalities in the region.

There is no guarantee that the Southern New Hampshire Region or the Metro Center-NH partnership will always be able to attract new business or keep and grow existing firms, or that the region's unemployment and financial outlook will drastically improve. The region must plan and take steps in order to remain competitive. This means the region must strive to broaden and improve its identity, maintain a continuing dialogue and a regional identity among all stakeholders, and seek and obtain necessary and ongoing funding to carry out effective, meaningful and successful economic development projects and programs. Indeed, advancing the economic needs of the region can best be achieved through regional planning and the coordination and cooperation of all the region's municipalities and Metro Center-NH.



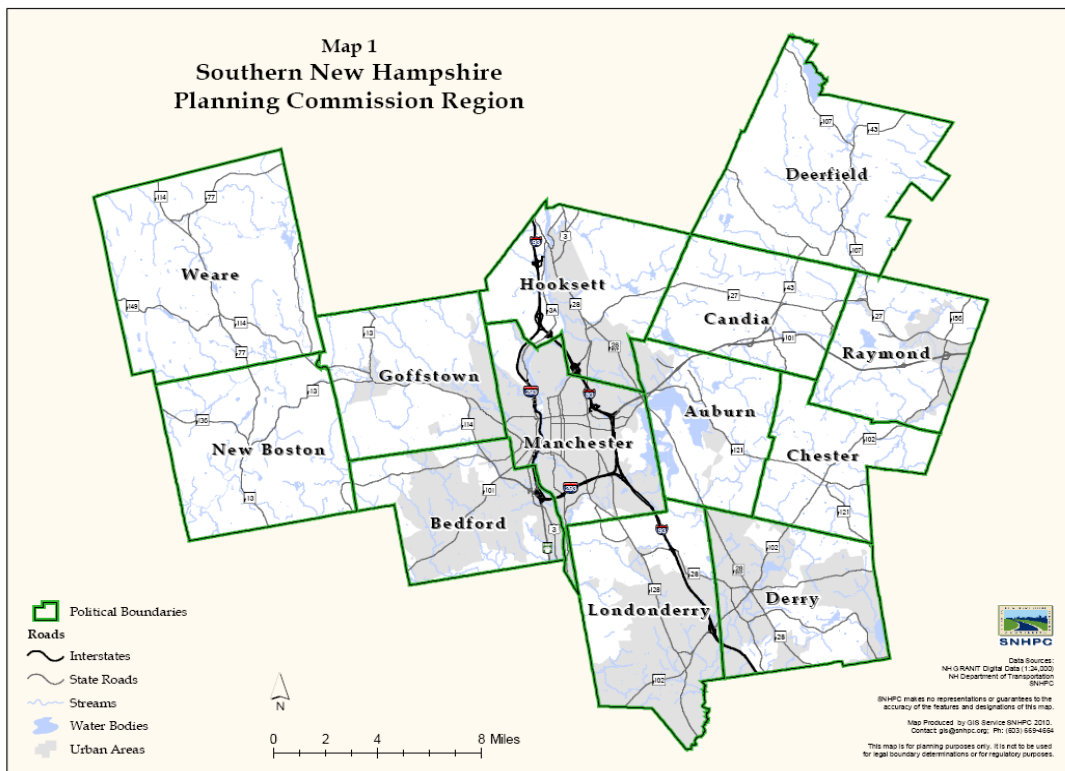
Introduction

This Regional Economic Development Plan has been prepared by the Southern New Hampshire Planning Commission (SNHPC) in cooperation with the thirteen municipalities which make up the Southern New Hampshire Planning Region (see Map 1).

In guiding the development of this plan, a *Regional Economic Development Plan Steering Committee* was established consisting of representatives appointed from each of the thirteen municipalities. In addition, key municipal and state officials, members of the METRO CENTER-NH Steering Committee, as well as representatives of existing economic development committees, councils, corporations, and other related organizations played a significant role in the planning process.

This document directly reflects the input and work performed by the *Regional Economic Development Plan Steering Committee*, including the input and feedback received by all thirteen municipalities, the public, and other participants involved in the development of the plan (see acknowledgements). The content and organization of this document is consistent with the scope of work and the planning schedule that was prepared at the beginning of the planning process. Funding for the plan was provided as a result of eight collaborative grants awarded by the New Hampshire Department of Transportation (NH DOT) through the I-93 Community Technical Assistance Program (CTAP).

Map 1
Southern New Hampshire Planning Commission Region



Source: SNHPC



Why Prepare A Regional Economic Development Plan?

There are many reasons why an economic development plan is important and necessary. Foremost such a plan provides a public forum to promote and frame discussions around economic issues, public investments, and infrastructure needs of regional importance. Second a plan offers a vision and direction, and establishes a framework for putting into place an economic development planning process that can be carried out now and in the future. Finally, an economic development plan sets forth goals and strategies, key actions and priorities, including recommendations for implementing new projects and programs to improve the region's economy and advance the economic health of the region and its municipalities.

This Economic Development Plan is not only important to the SNHPC which is charged with developing and carrying out the plan, but also Metro Center-NH, and the many existing local economic development organizations, chambers of commerce, economic development councils, committees and corporations existing within the region. Most importantly this also includes all the municipal, state and federal agencies, public officials, and other public and private stakeholders that need a clear understanding of the key issues, the vision, the direction, goals and strategies as well as the community and economic development programs and projects that are important priorities for the region as a whole.

While there is no mandatory requirement that a regional planning commission prepare a Regional Economic Development Plan, specific statutory authority for the preparation of such a plan is provided through the intent of RSA 36:47, II which states in part that:

“...it shall be the duty of a regional planning commission to prepare a comprehensive master plan for the development of the region within its jurisdiction, including the commission's recommendations, among other things, for the use of land within the region; for the general location, extent, type of use, and character of highways, major streets, intersections, parking lots, railroads, aircraft landing areas, waterways and bridges, and other means of transportation, communication, and other purposes; for the development, extent, and general location of parks, playgrounds, shore front developments, parkways and other public reservations and recreation areas; for the location, type, and character of public buildings, schools, community centers, and other public property, and for the improvement, redevelopment, rehabilitation, or conservation of residential, business, industrial and other areas; including the development of programs for the modernization and coordination of buildings, housing, zoning and subdivision regulations of municipalities and their enforcement on a coordinated and unified basis.”

What is the Purpose of this Plan?

One of the primary aims of this Regional Economic Development Plan is to establish a framework for engaging economic development planning within the region. This includes the identification and implementation of a **shared vision statement – an economic development strategy for the region** - consisting of core goals and key implementation actions designed to bring about the SHARED economic development vision and strategy. Establishing and revisiting this vision is critical in order to provide direction to the SNHPC,



the 13 municipalities of the region, Metro Center-NH as well as other stakeholders working to enhance and sustain the region's economic health today and in the future.

In addition to this mission, the Regional Economic Development Plan also aims to:

- (1) Obtain an understanding of the region's economy and industry clusters and to identify those industries critical to the health of the region and each municipality;
- (2) Compile up-to-date economic data and information about the region and each municipality that can be used for marketing on economic development websites;
- (3) Conduct an inventory of existing and planned public infrastructure and utilities to identify the region's overall infrastructure needs;
- (4) Compile a summary of all the projects receiving economic stimulus funding within the region and by municipality to identify existing funding levels;
- (5) Facilitate a SWOT analysis designed to identify both regional and municipal strengths, weaknesses, opportunities and threats for economic development;
- (6) Identify the top municipal and regional public projects both short term and long term and to prioritize these projects as they relate to the goals and objectives of the plan;
- (7) Provide an overview of the various types and best practices for business incubators/accelerators to the region's municipalities and promote a regional approach to incubator development;
- (8) Engage the public, residents, stakeholders and municipalities to participate in the development and implementation of this plan;
- (9) Offer technical information and guidance to municipalities and local economic development committees, boards and councils and other stakeholders in obtaining grants and implementing local economic development planning initiatives;
- (10) Seek adoption and/or acceptance of the Regional Economic Development Plan by the SNHPC and the Metro Center-NH Steering Committee;
- (11) Assist Metro Center– NH in organizing and sustaining multi-jurisdictional and multi-sector partnerships for promoting the economic prosperity of the region; and
- (12) Build support through Metro Center-NH, the region's municipalities, NH Department of Resources and Economic Development (NH DRED), and the US Economic Development Administration (EDA) and other stakeholders in obtaining official federal and state approval for the designation of an economic development district or districts for the region, including a source of continuous federal planning funds to implement a comprehensive economic development strategy (CEDS) process for the region.



How is the Plan Organized?

To achieve maximum benefit and use, the plan is organized into two volumes. This document represents Volume One of the plan and contains a Preface, Introduction and the following five Chapters: Chapter One: Current Economic Conditions and Trends; Chapter Two: Economic Issues, Challenges & Opportunities; Chapter Three: Shared Regional Vision; Chapter Four: Strategic Initiatives; and Chapter Five: Priority Public Projects.

Volume Two is basically the Appendix of the plan and houses the key information and research, including copies of the final reports, economic data and analysis, meeting agendas and notes, and other information that was generated and discussed as part of the planning process.

How Should the Plan Be Used?

It is recommended that this plan be used by the region's municipalities, the SNHPC, and Metro Center-NH as: (1) an *advisory guide* in the preparation and update of both future regional and local economic development plans, annual work programs and priorities, economic development goals, strategies and other related projects; (2) as a *road map* in establishing and updating a continuous and comprehensive economic development strategy for the region; and (3) as an *implementation tool* for identifying and carrying out both short term and long range actions, strategies and projects for improving the economic health and prosperity of the region.

It is important to note that this economic development plan is not a cookbook nor is it a manual on how to conduct and promote economic development. There are many useful resources and publications which provide this information, including and most importantly the direct experience and expertise of local, state and federal economic development professionals and practitioners.¹

Additionally it is important to note that this plan does not suggest or recommend that any changes be made to the existing Rockingham Economic Development District which partially exists within the Southern New Hampshire planning region. Nor does this plan recommend that the current operational boundaries of the two existing economic development corporations existing within the region (i.e. the Rockingham Economic Development Corporation and the Capital Regional Development Council) be amended. The operating boundaries of these two existing economic development corporations are shown on Map 2 and are fully discussed in Chapter 4 of the plan.

¹ Also see American Planning Association's Planning Advisory Service (PAS) Reports: *An Economic Development Toolkit: Strategies and Methods* (PAS 541) and *Community Indicators* (PAS 517) which is nicely summarized by APA Connect at: <http://www.planning.org/eda/toolkit>.



The Methodology of the Plan

The methodology employed in the development of this plan is based upon strategic planning concepts (e.g. the SWOT Analysis) and a product-driven approach to plan building which facilitates high levels of participation and involvement. Specifically this strategic and product-driven approach not only encourages regional dialogue and collaboration, but offers an effective planning process for developing meaningful goals, strategies and key actions. The primary products or deliverables resulting from the development of this plan include:

- A Public Opinion Survey on Economic Development within the region;
- Published Economic Assets Profiles for each municipality;
- A Cluster or Target Industry Study of existing and future industry types;
- A Summary of Important Regional Economic Data and Trends;
- A SWOT Analysis Resulting in a Vision Statement -- Economic Development Strategy consisting of Core Goals and Key Actions;
- A Region-wide Inventory of Existing and Planned Public Utilities;
- A Region-wide Summary of AARA Stimulus Funding by Category and Municipality;
- Ranking of the Top Public Projects Both Short and Long Term for the Region;
- A Business Incubator Study and a Recommended Regional Approach;
- A Certified Site Program Proposal;
- Best Planning Practices – Model Ordinances;
- Grant Writing assistance to municipalities to promote Economic Development;
- Assistance to Municipalities in Establishing Economic Revitalization Tax Credit Zones; and
- A Recommended Approach and Framework for Establishing a Comprehensive Economic Development Strategy (CEDS) and an Economic Development District for the Region.

In preparing the plan, three basic studies were performed. The first study was to conduct a cluster or target industry analysis of the region. This analysis was conducted for the purpose of identifying the economic sectors and industries which have been successful in the past and will continue to be successful in the future, including the identification and targeting of economic markets and industries that offer new business and job opportunities not only to the region, but to each of the region's thirteen municipalities. Central to this analysis is a review of the dynamics of the region's existing economy.

This cluster or target industry analysis was conducted by John Rhodes, Senior Principal of Moran, Stahl and Boyer, a national Site Selection and Economic Development consulting firm. A complete copy of the final report entitled *Target Industry Analysis* is included in Volume II of this plan and is also available for download on the SNHPC website at www.shnpc.org.

The second study and key focus of the strategic planning process was the SWOT analysis. This analysis was carried out not only to identify the region's internal and external strengths, weaknesses, opportunities and threats, but to lay the groundwork for the Steering Committee's development of the vision statement, core goals and key actions of the plan.



Dennis Delay, a local economist with the New England Economic Partnership in Concord, NH was retained by the SNHPC to facilitate this important planning process. The SWOT analysis itself was carried out over a two month process at two public workshops held at the Public Service of New Hampshire's Energy Park Auditorium in the City of Manchester (a copy of Mr. Delay's final SWOT report is included in Volume II and is also available for download from the SNHPC website).

The SWOT analysis also set the stage for the Steering Committee's review and ranking of the top public projects for the region as identified by the region's municipalities. This prioritization process also considered and ranked the key implementation actions (e.g. the actions, programs and projects recommended by this plan). This step in the planning process, while not an official U.S. Department of Commerce funded Comprehensive Economic Development Strategy (CEDS) process, was included not only to show what a CEDS process consists of but more importantly to identify what the Steering Committee believes the most important publicly funded economic development priorities, projects and actions should be for the region.

The final study involved the preparation of the business incubator report (a copy of the final report is provided in Volume II and as well as the SNHPC website). This study was performed by Dr. Keith Moon, Director of the Southern New Hampshire University Center for Entrepreneurship and Social Innovation. It includes not only detailed information about business incubators, but it identifies and sets forth an innovative regional accelerator approach to business incubator development in the new creative knowledge-based industries and how the region's municipalities can participate in its implementation. This study is important not only for educational purposes, but to advance the core part of this plan's effort to spur local entrepreneurship and promote start-up opportunities and jobs for the region's college graduates and young professionals— a key goal and central theme of the plan.

It is important to note that none of the three studies as described above have ever been performed for the region before. While the research and studies are not new to economic development practices, the studies provide this plan with original research and analysis. This is important to the success of the plan as it is carried forward, implemented and updated in the future.

In addition, it is important to note that in the past many economic development plans included extensive economic base analysis, market and survey data, and trends analysis, however today approaches in economic development are now focused on creating economic opportunities through sustainable growth, regional coordination and collaboration, the coordination of economic development programs and support services, identifying skills and job development, and business attraction and retention strategies – all important objectives in today's challenging economic times.

These new perspectives and approaches to economic development are currently being advanced by the states of Maine and Vermont, not only focusing on the state and region's economic strengths, advantages and assets, but also acting to build upon, enhance and align



capacities, budgets, and economic districts to bring about improved regional coordination, integrated planning, and economic development.²

In fact, achieving accelerated economic growth through integrated planning and strategically prioritized public investments is now a key focus of many new federal programs, including the joint HUD, DOT and EPA Sustainable Communities Initiative.³ This new initiative emphasizes bringing transportation, environment and economic development decisions together through coordinated, comprehensive and regional-based planning.

The Planning Process

The development of this plan began in July 2009 and is now completed with this final adopted document. Copies of this document are posted on the SNHPC website and have been distributed to all municipalities, the Metro Center-NH Steering Committee, and members of the *Regional Economic Development Plan Steering Committee* for public comment and review.

During the course of development of this plan, a total of eight *Regional Economic Development Plan Steering Committee* meetings were held (copies of all Steering Committee meeting agendas and notes are provided in Volume II of this plan).

The first Steering Committee or Kick-Off Meeting for the plan was held on August 10, 2009. Prior to holding this meeting, a letter of invitation was circulated to all municipal governing bodies, city and town managers, and town administrators seeking (1) municipal support and participation in the development of the Regional Economic Development Plan; and (2) the appointment of at least two representatives and one alternate member from each municipality to serve on the *Regional Economic Development Plan Steering Committee*.

In response to this invitation, all thirteen municipalities in the region not only agreed to support and participate in the development of this plan, but each governing body appointed between two to three representatives to serve on the Steering Committee. The Steering Committee contained a total of 34 members (see the Acknowledgements for a completed list of all the Steering Committee members).

Concurrent with the establishment of the Steering Committee, Metro Center-NH and SNHPC staff also worked together to secure among all thirteen municipalities the adoption of ***Proclamations and Resolutions*** in support of regional economic development, particularly support for and participation in the Metro Center-NH region-wide initiative and partnership (see copies of the adopted Proclamations and Resolutions in Volume II).

² See Mobilize Maine, VITAL Economy, Inc., 2009 and State of Vermont, Joint Legislative Government Accountability Committee's Report "Challenges for Change: Progress Report" to the Governor, 2010.

³ See US HUD, Sustainable Communities Program, Community Planning Grants at http://portal.hud.gov/portal/page/portal/HUD/program_offices/sustainable_housing_communities



With the establishment of the Steering Committee and adoption of these Proclamations, the Kick-Off Meeting began with a luncheon in the SNHPC conference room. At the meeting the purpose of the plan as well as the proposed scope of work and planning schedule was discussed. Because of the importance of the plan, all city and town managers, town administrators, Mayor/Council and Selectmen Chairs were invited to the meeting. A Press Release was also prepared and published in the local papers inviting the public to participate in the regional economic development planning process and to attend the Steering Committee meetings.

At the Kick-Off Meeting, SNHPC staff presented copies of DRAFT *Economic Assets Profiles* which had been initially prepared for each of the region's thirteen municipalities. Steering Committee members and participating municipal officials were asked to review the profiles for accuracy and content (see copies of the final published Economic Assets Profiles in Volume II).

Each Economic Assets Profile provides an updated version of the municipal "Flash Facts" which were created by the SNHPC in 2004. The Assets Profiles also provide the public and municipal officials with a quick reference guide to current contact information, up to date facts and figures, as well as important demographic and economic data about each municipality (including population, housing, education, tax rates, employment, income, wages, unemployment, transportation and commuting patterns). Specifically the *Economic Assets Profiles* were prepared for each municipality in a format that could be posted on local and municipal websites and used for various economic development and public information purposes. In addition, the Profiles were later updated to include a bulleted list of each community's key economic assets and strengths identified through the SWOT analysis.

At the August 10, 2009 Kick-Off Meeting, SNHPC staff also reviewed the proposal and scope of work received from the consulting firm of Moran, Stahl & Boyer which was selected by the SNHPC to undertake the target industry analysis of the region in response to the planning commission's RFP.

The second meeting of the *Regional Economic Development Plan Steering Committee* was held on September 29, 2009 at PSNH Energy Park in Manchester, NH. At this public meeting, the USDA – Rural Development Office provided a summary overview of funding opportunities, loans and grant programs available to homeowners, businesses, municipalities and non-profit organizations. In addition, a progress update on Moran, Stahl & Boyer's target industry analysis and methodology was provided, including a list of four key economic development questions the consultant requested of each community (see Target Industry Analysis Final Report in Volume II). At the meeting, SNHPC staff also reviewed with the Committee, survey questions and a schedule for implementing the economic development public opinion survey which was hosted on the commission's website.

The third public meeting of the *Regional Economic Development Plan Steering Committee* was held on November 16, 2009 at PSNH Energy Park in Manchester. This meeting provided the first public visioning workshop and the start of the SWOT analysis identifying the region's economic strengths, weaknesses, opportunities and threats. As noted earlier, the SWOT analysis was facilitated by Dennis Delay, a local economist. Also at the meeting an update



on the progress of the economic development plan and the target industry analysis was presented.

It is important to note that during the implementation of the SWOT analysis, Metro Center-NH held an important Municipal Leadership Forum on December 10, 2009 at which the Final Report of the Target Industry Analysis and Regional Solutions for Economic Development was presented to the public.

The fourth public meeting of the *Regional Economic Development Plan Steering Committee* was held on January 25, 2010 at PSNH Energy Park in Manchester. This second public visioning workshop concluded the SWOT analysis by focusing on the key economic development strategies for the region. The results obtained from the economic development public opinion survey were also shared at the meeting as well as the findings of the target industry analysis and the key discussion points resulting from the December 10, 2009 Metro Center-NH Leadership Forum.

The fifth public meeting of the *Regional Economic Development Plan Steering Committee* was held on March 29, 2010 at PSNH Energy Park in Manchester. At this meeting, the final report and overall strategies resulting from the SWOT analysis were discussed as well as a proposed Vision Statement -- Economic Development Strategy for the region. In addition, an introduction and presentation to business incubators was provided by Dr. Keith Moon of Southern New Hampshire University.

The sixth public meeting of the *Regional Economic Development Plan Steering Committee* was held on April 26, 2010 at PSNH Energy Park in Manchester. At this meeting, Steering Committee members reviewed and discussed the final Vision Statement and the proposed Goals and Key Actions for the plan.

The seventh and final public meeting of the *Regional Economic Development Plan Steering Committee* was held on May 24, 2010 at PSNH Energy Park in Manchester. Steering Committee members at this meeting discussed and prioritized the top public projects submitted by municipalities for the region. In addition, an update on the business incubator study was provided including an update on SNHPC staff's efforts in preparing an inventory of the region's public utilities as well as a summary of American Recovery and Reinvestment Act (ARRA) Funding awarded to each municipality within the region.

How Should The Plan Be Adopted and Updated?

The *Regional Economic Development Plan Steering Committee* recommended that this plan be **adopted** by the Southern New Hampshire Planning Commission which occurred on March 22, 2011 and endorsed by the Metro Center-NH Steering Committee which occurred on March 23, 2011. As such, the plan has been adopted as an element of the Southern New Hampshire Planning Commission's Regional Comprehensive Plan and it has been forwarded to all thirteen communities, the Metro Center-NH Steering Committee, and the NH Department of Resources and Economic Development. In addition, a copy of the adopted plan has been provided to the New England Regional Office of the U.S. Department of Commerce, Economic Development Administration, and the Concord, NH offices of the



US Department of Agriculture, Rural Development Administration, and the Small Business Administration.

Ideally, the Regional Economic Development Plan should be **updated** by the SNHPC every five years in accordance with the comprehensive planning requirements of RSA 36:47, II. However and more importantly, it is recommended that the central **Vision Statement - Economic Development Strategy for the Region** contained within the plan be updated or at least evaluated on an annual basis by the SNHPC working in partnership with Metro Center-NH and the region's municipalities. This is critically important as this strategy not only forms the foundation of the Regional Economic Development Plan, but provides the region, the SNHPC and Metro Center-NH with an agenda and focus for current and future economic development efforts.

How Should The Plan Be Implemented?

Implementing the Regional Economic Development Plan – the region's central economic development strategy, core goals and key actions is the primary responsibility of the SNHPC. Ideally, this plan should be implemented by working in concert with: (1) the Metro Center-NH Steering Committee; (2) all thirteen communities; and (3) the New Hampshire Department of Resources and Economic Development, Division of Economic Development for the betterment of the region as a whole.

Ideally it will be important over time that all of the above entities establish a formalized relationship and understanding of each other's role in economic development planning for the region. Currently however, given the existing strengths and capacities of each organization, it is recommended that the SNHPC be instrumental in and responsible for facilitating on a continuous basis comprehensive and strategic economic development planning for the region. This can be facilitated through federal, state and local support of a CEDS planning process now and the establishment of an economic development district for the region in the future.

In addition, it is recommended that Metro Center-NH continue to serve in its advocacy and project development roles in order to achieve its organizational mission in promoting economic development. Also Metro Center-NH is best positioned to act as a front door and information portal for the region. This is absolutely essential as investors, site selectors and various companies and business entities research and evaluate the Southern New Hampshire Region as a place to do business. This will mean Metro Center-NH will need to maintain a long-term commitment to the region through partnership building and an internet presence that can provide a marketing conduit for the region.

Lastly, the NH DRED Division of Economic Development serves in a valuable technical and advisory role for the region given its statewide economic development mission. However, NH DRED's official role in economic development for the region is currently limited due to capacity issues and reductions in funding and staff. These issues may be improved in the future as the economy and state's budget improves.



Why Metro Center-NH?

Metro Center-NH is a recently formed regional economic development initiative and partnership between the Greater Manchester Chamber of Commerce, the New Hampshire Department of Resources and Economic Development, and the SNHPC. As such it is an off-shoot from the 2001 Regional Citizen Initiative, sponsored by the Greater Manchester Chamber of Commerce (GMCC). Specifically, it is a regional economic development initiative, created in partnership with the GMCC, the New Hampshire Resources and Economic Development (DRED), and the SNHPC to establish a voice and regional network of practitioners who envision a collaborative approach to promoting the quality of life, the business community, and the development of each individual community as part of a larger regional community.

Metro Center-NH also brings together public and private stakeholders from each of the thirteen communities into one collective partnership through which issues affecting the economic development of each individual community can be addressed with one voice. The strategy of Metro Center-NH is as follows:

- Sustain and nurture a Steering Committee with Board members and regional stakeholders, including DRED and the SNHPC.
- Become visible and active at all levels of government.
- Establish relationships that build a network among and between the GMCC and all the communities within the region.
- Continue to build upon existing relationships with DRED and SNHPC to promote the growth and development of the Metro Center.
- Hold multiple roundtables, including an annual “Municipal Leadership Forum,” to build a foundation to accomplish the goals set forth for the Metro Center and select the areas of focus affecting the region, including the commuter rail system, community beautification, and public safety.
- Develop an interactive website that is representative of all participating communities.

The underlying premise of Metro Center-NH is the belief that by promoting the region as one entity, the region can better position itself and compete with other regions in today’s global economy. Every city and town in the Metro Center region has unique qualities that make it a desirable place to live and do business. By marketing the Metro Center region as one regional entity, everyone can be more effective in advertising these special qualities to those who are unfamiliar with the region.



Section One: Current Economic Conditions/Trends

Regional Setting

The Southern New Hampshire Planning Commission (SNHPC) Region consists of thirteen municipalities located within three counties – Hillsborough, Merrimack and Rockingham. The region is located within what is identified as the Merrimack Valley Region of the State of New Hampshire (see following Map 2).⁴ The Merrimack Valley Region is named after the Merrimack River which flows in a north to south direction directly through the center of the region.

In many ways the Merrimack River defines the character of the region and continues to shape the region's history and economic growth. The river also provides both a natural geographic and political boundary between Hillsborough and Merrimack Counties to the west and north, and Rockingham County to the east (see Map 2).

Today the Southern New Hampshire Planning Commission Region is home to 263,389 people; 7,613 businesses; and 126,942 jobs.⁵ The majority of these people, 108,625 residents and 3,330 businesses, are located within the City of Manchester, the largest populated municipality and center of employment both within the SNHPC Region and the state of New Hampshire (the following Tables 1 and 2 provide the latest available employment and population data for the region).

In addition to the City of Manchester, the SNHPC Region contains six suburban-sized municipalities which contain substantial downtowns and/or commercial/industrial centers ranging in size from 10,950 to 34,318 residents. These suburban communities include the towns of Bedford, Derry, Goffstown, Hooksett, Londonderry and Raymond. Four of the communities – the towns of Derry, Londonderry, Bedford and Goffstown are also respectively the 4th, 9th, 12th and 14th largest populated municipalities in the state of New Hampshire (see Table 2).

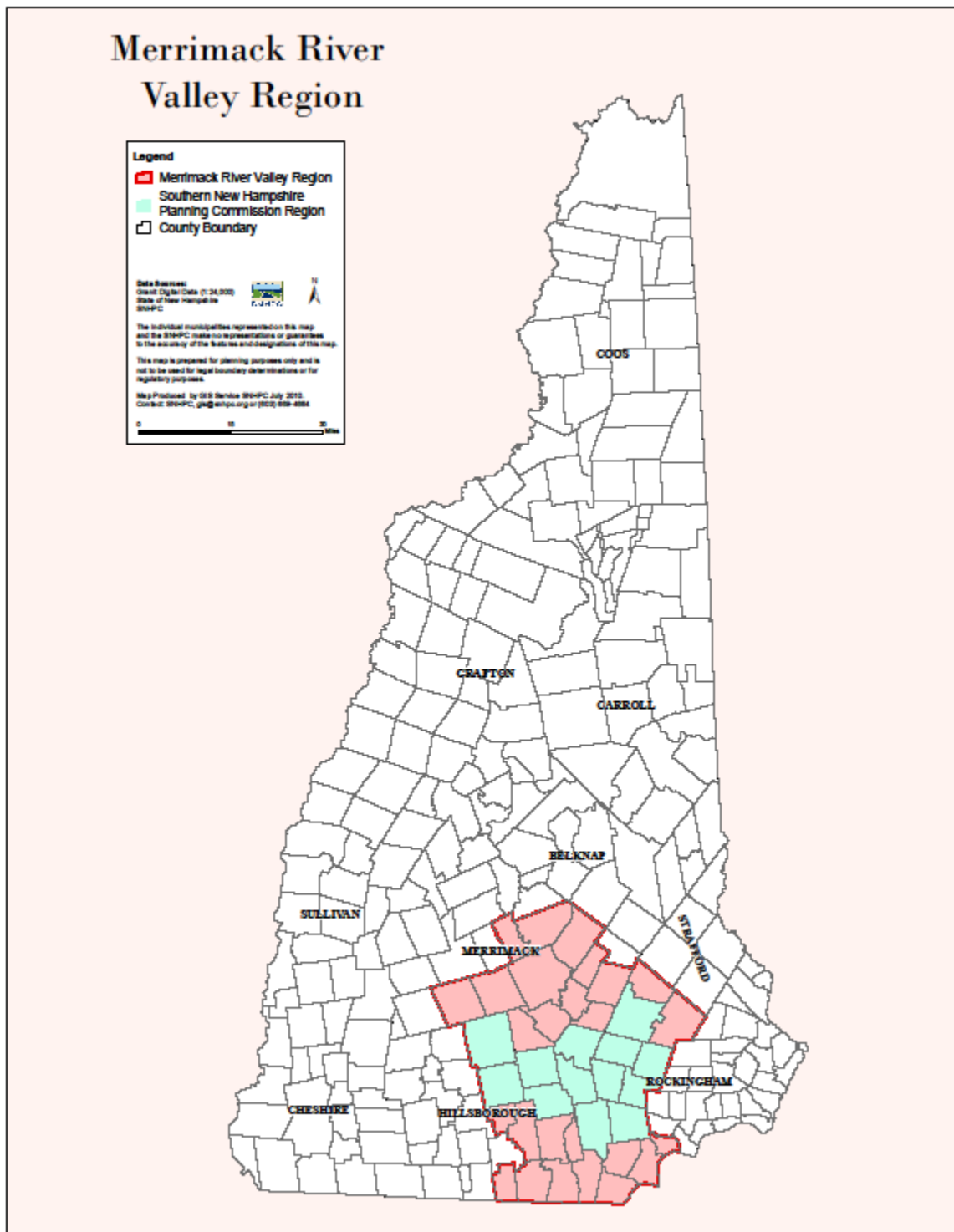
In addition to these larger municipalities, the SNHPC Region contains six smaller rural or bedroom communities ranging in size from 4,112 to 9,052 residents (see Table 2). These smaller communities include the towns of Auburn, Candia, Chester, Deerfield, New Boston and Weare.

⁴ Also see New Hampshire Highway Map and NH Department of Resources and Economic Development, Division of Travel and Tourism website at: <http://www.visitnh.gov/welcome-to-nh/about-the-regions/maps.aspx#>

⁵ New Hampshire Office of Energy and Planning 2009 Population Municipal Population Estimate and NH Economic and Labor Market Information Bureau, 2008 employment data.



Map 2 Merrimack Valley Region of the State of New Hampshire



Source: SNHPC



Table 1
Work Site & Average Annual Employment Data, SNHPC Region by Municipality
(2008 and 2009)

Municipality	2008 Work Sites*	2008 Average Annual Employment	2009 Work Sites*	Average Annual Employment
Auburn	151	1,732	141	1,689
Bedford	1,001	14,354	951	13,834
Candia	100	801	105	756
Chester	87	461	86	489
Deerfield	69	440	64	465
Derry	672	8,243	647	7,750
Goffstown	289	3,554	292	3,535
Hooksett	504	8,105	491	7,793
Londonderry	810	13,945	796	13,240
Manchester	3,330	67,945	3,237	64,691
New Boston	101	647	101	635
Raymond	181	2,853	175	2,792
Ware	137	1,567	126	1,565
Totals	7,431	124,087	7,211	119,232

Note: Work Sites Refer to Businesses

Source: NHetwork, New Hampshire Economic & Labor Market Information Bureau

Table 2
Population Estimates for the SNHPC Region (1990-2009)

Municipality	Population				1990-2000		2000-2009	
	1990	2000	2009	2009 State Rank	Increase	Percent Change	Increase	Percent Change
Auburn	4,085	4,682	5,110	66	597	14.61%	428	9.14%
Bedford	12,563	18,274	20,892	12	5,711	45.46%	2,618	14.33%
Candia	3,557	3,911	4,112	94	354	9.95%	201	5.14%
Chester	2,691	3,792	4,624	79	1,101	40.91%	832	21.94%
Deerfield	3,124	3,678	4,403	87	554	17.73%	725	19.71%
Derry	29,603	34,021	34,318	4	4,418	14.92%	297	0.87%
Goffstown	14,621	16,929	17,817	14	2,308	15.79%	888	5.25%
Hooksett	9,002	11,721	13,554	21	2,719	30.20%	1,833	15.64%
Londonderry	19,781	23,236	24,729	9	3,455	17.47%	1,493	6.43%
Manchester	99,332	107,006	108,625	1	7,674	7.73%	1,619	1.51%
New Boston	3,214	4,138	5,203	63	924	28.75%	1065	25.74%
Raymond	8,713	9,674	10,950	27	961	11.03%	1,276	13.19%
Weare	6,193	7,776	9,052	32	1,583	25.56%	1,276	16.41%
SNHPC Region	216,479	248,838	263,326	1	32,359	14.95%	14,488	5.82%

Source: 1990 and 2000 U.S. Census/New Hampshire OEP Population Estimates (2009)

Note: 1990 and 2000 are 100 percent count data whereas 2009 is an estimate



Snapshot of Current Economic Conditions

This section provides an overview of current economic conditions and identifies some of the important economic and socio-demographic trends facing New Hampshire and the SNHPC Region now and in the future. This section also highlights how the SNHPC Region is doing in comparison to the state of New Hampshire, New England, and the nation as a whole. More detailed statistics and a summary of the Region's Important Economic Data and Trends is provided in Volume II of the Plan. There are also important economic data and trends identified in the Target Industry Analysis report identified in both Section Two and in Volume II.

New Hampshire's Economy

Despite recent positive economic indicators that the economy is showing signs of improvement (such as gains in jobs growth and a decline in the number of new claims for unemployment), a full recovery from the current national recession has not yet occurred.⁶ In fact, the current economic downturn caused by the collapse of many financial institutions (officially indexed to have started in the month of December 2007) may be one of the worst economic recessions in our nation's history since the Great Depression.⁷ Many economic forecasts are projecting that the nation and New Hampshire may be facing a long and slow recovery.⁸

Some of the major impacts of the national recession on New Hampshire, the SNHPC Region, and its municipalities have included slowing population growth rates; higher reported unemployment and unemployment claims; record high numbers of foreclosures; depressed economic activity and growth; increased personal bankruptcies, business closings and layoffs; lower wage and salary increases; higher poverty rates and issuance of food stamps; higher health insurance costs; sharp drop in new housing starts, building permits, and construction employment; weak real estate demand and credit markets; retreating housing and property values; increasing vacancy rates; weak consumer spending; and declining revenues resulting in larger state and municipal budget deficits. Overall, there has not been one sector of the economy either private or public which has not felt or has not been impacted in some way by these current economic conditions (see the SNHPC Region's Important Economic Data and Trends in Volume II of this Plan for some of the statistical data related to these conditions).

Yet, according to many economic indicators both the state of New Hampshire and the SNHPC Region are performing better than national averages in numerous areas and New Hampshire has been identified as a state that may be poised for growth particularly in post-recession, postsecondary jobs with between **8.8** and **11** percent more jobs projected through

⁶ Unemployment claims have declined by over 1,000 between September 2009 and September 2010, NH Economic and Labor Market Bureau.

⁷ Official Start of National Recession as defined by National Bureau of Economic Research

⁸ US Department of Labor, Bureau of Labor Statistics, Economic News Release: <http://www.bls.gov/news.release/ecopro.toc.htm>; United States Economic Outlook, BMO Capital Markets Economics, November 5, 2010; Board of Governors of the Federal Reserve System, Minutes of the Federal Open Market Committee, January 27-28, 2009: <http://www.federalreserve.gov/monetarypolicy/formcminutes20090128ep.htm>.



2018.⁹ In fact, New Hampshire is currently the **second-fastest** growing job market in the country, according to recent information released by the US Department of Labor.¹⁰ New Hampshire also leads New England with the lowest unemployment rate, dropping to 5.5 percent in September 2010, well below the national average of 9.6 percent.

In addition to these positive employment trends, the U.S. Census Bureau estimates as of July 1, 2009, indicate that New Hampshire's population has now surpassed Maine's for the first time since the year 1800. Both states contain roughly 1.3 million people, separated by a difference of about 6,000 more people in New Hampshire than in Maine.¹¹

Despite the fact that New Hampshire's economy has been significantly impacted by the current recession (including past recessions such as 1992 to 1996), the state's economy today and its overall ranking among the 50 states and New England indicates that New Hampshire is showing signs of an improving economy and continues to be a very attractive place to locate a business and raise a family.

Some of the leading indicators reveal that New Hampshire's per capita income in 2009 improved from being near the U.S. median to **7th** Highest in the US and **3rd** Highest in New England. Over the past several years (2006-2010), New Hampshire has also had the **highest standard of living** in the nation and the state's September 2010 unemployment rate of 5.2 percent was the **4th** lowest in the nation, compared to 8 percent in the New England region, and 9.6 percent nationally. New Hampshire's unemployment rate of 7.0 percent in March 2010 during the height of the recession was also 2.7 percentage points below the national average of 9.7 percent.¹²

In addition, the U.S. Department of Labor recently reported that between June 2009 and June 2010, New Hampshire experienced a job growth of 1.42 percent which resulted in a total of 8,900 new non-farm related jobs. This small but important job growth now places New Hampshire as the **second fastest growing job market** in the country after Texas which created 110,200 jobs during the same time period. While New Hampshire is currently second, Massachusetts added more jobs – 16,700 – and had the 12th fastest job growth in the country at 0.53 percent. The other four New England states lost jobs during 2009; Rhode Island lost the most – 7,900 jobs or 1.72 percent.

According to the most recent New Hampshire Economic Review (2009), the state of New Hampshire's overall national and regional report card is quite favorable in a number of important economic indicators (see Table 3).

⁹ See NH Employment Security, New Hampshire Employment Projections, May 2010; New Hampshire Economic Outlook, May 20, 2010, New England Economic Partnership; Georgetown University, Center on Education and the Workforce, Projections of Jobs and Education Requirements through 2018, see <http://explore.georgetown.edu/jobs2018/>.

¹⁰ US Department of Labor, Bureau of Labor Statistics: New Hampshire experienced job growth of 1.43 percent between June 2009 and June 2010, which resulted in 8,900 new non-farm related jobs. While New Hampshire is second, Massachusetts added more jobs, 16,700 but had the 12th fastest job growth in the country.

¹¹ New Hampshire Office of Energy and Planning (OEP), State Data Center.

¹² U.S. Dept. of Labor, Bureau of Labor Statistics



Table 3
Economic Indicators

Categories	National Rank	New England Rank
Favorable Tax Climate (lowest state and local tax burden as percent of income) (CQ Press 2008)	1	1
Standard of Living (by poverty rate, 2007-2009)	1	1
Safest State (CQ Press, 2010)	1	1
Child and Family Well-Being (Anne. E. Casey, 2010)	1	1
Most Livable State (CQ Press, 2010)	4	1
America's Health Ranking (United Health Foundation, 2009)	5	3
Highest Percentage of College-Educated Adults (2009)	10	4
Per Capita Income (2010)	7	3
Lowest Unemployment Rate (2010)	4	1

Sources: 2010 New Hampshire Economic Review
Economic and Labor Market Information Bureau

Overall, the New Hampshire's economy relies on well educated, highly skilled, and hard working business owners and employees. Since 1980, the state's high quality of life, including low poverty and crime rates, access to cultural and recreational amenities, physical beauty/clean environment, the "New Hampshire tax advantage," proximity to the Boston area, and relatively low real estate and living costs compared to Boston and its immediate suburbs, have served as strong "magnets" to attract entrepreneurs, businesses, and skilled workers and their families to the state.

It is envisioned that NH economic advantages will continue to work well for the state in the years ahead. In addition, to New Hampshire's strong showing with respect to the economic indicators identified in Table 3, the state's overall ranking also fairs well with respect to the following socio-economic criteria.

[Additional NH Socio-Economic Rankings:](#)

- **1st** – New Hampshire's rank on The Annie E. Casey KIDS COUNT survey as the best state when it comes to educational, social, economic and physical well being of children. Rankings are based on 10 measures including low-birth weights, teen homicides and suicides, and percent of children living in poverty;
- **10th** – On Greenopia's 2010 Greenest States List, which ranks the 50 states on criteria that includes water and air quality, recycling rates, emissions, number of LEED-certified buildings, number of green businesses and renewable energy generation;
- **12th** – For per pupil spending in primary and secondary schools. New Hampshire spends an average of \$11,951 per student, putting it behind the rest of New England except Maine (Source: National Center for Education Statistics);



- **14th** – For change in per capita personal income between 2009 and 2010, when NH's per capita personal income fell 1.4 percent to \$42,831 (Source: Bureau of Economic Analysis, U.S. Census Bureau);
- **15th** – For state competitiveness when it comes to promoting economic growth and providing high-income long-term jobs. This ranking is based on 43 indicators including government and fiscal policy, business incubation, infrastructure and technology (Source: Beacon Hill Institute at Suffolk University);
- **16th** – For highest cigarette excise tax in the country. New Hampshire's cigarette excise tax is \$1.78, the next closest New England state is Maine at \$2 (Source: Campaign for Tobacco-Free Kids);
- **19th** – On Forbes.com's list of the best states for business. The rankings are based on costs, labor supply, regulatory environment, current economic climate, growth prospects and quality of life;
- **39th** – Policies for affecting the cost of health care, including whether states remove unnecessary mandates and regulations, and remove obstacles to private sector choice and competition (Source: Small Business & Entrepreneurship Council);
- **42nd** – For percentage of population under 18 as of 2008. In 2000, 22.3 percent of NH's population was under 18 (Source: U.S. Census Bureau);
- **51st** – NH is ranked as the least corrupt state in the nation (rankings include the District of Columbia). The survey measures cases of public corruption, racketeering and extortion, forgery and counterfeiting, fraud and embezzlement between 1998-1999 and 2008 (Source: [The Daily Beast](#)).

While most of these indicators provide a cause for optimism for New Hampshire and the SNHPC Region in terms of future economic recovery and growth, the reality, is the state and the region must continue to address many pressing economic issues and financial challenges. These include declining revenues for municipalities and state government; maintaining and funding quality education and housing opportunities; high energy costs – both heating and transportation; and most importantly changing workforce demographics as the state and the region's population ages with shrinking numbers of younger children (0-15 years age group) and younger adults (18-39) residing in the state. Figure 1 shows how the Manchester metropolitan area performs when compared to other New England and East Coast metropolitan areas.

While the state is projected to experience growing job markets in a number of occupations (see following labor force/occupation trends) many of the projected new jobs in the region and the state will require a postsecondary education. This means (1) the state's higher educational system must be prepared to respond as new requirements for educated and skilled workers emerge; and (2) many more of NH's college graduates will need to remain in the state instead of relocating to other job markets in order to sustain economic growth and fill preexisting jobs that people leave behind when they retire, or move into other occupations.

In fact, the need to retain college graduates and New Hampshire's younger workforce is one of the central themes of this plan and is one of the most important and critical economic issues facing the state and the region. In the past, New Hampshire has been a net importer



of college graduates for many of the state’s best jobs.¹³ However, as the population of the state ages (New Hampshire is now currently tied with Florida as the 4th oldest state in the nation according to the U.S. Census Bureau), the need for educating the state’s workforce and retaining New Hampshire’s college graduates becomes even more important as the state’s older workforce retires.

Figure 1
Comparisons of East Coast Locations

Comparisons of East Coast Locations

In order to place the competitive positioning of Manchester area in context with other New England and East Coast locations, the following analysis was performed. In general, the Manchester area is quite competitive within New England but less competitive with selected East Coast destinations.

COMPARISON OF MANCHESTER WITH SELECTED LOCATIONS BASED ON TYPICAL SITE SELECTION CRITERIA								
Parameter	Providence, RI MSA	Hartford, CT MSA	Boston, MA MSA	Manchester, NH MSA	Richmond, VA MSA	Raleigh, NC MSA	Greensboro, NC MSA	Greenville, SC MSA
2006 Population (000's)	1,613	1,189	4,455	403	1,194	995	685	601
Avg. Annual Growth Rate	0.5%	0.69%	0.24%	1.13%	1.43%	3.83%	0.97%	1.12%
4-Yr + Educ. Attainment	23.5%	30.5%	36.6%	30.1%	27.8%	37.8%	23.8%	23.7%
% of Employed in Union (state-wide basis)	16.5%	16.9%	15.7%	10.6%	4.1%	3.5%	3.5%	3.9%
Right to Work State	NO	NO	NO	NO	YES	YES	YES	YES
Corporate Tax Rate	9%	7.5%	9.5%	8.5%	6%	6.9%	6.9%	5%
Individual Tax Rate	9.9% max	5%	5.3%	0%	5.75%	7.75%	7.75%	7%
Class A Off/CBD (\$/SF)	30+	22	60+	22	24	23	18	17
Class A Off/Suburbs (\$/SF)	22	18	26	12	20	21	13	13
Mfg/Warehouse (\$/SF)	4	5.5	5.7	6	3.3	4.8	3.5	3
Flex/R&D (\$/SF)	Limited Supply	8.5	9.9	9.5	7.8	9.3	8.5	6.4
Cost of Electric Power (cents/KWhr)	14.3	14.2	13.9	13.9	7.0	5.5	5.5	5.6
Accountant	\$63,580	\$67,870	\$68,740	\$58,200	\$64,080	\$62,270	\$60,400	\$59,910
Insurance Underwriter	\$62,170	\$73,590	\$75,440	\$65,680	\$50,780	\$54,920	\$44,450	\$42,470
Mechanical Engineer	\$81,820	\$77,350	\$87,650	\$69,190	\$77,140	\$69,420	\$74,240	\$79,930
Computer Controlled Mach.	\$34,220	\$41,170	\$37,950	\$34,560	\$29,730	\$29,330	\$34,200	\$35,420
Machinist	\$40,320	\$41,720	\$42,090	\$43,900	\$39,400	\$33,670	\$35,360	\$33,310

Legend
 Least Favorable
 Mid-Range (average)
 Most Favorable

Class A Off/CBD = the newer, best appointed office space in the Manchester "Central Business District"
 Class A Off/Suburbs = the newer, best appointed office space adjacent to the City of Manchester (e.g., Bedford)

Data Sources

- U.S. Census Bureau and Claritas (demographic data)
- U.S. Department of Labor (union activities and cost of labor)
- U.S. Department of Energy (electric power rates)
- Co-Star and Grubb & Ellis databases (real estate data)

¹³ Georgetown University, CEW, Projections of Jobs and Education Requirements through 2018.



The SNHPC Region's Economy

This section identifies and highlights the SNHPC Region's most important economic and socio-demographic conditions and trends (for more detailed statistics, see a summary of the Region's Important Economic Data and Trends in Volume II of the Plan). This section also compares how the SNHPC Region is doing overall within the state and New England.

It is important to note that much of this data could change with the release of the 2010 Census in March and April 2011; therefore some of the data contained in this plan will need to be updated in the near future. One area of major concern is that the U.S. Census Bureau is currently considering revisions to how statistical metropolitan areas are determined and how this could impact the flow and distribution of federal funding to the state and the region in the future.

Metropolitan and Micropolitan Statistical Areas are used to help define larger populated regions. The United States Census Bureau defines these areas as follows:

Metropolitan and micropolitan statistical areas (metro and micro areas) are geographic entities defined by the U.S. Office of Management and Budget (OMB) for use by Federal statistical agencies in collecting, tabulating, and publishing Federal statistics. The term "Core Based Statistical Area" (CBSA) is a collective term for both metro and micro areas. A metro area contains a core urban area of 50,000 or more population, and a micro area contains an urban core of at least 10,000 (but less than 50,000) population. Each metro or micro area consists of one or more counties and includes the counties containing the core urban area, as well as any adjacent counties that have a high degree of social and economic integration (as measured by commuting to work) with the urban core.¹⁴

Currently, the SNHPC Region is part of the following three U.S. Census statistical areas as shown on Map 3:

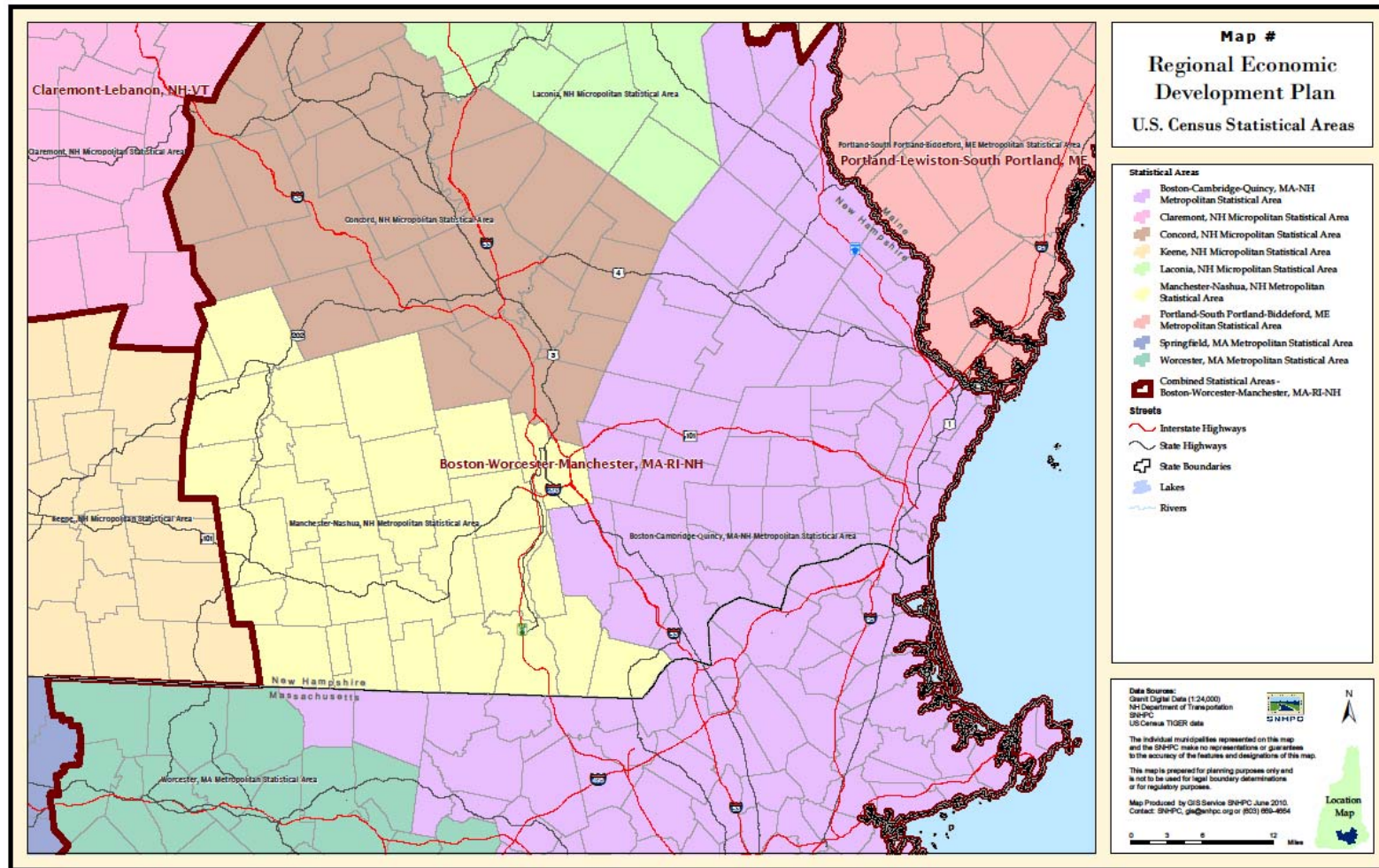
- Manchester-Nashua, NH Metropolitan Statistical Area
- Boston-Cambridge-Quincy, MA-NH Metropolitan Statistical Area
- Concord, NH Micropolitan Statistical Area

The SNHPC Region is also part of the larger Boston-Worcester-Manchester, MA-RI-NH Combined Statistical Area. Combined Statistical Areas are used by the U.S. Census when Metropolitan and Micropolitan Statistical Areas grow and become more integrated and intertwined.

¹⁴ U.S. Census Bureau, <http://www.census.gov/population/www/metroareas/metroarea.html>



Map 3 Boston-Worcester-Manchester, MA-RI-NH Combined Statistical Area



Source: SNHPC

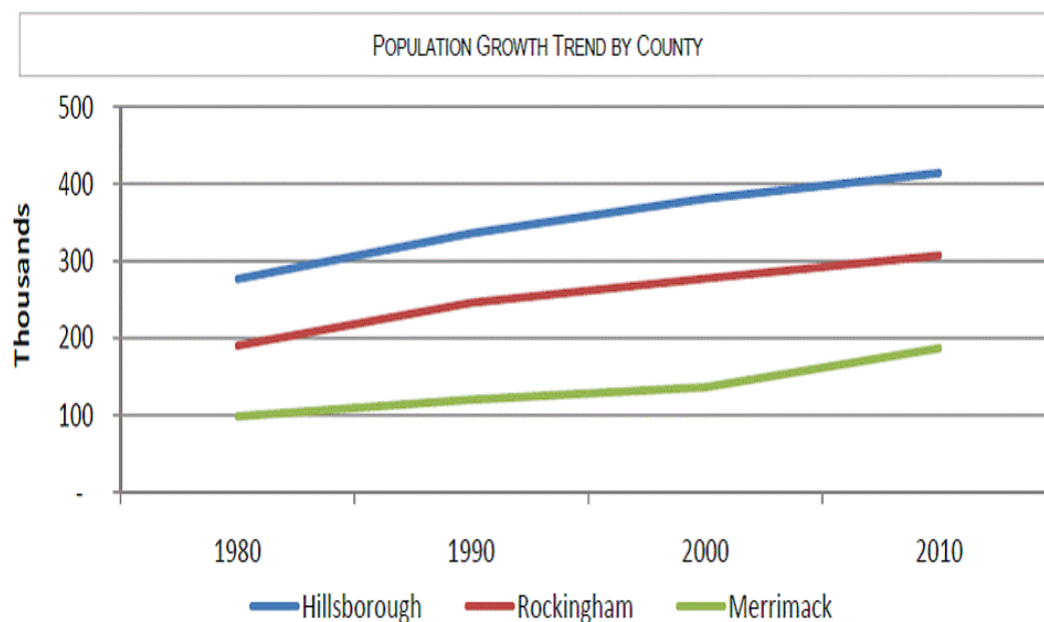


Declining Population Growth

An important trend facing the SNHPC Region is that since 2004, the rate of population growth within the region and the State of New Hampshire has been declining. This decline can be partially attributed to current economic conditions as population growth is measured by both births and deaths and in and out-migration. Currently, New Hampshire's immigration rates are very slow. Since 2004, the annual population growth rates of the state and the SNHPC Region have declined from rates of 0.6 and 0.8 percent per year to between 0.2 and 0.4 percent per year in 2007-2008 (see Table 4).

Despite these current slowing rates of growth, the population growth of the SNHPC Region is projected to continue to increase in the future (see Table 4). Figure 2 displays the projected growth in the three counties containing SNHPC communities.

Figure 2
Population Growth in Hillsborough, Rockingham and Merrimack Counties



Source: U.S. Census Bureau, SNHPC Target Industry Analysis

Some of this growth is projected as a result of the ongoing widening of I-93 from two to four lanes in both directions between the Massachusetts state line and the City of Manchester. By improving the capacity and safety of this strategic interstate corridor, it has been determined by the New Hampshire Department of Transportation (NH DOT) and the State Office of Energy and Planning who performed the projections that it will be much

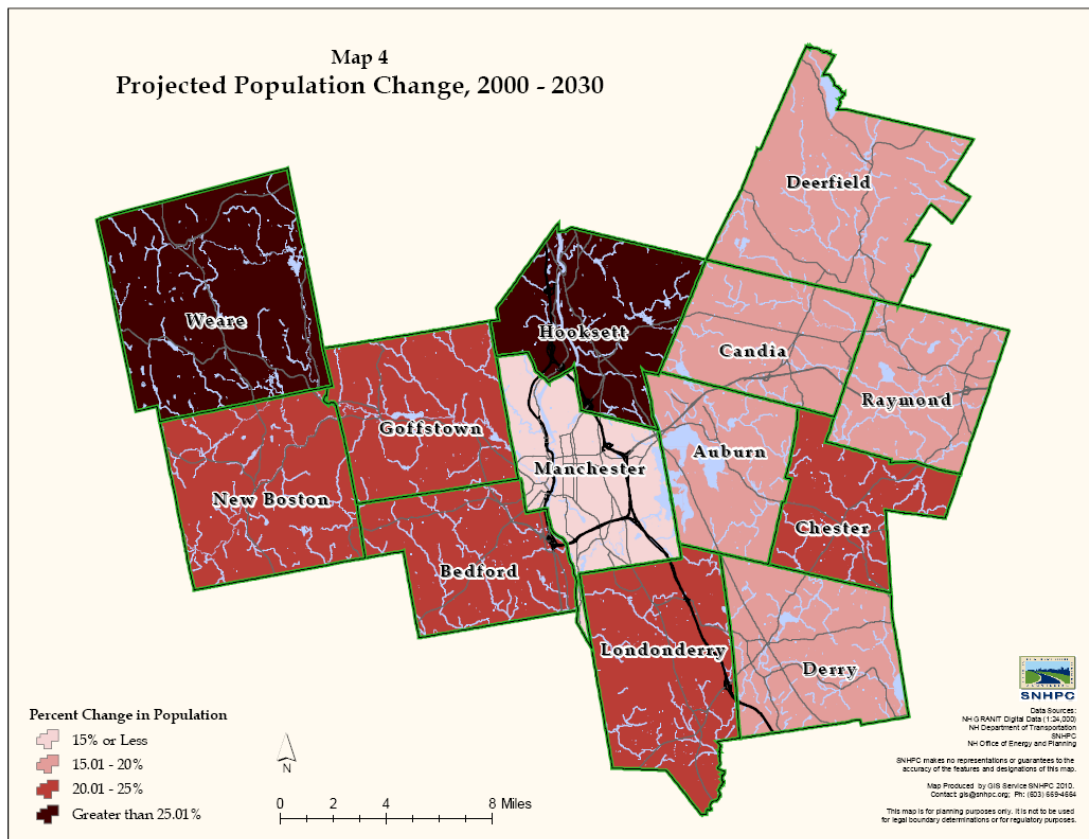


easier for commuters and interstate commerce to travel between the two states, thus encouraging more people to move to New Hampshire.

The anticipated distribution of this population increase among the municipalities within the SNHPC Region is displayed in Map 4 with the greatest percentage of population growth projected to take place within the towns of Hooksett and Weare.

The largest numeric population increases are projected to occur within the City of Manchester and the towns of Londonderry, Derry, Hooksett and Bedford in that order (see Table 4).

Map 4
SNHPC Region, Projected Population Distribution



Source: NH DOT and OEP; map prepared by SNHPC



**Table 4
SNHPC Region Population Projections, 1990-2030**

Municipality									2005-2030			
	Census		Projected						Absolute Change	Percent Change	Growth Rate	2030 Percent of Total
	1990	2000	2005	2010	2015	2020	2025	2030				
Auburn	4,085	4,682	5,180	5,360	5,600	5,790	5,980	6,170	990	19.11%	0.55%	1.99%
Bedford	12,563	18,274	20,740	21,810	23,080	23,940	24,810	25,400	4,660	22.47%	0.64%	8.20%
Candia	3,557	3,911	4,110	4,250	4,430	4,570	4,710	4,840	730	17.76%	0.51%	1.56%
Chester	2,691	3,792	4,620	4,790	5,020	5,220	5,410	5,590	970	21.00%	0.60%	1.81%
Deerfield	3,124	3,678	4,270	4,420	4,620	4,780	4,940	5,100	830	19.44%	0.56%	1.65%
Derry	29,603	34,021	34,660	36,560	37,860	38,980	39,730	40,430	5,770	16.65%	0.48%	13.06%
Goffstown	14,621	16,929	17,800	18,600	19,480	20,260	21,030	21,800	4,000	22.47%	0.64%	7.04%
Hooksett	9,002	11,721	13,240	14,330	15,330	16,360	17,420	18,100	4,860	36.71%	1.05%	5.85%
Londonderry	19,781	23,236	24,670	26,210	27,340	28,440	29,540	30,580	5,910	23.96%	0.68%	9.88%
Manchester	99,332	107,006	109,970	112,400	115,230	117,620	120,050	121,700	11,730	10.67%	0.30%	39.31%
New Boston	3,214	4,138	4,970	5,190	5,450	5,690	5,930	6,160	1,190	23.94%	0.68%	1.99%
Raymond	8,713	9,674	10,640	11,010	11,470	11,840	12,210	12,560	1,920	18.05%	0.52%	4.06%
Weare	6,193	7,776	8,850	9,280	9,790	10,240	10,700	11,150	2,300	25.99%	0.74%	3.60%
Total	216,479	248,838	263,720	274,210	284,700	293,730	302,460	309,580	45,860	17.39%	0.58%	100%

Source: NH OEP and NH DOT 2005, updated 2010



The Region's Population is Aging with Fewer Young Adults

Another important demographic trend facing the SNHPC Region and New Hampshire is that the median age of the population is increasing (i.e. the population of the state is aging) and the total number of children (0-18) and young adults (30-39) residing in New Hampshire is declining.

In 2009, the median age in New Hampshire was 40.4 compared to 36.8 for the nation, and the number of residents over the age of 65 was 13.5 compared to the national average of 12.9 (U.S. Census). In comparison, the median age in 2009 averaged among the three counties that make up the SNHPC Region was 40.2.

At the county level, 11.8 percent of the population of Hillsborough County was above 65 and 23.6 percent of the population was under 18 with a median age of 38.4. These demographics are generally the same in Rockingham County with 12.6 percent of the population above 65 and 22.9 percent below 18 with an average age of 41.6. The same statistics also apply to Merrimack County with 13.7 percent of population above 65 and 21.5 percent below 18 with a median age 40.7.¹⁵

Table 5 shows the median age of each community within the SNHPC Region (based on 2000 Census data -- the most current data available), it shows that the towns of Bedford, Candia and Auburn have the oldest median age while the towns of Derry, Raymond and Manchester have the youngest.

Table 5
SNHPC Region Median Age by Community (2000)

Municipality	Median Age
Auburn	36.8
Bedford	39.2
Candia	37.6
Chester	35.7
Deerfield	36.2
Derry	33.6
Goffstown	35.4
Hooksett	35.3
Londonderry	35
Manchester	34.9
New Boston	36.2
Raymond	34.4
Ware	34.1
Region Average	35.7

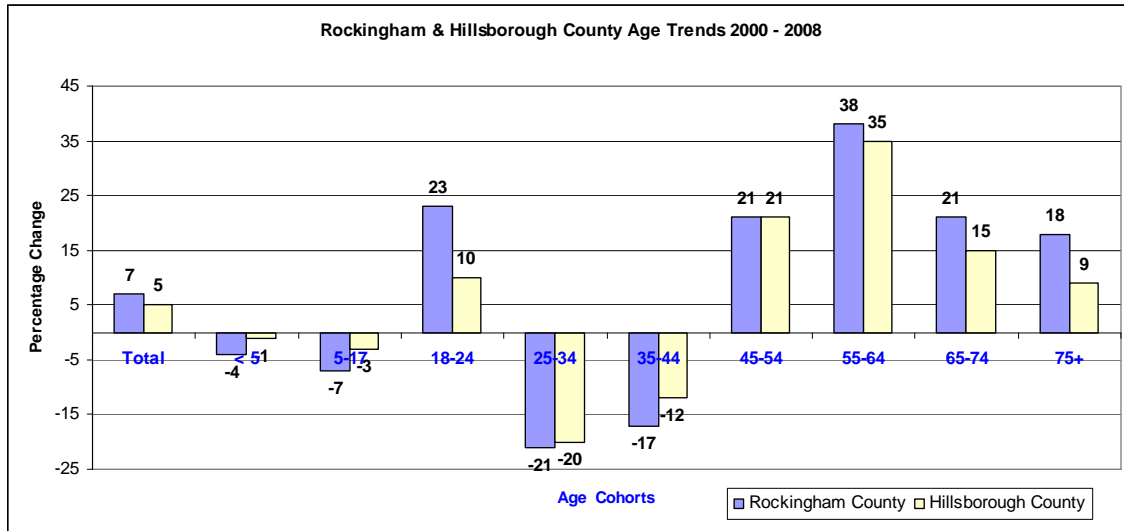
Source: New Hampshire Employment Security/ELMB Community Profiles

¹⁵ U.S. Census 2009 estimate



Another important demographic trend in New Hampshire and the SNHPC Region (see Figure 3 for Rockingham and Hillsborough counties) is that total population within the age groups 25-34 and 35-44 have been decreasing since 2000 and the percentage of residents under the age of 18 is now 21.8 compared to 24.3 nationally (2009 Census – American Community Survey data).

Figure 3
Rockingham and Hillsborough County Population Change by Age, 2000-2008



Source: U.S. Census, American Community Survey

This overall decline in young adults is raising concerns about the long term sustainability of the state’s labor force. Generally those who were 30 to 40 years old in 2009 belong to the group referred to as “Generation X”. This generation is smaller in size than the baby boom generation ahead of them. Generation X is also smaller in size than the younger generation following them (18-24), which are called the “Echo Boomers”.

What this new demographic data means is that with fewer adults 25 to 44 years old, there likely will be fewer children in the state and the region in the near-term future – in fact, there were 10,500 less students in the state’s K-12 pipeline in 2008 than in 2000.¹⁶ At the same time, New Hampshire is now (as of 2009) the 4th oldest state in the nation – surpassing Florida. Maine and Vermont are the first and second oldest states followed by West Virginia as third. The implications of these demographic shifts mean that for the Southern New Hampshire region and the state as a whole, greater efforts are needed to improve the state’s educational system and job opportunities to retain the young adult population in the state, and to attract more young adults to replenish the state’s workforce as the Baby Boom generation retires.

The 55% Initiative, a collaborative effort launched in 2007 to encourage more New Hampshire college students to live and work in the state after they graduate has been one

¹⁶ New Hampshire Economic and Labor Market Information Bureau



important initiative addressing these demographic concerns. However, as recently reported by the New Hampshire Employment Security, Economic and Labor Market Information Bureau (ELMB), the current state of the economy – both nationally as well as for New Hampshire - has changed considerably since the 55% Initiative was launched in 2007.¹⁷ Specifically, today, as a result of the recession many workers close to retirement in the state have seen their retirement funds dwindle, so their decision to retire any time soon is generally being postponed. Additionally, some retirees may have decided to re-join the labor force instead of retire as a result.

In the past, out-migration of younger adults did not significantly impact the state's economy, as experienced workers with high educational attainment tended to migrate into the state from more densely populated areas to the south (such as Massachusetts). Now that population growth and in-migration has slowed, New Hampshire has to rely more heavily on those graduating from educational institutions in the state to become the educated workforce of the future. This makes the 55% Initiative that much more of an economic development imperative.

Job Growth Has Slowed But Is Increasing Again

Critical to sustaining and improving both the region and the state's economy is job growth. Table 6 identifies the average annual employment or number of jobs for both public and private sectors for each of the 13 municipalities within the SNHPC Region between 2000 and 2009 (as calculated by the New Hampshire Employment Security).

The data shows that in 2000, the SNHPC region was home to a total of 117,156 jobs. Between 2000 and the 2005, the total number of jobs in the region grew to 121,608 (a 3.8 percent increase). Between 2005 and 2009, the total number of jobs in the region decreased to 119,234 (a 2 percent decrease). Communities with the greatest percent job increase from 2000 to 2009 were the towns of Auburn (71.3 percent), Chester (46.0 percent), Weare (26.9 percent), and Candia (25.6 percent) (see Table 6).

Seven of the SNHPC Region's 13 communities also appear in the most recent listing of the state's top 50 employment centers. Manchester ranked first in the state along with Bedford, Londonderry, Derry, Hooksett, Goffstown and Raymond at 6, 9, 12, 20, 32, and 48, respectively.¹⁸ This ranking of the SNHPC Region's top employment centers also correlates with Map 5 which shows which municipalities within the region have the largest concentration of employment.

Table 7 summarizes the future employment projections for the SNHPC Region based on New Hampshire Department of Employment Security data. These projections are based on five-year increments. The projections indicate that total employment within the region is expected to grow from 149,288 in the year 2015 to a total of 209,330 by the year 2040, a

¹⁷ For more information on the 55% Initiative see University System of New Hampshire at: http://www.usnh.edu/media/press/20090316_charter_partners.html

¹⁸ Economic and Labor Market Information Bureau, NH Employment Security

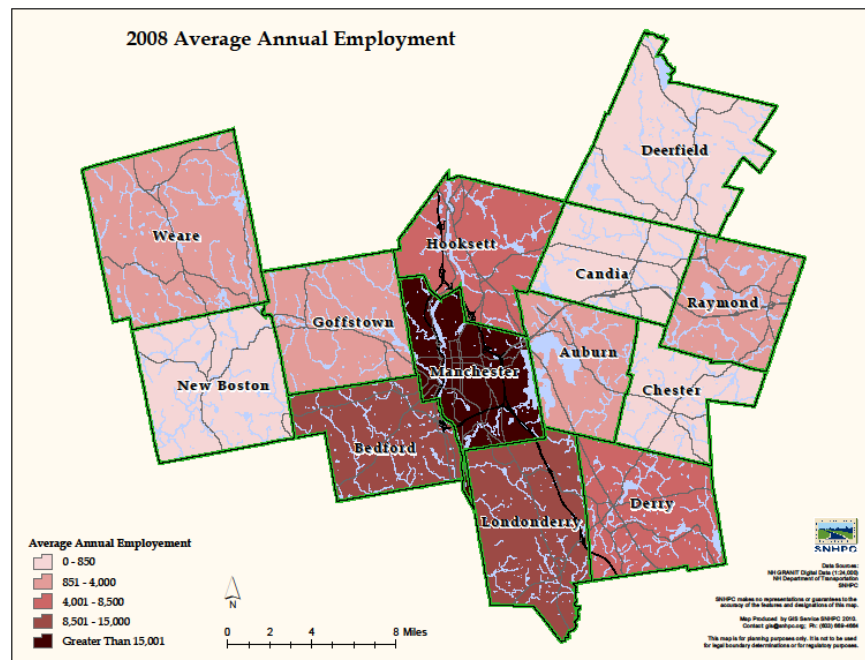


percentage increase of 40.2. The largest percentage change in employment at 11.31 percent is expected to occur between 2015 and 2020.

While growth is forecasted to slow to 6.08 percent between 2035 and 2040, the City of Manchester is expected to add the most jobs with 19,213; followed by Londonderry with 13,123 and Bedford with 9,245. New Boston looks to add the fewest jobs with only 347, while the towns of Deerfield and Chester are projected to add only 369 and 492, respectively.

According to the NHES ELMB, nearly all new jobs in the state are expected to be concentrated in the *Service-providing* industries; while job gains in *Goods-producing* industries and *Manufacturing* jobs are projected to shrink, except for *Primary metals manufacturing*; *Chemical manufacturing*; and *Fabricated metals products manufacturing*, which are projected to experience job gains.¹⁹ *Retail trade*, the state's largest single employment sector, and the *Educational services sector* are also projected to see job gains. Jobs in *Health care and social assistance* is projected to surpass all industry sectors by 2018.

Map 5
SNHPC Region 2008 Employment by Municipality



Source: SNHPC

¹⁹ Ibid.



Table 6
Annual Average Covered Employment SNHPC Region, by Municipality, 2000-2009

Municipality	2000			2005			2009			2000-2005 change Total	2005-2009 change Total	2000-2009 change Total
	Private Sector	Public Sector	Total	Private Sector	Public Sector	Total	Private Sector	Public Sector	Total			
Auburn	870	116	986	1,178	142	1,320	1,527	162	1,689	33.9%	28.0%	71.3%
Bedford	12,667	611	13,278	12,990	778	13,768	12,774	1,060	13,834	3.7%	0.5%	4.2%
Candia	494	108	602	615	113	728	649	107	756	20.9%	3.8%	25.6%
Chester	249	86	335	311	162	473	290	199	489	41.2%	3.4%	46.0%
Deerfield	318	131	449	352	150	502	306	159	465	11.8%	-7.4%	3.6%
Derry	7,869	944	8,813	7,081	1,084	8,165	6,688	1,062	7,750	-7.4%	-5.1%	-12.1%
Goffstown	2,523	538	3,061	2,500	1,182	3,682	2,376	1,159	3,535	20.3%	-4.0%	15.5%
Hooksett	6,264	491	6,755	7,420	579	7,999	7,164	629	7,793	10.1%	-2.6%	15.4%
Londonderry	10,221	987	11,208	12,344	1,162	13,506	11,989	1,251	13,240	20.5%	-2.0%	18.1%
Manchester	59,386	7,418	66,804	58,911	7,476	66,387	57,297	7,394	64,691	-0.6%	-2.6%	-3.2%
New Boston	369	105	474	426	169	595	448	187	635	25.5%	6.7%	34.0%
Raymond	2,771	387	3,158	2,628	401	3,029	2,358	434	2,792	-4.1%	-7.8%	-11.6%
Weare	928	305	1,233	1,040	414	1,454	1,118	447	1,565	17.9%	7.6%	26.9%
SNHPC Region	104,929	12,227	117,156	107,796	13,812	121,608	104,984	14,250	119,234	3.8%	-2.0%	1.8%

Sources: 2000 figures- NH Employment Security, Local, State and County data for 2000
 2005, 2009 figures- NHnetwork



**Table 7
Employment Projections by Municipality, 2015-2040**

Municipality	2015		2020		2025		2030		2035		2040		2015-2040
	Total Employed	Percentage Change	Total Employed	Percentage Change	Total Employed	Percentage Change	Total Employed	Percentage Change	Total Employed	Percentage Change	Total Employed	Percentage Change	Total Percentage Change
Auburn	1,929	19.29%	2,239	16.07%	2,550	13.89%	2,860	12.16%	3,171	10.87%	3,482	9.81%	80.51%
Bedford	18,243	11.29%	20,092	10.14%	21,941	9.20%	23,790	8.43%	25,639	7.77%	27,488	7.21%	50.68%
Candia	990	14.06%	1,113	12.42%	1,236	11.05%	1,359	9.95%	1,481	8.98%	1,604	8.31%	62.02%
Chester	644	17.52%	740	14.91%	836	12.97%	932	11.48%	1,028	10.30%	1,124	9.34%	69.28%
Deerfield	632	12.66%	708	12.03%	781	10.31%	854	9.35%	927	8.55%	1,001	7.98%	58.39%
Derry	9,856	6.81%	10,485	6.38%	11,114	6.00%	11,742	5.65%	12,371	5.36%	12,999	5.08%	31.89%
Goffstown	5,102	9.23%	5,531	8.41%	5,960	7.76%	6,390	7.21%	6,823	6.78%	7,252	6.29%	42.14%
Hooksett	10,164	10.49%	11,129	9.49%	12,095	8.68%	13,060	7.98%	14,025	7.39%	14,990	6.88%	47.48%
Londonderry	18,889	16.14%	21,513	13.89%	24,138	12.20%	26,763	10.87%	29,387	9.80%	32,012	7.69%	69.48%
Manchester	75,357	5.37%	79,200	5.10%	83,042	4.85%	86,885	4.63%	90,727	4.42%	94,570	4.24%	25.50%
New Boston	713	10.89%	782	9.68%	852	8.95%	921	8.10%	991	7.60%	1,060	6.96%	48.67%
Raymond	4,644	17.04%	5,321	14.58%	5,998	12.72%	6,675	11.29%	7,351	10.13%	8,028	9.21%	72.87%
Weare	2,123	17.68%	2,443	15.07%	2,762	13.06%	3,081	11.55%	3,401	10.39%	3,720	9.38%	75.22%
Total	149,288	5.55%	161,296	11.31%	173,256	7.42%	185,312	6.96%	197,323	6.48%	209,330	6.08%	40.22%

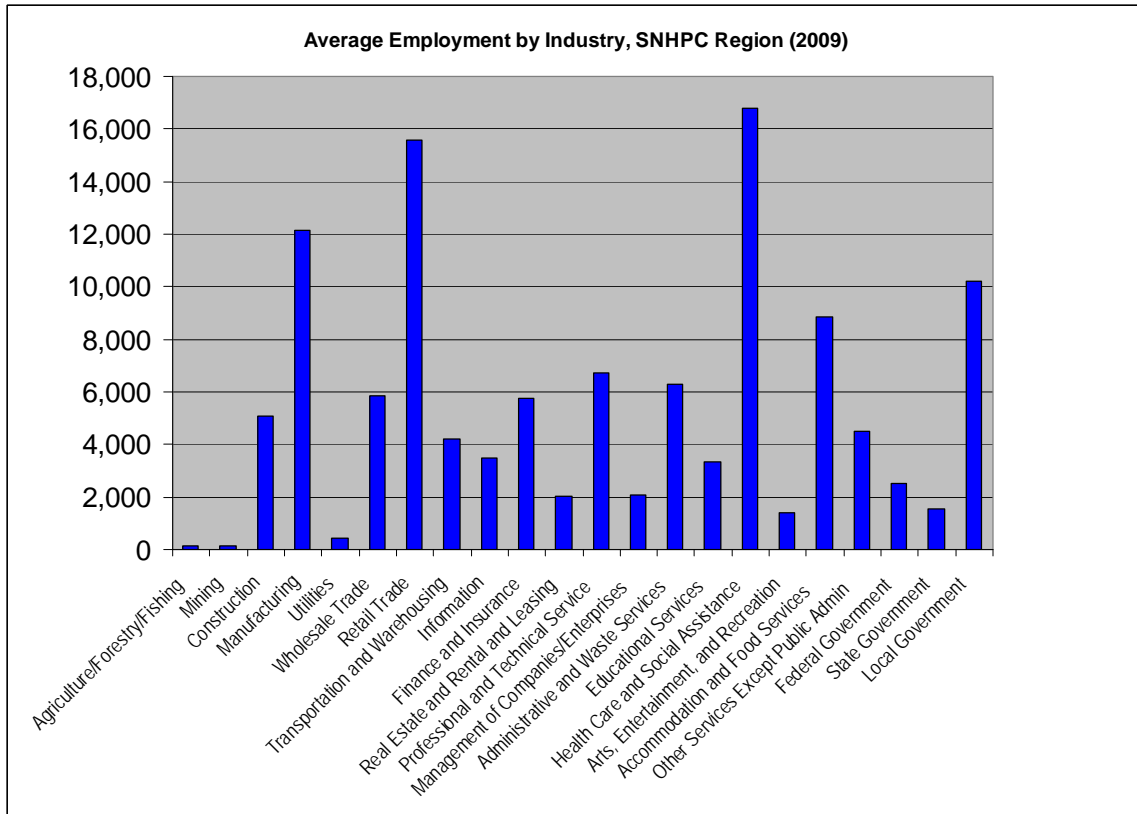
Source: New Hampshire Department of Employment Security (NHDES), 2005 baseline data and SNHPC projections

Most of the Region’s Jobs are In Retail and Manufacturing

New Hampshire has a diverse, service-oriented economy. According to the U.S. Bureau of Labor Statistics (December 2009), nearly 16 percent of New Hampshire jobs are in Retail Trade; 17 percent are in Education and Health Services; 16 percent in Government, another 11 percent in Professional and Business Services; and 9 percent in Leisure and Hospitality. Other sectors include: Manufacturing at 10 percent; Construction at 3 percent; Wholesale Trade at 4.5 percent; Transportation and Utilities at 2 percent; Information at 2 percent; Financial Activities at 5.5 percent; and Other Services at 3.5 percent.



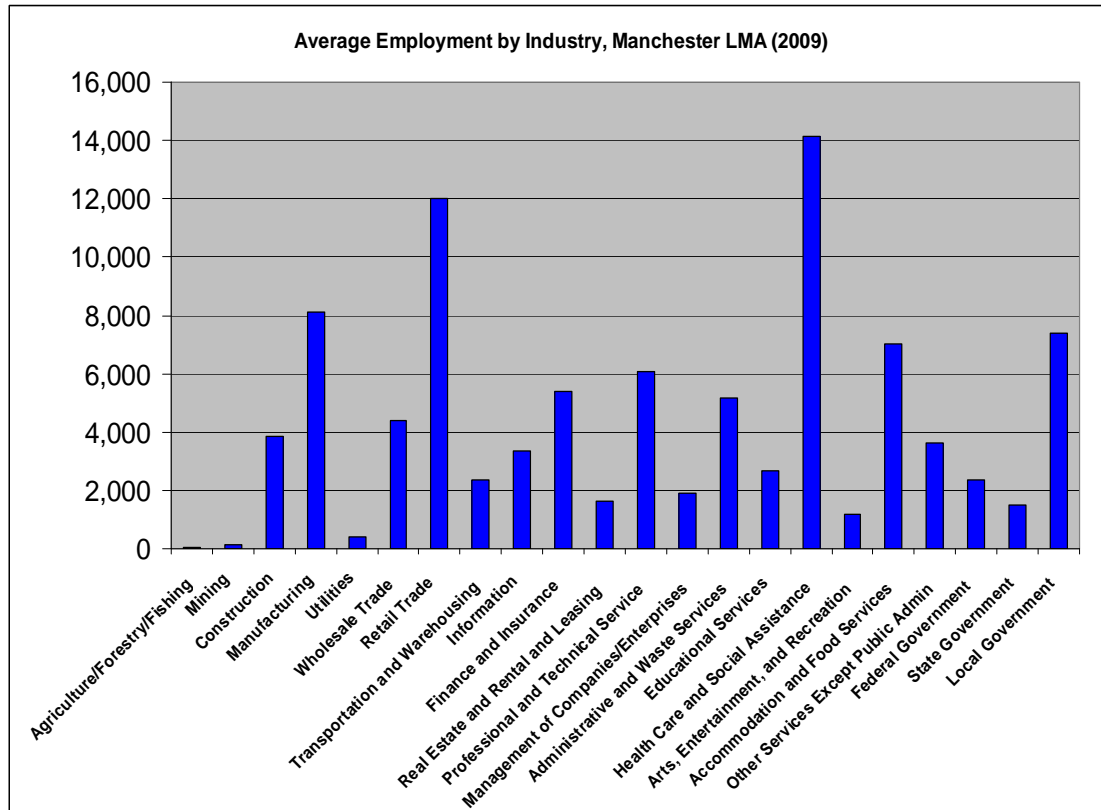
Figure 4
SNHPC Region Employment by Industry (2009)



Source: SNHPC



Figure 5
Manchester LMA Employment by Industry (2009)



Source: SNHPC

While only 10 percent of the state’s jobs are in manufacturing, in 2008 New Hampshire was ranked 11th among all states in the country according to manufacturing employment as a percent of state population (U.S. Department of Labor, Bureau of Labor Statistics). Also in 2008, the state scored 9th highest in the nation as a technology-friendly state among 77 indicators. In addition, New Hampshire was ranked 9th highest in the nation in manufacturing employment as a percent of population, and 27th highest in the nation as manufacturing gross domestic product (GDP) as a percent of total state GDP.

These high performance measures portray the importance of manufacturing to the state’s economy, despite a 3.3 percent loss of manufacturing jobs over the past five years (2004 to 2009). In spite of the overall decline in manufacturing, the NHES ELMB reports that navigational, measuring, electromedical, and control instruments (generally defense-related technologies) gained 300 jobs during 2009. This gain represents a positive outlook that some of the state’s highly advanced manufacturing industries will come out of the current recession even stronger than before. Strength of manufacturing in New Hampshire is significant because unlike retail trade, manufacturing jobs in the state pay above average wages. More recently, economists are now forecasting that the state’s decline in manufacturing jobs will slow to a 0.3 percent average loss per year (New England Economic Partnership, May 2010).



Other large industry sectors which have been hard hit during the current economic recession include Construction, which lost close to 4,300 jobs -- a decline of close to 15 percent between December 2008 and December 2009. Generally, almost every industry section in the state experienced employment losses during this time period. During 2009 the NHES ELMB reported that Trade, Transportation and Utilities, and Other Services industries had job gains of 400 and 300 respectively (this was partly due to the federal stimulus funding provided to the state and local governments). In addition, despite the current downturn, Education and Health Services added 2,600 jobs over the year.

Among the 13 municipalities in the SNHPC Region, the following industries had the highest employment numbers: health care and social assistance, retail trade, local government and manufacturing, respectively. For the Manchester labor market area (LMA, shown in Map 6), health care and social assistance was the largest industry followed by retail trade, manufacturing and local government. Employment by industry for both areas is broken down in the following Tables 8 and 9 and Figures 4 and 5. Some of the largest employers in the region include Elliot Hospital, Catholic Medical Center, FairPoint, PSNH, Citizens Bank, TD Bank, and Insight Technologies, each providing over 1,000 jobs.



Table 8
SNHPC Region Employment by Industry (2009)

Industry	Units	Average Annual Employment	Percentage of Total Regional Employment	Average Weekly Wage
Total Private Sector	7,033	104,953	88.02	\$898.31
Goods-Producing Industries	1,058	17,545	14.7	\$1,074.43
Agriculture/Forestry/Fishing	16	158	0.13	\$422.33
Crop Production	9	124		\$346.93
Agriculture and Forestry Support Activities	3	15		\$575.50
Mining	11	142	0.12	\$1,032.73
Construction	683	5,089	4.27	\$1,010.90
Construction of Buildings	157	803		\$1,154.94
Heavy and Civil Engineering Construction	24	569		\$1,322.70
Specialty Trade Contractors	502	3,717		\$932.05
Manufacturing	348	12,157	10.20	\$1,110.00
Food Manufacturing	20	699		\$991.83
Textile Product Mills	8	64		\$564.71
Wood Product Manufacturing	10	179		\$869.03
Paper Manufacturing	4	34		\$789.00
Printing and Related Support Activities	36	468		\$871.93
Chemical Manufacturing	10	164		\$1,080.47
Plastics and Rubber Products Manufacturing	24	1,629		\$927.84
Nonmetallic Mineral Product Manufacturing	9	112		\$759.69
Primary Metal Manufacturing	4	532		\$923.76
Fabricated Metal Product Manufacturing	58	1,267		\$988.80
Machinery Manufacturing	26	1,568		\$1,358.26
Computer and Electronic Product Manufacturing	57	2,016		\$1,280.05
Electrical Equipment/Appliances Manufacturing	12	940		\$1,158.76
Transportation Equipment Manufacturing	8	1,080		\$1,395.21
Furniture and Related Product Manufacturing	16	145		\$837.15
Miscellaneous Manufacturing	37	969		\$967.91
Service-Providing Industries	5,976	87,408	73.3	\$862.96
Utilities	12	451	0.38	\$1,515.75
Utilities	12	451		\$1,515.75
Wholesale Trade	674	5,877	4.93	\$1,162.91
Merchant Wholesalers, Durable Goods	226	3,099		\$1,138.37
Merchant Wholesalers, Nondurable Goods	75	1,706		\$912.13
Electronic Markets and Agents and Brokers	373	1,072		\$1,633.23
Retail Trade	856	15,584	13.07	\$566.93
Motor Vehicle and Parts Dealers	118	2,114		\$862.76
Furniture and Home Furnishings Stores	39	363		\$621.23
Electronics and Appliance Stores	57	981		\$1,617.60



Building Material and Garden Supply Stores	65	1,416		\$617.57
Food and Beverage Stores	90	3,752		\$370.75
Health and Personal Care Stores	62	797		\$585.77
Gasoline Stations	100	678		\$370.87
Clothing and Clothing Accessories Stores	93	1,179		\$319.46
Sporting Goods, Hobby, Book, and Music Stores	57	612		\$368.53
General Merchandise Stores	32	2,423		\$378.32
Miscellaneous Store Retailers	106	809		\$457.10
Nonstore Retailers	38	460		\$709.05
Transportation and Warehousing	191	4,222	3.54	\$735.84
Air Transportation	13	374		\$757.47
Truck Transportation	71	936		\$914.74
Transit and Ground Passenger Transportation	28	736		\$376.33
Couriers and Messengers	35	1,038		\$703.23
Warehousing and Storage	16	896		\$812.83
Information	136	3,505	2.94	\$1,369.26
Publishing Industries (except Internet)	39	1,160		\$1,467.70
Motion Picture and Sound Recording	9	124		\$258.02
Broadcasting (except Internet)	13	252		\$1,145.83
Telecommunications	40	1,800		\$1,427.40
Data Processing and Related Services	18	136		\$1,132.86
Other Information Services	17	34		\$1,568.79
Finance and Insurance	440	5,762	4.83	\$1,602.64
Credit Intermediation and Related Activities	131	1,565		\$1,246.53
Financial Investment and Related Activities	90	608		\$3,515.44
Insurance Carriers and Related Activities	212	3,466		\$1,436.26
Funds, Trusts, and Other Financial Vehicles	8	123		\$1,369.72
Real Estate and Rental and Leasing	248	2,020	1.69	\$1,065.14
Real Estate	187	1,365		\$1,228.98
Professional and Technical Service	844	6,733	5.65	\$1,389.21
Professional and Technical Services	844	6,733		\$1,389.21
Legal services	177	1,461		\$1,596.82
Accounting and bookkeeping services	112	892		\$1,284.68
Architectural and engineering services	129	1,234		\$1,266.33
Specialized design services	14	70		\$1,109.50
Computer systems design and related services	185	1,212		\$1,593.09
Management and technical consulting services	126	768		\$1,409.02
Scientific research and development services	19	392		\$1,789.36
Advertising, PR and related services	33	286		\$899.55
Other professional and technical services	50	418		\$629.30
Management of Companies/Enterprises	61	2,082	1.75	\$1,186.47
Management of Companies/Enterprises	61	2,082		\$1,186.47
Administrative and Waste Services	477	6,276	5.26	\$624.68
Administrative and Support Services	443	5,883		\$605.35
Office administrative services	57	363		\$1,411.25
Employment services	74	2,104		\$528.97

Section 1 – Current Economic Conditions and Trends



Business support services	48	579		\$595.25
Travel arrangement and reservation services	22	88		\$706.00
Investigation and security services	28	859		\$679.91
Services to buildings and dwellings	201	1,562		\$510.72
Other support services	14	329		\$449.99
Waste Management and Remediation Services	34	392		\$914.69
Educational Services	122	3,342	2.80	\$729.10
Educational Services	122	3,342		\$729.10
Health Care and Social Assistance	687	16,787	14.08	\$916.94
Ambulatory Health Care Services	445	6,644		\$1,229.65
Hospitals	3	4,734		\$932.87
Nursing and Residential Care Facilities	63	2,985		\$582.21
Social Assistance	176	2,423		\$440.73
Arts, Entertainment, and Recreation	102	1,411	1.18	\$360.13
Performing Arts and Spectator Sports	20	237		\$738.08
Museums, Historical Sites, Zoos, and Parks	8	120		\$392.61
Gambling, Recreation, Amusement Industries	75	1,054		\$271.31
Accommodation and Food Services	497	8,850	7.42	\$315.35
Accommodation	37	805		\$395.04
Food Services and Drinking Places	460	8,046		\$307.37
Other Services Except Public Admin	630	4,506	3.78	\$646.30
Repair and Maintenance	244	1,663		\$871.86
Personal and Laundry Services	187	1,551		\$433.91
Membership Associations and Organizations	129	1,193		\$624.38
Private Households	71	99		\$447.50
Total Government Sector	178	14,279	11.98	\$912.87
Federal Government	50	2,526	2.12	\$1,374.62
State Government	67	1,540	1.29	\$763.43
Local Government	61	10,213	8.57	\$821.20
Total, Private plus Government	7,211	119,232	100%	\$900.05

Source: Economic and Labor Market Information Bureau



Table 9
Manchester LMA Employment by Industry (2009)

Industry	Units*	Average Annual Employment	Percentage of Total Regional Employment	Average Weekly Wage
Total Private Sector	5,331	83,426	88.13	\$918.42
Goods-Producing Industries	761	12,109	12.79	\$1,042.51
Agriculture/Forestry/Fishing	5	36	0.04	\$489.35
Mining	10	127	0.13	\$1,079.74
Construction	503	3,848	4.06	\$1,003.96
Construction of Buildings	112	632		\$1,229.51
Heavy & Civil Engineering Construction	13	184		\$1,096.73
Specialty Trade Contractors	378	3,033		\$951.38
Manufacturing	243	8,098	8.55	\$1,062.72
Food Manufacturing	12	302		\$657.71
Textile Product Mills	6	60		\$582.50
Wood Product Manufacturing	5	49		\$804.80
Paper Manufacturing	3	27		\$786.64
Printing and Related Support Activities	31	416		\$903.42
Chemical Manufacturing	5	94		\$1,105.27
Plastics & Rubber Products Manufacturing	17	1,209		\$939.44
Nonmetallic Mineral Product Manufacturing	6	45		\$882.92
Fabricated Metal Product Manufacturing	35	887		\$949.33
Machinery Manufacturing	16	277		\$1,117.03
Computer & Electronic Product Manufacturing	45	1,481		\$1,178.19
Electrical Equipment/Appliances Mfg.	10	939		\$1,157.96
Transportation Equipment Manufacturing	7	1,059		\$1,405.05
Furniture & Related Product Mfg.	10	90		\$698.80
Miscellaneous Manufacturing	30	865		\$976.99
Service-Providing Industries	4,571	71,317	75.34	\$897.35
Utilities	10	417	0.44	\$1,511.86
Utilities	10	417		\$1,511.86
Wholesale Trade	478	4,401	4.65	\$1,169.59
Merchant Wholesalers, Durable Goods	173	2,404		\$1,173.09
Merchant Wholesalers, Nondurable Goods	52	1,197		\$889.95
Electronic Markets and Agents and Brokers	253	800		\$1,577.31
Retail Trade	668	12,009	12.69	\$595.69
Motor Vehicle and Parts Dealers	89	1,767		\$877.37
Furniture and Home Furnishings Stores	31	278		\$621.58
Electronics and Appliance Stores	45	943		\$1,625.50
Building Material and Garden Supply Stores	48	999		\$593.11
Food and Beverage Stores	71	2,448		\$398.42
Health and Personal Care Stores	49	543		\$587.68
Gasoline Stations	71	467		\$376.42
Clothing and Clothing Accessories Stores	86	1,100		\$318.16
Sporting Goods, Hobby, Book, Music Stores	48	586		\$371.18



General Merchandise Stores	23	1,984		\$379.88
Miscellaneous Store Retailers	80	638		\$484.54
Nonstore Retailers	26	257		\$796.72
Transportation and Warehousing	122	2,358	2.49	\$652.90
Air Transportation	11	370		\$743.40
Truck Transportation	39	481		\$821.49
Transit and Ground Passenger Transportation	20	490		\$365.08
Couriers and Messengers	22	705		\$621.81
Warehousing and Storage	8	141		\$819.76
Information	115	3,350	3.54	\$1,403.25
Publishing Industries (except Internet)	35	1,109		\$1,502.22
Motion Picture and Sound Recording	4	58		\$274.37
Broadcasting (except Internet)	10	224		\$1,136.74
Telecommunications	40	1,806		\$1,427.93
Data Processing and Related Services	14	130		\$1,128.41
Other Information Services	12	23		\$1,675.11
Finance and Insurance	369	5,404	5.71	\$1,637.89
Credit Intermediation & Related Activities	110	1,342		\$1,257.78
Financial Investment and Related Activities	73	573		\$3,655.26
Insurance Carriers and Related Activities	179	3,366		\$1,455.27
Funds, Trusts, and Other Financial Vehicles	7	122		\$1,376.24
Real Estate and Rental and Leasing	194	1,625	1.72	\$1,124.87
Real Estate	145	1,037		\$1,342.45
Professional and Technical Service	665	6,066	6.41	\$1,414.94
Professional and Technical Services	665	6,066		\$1,414.94
Legal services	152	1,378		\$1,636.63
Accounting and bookkeeping services	86	806		\$1,335.73
Architectural and engineering services	101	1,116		\$1,278.10
Specialized design services	14	70		\$1,109.50
Computer systems design & related svcs.	138	1,087		\$1,613.11
Management & technical consulting	97	677		\$1,395.45
Scientific research & development services	14	365		\$1,724.76
Advertising, PR and related services	30	266		\$930.54
Other professional / technical services	34	301		\$571.64
Management of Companies/Enterprises	46	1,891	2.00	\$1,188.86
Management of Companies/Enterprises	46	1,891		\$1,188.86
Administrative and Waste Services	358	5,160	5.45	\$626.84
Administrative and Support Services	335	4,937		\$618.52
Office administrative services	48	324		\$1,359.94
Employment services	55	1,707		\$538.02
Business support services	40	560		\$586.21
Travel arrangement & reservation services	14	78		\$676.87
Investigation and security services	23	726		\$681.09
Services to buildings and dwellings	146	1,366		\$520.43
Other support services	10	175		\$614.18
Waste Management & Remediation Services	23	223		\$811.19
Educational Services	92	2,668	2.82	\$716.94
Educational Services	92	2,668		\$716.94
Health Care and Social Assistance	510	14,152	14.95	\$926.68

Section 1 – Current Economic Conditions and Trends



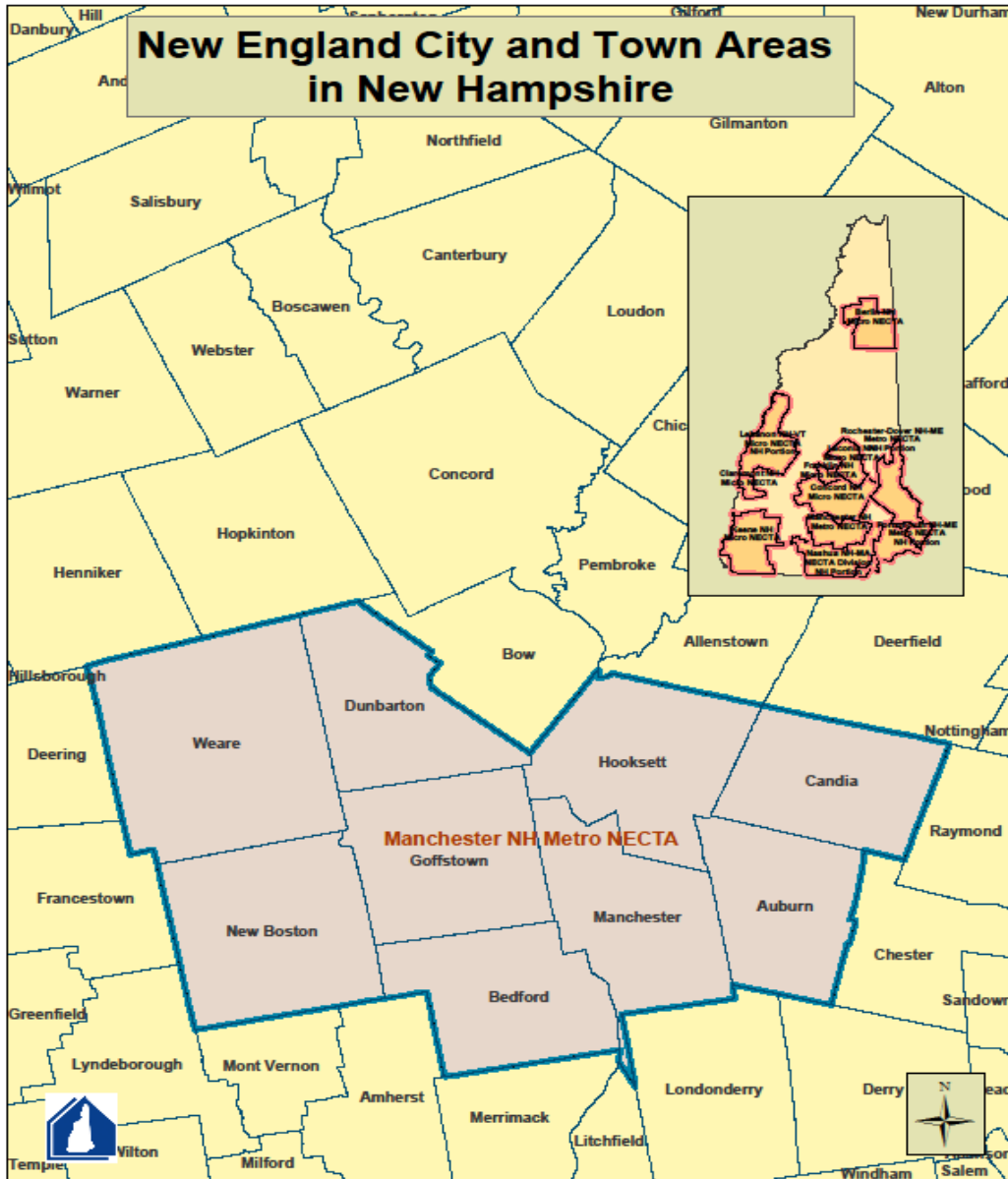
Ambulatory Health Care Services	330	5,328		\$1,264.32
Nursing and Residential Care Facilities	54	2,641		\$591.73
Arts, Entertainment, and Recreation	79	1,182	1.25	\$379.87
Performing Arts and Spectator Sports	15	182		\$896.11
Museums, Historical Sites, Zoos, and Parks	7	120		\$392.37
Gambling, Recreation, Amusement Industries	57	880		\$271.64
Accommodation and Food Services	386	7,024	7.42	\$320.28
Accommodation	32	745		\$397.30
Food Services and Drinking Places	354	6,279		\$311.14
Other Services Except Public Admin	478	3,612	3.82	\$652.48
Repair and Maintenance	188	1,231		\$896.62
Personal and Laundry Services	132	1,258		\$437.31
Membership Associations and Organizations	109	1,056		\$634.18
Private Households	50	66		\$494.54
Total Government Sector	146	11,237	11.87	\$936.38
Federal Government	42	2,360	2.49	\$1,403.88
State Government	58	1,482	1.57	\$765.73
Local Government	46	7,395	7.81	\$821.37
Total, Private plus Government	5,477	94,663	100%	\$920.55

Source: Economic and Labor Market Information Bureau

*Not all sub-industry unit totals add up to their larger industry totals as not all jobs in a given industry are classifiable into a sub-industry



Map 6
Manchester LMA





The Region's Largest Growing Occupation is Health Care

According to the New Hampshire Employment Security, three major occupational groups are projected to substantially increase their share of employment between 2008 and 2018: ***Healthcare practitioners and technical*** occupations, ***Healthcare support*** occupations, and ***Personal care and service*** occupations.²⁰ Combined these three groups comprise 11.1 percent of New Hampshire's total employment in 2008, and are projected to make up 12.6 percent of the state's total employment by 2018 (see Tables 10 and 11).²¹

NH Business Magazine as of July 2010 also shows (see Tables 10 and 11) that many of New Hampshire's fastest-growing occupations are currently in the medical and health service fields, and include: home health aides, network systems and data communications analysts, personal and home care aides, physician assistants and dental assistants. Generally most of these occupations require a college or associates degree and/or post-secondary education, and are reflective of the emerging skills and knowledge-based economy. Based upon these trends, it is important that the region's colleges and schools provide the necessary education for enhancing these occupations. The need for these skill sets will be increasingly in demand as the population of the region ages.

Table 10: Fastest Growing Occupations in NH (2008-2018)

Occupations	Estimated 2008	Projected 2018	% Change
Home Health Aides	2,864	4,318	50.8%
Network Systems and Data Communication Analysts	1,067	1,590	49.0%
Personal Home Care Aides	3,472	5,154	48.4%
Physician Assistants	508	740	45.7%
Dental Assistants	1,443	1,981	37.3%
Dental Hygienists	1,204	1,653	37.3%
Medical Assistants	1,336	1,812	35.6%
Self-Enrichment Education Teachers	1,181	1,584	34.1%
Physical Therapist Assistants	384	510	32.8%
Environmental Science/Protection Techs	327	427	30.6%
Fitness Trainers and Aerobics Instructors	2,070	2,700	30.4%
Mental Health Councilors	531	692	30.3%
Physical Therapists	1,205	1,557	29.2%
Social and Human Service Assistants	1,628	2,090	28.4%
Veterinary Technologists and Technicians	635	811	27.7%

²⁰ New Hampshire Employment Security, Economic and Labor Market Information Bureau, Road to Recovery New Hampshire's Economy 2010.

²¹ Ibid.

**Table 11: Occupations Adding the Most Jobs NH (2008-2018)**

Occupations	Estimated 2008	Projected 2018	Change
Registered Nurses	13,866	17,340	3,474
Combined Food Prep/Serving Workers (Including Fast Food)	11,209	13,058	1,849
Personal Home Care Aides	3,472	5,154	1,682
Retail Salespersons	24,175	25,833	1,658
Nursing Aides, Orderlies and Attendants	8,012	9,648	1,636
Home Health Aides	2,864	4,318	1,454
Customer Service Representatives	9,097	10,480	1,383
Office Clerks (General)	12,316	13,630	1,314
Cashiers	22,836	24,037	1,201
Postsecondary Teachers	5,347	6,497	1,150
Computer Software Engineers, Applications	4,906	6,004	1,098
Elementary School Teachers (Except Special Education)	6,599	7,657	1,058
Waiters and Waitresses	11,989	13,043	1,054
Accountants and Auditors	4,395	5,354	959
Landscaping and Grounds-Keeping Workers	6,073	7,019	946

Source: Business NH Magazine, July, 2010 (Table 10 and 11)

Income/Wage Increases in the Region are Slowing But Still Higher Overall than the State and US

In 2009, New Hampshire's per capita personal income of \$42,831 ranked 8th highest among all 50 states. However, this was a decrease of \$592 from 2008, the first time that New Hampshire experienced a decline in per capita personal income since the data was first collected in 1969.²²

The 2008 Median Household Income for the SNHPC Region is \$67,694 (U.S. Census). This is higher than both the state of New Hampshire (\$63,235) and the United States (\$50,303). However, as Figure 6 illustrates, salaries for high skill, high paying jobs are less in the Manchester area than they are in other nearby large metropolitan areas (Nashua and Boston in this case).

The highest average weekly wages within the SNHPC Region is \$954 within the towns of Bedford and Candia, while the City of Manchester's average is \$953 (2009 New Hampshire Employment Security). The Town of Deerfield has the lowest average weekly wage at \$608, followed by the towns of Goffstown at \$626 and Candia at \$660. The regional average is \$847.31 (Figure 7). Annual wages vary greatly across the state and within the SNHPC region by occupation. Surprisingly, the highest paid occupations in the state are utilities workers at \$121,345 annually, business services at \$91,444, and wholesale trade at \$80,684. The lowest

²² NHES, ELMB, Road to Recovery, New Hampshire's Economy 2010, June 2010.



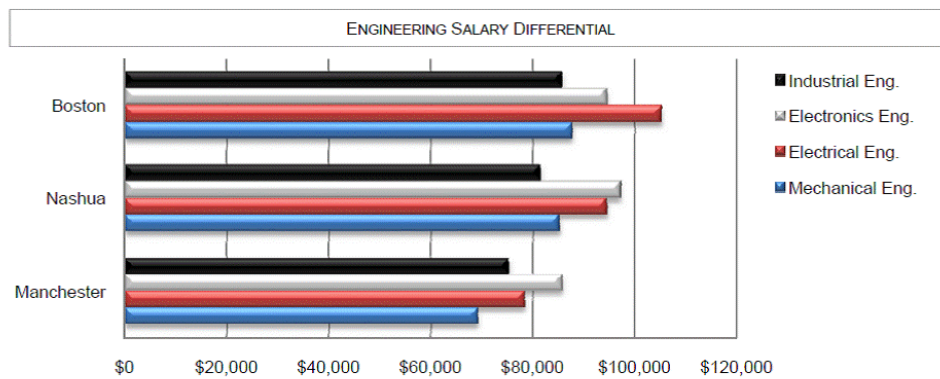
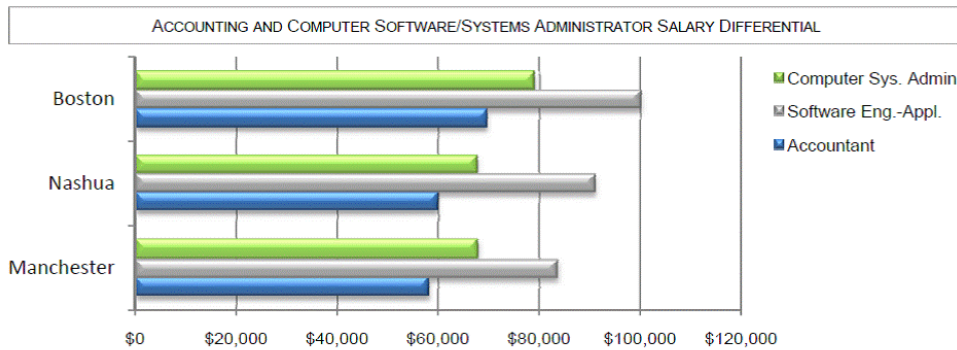
paying occupations are real estate services at \$16,111 annually, leisure at \$19,213, and hospitality services at \$21,988.²³

Table 12 identifies the Area Median Family Income (AMFI) for communities in the SNHPC region as designated by HUD. Eleven of the 13 municipalities are located within Primary Metropolitan Statistical Areas (PMSAs). County level data is also shown for those communities within the SNHPC region which are not located within a PMSA-- the towns of New Boston and Deerfield.

Figure 6
Salary Differentials

Salary Differentials Between Manchester, Nashua and Boston

As is well known, a large portion of talent resides in southern New Hampshire to gain access to high paying jobs in the Boston area while enjoying New Hampshire’s relatively low cost and great life style. The charts below document the salary differential for selected skill areas between Manchester and Nashua and even more so with Boston. This makes it very difficult to offer local residents jobs in Manchester unless they can justify it based on reduced travel time and expenses and eliminating the income tax paid to Massachusetts.



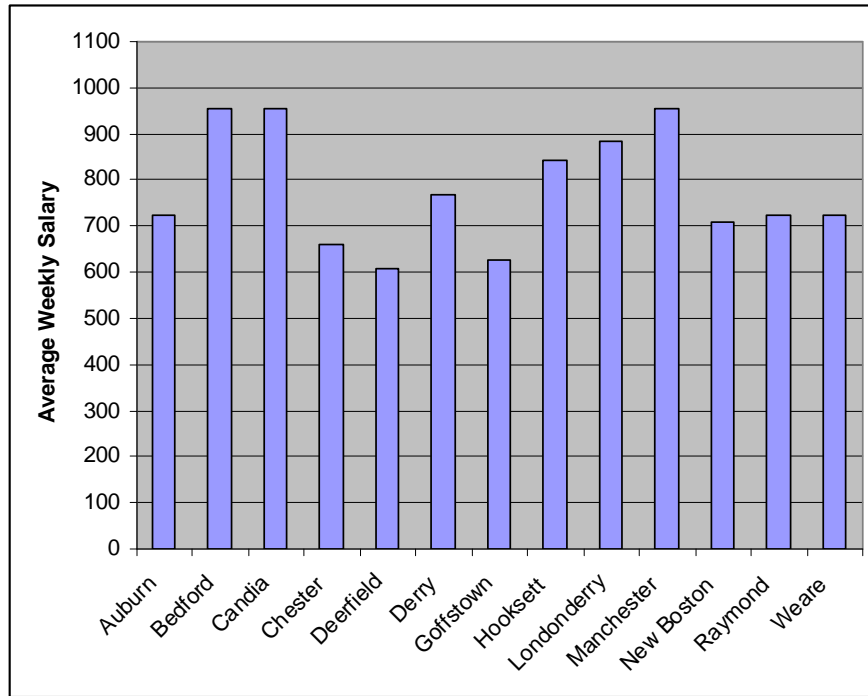
Note: The high level of compensation in Nashua for Electronics Engineers is most likely attributed to BAE Systems presence there.

Source: U.S. Department of Labor

²³ Business NH Magazine, July, 2010



Figure 7
Average Weekly Wage by Town for the SNHPC Region (2009)



Source: NNetwork

Table 12
2008 Median Area Family Income (MAI) Limits

Area	Median Family Income
Manchester, NH PMSA	\$76,400
Auburn, Bedford, Candia, Goffstown, Hooksett, Londonderry, Manchester, Weare	
Lawrence, MA - NH PMSA	\$80,600
Chester, Derry, Raymond	
Hillsborough County	\$74,000
New Boston	
Western Rockingham County	\$90,600
Deerfield	

Source: HUD



Unemployment in the Region Is High But Lower Than State and US

Table 13 identifies the labor force (the total number of working residents age sixteen or older) residing within each of the region’s 13 municipalities. Table 11 also identifies the total number of employed working residents in each community as well as the unemployment rate for each municipality.

Between 1998 and 2000, the SNHPC Region’s total employed labor force rose from 129,848 to 137,399, a 5.8 percent increase. Between 2000 and 2010, total employment increased to 145,550, a 5.9 percent increase.

Among the region’s municipalities during this same time period, the towns of Hooksett (44 percent), New Boston (36.8 percent), and Chester (35.5 percent) experienced the largest increase in total labor force employment. The towns of Derry (4.1 percent), Deerfield (6.2 percent), and the City of Manchester (6.2 percent) experienced the smallest increase in total labor force employed.

During this same time period, unemployment rates in the SNHPC Region increased from 2.7 percent in 2000 to 5.2 percent in 2010.

The SNHPC Region’s current unemployment rate of 5.2 percent is much less than the New Hampshire’s unemployment rate of 5.5 percent as of September, 2010, and the United States rate of 9.5 percent as of September, 2010.



**Table 13
Labor Force, 1998-2010**

Municipality	1998			2000			2010			1998-2000 Change Employed	2000-2010 Change Employed	1998-2010 Change Employed
	Civilian Labor Force	Employed	Unemploy- ment Rate	Civilian Labor Force	Employed	Unemploy- ment Rate	Civilian Labor Force	Employed	Unemploy- ment Rate			
Auburn	2,643	2,579	2.4%	2,728	2,667	2.2%	3,183	3,066	3.7%	3.4%	14.96%	18.88%
Bedford	9,150	8,988	1.8%	9,466	9,296	1.8%	11,526	11,083	3.8%	3.4%	23.31%	23.6%
Candia	2,186	2,125	2.8%	2,253	2,197	2.5%	2,649	2,545	3.9%	3.4%	15.84%	19.76%
Chester	1,996	1,946	2.6%	2,308	2,249	2.6%	2,784	2,636	5.3%	15.6%	17.21%	35.46%
Deerfield	2,168	2,111	2.6%	2,228	2,173	2.5%	2,369	2,243	5.3%	2.9%	3.22%	6.26%
Derry	19,268	18,522	3.9%	22,161	21,401	3.4%	20,449	19,287	5.7%	15.5%	-9.88%	4.13%
Goffstown	8,932	8,718	2.4%	9,263	9,016	2.7%	10,390	9,907	4.6%	3.4%	9.88%	13.64%
Hooksett	5,604	5,472	2.4%	5,812	5,660	2.6%	8,283	7,882	4.8%	3.4%	39.26%	44.04%
Londonderry	13,057	12,706	2.7%	13,521	13,142	2.8%	14,763	14,070	4.7%	3.4%	7.06%	10.74%
Manchester	57,027	55,481	2.7%	58,829	57,385	2.5%	62,617	58,946	5.9%	3.4%	2.72%	6.25%
New Boston	2,188	2,152	1.6%	2,283	2,240	1.9%	3,087	2,958	4.2%	4.1%	37.45%	36.8%
Raymond	5,286	5,080	3.9%	6,085	5,869	3.5%	6,199	5,846	5.7%	15.5%	-0.39%	15.08%
Weare	4,043	3,968	1.9%	4,205	4,104	2.4%	5,348	5,081	5.0%	3.4%	23.81%	28.05%
Total	133,548	129,848	2.8%	141,142	137,399	2.7%	153,647	145,550	5.2%	5.82%	5.93%	12.09%

Source: NHNetwork by NH Employment Security, Labor Force, Employment and Unemployment Data



Majority of Residents in the Region Commute to Work

As reported by the 2000 Census, approximately 66 percent of the SNHPC Region's population commutes out of town for employment (see Table 14). Municipalities with the greatest percent of residents commuting out of town are Candia (89 percent), Auburn (87 percent), and Weare (85 percent). The rural communities of the SNHPC Region see upwards of 80% of their population commuting outside of town for work as shown in the map portion of Figure 7.

Table 14 identifies the total number of residents commuting out of town in each municipality as well as the 1st, 2nd and 3rd most common commuting work site location. Most of the region's communities have more than 73 percent of their population commuting to Manchester for work or other large municipalities within twenty to thirty-five minutes away.

Table 14
SHNPC Region Commuting Patterns, 2000

Municipality	Commuting Out of Town- 2000					Average Commuting Time
	Number of Residents	Percent of Residents	Most Common Commute To	Second Most Common Commute To	Third Most Common Commute To	
Auburn	2,312	87.44%	Manchester	Londonderry	Hooksett	26.7
Bedford	6,674	73.62%	Manchester	Nashua	Merrimack	27.2
Candia	1,960	89.25%	Manchester	Hooksett	Bedford	28.3
Chester	1,686	83.76%	Manchester	Derry	Salem	32.2
Deerfield	1,602	83.92%	Manchester	Concord	Raymond	33.9
Derry	14,515	79.53%	Salem	Manchester	Londonderry	31.1
Goffstown	6,971	78.22%	Manchester	Bedford	Nashua	26.1
Hooksett	4,992	79.43%	Manchester	Concord	Bedford	25.7
Londonderry	9,772	78.08%	Manchester	Nashua	Derry	29.7
Manchester	26,139	47.69%	Nashua	Bedford	Londonderry	21.3
New Boston	1,940	83.95%	Manchester	Goffstown	Nashua	32.7
Raymond	4,344	82.29%	Manchester	Exeter	Londonderry	31.6
Weare	3,516	85.34%	Manchester	Concord	Goffstown	35.1
Total	86,423	66.32%				30.0

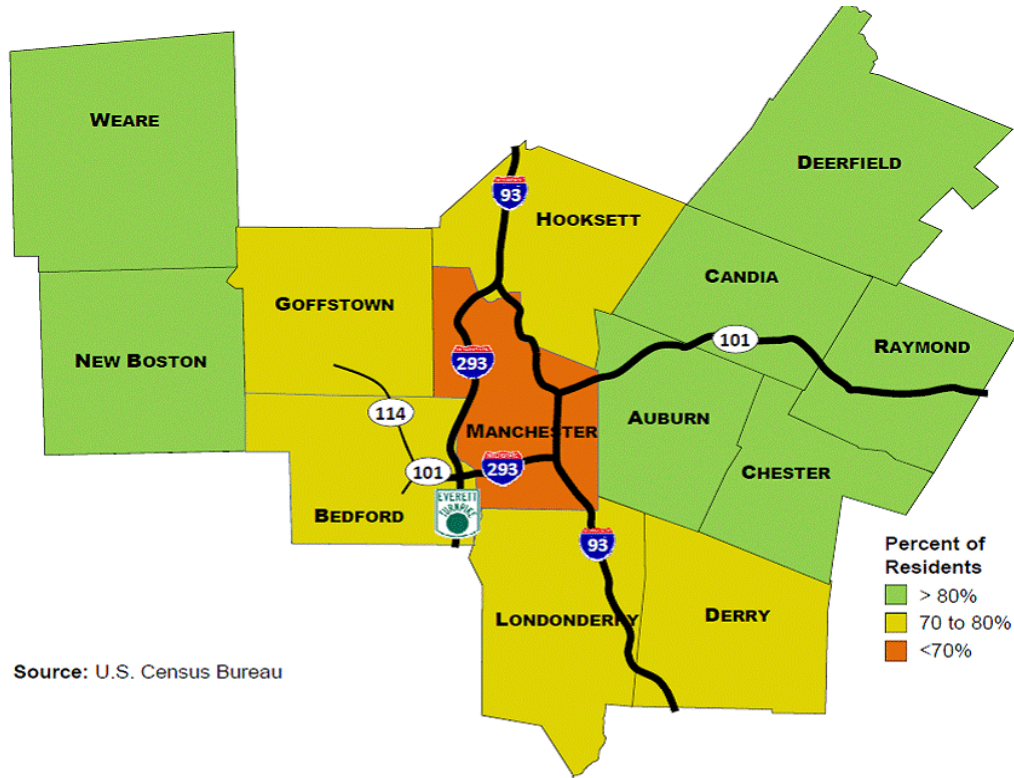
Source: U.S. Census 2000 MCD-to-MCD Worker Flow Files, State of New Hampshire, Residence MCD

It is not known if this commuting or journey to work data will be released through the 2010 Census. However, it is fairly common knowledge that more and more of the region's residents, as a result of current economic conditions and a poor job market, have to commute farther and for longer periods of time to work than in the past. It is anticipated that commuting distances and times will continue to rise within the region, especially given rising cost of living near major employment centers. In addition, the widening of I-93 will increase transportation options locally and improve access to outside markets. The chart

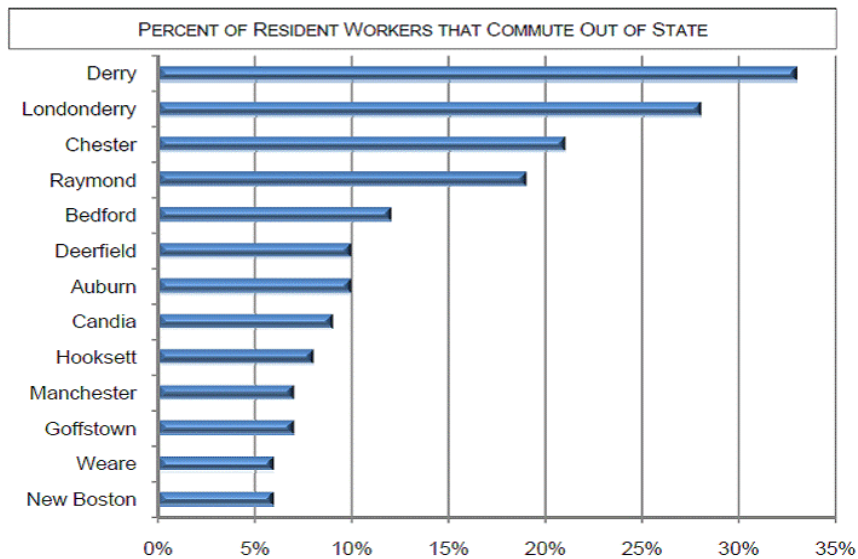


portion of Figure 8 shows the number of residents from each SNHPC community that commute out of state for work.

Figure 8
SNHPC Region Commuting Trends



Source: U.S. Census Bureau



Source: U.S. Census Bureau, SNHPC Target Industry Analysis

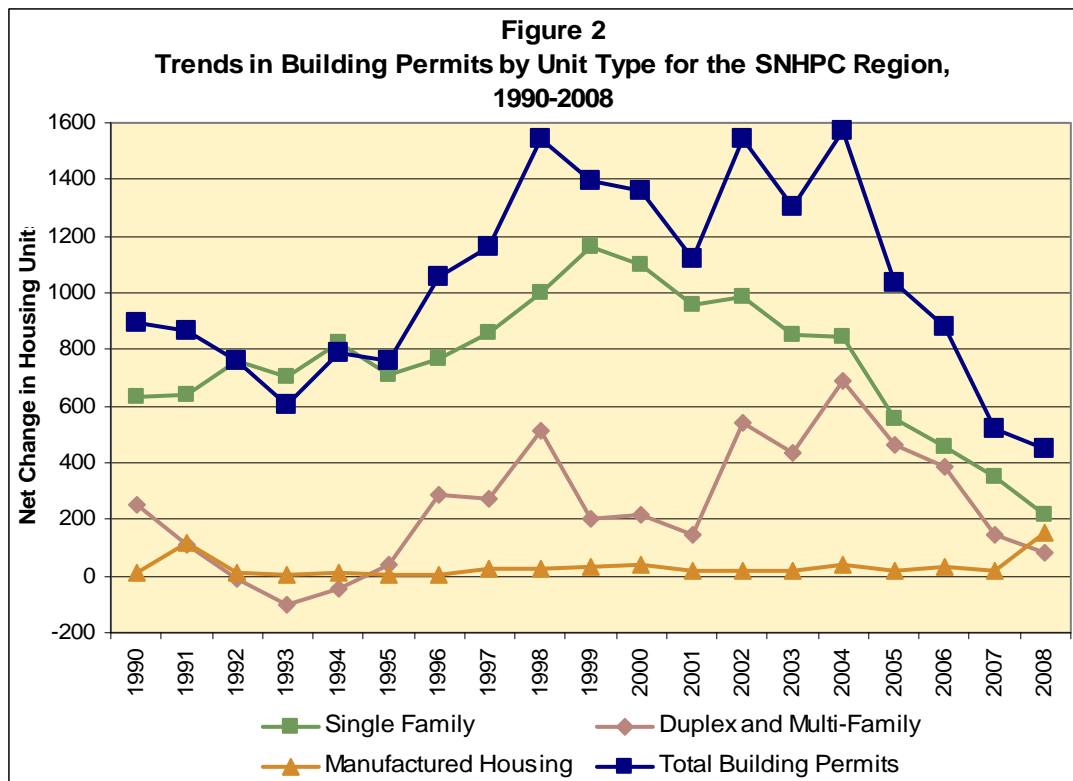


Building Construction Is Way Down But Slowly Increasing

Building construction within the SNHPC Region, like most places in New Hampshire and across the nation, has slowed considerably due to the current recession (Figure 9 shows trends in building permits by unit type for the SNHPC Region between 1990 and 2008). As shown in Figure 9, there has been a steep across the board drop off in the issuance of total residential building permits in the region from historic peaks around 1,600 permits in 1998, 2002 and 2004 to just over 400 permits in 2008. Between 2004 and 2008 this represents a drastic decline of 25 percent over a four-year period or on average a decline of 6.25 percent per year.

As noted previously, the construction industry has been hit particularly hard by the current recession. Between December 2009 and December 2010 the industry lost approximately 4,300 jobs. Moreover, the median purchase price for residential homes has also been dropping over the past few years. As of June 2010, the median purchase price for a home in the SNHPC Region was \$199,900, which is the same as the statewide average. This is the lowest the median purchase price for a home has been since 2001. The national median as of June 2010 was \$219,500. As recently as 2007 the average home price in the SNHPC region was \$257,000 compared to \$252,500 for the state and \$227,700 nationally.²⁴

Figure 9



Source: NH OEP "Current Estimates and Trends in NH's Housing Supply"
Data covers January 2000 through December 2008

²⁴ New Hampshire Housing Finance Authority and National Association of Homebuilders



The total number of residential building permits for single family, duplex, multi-family and mobile homes by municipality and for the SNHPC Region is provided in Table 15.

Table 15
Residential Building Permits Issued by Community and by Housing Type
SNHPC Region, 2000-2008

Municipality	Number of Building Permits Issued			
	Single Family	Duplex & Multi-Family	Mobile Homes	Total
Auburn	215	3	0	218
Bedford	1,017	299	1	1,317
Candia	117	3	15	135
Chester	297	18	6	321
Deerfield	317	20	2	339
Derry	415	172	18	605
Goffstown	468	64	67	599
Hooksett	605	120	88	813
Londonderry	595	267	-3	859
Manchester	942	1,806	82	2,830
New Boston	425	21	5	451
Raymond	436	218	21	675
Weare	470	90	61	621
SNHPC Region	6,319	3,101	363	9,783

Source: NH OEP "Current Estimates and Trends in NH's Housing Supply"
Data covers January 2000 through December 2008

Despite the current drastic decline in residential construction, there are a number of significant construction projects currently under construction and planned to be constructed in the near future within the SNHPC Region. These projects have significant and positive economic impacts and include:

- The Merrimack Premium Outlets to be developed by the Simon Property Group, Roseland, New Jersey
- City of Manchester, Safety and Public Works Complex
- Elliot Hospital, Anagnost Development Corporation
- Northeast Industrial Park, Manchester
- Airport Access Road
- I-93 Widening

Table 16 shows total number foreclosures in each municipality in the SNHPC Region in 2010, along with their percentage of the state and national totals. Manchester leads the Region with 282, or 9.6 percent of the total in the state. Derry and Londonderry rank



second and third, respectively. In July of 2010 Derry recorded 15 foreclosures while Londonderry reported nine and Raymond seven. These ranked first, second and fourth, respectively in Rockingham County (Salem was third).

March of 2010 saw the most foreclosures since 2005 with 449 statewide – a 35 percent increase from March of 2009 – and in June there were 377 recorded. The foreclosure rates in February of 2010 were a 52 percent increase from February of 2009.²⁵ Table 16 shows month-by-month statewide foreclosure numbers from 2005-2010 for all the municipalities located within the region.

Table 16
Foreclosures by Municipality, 2010

Towns	Foreclosures		
	Total #	% of State	% of Nation
Auburn	6	0.22	0.000
Bedford	26	0.88	0.000
Candia	8	0.22	0.000
Chester	11	0.37	0.000
Deerfield	14	0.47	0.000
Derry	98	3.33	0.003
Goffstown	36	1.22	0.001
Hooksett	35	1.22	0.001
Londonderry	65	2.21	0.002
Manchester	282	9.6	0.010
New Boston	14	0.47	0.000
Raymond	39	1.33	0.001
Weare	13	0.47	0.000

Source: NH Housing Finance Authority, 2010

²⁵ Lawrence Eagle-Tribune, August 11, 2010. Retrieved November 15, 2010
<http://www.eagletribune.com/newhampshire/x664158893/Foreclosures-rising-in-NH>



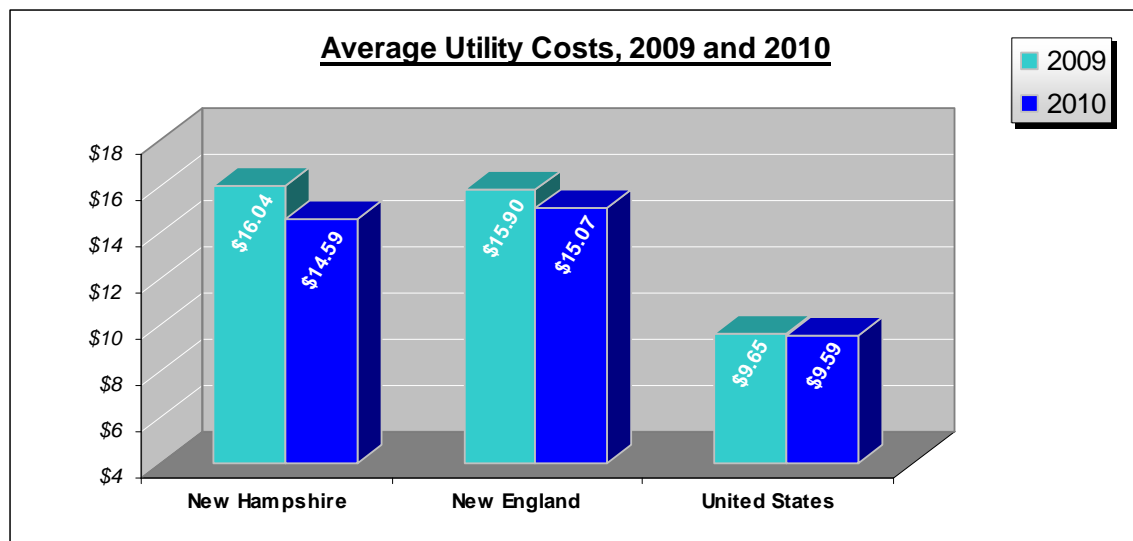
The Region's Energy Costs are High Overall Compared to US

According to the U.S. Energy Information Administration (EIA), in 2008 New Hampshire ranked 45th nationally in total energy consumption per capita. This means that, despite the high heating costs for the state, we are using our energy resources fairly efficiently. Figure 10 shows average retail price of electricity per kilowatt hour to ultimate customers as measured in April of 2009 and 2010. At \$16.04 in 2009 and \$14.59 in 2010 compared to the U.S. averages of \$9.65 and \$9.59, respectively, New Hampshire utility bills are among the highest in the US.

Tables 17, 18 and 19 break down energy use by sector and type and are taken from the most recent inventory performed by the NH Office of Energy and Planning in 2007. The residential sector consumed 29.1% of the State's 315.8 TBtu, while the commercial sector consumed 22.3% and the industrial sector consumed 14.2%. The remaining 33.9% of the state's TBtu consumption was on fuels for the transportation sector. Table 20 breaks down residential heating energy use by type and community as of the 2000 Census.

The majority of the state's energy consumption comes in the form of electricity. Public Service of New Hampshire (PSNH) currently provides electricity to the majority of the SNHPC Region and more than 475,000 homes and businesses throughout New Hampshire. PSNH owns and operates three fossil fuel-fired generating plants and nine hydroelectric facilities across the state. These facilities are capable of generating more than 1,110 megawatts of electricity. New Hampshire Electric Cooperative provides electricity to some areas of the Region also. In its 2006 Community Assessment of the Manchester area, the Angelou Economics consulting firm rated electricity pricing in the area as moderate, stating that pricing is competitive. However, there is still much that can be done in the Region to encourage a more *diversified* range of energy options, especially in the renewable areas such as wind, solar and geothermal.

Figure 10



Source: U.S. Energy Information Administration



Table 17
New Hampshire Residential Energy Usage (2007)

Heating Type	Percentage of Total Usage
Electricity	52.5
Natural Gas	8.1
Heating Oil	25.7
Propane	9.7
Residual Oil	0.0
Kerosene	1.8
Coal	0.0
Gasoline	0.0
Wood	2.1
Wind	0.0
Solar	0.1
Geothermal	0.0

Source: New Hampshire Office of Energy and Planning

Table 18
New Hampshire Commercial Energy Usage (2007)

Heating Type	Percentage of Total Usage
Electricity	49.2
Natural Gas	14.3
Heating Oil	9.2
Propane	2.3
Residual Oil	4.0
Kerosene	0.3
Coal	0.1
Gasoline	0.3
Wood	0.4
Wind	0.0
Solar	0.0
Geothermal	0.0

Source: New Hampshire Office of Energy and Planning



Table 19
New Hampshire Industrial Energy Usage (2007)

Heating Type	Percentage of Total Usage
Electricity	52.2
Natural Gas	13.5
Heating Oil	6.5
Propane	3.1
Residual Oil	5.8
Kerosene	0.0
Coal	0.0
Gasoline	2.2
Wood	3.6
Wind	0.0
Solar	0.0
Geothermal	0.0
Hydro	0.2
Asphalt	11.2
Lubricants	0.2
Other Petroleum	0.7
Biogenic Muni/Other Solid Waste	0.2

Source: New Hampshire Office of Energy and Planning

Table 20
SNHPC Household Heating Type by Percentage

Municipality	Utility Gas	Bottled, Tank or Liquid Propane	Electricity	Fuel Oil, Kerosene, Etc	Coal or Coke	Wood	Solar Energy	Other Fuel	No Fuel
Auburn	0.0	9.7	1.0	82.3	1.3	5.2	0.4	0.0	0.0
Bedford	0.1	9.0	3.8	72.0	0.0	0.9	0.0	0.0	0.0
Candia	0.0	16.0	1.9	75.9	0.4	5.7	0.0	0.0	0.0
Chester	0.3	8.9	1.5	82.2	0.0	7.1	0.0	0.0	0.0
Deerfield	0.5	11.2	1.1	78.7	0.5	7.6	0.0	0.4	0.0
Derry	6.5	14.1	14.8	59.8	0.6	2.5	0.1	1.2	0.2
Goffstown	9.6	9.7	4.6	73.4	0.1	2.4	0.0	0.1	0.0
Hooksett	28.0	6.8	4.6	57.3	0.2	1.6	0.0	0.8	0.6
Londonderry	5.0	19.1	7.9	65.3	0.5	2.1	0.0	0.1	0.0
Manchester	43.1	3.1	9.4	42.7	0.2	0.6	0.0	0.7	0.2
New Boston	1.0	17.3	1.7	73.0	0.0	7.0	0.0	0.0	0.0
Raymond	4.0	20.1	4.4	64.3	0.3	6.7	0.0	0.3	0.0
Weare	0.7	18.8	1.6	68.6	0.5	9.8	0.0	0.0	0.0
State of New Hampshire	18.4	10.7	7.6	58.1	0.2	4.3	0.0	0.5	0.2

Source: 2000 U.S. Census



The Region's Population/Workforce is Highly Educated

As of 2009, New Hampshire ranks 10th nationally in the percent of population over 25 years old with a college degree. A total of 89.6 percent of the SNHPC Region's residents have earned a high school diploma while 29.3 percent have a bachelor's degree or higher, both of which are above the national average.²⁶

However, despite these positive rankings, New Hampshire ranks last, or close to last, in state funding to higher education as a percentage of the state budget. In addition, New Hampshire has the highest community college tuition in the nation, and close to the highest four year public higher education tuition. Not surprisingly, New Hampshire has the 5th highest student debt load in the country. At SNHPC's 2010 annual meeting, the President & CEO of New Hampshire College and the University Council reported that New Hampshire has one of the highest percentages of student populations leaving the state (48 percent) to pursue higher education. The New England average is 39 percent.

While the SNHPC Region is well endowed with institutions of higher education (Table 21), it is imperative that policies, such as the 55% Initiative be implemented to retain these graduates and to make tuition costs less burdensome. An educated and highly-skilled workforce is an economic necessity. Map 7 shows the locations of some of the higher education institutions both within the SNHPC Region and surrounding areas.

Table 21
SNHPC Region Higher Education Institutions

Name of School	Location	Enrolment	Highest Degree Offered
Chester College of New England	Chester	176 Full-time, 16 Part-time	Bachelor's
Franklin Pierce University	Manchester*	3,000	Doctorate
Hellenic American University	Manchester	300	Ph.D.
Hesser College	Manchester	3,025	Bachelor's
Manchester Community College	Manchester	3,300	Associate
Massachusetts College of Pharmacy and Health Sciences	Manchester	315	Doctor of Pharmacy
Saint Anslem College	Manchester, Goffstown	1,915	Bachelor's
Southern NH University	Manchester, Hooksett	7,119	Ph.D.
Springfield College, School of Human Services	Manchester	200	Master's
UNH-Manchester	Manchester	1,500	Bachelor's

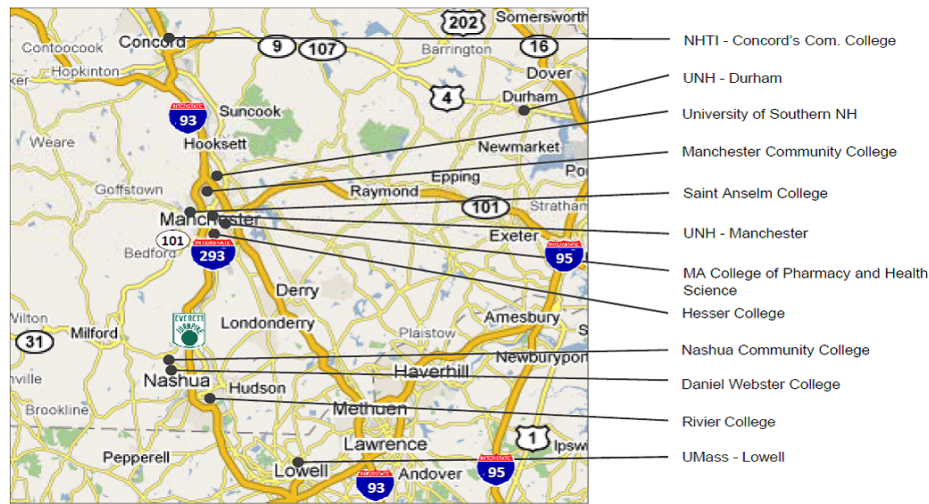
Source: NH Business Magazine, July 2010

*This is a satellite campus; the main campus is located in Rindge

²⁶ 2000 U.S. Census.



Map 7 Higher Education Institutions in the SNHPC Vicinity



Source: SNHPC Target Industry Analysis

The Region has Quality Healthcare Facilities

As this plan has already shown, occupations in the health care field are the fastest-growing in the state and the SNHPC Region. This field will only continue to grow, especially with New Hampshire’s aging population. Therefore it is vital to maintain quality healthcare infrastructure and facilities accessible to everyone within the region.

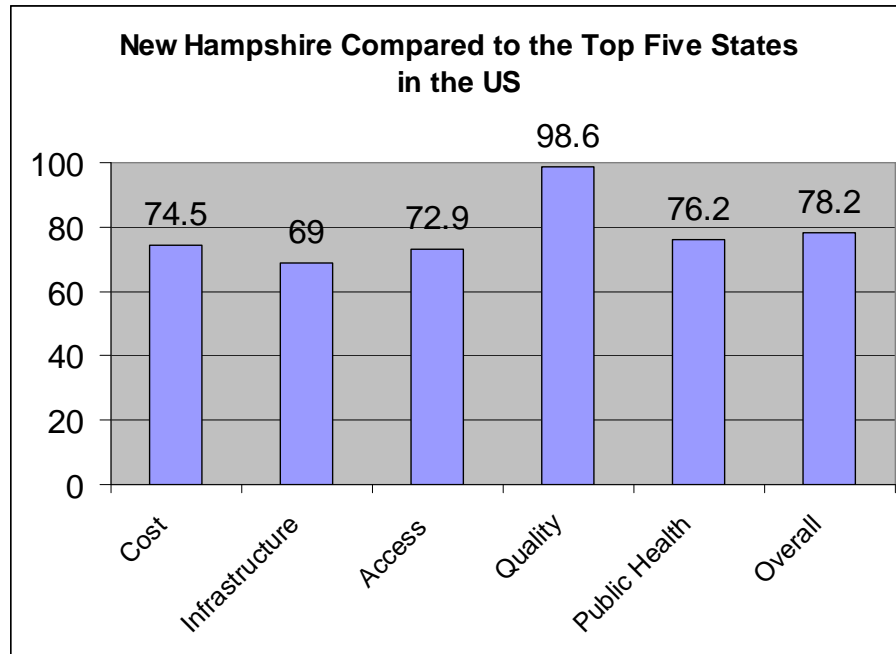
In addition to numerous smaller clinics, assisted living facilities and urgent care facilities, the SNHPC Region is also home to two of the State’s five largest hospitals. Elliot Hospital in Manchester, the second largest in the state, employs 3,428 people and houses 296 beds. Catholic Medical Center, also in Manchester and the fourth largest facility in the state, employs 2,003 people and houses 227 beds. A third large hospital, Parkland Medical Center, is located in Derry and houses 86 beds.

Figure 11, taken from 2009’s New Hampshire Healthcare Dashboard, ranks the state on several healthcare indicators compared to top performing states nationwide. The state’s overall average dashboard score in 2009 was 78.2%, placing it at twenty percent of the best ranked states. It scored very highly on the quality of its healthcare system (98.6%) while high costs were its major hindrance.²⁷

²⁷ New Hampshire Center for Public Policy Studies, New Hampshire’s Healthcare Dashboard 2009.



Figure 11
New Hampshire's Healthcare Dashboard 2009



Source: New Hampshire Citizens Health Initiative

The Region Has a High Quality of Life

The state of New Hampshire consistently ranks as one of, if not the, most livable state in the country. Its 2009 crime rate was the lowest in the United States and it ranked first in poverty child and family well being in 2010. In 2009 New Hampshire had the lowest poverty rate in the U.S. and its per capita income is consistently ranks in the top 10. In 2010, despite harsh economic conditions nationwide, the Granite State had the fourth lowest unemployment rate in the country.

Centrally located in Northern New England, the SNHPC Region is an hour away from both the seacoast and mountains and countless outdoor activities and scenic beauty. Boston, an international hub of commerce, healthcare, education and entertainment, is also an hour away. The SNHPC Region benefits from its access to major transportation infrastructure, with Interstates 93 and 293 running through its core and easy access to Manchester Boston Regional Airport as well as Boston's Logan International Airport.

The SNHPC Region has a highly skilled and educated adult population and many institutions of higher learning. It has excellent healthcare facilities. The City of Manchester provides the region with a vibrant economic center, housing numerous options for dining, night life, culture and professional sports. The outlying communities offer a quieter pace of life in suburban or rural settings.



Section Two: Economic Issues, Challenges and Opportunities

This section of the plan discusses the critical economic development issues and challenges facing the SNHPC Region. It also identifies the Region's strengths and opportunities. As background information, the results of the SNHPC's Public Opinion Survey on Economic Development have been included. Also included is a summary of the findings of the Target Industry Analysis and the SWOT Analysis. Both of these studies comprise the core methodology and components of this plan.

Public Opinion Survey

Between October 6 and December 7, 2009, the SNHPC prepared and released an Economic Development Public Opinion Survey on its webpage (a complete copy of the survey and survey results is contained within Volume II of this plan). This survey was reviewed and endorsed by the Regional Economic Development Steering Committee as a means to obtain public input about the current status of the region's economy and to provide an opportunity for state, regional and local planning officials to share their opinions regarding some of the key economic development issues identified within the 2006 SNHPC Regional Comprehensive Plan. The survey addressed the Economic Development chapter of the Regional Comprehensive Plan.

Every SNHPC region community (residents and public officials) participated in the survey, with the exceptions of the towns of Auburn and Goffstown. The towns of Londonderry, Derry and Bedford provided the highest levels of participation.

Regarding persistent economic development pressures facing the region, overwhelming majorities of respondents cited concerns related to “**Providing an adequate education**” (91.3 percent of respondents indicated that they were concerned or very concerned) and “**Seeking a balance in quality of life and growth management**” (86 percent expressed significant concern).

Other concerns that attracted substantive concern included the **challenges of improving infrastructure** enough to attract quality non-residential development, workforce issues associated with the **region's aging population** and **declining young adult** populace, and the **need to expand local tax bases** through the attraction of non-residential development.

When respondents were asked how the **Manchester-Boston Regional Airport** might better support community economic development efforts, 34 percent indicated that the airport should serve as the region's intermodal transportation hub. Twenty-four percent of those surveyed cited the need for greater ground transportation offerings from the airport to their communities, while only seven percent argued for an eastern highway link from Interstate 93 to the airport (similar to the leg off the Everett Turnpike now under



construction). However, 44 percent of those surveyed selected “All of the above,” indicating their desire to see all of the aforementioned plans implemented.

About two-thirds of respondents indicated that they believe the City of Manchester continues to serve as the economic engine of the region as it has historically. Among the 30 percent who felt Manchester’s role was diminishing, several cited the city’s aging infrastructure as well as a relative lack of city revitalization projects in the works.

In addition, communities were asked to identify industries that might be desirable for their local tax bases, and nearly 70 percent of respondents selected firms in education and information technology/computers. Other popular choices included industries in the Arts and Entertainment/Hospitality and Leisure (60 percent), light industrial operations (60 percent) and Health Sciences and Services (58 percent).

When asked to identify planning and land use mechanisms that might encourage or supplement economic development, nearly 80 percent of respondents cited the promotion of mixed-use development. Other well-liked proposals included the promotion of compact and vibrant downtowns and village centers (70 percent), the renovation of existing buildings and establishment of business incubators (67 percent), and the prevention of premature and scattered development (64 percent).

Over 70 percent of those surveyed indicated that their communities have considered Capital Improvement Programs to lure economic development, while the same number indicated that impact fees had been considered or implemented. Forty-eight percent of respondents cited Tax-Incremented Financing Districts (TIF’s), while 35 percent indicated that their communities had considered specific warrant articles related to development. Relatively few communities had considered Economic Revitalization Tax Credit zones (23 percent) or Foreign Trade Zones (16 percent).

To help address long commuting times in the region, 60 percent of respondents indicated that their communities have worked both to develop more ‘Park and Ride’ facilities and to establish more public transportation options.

In regard to the formation of local Economic Development Committees recommended in the 2006 Regional Master Plan, 43 percent of respondents indicated that their community had established such a committee to identify economic development goals and strategies. However, one-third of those surveyed indicated that such a body had not been formed. About 17 percent of respondents indicated that they were in the process of creating or implementing a Strategic Economic Development Plan. Fifty-eight percent of respondents indicated that they have utilized their community master plans to identify economic development efforts to pursue. Forty-five percent indicated that they had established a database of available properties for development, while 42 percent said they had posted such a database on the Internet. However, nearly 20 percent of those surveyed expressed that they had not yet taken any of those basic steps.



Table 22
Economic Development Measures by Municipality, SNHPC Region

Municipality	Has an Economic Development Strategy in Master Plan	Has a Specific Economic Board, Council or Committee	Addresses Economic Development on Website
Auburn	Yes	No	Yes
Bedford	Yes	Yes	Yes
Candia	No	No	Yes
Chester	Yes	No	No
Deerfield	Yes	No	No
Derry	Yes	No	No
Goffstown	Yes	Yes	Yes
Hooksett	Yes	Yes	Yes
Londonderry	Yes	Yes	Yes
Manchester	Yes	No	Yes
New Boston	Yes	No	No
Raymond	No	No	Yes
Weare	Yes	Yes	Yes

Source: SNHPC

Sixty-five percent of those surveyed expressed that their town or city possessed a vision for the future and an understanding of its strengths and selling points as communities (conversely, it's important to note that 32 percent indicated that their communities did not have a future vision). Among those citing a vision, many mentioned that maintaining “rural character” was a top priority, while Manchester officials indicated that they would work to build off the city's stature as an economic and cultural hub. Strengths cited included convenient access to highways, major cities and recreational/tourism centers, as well as quality educational systems and rural atmospheres.

Target Industry Analysis

An important part of any economic development plan is an analysis of the industries and industry sectors within the region and the region's municipalities which are important for the growth of the economy. The firm MS&B, Moran, Stahl and Boyer Site Selection and Economic Development Consultants was retained by the SNHPC to conduct the Target Industry Analysis or Cluster Analysis of the SNHPC Region included in this plan (a complete copy of the Final Target Industry Analysis Report is contained within Volume II of this plan).

The Cluster Analysis involved both a macro level review of the three counties making up the SNHPC Region along with a focus on the types of economic opportunities that are available for each community within the region. Input into the study was derived from information provided by the SNHPC Commission, local planners, published data sources, interviews



with selected companies, and internet-based research. The end result is the identification of target industries for the region and each community.

The process the consultant MS&B applied in identifying the target industries included a review of the historic presence of existing industries within the region to determine the potential presence of residual competencies; an analysis of current employment by industry within the region; market trends that impact the growth of specific industry types; local interest and business environment that supports a given industry; and the availability of resources required to support an industry, including labor, transportation access, utilities, sites and buildings, services to support industry cluster, types of financial incentives, access to college graduates and research and development and quality of life attributes.

In addition, the consultant asked each community to respond to the following four questions. Provided below is an example of the consultant's four questions and the response that was received from the Town of Goffstown.

Questions for Local Communities

The following information will be very helpful in defining target industries and in developing an Economic Development Strategic Plan for the region.

1. *List companies that have had significant growth or are new to the area since 2000. Include name of company, type of industry and year of expansion/entry into community.*

- Saint Anselm College Expansion
 - Addition to fitness center – 9,062 sq. ft. – 2009
 - Ice Arena – 51,000 sq. ft. – 2003
 - Dormitories – 5 buildings, 40-units – 43,876 sq. ft. – 2000
- All others have been 3rd tier – consumer services:
 - Local Healthcare – 3,080 sq. ft.
 - CMC Goffstown Primary Care – 1,280 sq. ft. – 2007
 - Elliot Rehabilitation Services – 1,800 sq. ft. – 2005
 - Retail/service 30,000 sq. ft.
 - Ace Hardware – 2007
 - Rite Aid Pharmacy – 2009
 - Assorted Vision, jewelry and gift
 - Automotive services – 14,389 sq. ft.
 - Super Suds Car Wash – 2005
 - Irving Oil Gas Station – 2004
 - Tire Warehouse – 2004
 - Shell Gas Station – 2003

2. *What types of industries do you feel your community would like to grow/attract?*

- Tourism Related
 - Lodging, restaurants, sporting goods
 - Boat, bike, fishing, and hiking goods and services



- Offices and services related to District Court and Hillsborough County Offices
- Professional/Technical/Science Services
- Manufacturing, e.g. Parts Assembly
- Back Office
- Regional Distribution

3. *Do you have any specific sites or office/industrial parks you have available for business growth? If so, provide a list that includes site/park designation, location and number of usable acres.*

- Pond View Park
 - 32.98 acres... 20+ acres flat/dry.
 - Located on Goffstown Back Road, 1.5 mi from Amoskeag rotary in Manchester.
- Gentle Slopes Industrial Park:
 - Located on NH Route 114
 - 58.47 acres... 20+ acres flat/dry.
- Tatro Drive Business Park
 - Located on NH Route 114.
 - 93.32 acres... 30+ acres flat/dry.
- Benchmark Business Park
 - Located on NH Route 114
 - 25 acres, flat and dry.
- Verres Financial Business Park
 - Located on NH Route 114
 - 40.41 acres... 20+ acres flat/dry.
- Several 1-2 acre parcels on Daniel Plummer Drive.
- Hillsborough County
 - Located on NH Route 114
 - 457 acres for which the County is undertaking a planning charrette and master plan.

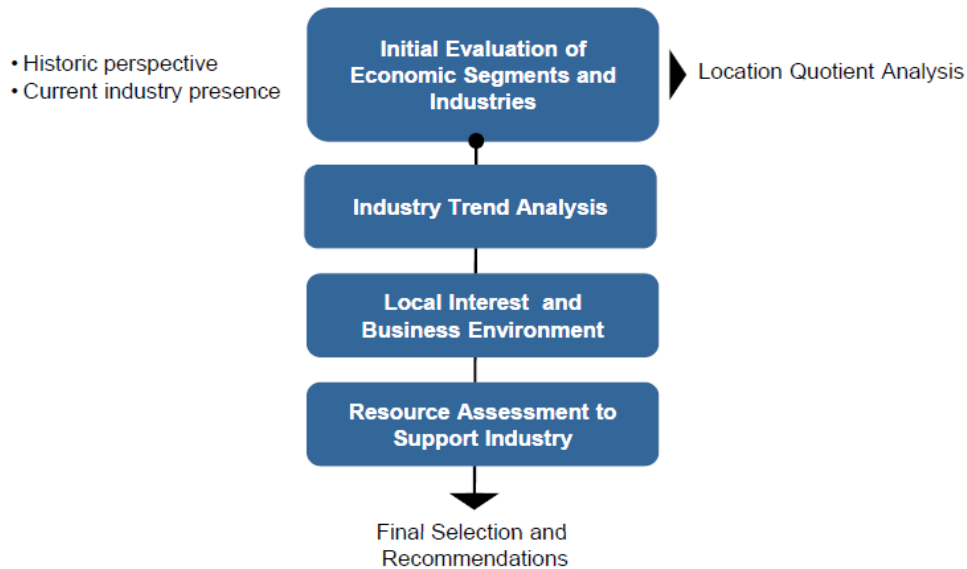
4. *Is there any organization within your community that formally talks to local employers about their needs on a routine basis (e.g., annually)?*

- Goffstown Economic Development Council (Bi-annually)
- Town Staff: Economic Development Coordinator

The following flow chart describes the process MS&B used to identify and define the target industries for the SNHPC Region and each municipality (Figure 12).



Figure 12
Target Industry Selection Process



Source: MS&B

In conducting the target industry analysis for this plan, MS&B utilized a standardized *economic portfolio* as a means to define the composition of the region's economy (see Figure 13). This portfolio breaks down the regional economy into the following three levels of employers:

Level 1 – Primary Industries: These industries consist of those companies/government agencies that not only offer local jobs but also infuse money into the region from other sources. These companies represent a broad range of industries – from manufacturing to agriculture and tourism. Most economic development organizations focus on the primary industries for business attraction and expansion, particularly manufacturing, back office/shared services/customer service and distribution operations.

Level 2 – Business Support Services: These industries represent those companies that exist within the region to support the Level 1 businesses and they would not exist if the Level 1 businesses were not present. This economic level is not normally focused as an economic development target because of their derivative relationship with Level 1 businesses.

Level 3 – Customer Services: These industries include all the services that support the local consumer/resident from grocery stores and retail banks to personal services and restaurants. This level expands and contracts with the size of the population and can be targeted for some communities if they are seeking to expand their tax base in conjunction with Level 1 business expansion/attraction.



Figure 13
Composition of a Regional Economy: “Economic Portfolio”



Source: MS&B

As described by MS&B, rural, suburban and urban settings within the region all tend to attract a different mix and size of businesses – thus various industries tend to locate in specific areas. For example, larger Level 1 businesses will typically locate closer to urban locations that have access to transportation while smaller companies generally locate in multiple settings.

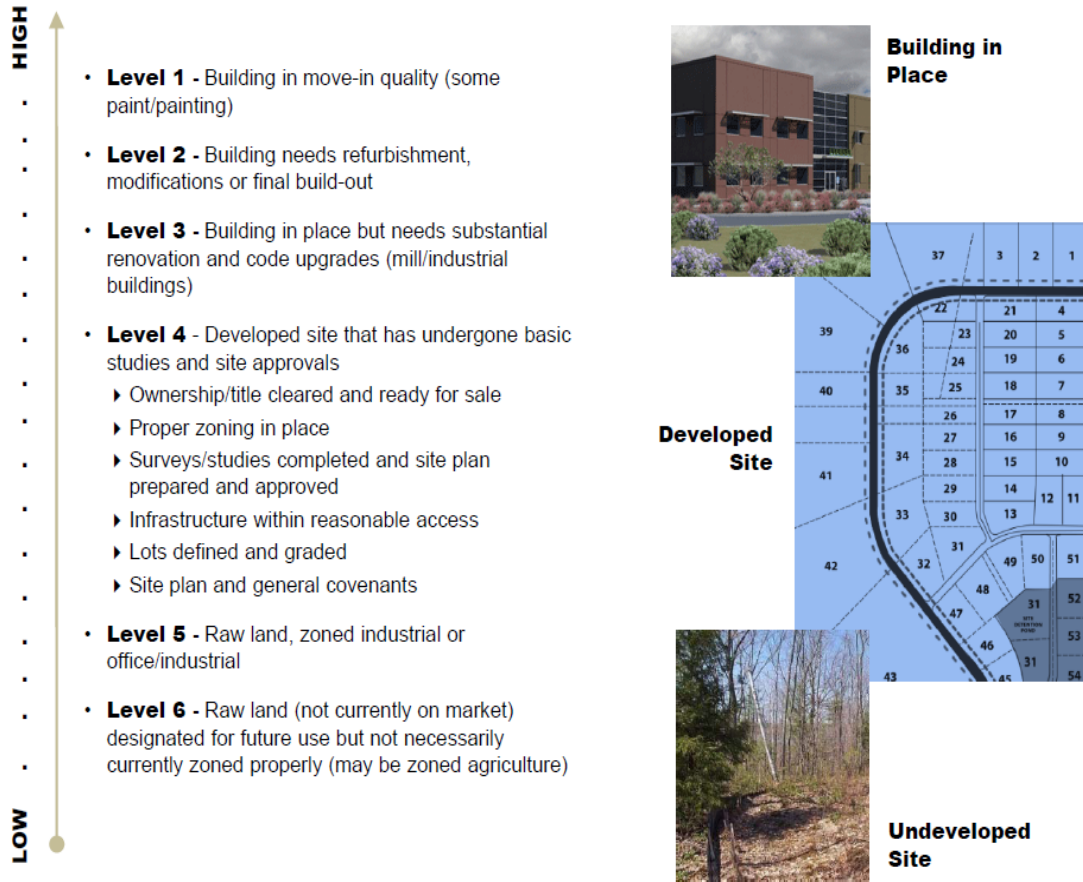
In addition to this “economic portfolio,” MS&B applied three other important selection factors in identifying target industries within the region and among the region’s municipalities. These three factors include:

- **Level of Site Readiness:** This is critical factor in making real estate decisions as companies generally seek out options that minimize start up time and limit potential risks. MS&B has developed a multi-level scale for determining the level of site readiness (Figure 14). The scale ranges from raw land currently zoned agriculture up to a fully developed site with a building in place.



Figure 14
Description of Site Readiness Levels

Readiness is ultimately defined by prospective companies as the time required to obtain occupancy in a building on a site.

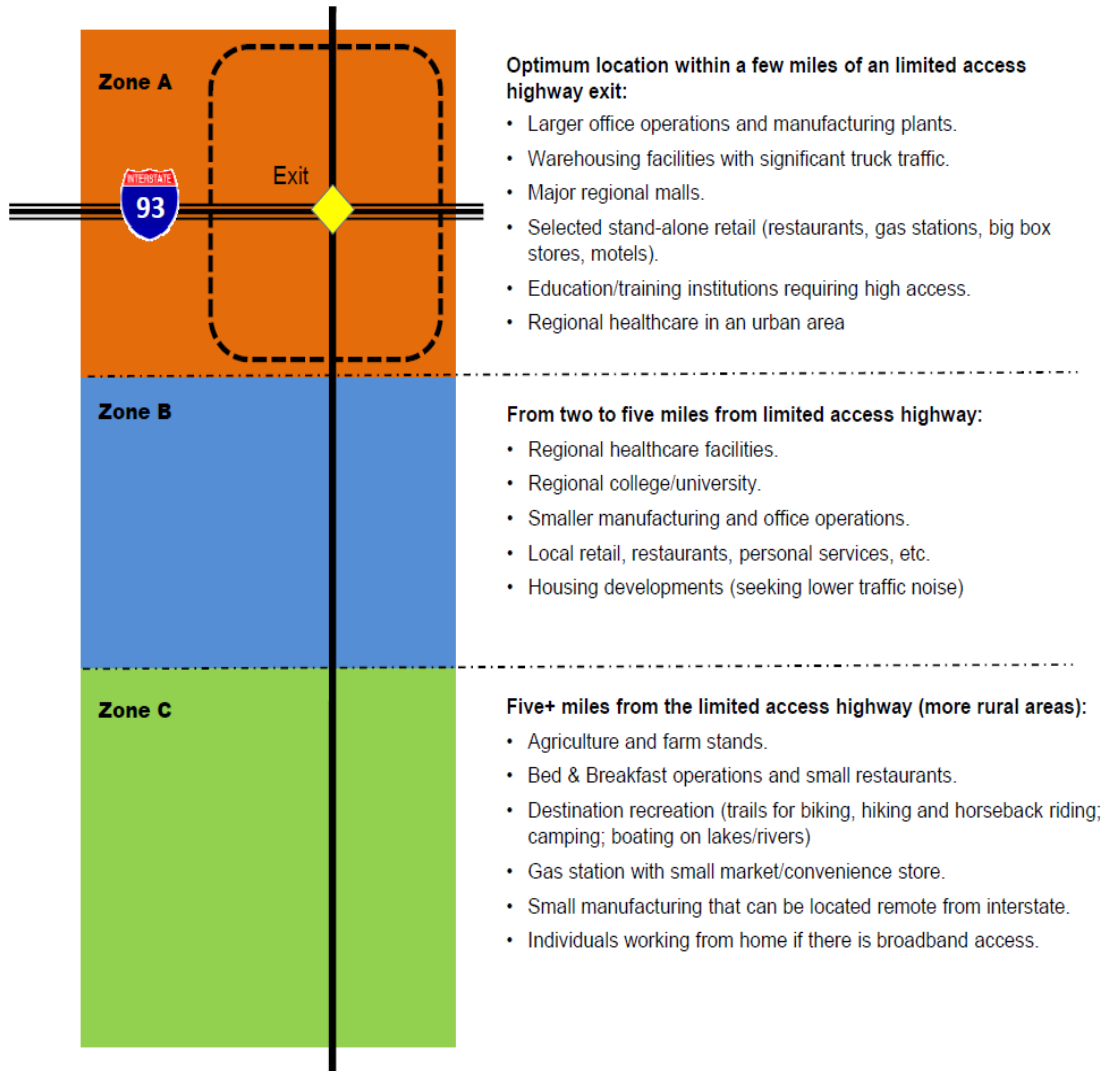


Source: MS&B

- **Distance From Limited Access Highway:** The principle here is that larger businesses and specific operations such as major offices, manufacturing/warehousing, major malls as well as retail businesses relying on the traveling public tend to locate close to a limited access highway. As the distance from the limited access highway expands, the profile of business changes. For example, a major manufacturing operation with 500+ employees and substantial truck traffic will tend to be located within 1-2 mile of an exit. A smaller manufacturing operation (<25 employees) may be located much more remotely within the region in an industrial area or even in a converted barn. Provided below is a copy of a diagram (Figure 15) used by MS&B to describe this factor:



Figure 15
Economic Activity vs. Distance to Limited Access Highway

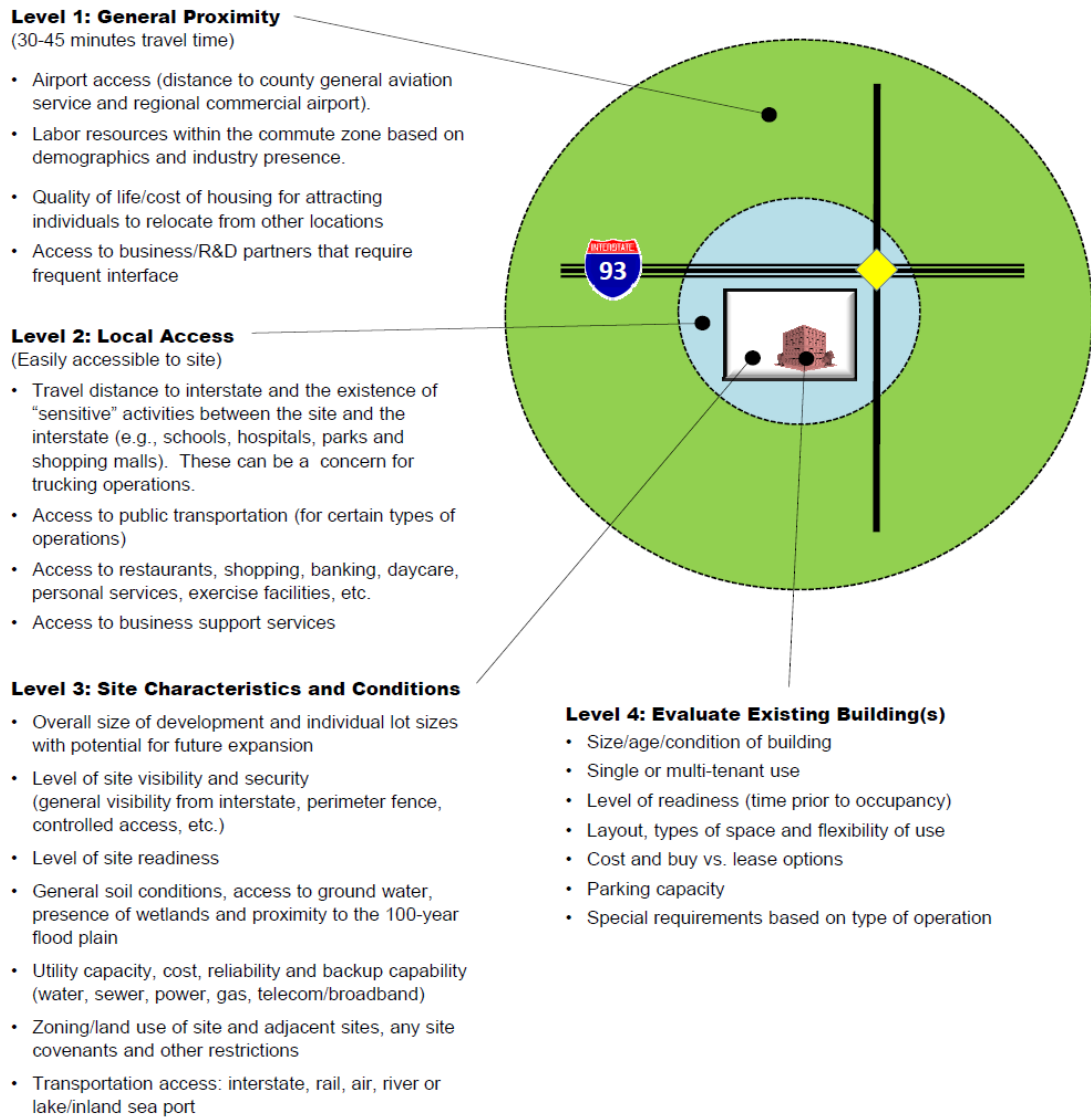


Source: MS&B

- **Four Levels of Site Evaluation:** As described by MS&B, when a prospective company views an area and its real estate options, there are four levels of evaluation (Figure 16) that frequently drive the location. When identifying a site or building, the search team conducts a quick evaluation of access to an airport (if air travel is important) and the labor force within 30 minutes of the site. Also considered are local amenities and interstate access within a few miles of the site as well as an evaluation of the overall site and details of the building(s), if present. In the final analysis, it is the site with the best access to resources and manageable risk at the lowest cost that will most likely be selected.



Figure 16
Four Levels of Site Evaluation



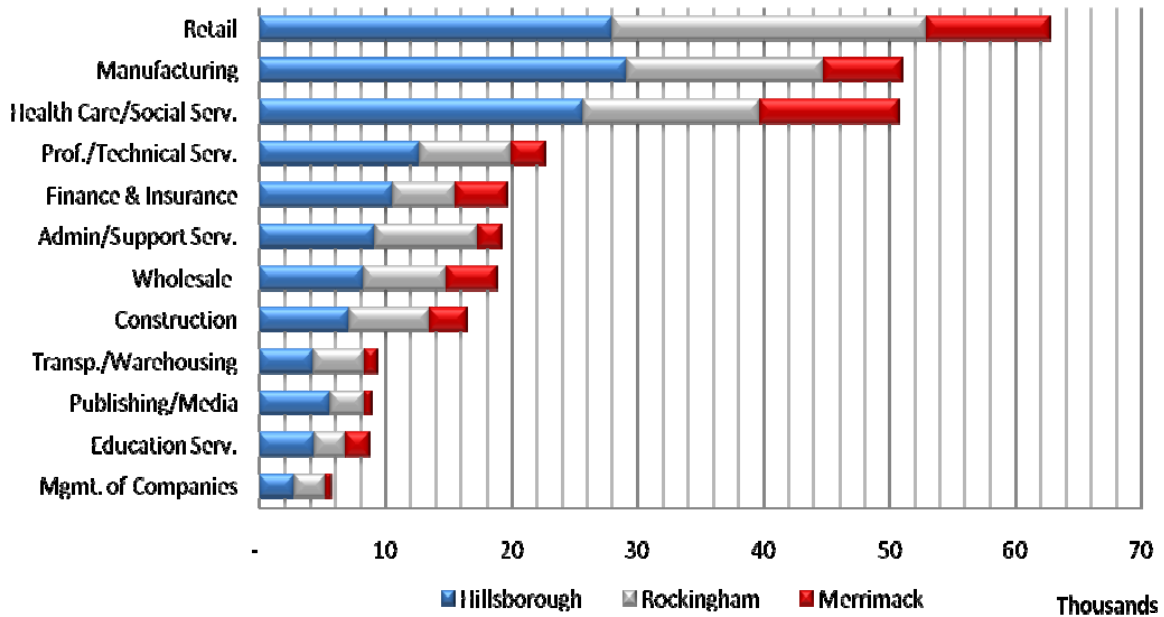
Source: MS&B



Key Employment Trends

In addition to the economic portfolio and the four site selection factors, MS&B also conducted a critical evaluation of the region’s employment trends by industry considering past growth trends (2002 – 2008 for the three counties) and projected growth 2006-2016 state-wide for each industry sector. The results of this analysis follow (Figure 17).

Figure 17
Employment by Industry/Segment for the Three-County Area



PAST AND FUTURE GROWTH TRENDS BY INDUSTRY/SEGMENT AND KEY DRIVERS OF GROWTH			
Industry/Segment	Growth: 2002-2008 (For 3 Counties)	Projected: 2006-2016 (State-Wide)	Key Drivers of Growth
Retail	-1%	7%	Reflects population growth, income levels.
Manufacturing	-10%	-5%	Access to resources/markets, costs, owner preferences.
Health Care/Social Serv.	17%	31%	Growth of overall population and aging of population.
Finance/Insurance	-2%	17%	Proximity to financial markets, operating cost of area.
Admin/Support Serv.	29%	29%	Growth of other business segments, operating cost of area.
Wholesale	8%	14%	Growth of population and commercial businesses.
Construction	-8%	14%	Growth of population and commercial businesses.
Transp./Warehousing	-3%	8%	Growth of population and commercial businesses.
Education	13%	19%	Population growth and demand as a destination.
Publishing/Media	2%	10%	Growth of population., owner preferences.
Mgmt. of Companies	23%	15%	Attractiveness of area to CEO's, access to markets.

Source: MS&B



It is important to note that while **Retail Trade, Manufacturing** and **Health Care/Social Services** are currently the largest industries (employment sectors) within the SNHPC Region, the key industry segments or drivers of growth in the future will be **Health Care/Social Services** at 31 percent; **Administrative/Support Services** at 29 percent; and **Education** at 19 percent (also see employment and job growth statistics in Section One). According to MS&B many of these industries are population driven and tend to reflect the overall growth, age demographics and demands of the consumer – these include health care services, retail, wholesale and construction.

In contrast, industry segments such as manufacturing, finance and insurance, certain professional/technical services and management of companies are the result of an individual or company deciding to reside in the region due to a cost advantage, access to labor or other resources, or due to the personal life style preferences of the owner.

Location Quotients for Each County

As part of the Cluster Analysis, MS&B also utilized location quotients to gauge the relative strength of an industry segment by comparing local employment levels within an industry/economic segment to national averages.²⁸ The results of this comparison are provided below and in the following graphs for Hillsborough, Rockingham and Merrimack counties (Figure 18):

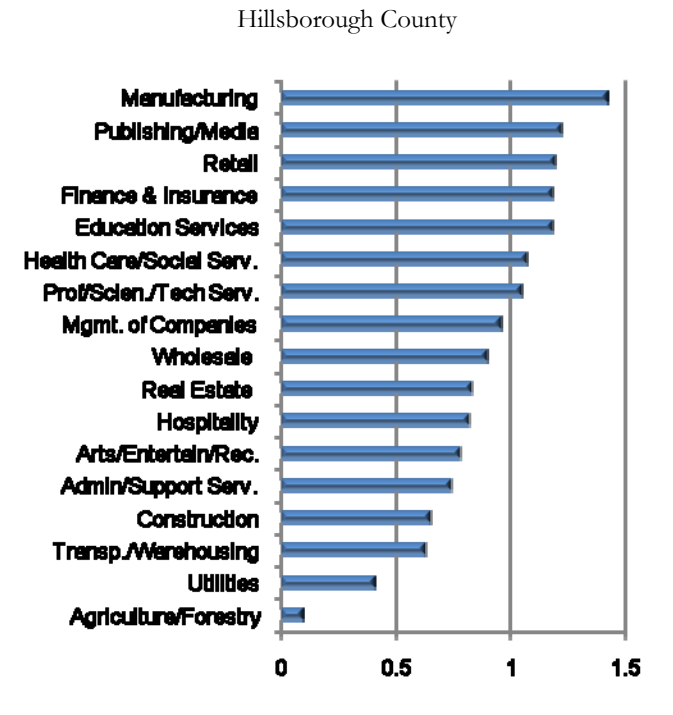
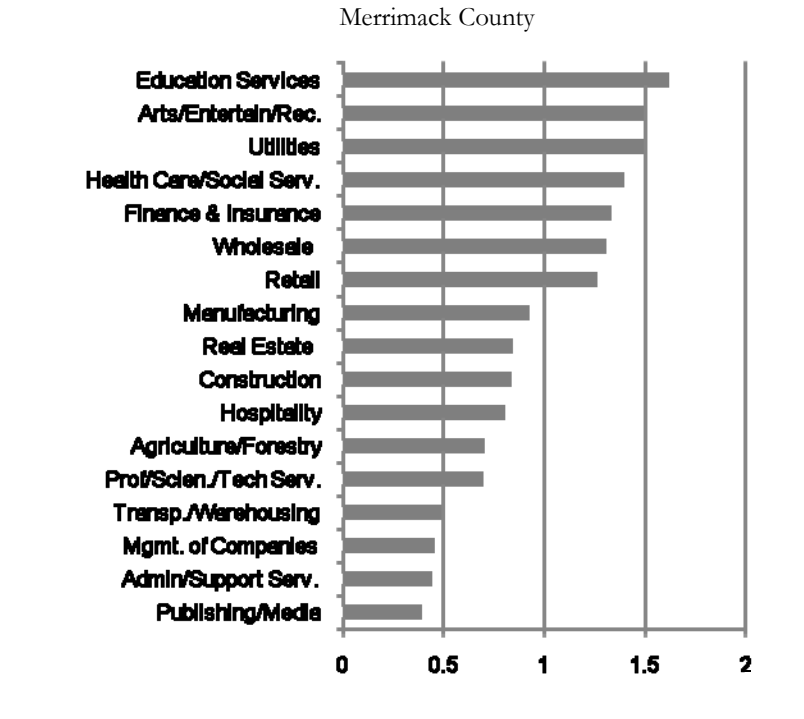
- **Manufacturing:** Hillsborough County hosts a large and diverse base of manufacturing firms that places it much higher than national average.
- **Retail:** Due to the population distribution in the state, the southern New Hampshire municipalities provide a significant amount of regional retail.
- **Wholesale:** Generally wholesale is low given much of the activity that takes place further south in New England or in New York State.
- **Insurance:** Generally back office operations represent a significant portion of this industry segment in Hillsborough and Merrimack Counties.
- **Construction:** Generally construction is not a high level of activity in the region.

²⁸ MS&B calculated and plotted a Location Quotient for each of the three counties that are part of the SNHPC Region. The purpose of the Location Quotient (LQ) is to identify industry employment levels that are proportionately higher or lower national average or other comparative base. Comparing all three counties provides a general indication for the SNHPC Region; however, it certainly would be easier to see trends had all of the region been located within a single county. An LQ was not done at the town level because most are too small to have full complement of employment to cover the economic spectrum and it would just show a significantly low ratio in many of the sectors. In essence, the many of the municipalities are too small for the data to be meaningful. In addition, since the vast majority (>75%) of residents leave the municipality to work each day, there is a need to study a larger area (as was done).



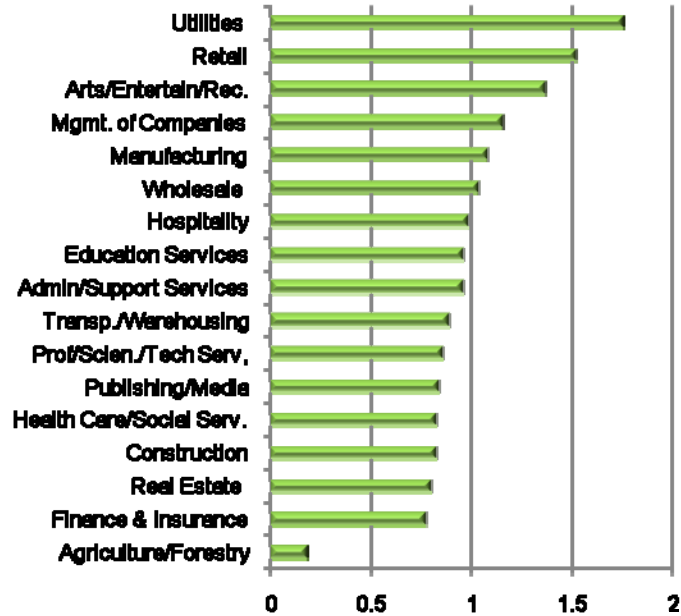
- **Professional, Scientific and Technical Services:** This is an emerging segment with significant home-based business potential.

Figure 18
Location Quotients by Industry/Segment for the Three-County Area





Rockingham County



Source: MS&B

Manufacturing Employment

In examining the manufacturing industries, MS&B found that manufacturing within the SNHPC Region is dominated by the computer/electronics industry with other key industries including fabricated metal products, machinery, plastics and an emerging medical instruments segment (Figure 19). A significant portion of these industries represent producers of high value/specialized components/parts (electrical, electronic, metal and plastic) and subassemblies that are shipped globally for final assembly with other sourced parts. Additionally, MS&B found that there are producers of high value machines and equipment within the region such as the Segway *Personal Transporter* and the Insight Technology night vision weapons and detection systems.

According to MS&B some of the reasons for why these manufacturing companies are located within the region are:

- The company relocated to the area at some point to take advantage of relatively low operating costs along with access to qualified labor and available facilities;
- The company was a spinoff of another company;
- The company started up in the area by a local entrepreneur.

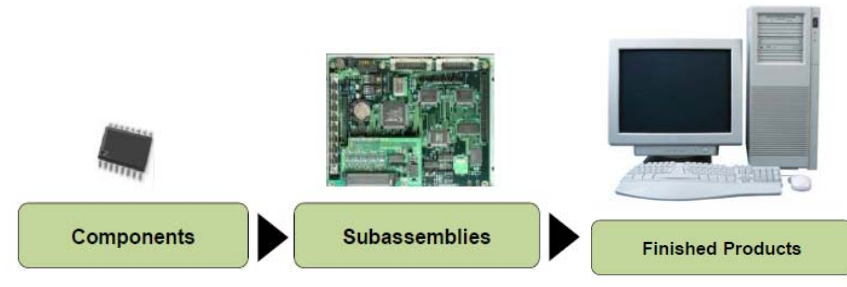
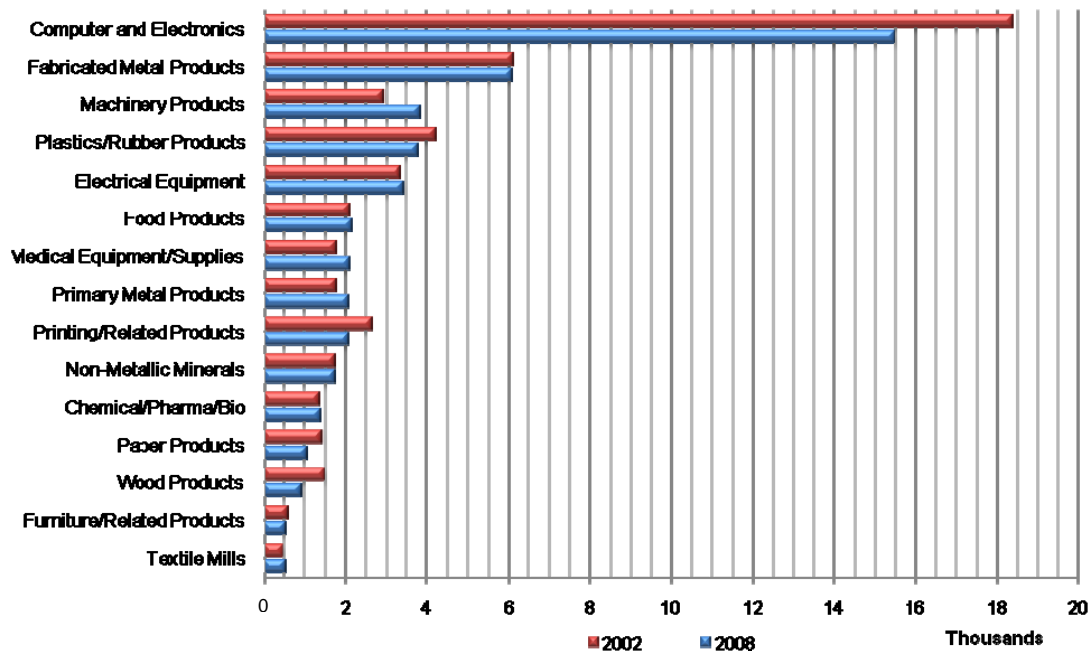


Figure 19
 Employment for Manufacturing Industries for the Three-County Area, 2000 vs. 2008



Source: MS&B

Market Drivers for Potential Industry Growth

In addition to this research, MS&B identified the following potential industry growth opportunities within the SNHPC Region. Basically a total of five areas or potential industry growth opportunities for the SNHPC Region are identified. These industry opportunities provide the basis for more detailed economic development planning and marketing research for the region and the region’s 13 municipalities.



Figure 20

■ **POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES**

Market Drivers for Potential Industry Growth



Energy

- Diversification to renewable energy sources
- Localization of energy production
- Improved power networks
- Energy efficient construction

Opportunity for SNHPC Region

- Design of systems.
- Parts and equipment production.
- Construction of energy efficient buildings and homes.



National Defense/Security Systems

- Innovative detection/defense systems
- Unmanned vehicles/other systems

Opportunity for SNHPC Region

- Parts and equipment production.



Protecting, Managing and Enjoying the Environment

- Managing water resources (quality and availability)
- Removal of air pollutants
- Cleanup of brownfield sites for reuse
- Sustainable environmental practices for business and individuals (LEED certified buildings)

Opportunity for SNHPC Region

- Technical services.
- Monitoring equipment and parts
- Offer places to enjoy the environment.



Health Care

- Aging Baby Boomers
- Medical device/pharmaceutical breakthroughs
- Shift to wellness and prevention of disease

Opportunity for SNHPC Region

- Health care services.
- Parts, devices and equipment production for medical devices.



Food Safety

- Concern over content and sources of food
- Want traceability to source and buy direct from the farmer

Opportunity for SNHPC Region

- Buy direct from local farms at farm stands or through the internet.
- Local restaurants utilizing local farm products.

Source: MS&B



Table 23
Description of Potential Target Industries

Target Industry/Sector	Description of Industry/Sector
Back Offices, Shared Service and Customer Contact Centers	Office environment with predominantly college-trained employees in skills such as: computer software/information technology, accounting/finance, human resources, marketing, paralegal, employee benefits, insurance, investments, etc. Operations may range from home-based in relatively remote areas to office buildings with 500+ employees within 1-2 miles of a limited access highway.
Headquarters Operations	Includes small corporate and regional offices. Companies may select New Hampshire for low operating cost, low personal income tax or for life style preferences. Operations may range from 5-10 employees in a multi-tenant building up to 250+ employees in their own building located in an office complex or on a stand-alone site.
Manufacturing of Parts, Components and Subassemblies: • Electrical/Electronic • Metal • Plastic • Wood • Specialty Materials	Products are typically higher value, specialty items with smaller runs and easy to ship. It may also be a limited order replacement part for unique equipment. There is frequently on-going product enhancement and new product development. Companies may be start-ups, spinoffs of local companies or relocated in from other states. Operations can range from 5-10 employees in industrial flex space or even in a converted barn on up to 100+ employees in an industrial park.
Manufacturing of Machinery and Equipment: • Electrical/Electronic Instruments • Specialized Tools • Medical Devices	Products are typically uniquely designed with high technical content utilized for production, testing/monitoring, measuring, or medical applications. There is frequently on-going product enhancement and new product development. Operations can range from 5-10 employees in industrial flex space up to 100+ employees in an industrial park.
Professional, Technical and Scientific Services: • Engineering/Architecture • Design/Graphics • Software • R&D/Testing Services • Business consulting	The sector represents of broad spectrum of high value services/specialties that can be delivered remotely as long as there is access to broad band for internet access and file transfers and within reasonable proximity to a regional airport. Many potential companies in this category may be rather small (2-5 owners and employees) that have either spun off from an existing company or relocated to New Hampshire for life style and no personal income taxes. Companies will reside in multi-tenant office building within an office park, in unique space such as an old barn/mill space, or from a home office.
Regional Retail	As the region grows, there is potential to expand regional big box/mall retail in Hooksett and in Bedford/Londonderry area.
Regional Distribution	As the region grows, there is potential to expand regional distribution in Raymond and Londonderry (near the airport).
Regional Health Care	Continued expansion of the major hospital facilities as well as installation of local clinics and walk-up services in more remote areas.
Tourism-Related	There is an opportunity for destination tourism packages in the more remote areas with more Bed & Breakfast operations, trails for bikes and cross-county skiing or leverage the state parks in/adjacent to the region (Bear Brook, Pawtuckaway and Northwood Meadows) as well as other state forest and local conservation lands.
Agriculture-Related	Local farms can expand operations to include with their farm stands a bakery, a sandwich shop, a creamery, corn mazes, petting zoos, and other destination activities. They can also offer farm products and other goods via the internet.

Source: MS&B



In summary, the major opportunities industry growth within the region include: **energy related markets** – the design and production of parts and equipment and construction of energy efficient buildings and homes; **national defense/security systems** – manufacturing of parts and equipment production; **environmental protection** – provision of technical services, monitoring and clean up of sites; **health care** - health care services, parts, devices, and equipment production; **food safety and local agriculture** – emerging markets in buy direct from local farms/farm stands/internet and local restaurants utilizing local farm products.

In reaching these conclusions, MS&B identified the following resources, opportunities, strengths, and weaknesses within the SNHPC Region which are important factors in attracting these and other industries to the region.

Strengths

- There is strong local interest within the region to expand existing employers and attract additional back office/financial/insurance operations. There are several major financial service companies located in or near the region, including for example Fidelity Investments, Liberty Mutual, CIGNA, United Healthcare, UniCare, and Wellpoint.
- Given existing economic conditions, there is currently a favorable supply of college graduates in business and IT skills within the region.
- Companies may select the region for low operating cost, low personal income tax or for life style preferences.
- The region offers opportunities for both “home-based” businesses in relatively remote areas to more urban/suburban settings with larger office buildings and industrial parks.



Retcomp, a small electronics assembly company, works in a converted barn equipped with state-of-the-art processes.



- Manufacturing and machine building has been a core industry of the SNHPC Region since the mid-19th century. There are many companies with a highly trained labor force skilled in machine building and manufacturing of parts, components, and specialized tools and equipment. There is also local interest in attracting these industries due to quality of the companies and high-paying jobs. See following list of major manufacturing firms (Table 24).

Table 24
Major Manufacturers within the SNHPC Region

MAJOR MANUFACTURERS WITHIN THE SNHPC REGION (250+ EMPLOYEES)		
Company	Location	Scope of Services
GE Aircraft Engine	Hooksett	Aircraft engine parts
Osram Sylvania	Manchester	HID lamps
Velcro USA	Manchester	Fasteners
Blue Seal Feeds	Londonderry	Animal feeds
Summit Packaging Systems	Manchester	Custom molded parts
Kalwall Corporation	Manchester	Wall panels and solar applications
Harvey Building Products	Londonderry	Vinyl, wood and aluminum windows and doors
Stonyfield Farms	Londonderry	Yogurt, ice cream
Insight Technology	Londonderry	Night vision weapon and detection systems
Vibro-Meter	Londonderry	Aircraft instruments, monitoring/sensing equipment
Rockwell International/A-B	Manchester	Photoelectric controls, proximity/limit switches
Poultry Products Northeast	Hooksett	Poultry, meat and cheese processing
Sanmina-SCI Corporation	Manchester	Assembly, test and packaging of printed circuit boards

Source: MS&B

- The SNHPC Region is innovative and there is frequently ongoing product enhancement and new product development. Examples include the Segway Personal Transporter, High Speed Technologies (metalworking machinery), Infinity Constructors (construction machinery), and Insight Technologies (night vision weapons and detection systems), etc.

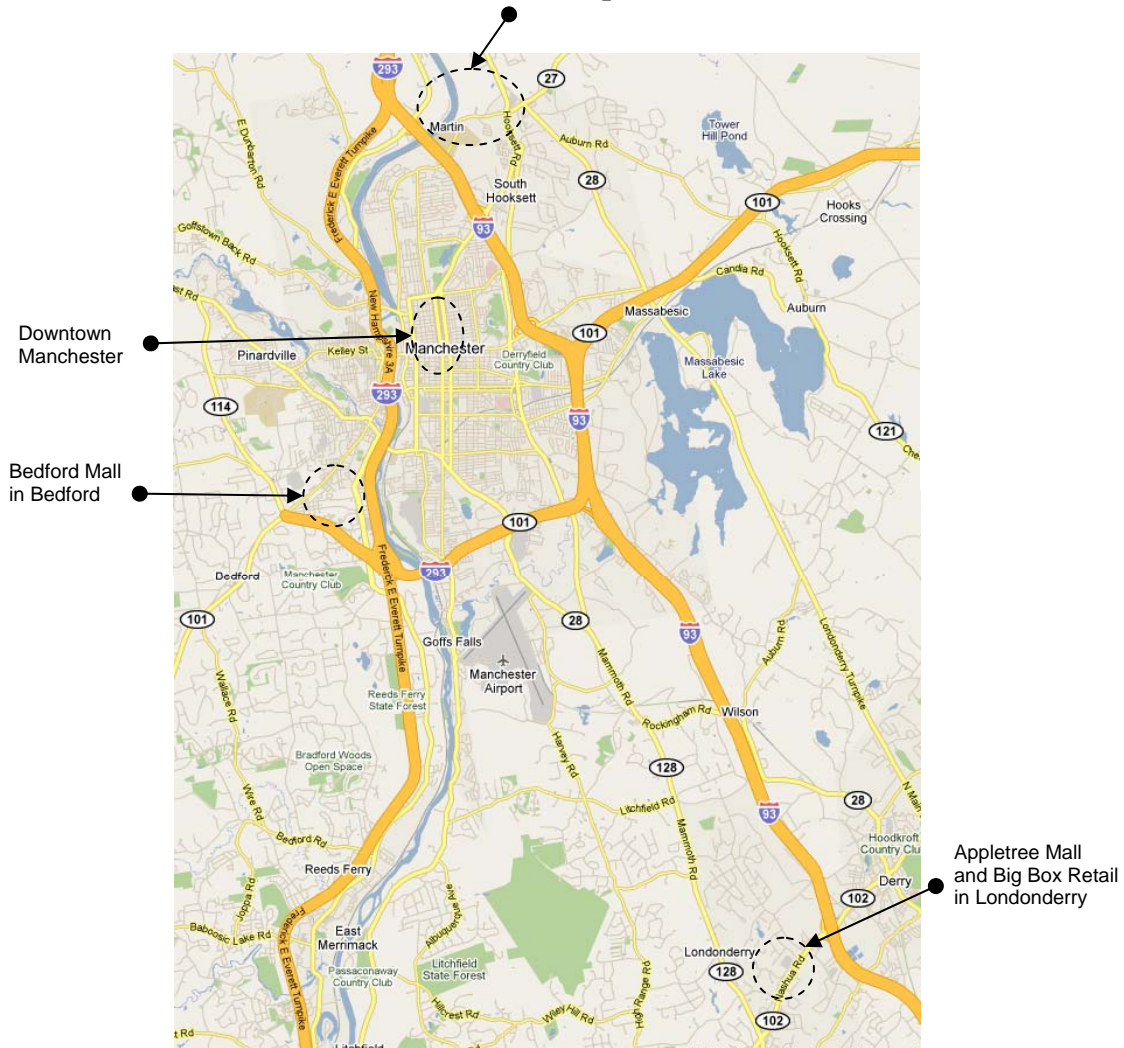


- The SNHPC Region has a broad spectrum of high value services/specialties that can be delivered remotely as long as there is access to broadband for internet and access to Manchester/Boston Regional Airport.



- The SNHPC Region has many smaller “knowledge-based” micro businesses and professional, technical and scientific services that have either spun off from an existing company or relocated to the region for life style and no personal income taxes. This is one of the fastest growing segments of the US economy and the technology allows businesses to locate in more “life style” based areas.
- As the region grows, there is potential to expand regional big box/mall retail in Hooksett, downtown Manchester, and in Bedford/Londonderry area (Map 8).

**Map 8
Potential Retail Expansion Sites**



Source: MS&B

- Additionally there is also potential to expand regional distribution in Raymond and Londonderry (near the airport). There are several distribution centers currently in the region: activity near and within the International Free Trade



Zone at the Manchester/Boston Regional Airport and the Wal-Mart distribution center in Raymond.

- Current growth and expansion of the region’s major hospital facilities as well as installation of local clinics and walk-up services in more remote areas is a strong economic driver. Currently, Manchester is host to the majority of health care jobs within the region. This industry sector is projected to continue to grow in the future as the “baby boom” population ages.



Elliot Hospital Expansion, Manchester

- There are also many opportunities in the region to develop outdoor focused destination tourism operations and packages integrating Bed & Breakfast and small restaurants with access to trails for biking, hiking, nature study as well as taking advantage of existing state parks in/adjacent to the region (Bear Brook, Pawtuckaway and Northwood Meadows) as well as other state forest and local conservation lands, lakes and rivers for canoeing/kayaking and fishing.



Extensive trail system in Bear Brook State Park.



Damian's on the River in New Boston.

- The SNHPC Region is also well suited to grow and expand local agricultural economies including establishing farmers markets, community agricultural services to sell products locally, and include other retail services including baked goods, ice cream and milk products, small sandwich shops, creamery, petting zoos, and other destination attractions. See examples below.



Lakeside Farms
Ballston Lake, NY

Began as an orchard and cider mill in 1948, the operation focuses now on retail and includes the following:

- Seasonal retail of apples, fruits and vegetables (sourced locally)
- Store for NY cheeses, maple syrup and other farm products
- Serves breakfast and lunch (a local favorite)
- Small bakery for pies and donuts
- Seasonal garden center
- Pavilion rental for group gatherings



Milky Way Farms
Chester Springs, PA

This 18th century farm located on 103 acres raises 30 milking cows as well as 30 calves and heifers. Milk is sold to Land-o-Lakes Cooperative as well as a small portion is converted into ice cream. The farm has the following features:

- Creamery and retail ice cream store
- Small farm animal "zoo"
- Automated milking machines
- Pumpkin and squash farm stand
- Offer tours to clubs and school groups.
- Field crops grown for local "shareholders" under the Community Supported Agriculture Program.



Retail Store on the Farm Property



Cow ▶

DeLaval Automatic Milking Machine



- Other major strengths of the SNHPC Region include:

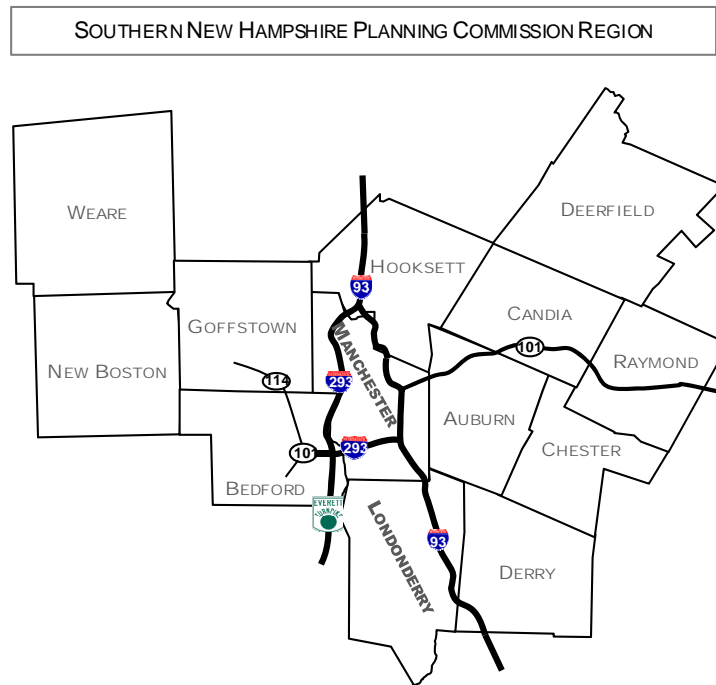
- Excellent regional airport and air access
- Adequate utilities in developed areas





- Strong existing business support services
- Favorable quality of life
- Favorable work force both skilled and non-skilled
- Favorable access to and close proximity to Interstate, Everett Turnpike, and state highways (Map 9) and

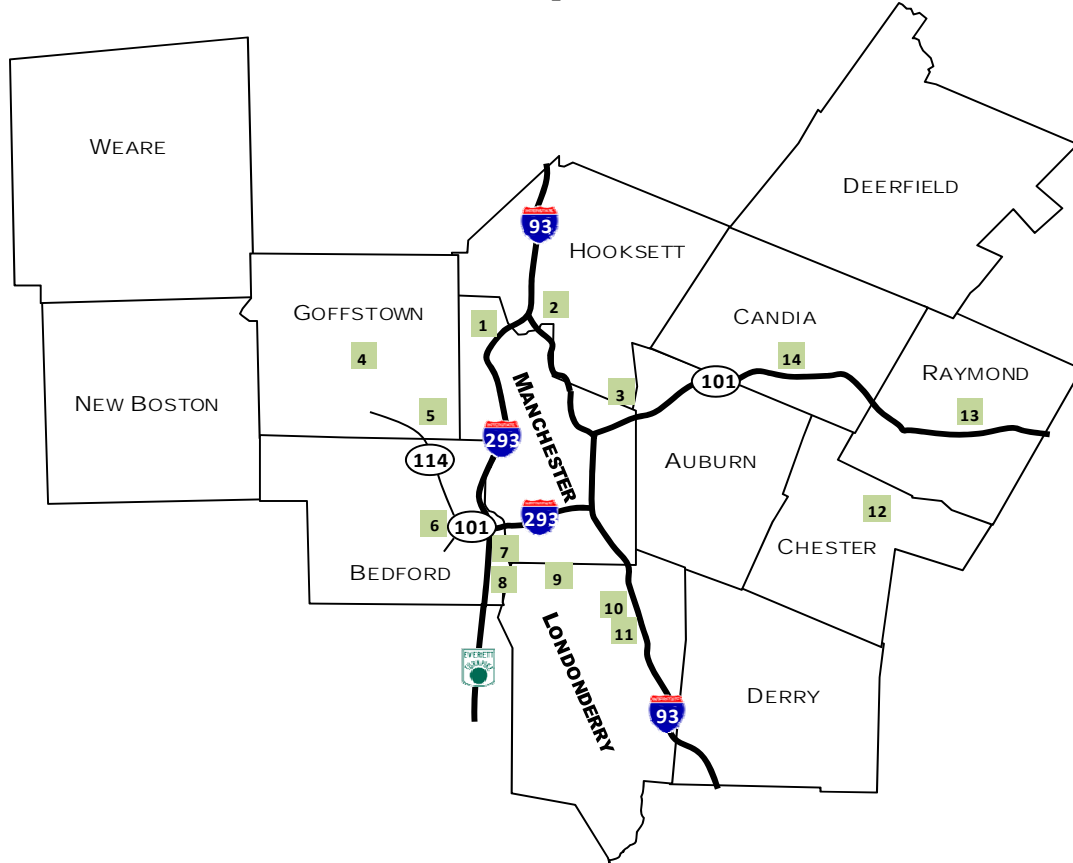
Map 9



- Significant number of ideal development sites, locations and major land parcels available throughout the SNHPC Region that are at different levels of readiness and cost (Figure 21)



**Figure 21
Ideal Development Sites**



Site #	Description	No. Acres	Zoning Options	Approx. Cost/Acre
1	NW Business Park at Hackett Hill	88	Industrial	\$60,225
2	University Heights in Hooksett	39.8	Office, Business Park	\$30,150
3	20 Londonderry Turnpike	25	Industrial	\$22,360
4	136 Mast Road in Goffstown	32	Industrial Flex Space	\$7,800
5	376 Goffstown Back Road	45.7	Industrial	\$59,200
6	SR 101 at SR 114 in Bedford	38	Office, Retail	\$184,200
7	308 South River Road in Bedford	27	Multi-Family, Office and/or Retail	\$87,969
8	Everett Turnpike at New Airport Access	27	Multi-Family, Office and/or Retail	\$111,110
9	1 Akiraway in Londonderry	25.5	Commercial and industrial	\$117,650
10	Clarks Farm Industrial Park	78	Industrial	\$125,000
11	62 Perkins Road	26	Commercial and Residential	\$88,460
12	SR 102 at Raymond Road in Chester	34.5	Commercial and Residential	\$37,780
13	133 Rt. 127 in Raymond	31.5	Industrial, Office and Residential	\$9,200
14	SR 101, Exit 3 in Candia	32	Industrial, Office, Commercial	\$62,500

Source: MS&B



Weaknesses

- While there is strong local interest within the region to expand existing employers and attract additional back office/financial/insurance operations, the service industry as a whole is still recovering from the recent financial meltdown.
- As the economy expands in the future, the supply of business/IT talent will get tight. In addition, the region's skilled labor is aging and engineering staff recruiting can be very competitive with few sources and schools in the state for replacements. This is especially true as there is a strong need to sustain a pool of skilled labors to support the manufacturing industry, especially the manufacturing of parts, components, subassemblies, machinery and equipment. Nashua is the only college with a mechanical program in the state and the program currently only has one graduate.
- The SNHPC Region would embrace potential new headquarters operations, but few communities have placed it on their list of high strategic targets.
- While many companies and industry sectors tract the economy, markets can be volatile and each company maintain a market "edge" to survive.
- As the region grows developable land will become scarce. Communities will need to be cautious as to what land and where additional regional retail and big box operations are placed. This will be true particularly in developing large tracts near limited access highway exits.
- Distribution for the region has traditionally come from states to the south. The region must work to attract warehousing operations. Expanding existing centers and attracting these industries to the Manchester Boston Regional Airport could be a favorable strategy.
- As the health care industry grows and expands, there will be a continuing need to sustain a pool of skilled talent to support this growth and to provide health care services at affordable costs.
- The SNHPC Region lacks an inventory of "shovel ready" building sites and available buildings within the region and in close proximity of interstates and other limited access highways.
- While utilities are adequate in developed areas, many of the region's smaller towns and rural areas do not have these services. Also electrical power costs in general are high in the state and in the region.
- Additionally, there are very few monetary incentives available in New Hampshire and the region to promote and attract economic development. Establishing local



Economic Revitalization Tax Credit Zones (see Volume II, Section J) through NH DRED can provide significant business tax credits.

Target Industry Recommendations for Region and Municipalities

An overall summary of the recommended target industries for the SNHPC Region and each of the 13 municipalities is provided in Table 25 below. Also, included here is a summary of MS&B’s recommendations for implementing a target industry strategy within the SNHPC Region (Figure 24) as well as examples of the target industry recommendations developed for the Town of Candia and the City of Manchester. A complete municipal by municipal target industry report is provided within the Target Industry Analysis study in Volume II of this plan.

As noted in the Target Industry Analysis final report, the identification of a target industry for a specific community does not guarantee success. Each community must assure that the right resources are in place and preferred locations for economic development are properly identified and marketed.

**Table 25
Executive Summary with Recommendations**

Industry/Economic Segment	Auburn	Bedford	Candia	Chester	Deerfield	Derry	Goffstown	Hooksett	Londonderry	Manchester	New Boston	Raymond	Weare
Back Office, Shared Service and Customer Interface	■	■				■	■	■	■	■			
Headquarters Operations		■							■	■			
Manufacturing of Parts, Components and Assemblies	■		■	(1)	(1)	■	■	■	■	■	(1)	■	(1)
Manufacturing of Machinery and Equipment	■		■	(1)	(1)	■	■	■	■	■	(1)	■	(1)
Professional, Technical and Scientific Services	■	■	■	(1)	(1)	■	■	■	■	■	(1)	(1)	(1)
Regional Retail		■					■	■	■	■			
Regional Health Care										■			
Regional Distribution									■			■	
Tourism-Related	■		■	■	■	■	■	■			■	■	■
Agriculture-Related	■		■	■	■	■	■	■			■	■	■

Source: MS&B



Figure 22

Recommendations For Implementing Target Industry Strategy Within the Region

- ▶ **Real Estate:** (1) Inventory and maintain a database on land and buildings available to support each target industry; (2) Develop a certified site program that defines the required level of site readiness by target industry and seeks to build an inventory of sites and buildings that meet the readiness needs.
- ▶ **Labor:** (1) Area HR/workforce organizations need to perform semi-annual critical skills inventory; (2) Develop/implement plan to build inventory of critical skills within the region including career awareness among Middle and High School students, job shadowing, mentoring, internships, training programs, etc.
- ▶ **Energy:** New England has some of the highest energy costs in the U.S. Seek alternative energy sources to provide industry with low cost sources.
- ▶ **Entrepreneurship:** Establish/enhance a program and incubator resource to support the start-up of small companies within the target industry sectors.
- ▶ **Financial and Incentive Resources:** provide access to loans, training and other in-kind resources that support business growth without branding them as “incentives.”
- ▶ **Working Groups:** Establish working group for each target industry that consists of planners, economic development staff, brokers/developers, HR organizations, workforce investment boards, etc. to assure the resources are available to expand and attract each target industry within specific locations in the region.

All of the above recommendations were evaluated and considered by the Economic Development Plan Steering Committee as part of the development of this plan, particularly in setting forth the plan’s core goals, key findings and strategic initiatives. It is also important to note that the recommended target industries and potential industry growth opportunities as well as the list of the region’s resources, strengths and weaknesses were considered and included as part of the SWOT Analysis conducted for this plan. The results and findings of the SWOT Analysis are described in the following section.

Lastly, it is also important to note that the Target Industry Analysis findings and recommendations were presented to the December 10, 2009 Metro Center-NH Leadership Forum held at Saint Anselm College in Goffstown. At the Forum, a key point identified and discussed among the participants is the need to slim down existing planning regulations and red tape if communities want to attract new business growth. In addition, the lack of readily available sites and buildings zoned and permitted for development within the region was identified as a critical issue for the region. Specifically, while it is recognized that the region has a lot of properties and building sites at broad price ranges, very few sites are ready or shovel ready for development.

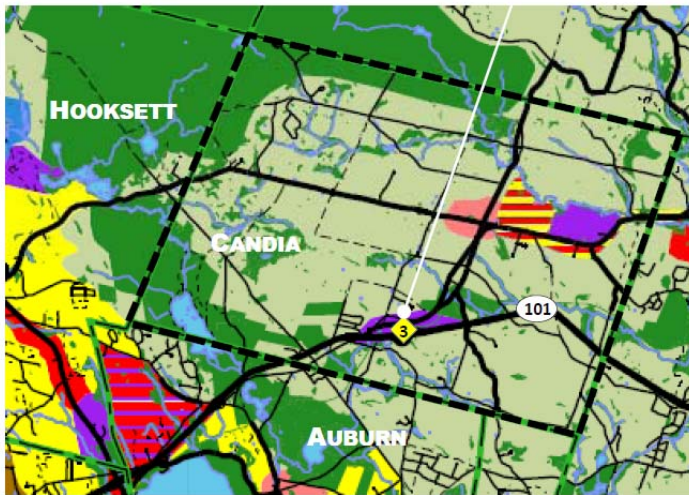


■ TARGET INDUSTRY ANALYSIS BY CITY/TOWN

TOWN OF CANDIA

General Statistics

Population (2008 est.): 4,085	% Adult Population With 4-Yr.+ Degree: 28.9% (U.S. average: 27%)
Median Age: 37.6 (U.S. average: 35.3)	% Population Over 65: 7.2% (U.S. average: 12.4%)
Population Density: 135 residents/sq. mi.	Per Capita Income (2000 Census): \$25,267 (U.S. average: \$21,587)
% Residents Commute to Other Community: 89%	Direct Access to Interstate/Limited Access Highway: Yes



- Commercial
- Conservation
- High Residential
- Industrial
- Medium Residential
- Mixed Use Commercial/Industrial
- Mixed Use Commercial/Residential
- Mixed Use Commercial/Residential/Public
- Public
- Rural Residential
- Town Center
- Village Center



■ TARGET INDUSTRY ANALYSIS BY CITY/TOWN

TOWN OF CANDIA (CONT'D)

Overall Observations and Comments on Target Industries

The town is located along Route 101 east of Manchester and in a rural area with low population density. Nearly 90% of the town working residents leave to work in outlying towns. Candia has one exit off of Route 101 around which is zoned industrial. There are several manufacturing firms in the tow along with a number of business support services (trucking, equipment rental, construction, etc.).

Due to its location with access to Route 101, the town should continue to attract small and mid-size manufacturers, small professional/technical services firms and additional agricultural and tourism destinations.

Powertronics manufacturers different types of power analyzers



Charmingfare Farm is an innovative working farm with an extensive zoo of farm and North American animals.



CURRENT EMPLOYERS BY ECONOMIC LEVEL AND INDUSTRY WITH NOTATION OF POTENTIAL TARGET INDUSTRIES

Economic Sector	Candia	Existing Employers
Level 1 - Primary Industries		
Agriculture/Forestry	■	Charmingfare Farm (farm + tourist destination)
State/Federal Government		
Manufacturing	■	High Speed Technologies, Powertronics,
Colleges/University/Training		
Back Office/Shared Services		
Prof./Tech/Scien. Services	■	Atlantic Bridge & Engineering,
Regional Healthcare		
Regional Retail		
Regional Distribution		
Tourism-Related	■	Candia Golf Links (regional),
Headquarters		
Level 2 – Business Support Services	Severino Trucking, American Oil Burner Services, Sunbelt Rentals, communications, farm equipment retailers, Candia Trailers, Blastech (construction), Hydro Grass, cleaning services	
Level 3 - Consumer Services	Education services and local government.	

■ Existing Industry ■ Potential Opportunities

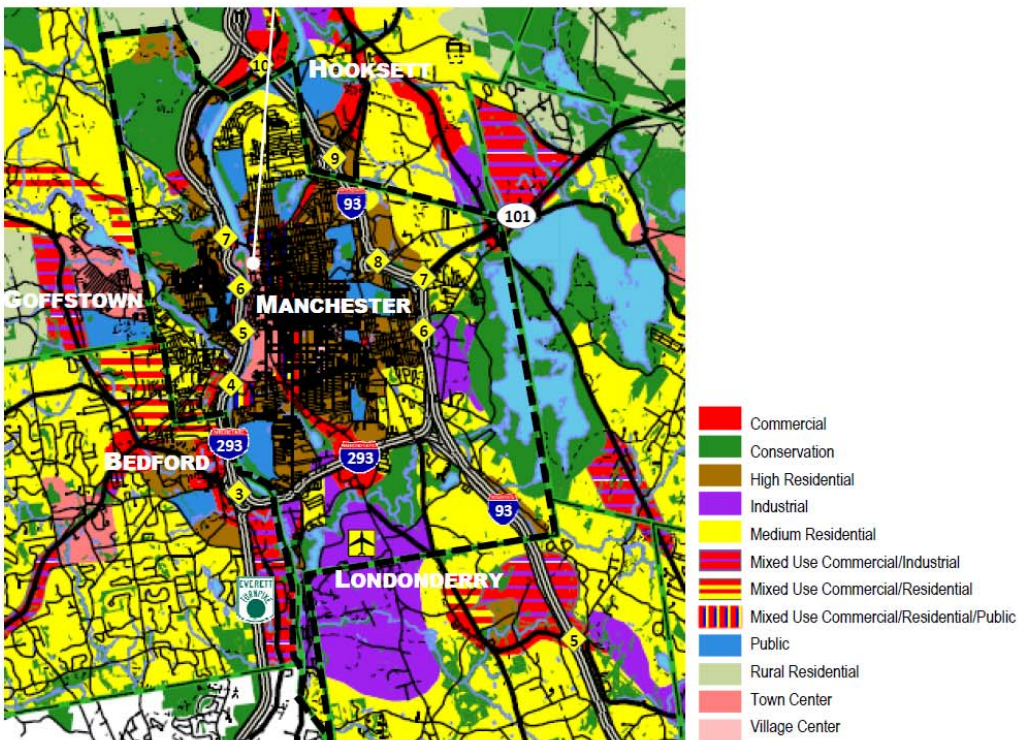


■ TARGET INDUSTRY ANALYSIS BY CITY/TOWN

CITY OF MANCHESTER

General Statistics

Population (2008 est.): 108,150	% Adult Population With 4-Yr.+ Degree: 22.3% (U.S. average: 27%)
Median Age: 34.9 (U.S. average: 35.3)	% Population Over 65: 12.9% (U.S. average: 12.4%)
Population Density: 3,290 residents/sq. mi.	Per Capita Income (2000 Census): \$21,244 (U.S. average: \$21,587)
% Residents Commute to Other Community: 48%	Direct Access to Interstate/Limited Access Highway: Yes





■ TARGET INDUSTRY ANALYSIS BY CITY/TOWN

CITY OF MANCHESTER (CONT'D)

Overall Observations and Comments on Target Industries

The City of Manchester has been the focal point of the region’s economic since the early 19th century. It continues to be a strong destination for regional employment with its manufacturing, healthcare, education and service industry base. In addition, the successful, multi-phased approach in the development of the former Amoskeag Manufacturing complex has brought substantial new life into the local economy. The key challenge with this project is that it was originally built for a pedestrian workforce that is now mainly commuters needing substantial parking. The ultimate success of this complex may be riding on how well this problem is addressed.

The target opportunities for Manchester will depend on the availability of sites and buildings as well as skilled labor and include additional components and assemblies manufacturing, some back office and selected headquarters operations, professional and technical consulting services (many of which will reside in the Amoskeag complex) as well as regional healthcare, niche shopping and event-driven tourism.



Velcro USA



Osram Sylvania outdoor light



Elliot Hospital



Vibracoustic Parts

CURRENT EMPLOYERS BY ECONOMIC LEVEL AND INDUSTRY WITH NOTATION OF POTENTIAL TARGET INDUSTRIES

Economic Sector	Manchester	Existing Employers
Level 1 - Primary Industries		
Agriculture/Forestry		
State/Federal Government	■	Post Office and regional offices
Manufacturing	■	Osram Sylvania, Vibracoustic, Velcro USA, Summit Dispensing Systems, Sanmina-Sci Corp., Ladesco, etc.
Colleges/University/Training	■	Hesser, UNH-Manchester, Manchester Com. College, So. NH University, etc.
Back Office/Shared Services		
Prof./Tech/Scien. Services	■	Significant presence of law, accounting, engineering, software, etc. firms
Regional Healthcare	■	Elliot Health Sys., Catholic Medical Center., U.S. Veterans Medical Center., Dartmouth Hitchcock Medical Center., etc.
Regional Retail	■	Downtown shopping and regional auto sales
Regional Distribution	■	Multiple operations near Manchester-Boston Regional Airport
Tourism-Related	■	Multiple destinations (museums, entertainment, sports, etc.)
Headquarters	■	Regional headquarters of utilities and banking operations
Level 2 – Business Support Services		Construction services, media, utilities, transportation services (air/trucking/rail)
Level 3 - Consumer Services		Full complement of consumer services and local government.

■ Existing Industry ■ Potential Opportunities



SWOT Analysis

Another important part of an economic development plan is a SWOT Analysis which takes stock of the region and a municipality's strengths, weaknesses, opportunities and threats for economic growth. Dennis Delay, a local economist was retained by the SNHPC to conduct the SWOT Analysis included in this plan (a complete copy of the Regional SWOT Analysis Report is contained within Volume II of this plan).

A SWOT (Strength, Weakness, Opportunity, and Threat) Analysis is an important analytical and strategic planning tool often used in a participatory planning approach. Originally the method was developed for strategic planning for marketing purposes. The outputs of a SWOT Analysis are structured basic information about an area, a common understanding of reality, and a set of common strategic options.

The main outputs from a SWOT Analysis include: (1) indicators of the *internal situation* described by existing strengths and weaknesses; and (2) indicators of the *external environment* described by existing threats and unexplored opportunities. The SWOT Analysis results in goal formulation, a professional development strategy or Vision Statement, and a priority of actions to be undertaken on a short, medium and long term basis to attain the development goal.

A *Strength* is defined as any internal asset of know-how, technology, motivation and entrepreneurial spirit, finance, business links, etc. which can help to exploit opportunities and to address threats. A *Weakness* is an internal condition or any internal deficit which endangers the competitive position of a region or hampers the exploitation of opportunities. An *Opportunity* is any external circumstance or characteristic which favors the demand of the region or where the region is enjoying a competitive advantage. A *Threat* is a challenge of an unfavorable trend or of any external circumstance which will unfavorably influence the position of the region.

The SWOT Analysis conducted for the SNHPC Region was divided into two work sessions held for the public, municipal officials, and the Regional Economic Development Plan Steering Committee. During the first SWOT session held on November 16, 2009, a brain storming exercise and small group discussions were facilitated by the consultant and SNHPC staff. Participants identified each municipality's current economic development performance (strengths and weaknesses) and factors in the external environment (opportunities and threats) that might affect the municipality's future.

Representatives on the Regional Economic Development Plan Steering Committee and public officials from each of the 13 municipalities were also asked prior to the work session to complete a SWOT template for their community and to bring that with them to the SWOT sessions. The SWOT template included an operational definition of each strength, weakness, opportunity and threat, and a set of suggested questions for each SWOT area (see following example).



SWOT Analysis Template

State the Town you are assessing here Bedford

(Many criteria can apply to more than one quadrant. Identify criteria appropriate to your own SWOT situation.)

<p>criteria examples</p> <p>What makes us stand out from competitors? What advantages do we have over other businesses/regions? What are the major sources of our revenue and profit? What is our market share of our various product lines? Do we have strong brands? Is the marketing/advertising effective? What is our major strength as a region? Do we have a pool of skilled employees? Is the morale of the businesses and employees high? Are there rewards in place to create an atmosphere conducive to excellence? What is the cost of capital, land, labor? Do we harness information technology effectively?</p>	<p>Strengths:</p> <ol style="list-style-type: none"> 1. Location – Bedford’s location is optimal due to its access to major highways (Everett Turnpike, I-293, I-93, Rt’s. 3 & 101) the airport and major population centers like Boston & Manchester. 2. School System / Education – Bedford’s students consistently score highly on state wide evaluations making us highly desirable. Also nearly 50% of our adult population hold at least a bachelors degree. 3. Quality of Life – Bedford offers a desirable small town atmosphere, family orientation, recreation programs, an attractive setting and accessibility to diverse cultural opportunities. 4. Performance Zone – This mixed use district with ultimate flexibility stands ready for development. 	<p>Weaknesses</p> <ol style="list-style-type: none"> 1. Limited Undeveloped Land – Bedford only has a total of 300 acres of commercially zones land, much of which is fragmented or of limited use due to such things as wetlands. 2. Public Transportation – Bedford has only limited bus transportation. 	<p>criteria examples</p> <p><u>What do our residents complain about?</u> <u>What are the unmet needs of our businesses?</u> <u>Which are the weak brands?</u> <u>Is the marketing/advertising effective?</u> <u>Is the region not focused?</u> <u>Is the region able to attract talent?</u> <u>What are our biggest expenditures?</u> <u>Have we been able to bring new ideas and products to the market place?</u> <u>Do businesses have the tools to succeed?</u> <u>Do businesses have faith in government?</u> <u>Are the governance standards high enough?</u> <u>Are we losing out to competitors on the technology front?</u></p>
<p>criteria examples</p> <p>Are there emerging trends that fit with our region’s strengths? What are the interesting trends? Is our region positioned to take on those trends? Is there a product/service area that others have not yet covered? What favorable circumstances are we facing? Are we entering new markets? Are we advanced in technology?</p>	<p>Opportunities</p> <ol style="list-style-type: none"> 1. Redevelopment – Bedford has several prime, high profile properties that are ready for redevelopment and reinvestment. 2. Airport & Rail Access – Bedford will be directly connected to the Manchester-Boston Regional Airport with the soon to open Airport Access Road. Bedford also has over 1.5 miles of frontage on an active freight line with the possibility of adding passenger rail. 3. Business Friendly – Bedford has embarked on a campaign to be welcoming and encouraging to business expansion and new development. 4. Professional Staff – Bedford’s highly professional staff is able to work with all scales of development to expedite and facilitate the development process. 	<p>Threats</p> <ol style="list-style-type: none"> 1. Regional Competition – Bedford will find it increasingly difficult to compete with surrounding communities that have a greater amount of land for development. 	<p>criteria examples</p> <p><u>Are our competitors becoming stronger?</u> <u>Are there emerging trends that amplify our weaknesses?</u> <u>Do we see other external threats to the region’s success?</u> <u>Internally, do we have financial, development, or other problems?</u> <u>What obstacles do we face?</u> <u>What is our competition doing?</u> <u>Are the required specifications for our products or services changing?</u> <u>Is changing technology threatening our position?</u> <u>What policies are local and national lawmakers backing? Do they affect our region?</u></p>



After the group brainstorming exercise was held, each participant was asked to prioritize each issue and idea raised during the brainstorm as to whether the issue or idea was something that **MUST** be addressed immediately; something that can be addressed now; something that should be researched further; and something that should be planned for the future. SWOT ideas that were marked as “must be addressed immediately” and “can be handled now” were given priority for the next phase of the SWOT Analysis.

The second SWOT work session was held on January 25, 2010. At this work session participants moved from the initial SWOT analysis results to strategies by focusing on prioritization and plan development. This was accomplished by pairing opportunities with strengths and threats with weaknesses, etc. Participants were asked to identify a specific goal, a strategy for reaching that goal, and policies to achieve the goals and strategies. Operational strategies were also developed with a concentration on costs, quality/reliability, flexibility and availability.

SWOT Results

The outputs from the SWOT Analysis conducted for this plan resulted in the formulation of the overall Vision/Economic Development Strategy, the identification of Core Goals and Key Actions, and the recommended strategic economic development initiatives for the SNHPC Region. These products are identified and described in the following **Section Three: Shared Regional Vision** and **Section Four: Strategic Initiatives** of this plan. The following tables identify the key issue areas and ideas resulting from the brainstorming exercise at the first SWOT work session. These issue areas and ideas were then ranked by the workshop participants.

Table 26

Strengths	
Highway System	National Political Clout
Politics are Clean	Manageable Size of NH
Airport	Location
Inexpensive Real Estate	Highly Educated Workforce
Diverse Economy	Utility Systems
Regional Retail	Quality of Life
School/College System	Cultural Amenities
Availability of Medical Care	Strong Volunteer/Work Ethic
Availability Low Cost/Low Skilled Workforce	Water/Land Availability
No Income/Sales Tax	University/Research Capabilities

Source: SNHPC



Table 27

Weaknesses	
High Housing Costs	Lower Salaries
Northeast Climate	Lack of Affordable Housing
Lack of Economic Development Funding	Inability to Make Long Term Decisions
High Business Taxes	Politics Hard, Localized
Water and Wastewater Infrastructure	Diversity of Tax Base (Lack thereof)
Lack of Public Transit	Losing Educated Workers
Lack of Rail and Freight	Tax Structure
Energy Cost	No Regional Convention Center

Source: SNHPC

Table 28

Opportunities	
Ahead in Economic Transition - region has been able to transition faster than other industrial parts of the nation	No Sales/Income Tax
Engineering/Technical accessible from 495 Belt	Accessible Government
Educated Labor Pool	Expansion of Passenger Rail/Freight Rail
Regional Convention Center	Alternative Energy
25+/- Workforce	Creative Innovation to Promote Quality of Life
Strengthen Relationship with Health Care Providers	Take Advantage of Infrastructure Opportunities in Region
Regional Perspective on Economic Development	Connecting Young Workforce with Opportunities

Source: SNHPC



Table 29

Threats	
Lack of High Speed Communication Ability	Energy Costs
Property Taxes	Loss of Young, Educated Workforce
Aging Workforce	Lack of Identification and Brand for Region
Lack of Younger Immigration	Housing Costs/Prices
Competition from Sunbelt	"Retirement State" Perception
Retention Rate of College Grads and Young Workforce	Competition from other regions
Lack of Leadership	Lack of Tax Incentives

Source: SNHPC

Utilizing the above identified list of strengths, weaknesses, opportunities and threats, participants were then asked to place colored dots next to the issue area or idea which they believed requires immediate attention. The results of this ranking process are identified in the following matrix (Table 30) and on the following pages.



Table 30
SWOT Matrix 1

<u>Strength</u>	<u>Weakness</u>	<u>Opportunity</u>	<u>Threat</u>
Airport 10	Losing Educated Workers 8	Regional Perspective on Economic Development 10	Retention Rate of College Grads and Young Workforce 8
University/Research Capabilities 3	Lack of Public Transit 6	Expansion of Passenger Rail/Freight Rail 5	Property Taxes 8
Manageable Size of NH 3	Lack of Economic Development Funding 3	Ahead in Economic Transition - region has been able to transition faster than other industrial parts of the nation 2	Lack of Tax Incentives 6
Highway System 2	Tax Structure 3	Connecting Young Workforce with Opportunities 3	Lack of High Speed Communication Ability 5
Location 2	Water and Wastewater Infrastructure 2	Accessible Government 2	Loss of Young, Educated Workforce 3

Source: SNHPC

Highest Ranked Strengths:

- Manchester-Boston Regional Airport
- University/Research Capabilities
- Manageable Size of New Hampshire
- Highway System
- Location

Highest Ranked Weaknesses:

- Losing Educated Workforce
- Lack of Public Transit
- Lack of Economic Development Funding
- Tax Structure
- Water and Wastewater Infrastructure

Highest Ranked Opportunities:

- Regional Perspective on Economic Development
- Expansion of Passenger Rail/Freight
- Ahead of Economic Transition – Region has been able to transition faster then other parts of country
- Connecting Young Workforce with Opportunities
- Accessible Government



Highest Ranked Threats:

- **Retention Rate of College Graduates and Young Workforce**
- **Property Taxes**
- **Lack of Tax Incentives**
- **Lack of High Speed Communication Ability**
- **Loss of Young, Educated Workforce**

At the second SWOT session, the matrix and the highest ranked SWOT issue areas and ideas were presented to the attendees. The purpose of the second SWOT session involved asking the workshop participants to utilize this information to develop strategies by turning negatives into positives. The idea being that strengths need to be maintained built upon or leveraged. Weaknesses need to be remediated or stopped. Opportunities need to be prioritized and optimized. Threats need to be countered or minimized.

To accomplish this, the workshop participants were divided into four groups, each charged with creating an action plan to address each of the four areas. The groups were asked to match the highest ranked SWOT areas according to the following pairings:

- **S-O Strategies:** Strengths & Opportunities building on success and good practices
- **S-T Strategies:** Strengths & Threats using success to minimize threats
- **W-O Strategies:** Weaknesses & Opportunities using opportunities to address weaknesses
- **W-T Strategies:** Weaknesses & Threat using defensive actions vs. susceptible areas

As a result of this work, the following table (Table 31) was generated as well as the following identified Group Strategies. These Group Strategies were then evaluated and utilized by the Regional Economic Development Steering Committee in the development of the overall Vision/Economic Development Strategy as well as the Core Goals and Key Actions, and the strategic initiatives for this plan.



**Table 31
SWOT Matrix 2**

<u>Matching SWOT areas 11/16/09 regional exercise with top regional economic development issues</u> Things that MUST be addressed now Things that can be Handled now	<u>Strengths</u> Airport University/Research Capabilities Manageable Size of NH Highway System Location	<u>Weaknesses</u> Losing Educated Workers Lack of Public Transit Lack of Economic Development Funding Tax Structure Water and Wastewater Infrastructure
<u>Opportunities</u> Regional Perspective on Economic Development Expansion of Passenger Rail/Freight Rail Ahead in Economic Transition Connecting Young Workforce with Opportunities Accessible Government	S-O STRATEGIES	
	<input type="checkbox"/> Build International Customs facilities at the airport to improve attractiveness to low cost carriers, and increase industrial development	<input type="checkbox"/> Improve public bus access to Manchester Airport
	<input type="checkbox"/> Highway improvements like exit 4, exit 6/7, CTAP and I-93 widening	<input type="checkbox"/> Have Londonderry North bus connect with other towns
	<input type="checkbox"/> Increase business to college communication in the region	<input type="checkbox"/> Promote nightlife for younger workers.
	Link Airport to commute rail	<input type="checkbox"/> Amend tax structure to encourage sewer/water expansion.
<u>Threats</u> Retention Rate of College Grads Property Taxes Lack of Tax Incentives Lack of High Speed Communication Ability Loss of Young, Educated Workforce	S-T STRATEGIES	
	<input type="checkbox"/> Create statewide broadband network	<input type="checkbox"/> Forgiveness policy for student loans
	<input type="checkbox"/> Promote young" lifestyles; shopping entertainment, attractions	<input type="checkbox"/> Promote high density housing to improve affordability and maximize infrastructure
	<input type="checkbox"/> Partner with high tech council to expand business and draw in younger workers	<input type="checkbox"/> Apply the FIRST" program to biotech/biomed research.
		<input type="checkbox"/> Examine resource of old copper in buildings

Source: SNHPC

Group Strategies developed for: Strengths and Opportunities

- **Build International Customs facilities at the airport to improve attractiveness to low cost carriers, and increase industrial development.**
- **Complete highway improvements in region: accelerate I-93 widening, fund Exit 4A in Derry, Exits 6/7 in Manchester, and Pettengill Road improvements in Londonderry.**
- **Increase business to college communication in the region.**
- **Link Manchester Boston Regional Airport to commuter rail.**



Group Strategies developed for: Strengths and Threats

- Create statewide broadband network.
- Promote “young” lifestyles; shopping entertainment, attractions.
- Partner with High Tech Council to expand business and draw in younger workers.

Group Strategies developed for: Weakness and Opportunity

- Improve public bus access to Manchester Airport.
- Have Londonderry North bus connect with other towns.
- Promote nightlife for younger workers.
- Amend tax structure to encourage sewer/water expansion.

Group Strategies developed for: Weakness and Threats:

- Implement a forgiveness policy for college student loans – student loans would be reduced if that student promised to seek employment in the region, or work in the region for a specified amount of time after college.
- Promote high density housing to improve affordability/maximize infrastructure.
- Apply the “FIRST” program²⁹ to biotech/biomed research.
- Examine resource of old copper in buildings.³⁰

²⁹ FIRST is an acronym, which means "For Inspiration and Recognition of Science and Technology." The program inspires K-12 students to pursue careers in science and engineering.

³⁰ With the move to cellphones and other wireless technology, there is probably significant unused copper wiring in residential and commercial buildings.



Section Three: Shared Regional Vision

The Region's Shared Vision/Economic Development Strategy

After considering the SNHPC Region's Economic Development Issues, Challenges and Opportunities, the Target Industry Analysis, and participating in the SWOT Analysis, the Regional Economic Development Plan Steering Committee adopted the following recommended **Vision Statement** and **Economic Development Strategy** for the region.

This shared vision statement and strategy forms the foundation of this Regional Economic Development Plan and as such should be identified and included as a **central theme** in the Metro Center-NH's strategic planning as well as applicable region-wide plans and projects developed by the Southern New Hampshire Planning Commission.

It is recommended that the Vision Statement and Economic Development Strategy be updated or at least evaluated on an annual basis by the SNHPC working in partnership with Metro Center-NH, and the region's municipalities. This is important because the vision and economic development strategy provides the region with a framework for carrying out an economic development agenda and focus for current and future economic development efforts.

Vision/Economic Development Strategy

The Southern New Hampshire Planning Commission, the Manchester Chamber of Commerce, the City of Manchester, and all twelve municipalities surrounding Manchester (the towns of Auburn, Bedford, Candia, Chester, Deerfield, Derry, Goffstown, Hooksett, Londonderry, New Boston, Raymond and Weare) agree to continue to work together to foster regional collaboration and economic growth through the Metro Center-NH partnership.

At the **regional scale** this partnership shall seek economic prosperity through increased planning and funding for economic development, transportation/public infrastructure improvements, and public and private investments in community development, job growth, entrepreneurship, education, energy, smart growth, affordable housing, and the region's youth.



At the **municipal scale** this partnership shall support balanced growth and development which broadens the local tax base and respects and strengthens quality of life, community character, and the environment.

In order to implement this Vision/Economic Development Strategy:

- (1) **Metro Center-NH** should continue to function as a partnership of public and private entities and stakeholders working together to promote the economic prosperity of the region and to market and brand the region to the outside world
- (2) **The Southern New Hampshire Planning Commission** should serve in the capacity of carrying out comprehensive and strategic economic development planning for the region by working in partnership with the region’s municipalities, Metro Center-NH, and existing economic development organizations.
- (3) **A continuous source of funding** must be established through grants and private investments in regional economic development to support these roles.
- (4) This **Shared Regional Vision and Economic Development Strategy** should be updated through continuous strategic planning and regional dialogue.
- (5) **The Core Goals and Key Actions** identified in this plan are an important part of the shared vision/ economic development strategy. It is important that these core goals and key actions be incorporated into existing programs and that these goals and actions are utilized to guide the direction and implementation of the region’s future economic development programs and priorities.
- (6) Finally and most importantly, it is critical that the recommended **Strategic Initiatives** of this plan (see Section Four) be carried out not only to demonstrate commitment to and implementation of the Core Goals and Key Actions of the plan, but to bring about enhanced economic growth and development for the region. Many of the recommended initiatives are important Catalytic Projects³¹ that will have significant benefits not only for the SNHPC Region, but statewide. These strategic initiatives in order of ranked priority by the Steering Committee include:
 - a. **Regional Certified Site Program** – This is a new program designed to enhance the marketing of locally designated sites for development purposes.
 - b. **Expand CTAP Funding and Services to Municipalities** – The Community Technical Assistance Program (CTAP) is an existing NH DOT program created

³¹ A catalytic project is a project that has the potential for immediate impact and success by generating interest in the project as well as generating support and energy for other additional related projects.



to offer planning services, tools and techniques to 26 municipalities identified to be directly impacted by future growth related to the widening of I-93.

- c. Best Planning Practices/Innovative Regional Model Ordinances** – The proposed Best Planning Practices Model Ordinances contained within this plan are part of the Certified Site Program. These model ordinances would also enable municipal planning boards to establish expedited review procedures and provide for enhanced development assurances for approved certified sites.
- d. Regional Incubator Development** – As part of this plan a business incubator study was conducted to introduce the various types of business incubators and their benefits as well as to identify and establish a new creative business accelerator (CBA) program for the region. This new CBA would be established through collaboration with the region’s municipalities and existing colleges and universities, including the existing Amoskeag Business Incubator in the City of Manchester.
- e. Comprehensive Economic Development Strategy (CEDS)** – A CEDS is a federally approved comprehensive economic development planning process designed to bring together the public and private sectors in the creation of an economic roadmap to diversify and strengthen regional economies. A Planning Organization is typically charged and funded by the U.S. Department of Commerce, Economic Development Administration (EDA) to develop a CEDS. The Public Works and Economic Development Act of 1965, as amended, requires a CEDS in order that municipalities can apply for public works related funding through the EDA.
- f. Expand Local and Regional Brownfields Programs** – SNHPC through EPA funded Brownfields Grants has established a successful Brownfields Program for the region. This initiative would continue to expand this existing program through additional EPA grants and to work with the region’s municipalities and existing regional economic development organizations by moving sites from assessment studies to clean up and ultimately to redevelopment.
- g. Conduct a College/University Economic Impact Study** – The Metro Center-NH Steering Committee has been approached and has endorsed the need for a comprehensive economic impact study that measures the impact all the region’s colleges/universities provide to the region. Recently, an economic impact study was conducted for UNH Manchester and it determined that this program contributes more than \$65 million every year to the Greater Manchester area and the state. This initiative would conduct a similar study, but for all colleges, universities and professional schools within the region.
- h. Develop a Comprehensive Region-wide Sustainability Plan/Energy Plan** – There is currently no comprehensive or long range plan for the region which



addresses sustainable growth patterns and renewable and alternative forms of energy and energy conservation.

- i. Conduct a Feasibility Study in Establishing a Regional Public Transit System/Authority** – In order to bring about systematic public transit services to outlying communities and other rural areas within the region, a regional transit authority will be needed. This study would explore these options and evaluate the region’s overall transit needs as NH DOT-TIP funded project.
- j. Expand I-93 Commuter Bus Service Throughout the Region** – This initiative would involve implementing and expanding intercity and commuter bus services within the region and the Manchester Boston Regional Airport through the NH DOT I-93 Commuter Bus Service Project.
- k. NH Capitol Corridor Passenger Rail** – Restoring passenger rail service through the NH Capitol Corridor passenger rail project linking Concord, Manchester, the Airport and Nashua with Boston is recognized as an important economic development initiative for the SNHPC Region.
- l. Develop a Water/Wastewater Plan for the Region** – There has never been a comprehensive and long-range water and sewer plan for the SNHPC Region that identifies growth and capacity needs as well as system improvements and funding needs. Such a study could be undertaken with federal, state and municipal support and participation.

Core Goals and Key Actions

Building upon the SWOT Analysis results and the Vision/Economic Development Strategy for the region, the following Core Goals and Key Actions were developed and endorsed by the Steering Committee for inclusion in the Regional Economic Development Plan.

The Core Goals and Key Actions help to define the region’s economic agenda and are used in the next section of the plan to identify and prioritize the Region’s most important economic development projects and strategic initiatives.

It is important as the issues and needs of the region change that the Core Goals and Key Actions in the Regional Economic Development Plan be updated. The Core Goals and Key Actions of this plan currently address the following topic areas:

- A. Transportation**
- B. Infrastructure**
- C. Land Use**



- D. Labor/Workforce Development**
- E. Education**
- F. Energy**
- G. Economic Development**
- H. Entrepreneurship**
- I. Real Estate Development**
- J. Funding Resources**

In support of the Core Goals and Key Actions developed for this plan, the Regional Economic Development Steering Committee recognized that:

- There is no guarantee that Southern New Hampshire or the Metro Center-NH Region will attract new business, or keep and grow existing firms. To maintain the region's economic prosperity, attract new business and keep and grow existing firms, the region must plan and take steps to remain competitive. This means the region must improve its identity, continue regional dialogues, maintain a regional perspective among all the region's municipalities, and seek and obtain sustainable funding for continuous economic development planning.
- The region's economic health and prosperity is directly linked to job creation which in turn is heavily dependent upon public and private investments and infrastructure improvements, including water/sewer, communications (broadband) and transportation (air, bus, rail and highway). To improve infrastructure, the region must continue to attract private capital and identify and obtain necessary public funding for facility improvements and system upgrades.
- In the new emerging global economy, many of today's most prominent companies can locate anywhere around the world. This means that today's businesses can choose those communities that they wish to locate in communities with a high quality of life, good schools, efficient transportation, affordable housing, supportive governmental policies, and an educated and skilled workforce will have a higher preference.
- The Southern New Hampshire Planning Commission Region has the building blocks to create a strong national and globally oriented and sustainable economic agenda that contributes to the economic health of the region. This economic agenda must also respect the region's natural environment and existing quality of life – which are the main building blocks which our economic growth depends.
- Participating and supporting the Manchester Chamber of Commerce and Southern NH Planning Commission's Metro Center-NH partnership is a critical step in developing the region's identity and economic agenda. Metropolitan regions are emerging as the basis for both national and global competition among businesses and site selectors. Around the nation and the world, regions are pooling their



public and private talent and resources to pursue shared economic goals, and Metro Center-NH is well positioned to accomplish this for the SNHPC region.

- Many people living in the SNHPC Region have good jobs and earn good incomes. Healthy, educated, vigorous and engaged citizens including youth are vital to a successful economy. We all share the goal of building an economy that provides good jobs with good wages. We all want opportunities to learn skills, bring them into the marketplace and be rewarded for our efforts.
- Retaining the region’s college graduates and creating opportunities for good jobs and wages requires continuous support of the region’s educational systems, schools, universities and colleges. This means we must embrace necessary funding and support expanding research capabilities, increasing opportunities for internships, job placement, and career development as well as promoting young “lifestyles”, shopping, entertainment and other attractions in our communities.
- Jobs are created by businesses, and businesses must have shovel-ready sites and energy efficient buildings to locate in. Good jobs and incomes come from competitive and prosperous enterprises. We want our region to be a good place for people to start a business. While business incubators and business accelerator programs can help, businesses also need governments that are accessible and have in place public policies and regulations that are clear and effective, and are constantly updated to create a good business climate.
- The Metro Center-NH region has vibrant and attractive communities. Over the past few years, municipalities have been focusing development and employment growth within more dense, compact and walkable municipal centers and villages. This smart growth will enable employees to commute to work through a variety of modes, and will help guide the region’s transportation investments. As the region’s economy grows, smart growth will also provide additional opportunities to further enhance our towns and communities.
- The SNHPC Region has a healthy and livable environment and a good quality of life which in turn makes it a good place to live and raise a family. Maintaining these qualities is critical to ensuring a healthy and vibrant economy. Within our region, we need diverse and affordable housing choices, effective and accessible transportation systems, good schools, as well as public parks. A healthy environment with clean air and water is at the core of the Metro Center-NH lifestyle. We also need strong communities that offer resident’s opportunities for recreation and leisure, arts and culture, and the preservation of our cultural resources.



Transportation

Goal A.1: Transportation – Airport

Strengthen and expand the aviation capacity of Manchester-Boston Regional Airport as well as the role of the Airport as a multi-modal transportation facility and an economic driver for local and regional business growth.

<p>Issues Addressed</p> <ul style="list-style-type: none"> • Airport Expansion • International Exposure • Multi-Modal Connections <p>Responsible Leads:</p> <ul style="list-style-type: none"> • Manchester-Boston Regional Airport • SNHPC – Metropolitan Planning Organization <p>Parties Involved:</p> <ul style="list-style-type: none"> • NH DOT/FHA • City of Manchester & Town of Londonderry • Commercial Operators <p>Funding:</p> <ul style="list-style-type: none"> • US DOT/FHA • Transportation Enhancement/CMAQ • Federal Transit • FAA/Airport Improvement Program 	<p>Key Actions:</p> <p>A.1.1 Continue to foster strategic transportation partnerships with the Manchester-Boston Regional Airport, Metro Center-NH, SNHPC, and surrounding municipalities.</p> <p>A.1.2 Enhance overall transportation access, mobility and connectivity to and from the Airport through highway, public transit, bus, shuttle services, rail, pedestrian, and bicycle improvements.</p> <p>A.1.3 Coordinate master plans and the NH DOT – Transportation Improvement Program (TIP) to enhance the role of the Airport as a multi-modal transportation facility for the region.</p> <p>A.1.4 Conduct planning studies to link public transit and other alternative modes of transportation with the future provision of passenger rail service to the Airport.</p> <p>A.1.5 Seek the provision of existing intercity and commuter bus service connections to the Airport.</p> <p>A.1.6 Build International Customs Facility at the Airport to foster more international flights.</p> <p>A.1.7 Attract more low cost carriers like JetBlue to Manchester-Boston Regional Airport.</p> <p>A.1.8 Coordinate with City of Manchester and surrounding municipalities, opportunities to expand industrial zoning around the airport and to further attract airport related development.</p>
---	--



Goal A.2: Transportation – Highway/Alternative Modes

Place a high priority and focus on highway improvements and other alternative modes of transportation that will enhance and strengthen the region’s accessibility, mobility and economic growth.

<p>Issues Addressed:</p> <ul style="list-style-type: none"> • Highway Capacity • Safety and Access • Mobility <p>Responsible Leads:</p> <ul style="list-style-type: none"> • SNHPC – Metropolitan Planning Organization • NH DOT - TIP <p>Parties Involved:</p> <ul style="list-style-type: none"> • SNHPC - TAC • Region’s Municipalities • NH DOT <p>Funding:</p> <ul style="list-style-type: none"> • US DOT/FHA – Surface Transportation Funds • NH DOT - TIP • Enhancement/CMAQ • U.S. Department of Commerce/Economic Development Administration 	<p>Key Actions:</p> <p>A.2.1 Continue to participate and support the development and implementation of the NH DOT – TIP process to plan and fund highway and other alternative modes of transportation for the region.</p> <p>A.2.2 Coordinate the NH DOT – TIP process with the Region’s Economic Development Strategy and Agenda.</p> <p>A.2.3 Identify and work with all levels of government to seek alternative sources of transportation funding for the region and the state’s TIP.</p> <p>A.2.4 Accelerate the I-93 widening project.</p> <p>A.2.5 Retain financial support for transportation and land use programs such as CTAP to provide financial and planning support to communities.</p> <p>A.2.6 Complete Exit 6/7 improvements.</p> <p>A.2.7 Develop Pettengill Road improvements in Londonderry.</p> <p>A.2.8 Develop Exit 4A in Derry.</p> <p>A.2.9 Upgrade NH 101 in Bedford.</p>
--	--



Goal A.3: Transportation – Public Transit/Multi Modal

Develop a comprehensive multi-modal transportation strategy and explore the feasibility of establishing a public transit authority for the region to expand service routes and connections to communities and key destinations within the region.

<p>Issues Addressed:</p> <ul style="list-style-type: none"> • Regional Public Transit • Urban/Rural Access & Mobility • Special Needs Population <p>Leads:</p> <ul style="list-style-type: none"> • SNHPC – Metropolitan Planning Organization • NH DOT – TIP <p>Parties Involved:</p> <ul style="list-style-type: none"> • Manchester Transit Authority • Region’s Municipalities • Private Operator such as Boston Express • Metro Center-NH <p>Funding:</p> <ul style="list-style-type: none"> • US Federal Transit Administration • NH DOT - TIP 	<p>Key Actions:</p> <p>A.3.1 Obtain SNHPC, NH DOT and US Federal Transit Administration support in funding a multi-modal feasibility study to evaluate the creation of a regional public transportation system/authority.</p> <p>A.3.2 Obtain local, state and federal funding, partnership or cooperation to ensure the successful operation of such a regional transportation system.</p> <p>A.3.3 Implement and expand intercity and commuter bus services within the region to the Manchester-Boston Regional Airport with the I-93 Commuter Bus Service Project.</p> <p>A.3.4 Include a regional public transportation system/authority feasibility study in the NH DOT – TIP.</p> <p>A.3.5 Establish as part of Metro Center-NH, a regional public transportation coalition consisting of SNHPC, the Manchester-Boston Regional Airport, the City of Manchester, and other interested municipalities to expand existing bus services within the region.</p>
---	--



Goal A.4: Transportation – Passenger/Freight Rail

Bring about the delivery of safe, reliable and efficient passenger and freight rail service along the New Hampshire Capitol Corridor between Manchester and Boston.

<p>Issues Addressed:</p> <ul style="list-style-type: none"> • Rail Mobility/Access • Alternative Transportation • Freight <p>Leads:</p> <ul style="list-style-type: none"> • SNHPC – Metropolitan Planning Organization • NH DOT – TIP <p>Parties Involved:</p> <ul style="list-style-type: none"> • Amtrack • Pan Am • NHRTA • FTA • Metro Center-NH • Region’s Municipalities <p>Funding:</p> <ul style="list-style-type: none"> • US DOT/FTA • NH DOT – TIP 	<p>Key Actions:</p> <p>A.4.1 Foster strategic partnerships to coordinate support for passenger and freight rail investment from within the business community.</p> <p>A.4.2 Assist and advise NH DOT and NHRTA in overall project implementation, including preparation and submittal of necessary grant applications for continued planning and future engineering studies and plans.</p> <p>A.4.3 Develop legislative and federal financial support and explore funding opportunities through the Federal Rail Administration (FTA).</p> <p>A.4.4 Educate the public, state leaders and others on the economic benefits of the proposed Capitol Corridor passenger and freight rail system.</p> <p>A.4.5 Assist the regional planning commissions in working with the corridor communities in land use and transportation planning to prepare for and enhance passenger rail and freight opportunities.</p>
---	--



Infrastructure

Goal B.1: Infrastructure – Water and Wastewater

Place a high priority in upgrading, expanding and funding public water and sewer systems including a regional approach to the provision of such services within the region.

<p>Issues Addressed:</p> <ul style="list-style-type: none"> • Economic Growth • Public Health • Plant Capacity • Line Distribution • Emergency Connections <p>Leads:</p> <ul style="list-style-type: none"> • SNHPC • Metro Center-NH • Manchester WW • Pennichuck WW <p>Parties Involved:</p> <ul style="list-style-type: none"> • NH DES • Region’s Municipalities • Water/Sewer Commissions and Precincts <p>Funding:</p> <ul style="list-style-type: none"> • EPA • Homeland Security • Federal Stimulus • Municipal CIP/Bonding 	<p>Key Actions:</p> <p>B.1.1 Seek out and explore funding for water/wastewater systems upgrades.</p> <p>B.1.2 Develop a comprehensive and long range water and sewer plan for the region with municipal, state and federal support in cooperation with Manchester Water Works, Pennichuck Water Works, Inc., and the Public Works Directors and Water and Sewer Commissions of all the region’s municipalities.</p> <p>B.1.3 Identify all the growth needs and funding issues associated with the provision of necessary water and sewer service improvements at the municipal level, then address these needs and issues for the region as a whole.</p> <p>B.1.4 Examine various tax and funding opportunities such as the use of improvement districts and enterprise funds to encourage water/sewer upgrade and expansion. The plan should also examine incentives to encourage upgrades on a town-by-town basis.</p> <p>B.1.5 Examine and include health issues/impacts associated with older water and sewer lines, including CSO issues.</p> <p>B.1.6 Address the provision of water and sewer into industrial/commercial zones first.</p> <p>B.1.7 Investigate and support the use of porous pavement and other water saving practices and technologies, as well as the infrastructure need to support these systems. This could be a potential job-creating opportunity.</p>
--	---



Goal B.2: Infrastructure – Communications/Broadband

Staying “well connected” through telecommunication and broadband services is critical to the region’s economic development, expanding business opportunities, retaining college graduates, and maintaining public safety.

<p>Issues Addressed:</p> <ul style="list-style-type: none"> • High Speed Internet Access • Infrastructure Support • Government/Business Investment <p>Leads:</p> <ul style="list-style-type: none"> • NH DRED • UNH Broadband Study <p>Parties Involved:</p> <ul style="list-style-type: none"> • SNHPC • Region’s Municipalities • Commercial Operators <p>Funding:</p> <ul style="list-style-type: none"> • Federal Stimulus • Federal, State Grants • Private Investment 	<p>Key Actions:</p> <p>B.2.1 Support continued investment in advanced telecommunication systems and broadband services, including the expansion of “wireless” coverage within the region to sustain and improve communications access for all.</p> <p>B.2.2 Implement the statewide communications and broadband plan currently being developed to benefit the region and NH as a whole.</p> <p>B.2.3 Support necessary policies and funding to implement the findings of this study immediately.</p> <p>B.2.4 Continue to support and implement public safety and emergency communication system improvements regionally and at the local level, including the placement and installation of necessary cell and radio towers.</p> <p>B.2.5 Examine feasibility and use of older copper/phone lines in existing buildings.</p>
--	---



Land Use

Goal C: Land Use – Smart Growth/Affordable Housing

Seek balanced growth and development which broadens the local tax base and respects and strengthens quality of life, community character, and the environment.

<p>Issues Addressed:</p> <ul style="list-style-type: none"> • Smart Growth • Affordable Housing • Property Taxes <p>Leads:</p> <ul style="list-style-type: none"> • SNHPC • Region’s Municipalities <p>Parties Involved:</p> <ul style="list-style-type: none"> • Planning Boards • NH DES Brownfields Program • CDFA/NHHFA <p>Funding:</p> <ul style="list-style-type: none"> • Local CIP • Impact Fees • EPA – Brownfields • CDBG • Public/Private Investment 	<p>Key Actions:</p> <p>C.1 Update local and regional plans and policies to direct future growth to areas where public infrastructure (water and sewer, public transportation facilities – transit, ride share programs, car pool lots, bike paths, etc.) exist to implement smart growth and prevent costly sprawl.</p> <p>C.2 Support mixed use and compact growth patterns where appropriate to create sustainable communities and livable/walkable downtowns and village centers.</p> <p>C.3 Encourage the redevelopment of brownfields to facilitate economic development and the clean up of vacant, abandoned or underutilized sites and buildings for commercial, residential and mixed-use as appropriate.</p> <p>C.4 Increase opportunities to promote “young” lifestyles, shopping, entertainment, nightlife, and other amenities to attract and retain younger workers within the region.</p> <p>C.5 Promote a diversity of affordable and workforce housing.</p>
--	---



Labor/Workforce Development

Goal D: Labor/Workforce Development

Strengthen the region’s workforce and vocation training programs and improve the integration of apprenticeship training and education and the workplace.

<p>Issues Addressed:</p> <ul style="list-style-type: none"> • Labor Force • Workforce Training • Integrating Education/Workplace <p>Leads:</p> <ul style="list-style-type: none"> • NH DRED & NH Employment Security Bureau • Job Training Programs • School Districts/SAUs • Colleges/Universities <p>Parties Involved:</p> <ul style="list-style-type: none"> • High Tech Council • High Tech Companies • NH Small Business Development Center • SCORE <p>Funding:</p> <ul style="list-style-type: none"> • Federal Job Training Grants • Federal/State Program Assistance 	<p>Key Actions:</p> <p>D.1 Work with human resource/workforce organizations to perform semi-annual critical skills inventory, expand workforce training programs, and pursue funding opportunities to prepare the region’s workforce for high-paying and high-skilled jobs in growth industries.</p> <p>D.2 Develop and implement a plan through collaboration among employers, educational institutions, and the workforce development system to build critical skills and expand career awareness among Middle and High School students including job shadowing, mentoring, internships, training programs, etc.</p> <p>D.3 Partner with High Tech Council and local high tech companies to make use of the region’s highly educated workforce to develop ideas for expanding business opportunities, attract business in more advanced sectors, and to draw in younger workers to the labor force.</p> <p>D.4 Work with municipalities within the region to make a commitment to make affordable housing available as well as promote “young” lifestyles, such as shopping, entertainment, attractions, etc. to retain younger populations.</p> <p>D.5 Evaluate and implement “forgiveness” programs for student loans.</p>
---	---



Education

Goal E: Education – Colleges and Universities

Strengthen the region’s colleges, universities and professional schools and place a high priority on the importance of increasing the number of college graduates that stay, work and live within the region.

<p>Issues Addressed:</p> <ul style="list-style-type: none"> • Critical Skills • Retaining College Graduates • Program Development <p>Leads:</p> <ul style="list-style-type: none"> • Colleges/Universities • Metro Center-NH <p>Parties Involved:</p> <ul style="list-style-type: none"> • Stay/Work/Play NH³² • Local/State Agencies • University Council <p>Funding:</p> <ul style="list-style-type: none"> • UNH 55% Initiative • Private/Charitable • Federal/State Grants 	<p>Key Actions:</p> <p>E.1 Increase the number of professional, bachelor and graduate degrees awarded by the region’s schools and colleges with emphasis on applied science, engineering, health and other critical skills.</p> <p>E.2 Conduct a study of the economic impact and importance of existing educational institutions, professional schools, colleges and universities within the region.</p> <p>E.3 Increase collaboration and communications with colleges and local business to facilitate new and expand existing continuing education, work cooperatives, internships, and job placement programs which train and hire new graduates.</p> <p>E.4 Consider tax and tuition incentives for students and businesses involved in high tech and creative industries.</p>
--	---

³² See website: www.stayworkplay.org



Energy

Goal F: Energy

New England has some of the highest energy costs in the US. It is absolutely critical that renewable, environmentally friendly and lower cost forms of energy, alternative energy sources, and green technologies are developed within the region.

<p>Issues Addressed:</p> <ul style="list-style-type: none"> • Sustainability • Energy Efficiency • Alternative Fuels • Green Technologies <p>Leads:</p> <ul style="list-style-type: none"> • SNHPC • Metro Center-NH <p>Parties Involved:</p> <ul style="list-style-type: none"> • NH OEP • Energy Efficiency Nonprofits • Private Companies • Home Builders Association • NH Business Industry Association <p>Funding:</p> <ul style="list-style-type: none"> • Federal/State Grants • REGGI Funds • Private/Charitable 	<p>Key Actions:</p> <p>F.1 Develop/implement an energy plan to identify and bring about renewable and sustainable forms of local energy production and green technologies in the region.</p> <p>F.2 Develop the energy plan as a collaborative research effort of business, government and the region’s colleges and universities.</p> <p>F.3 Focus on sustainable forms of energy sources and the identification of programs, grants and other funding sources to reduce the upfront costs typically associated with these technologies.</p> <p>F.4 Implement energy conservation measures and “green” building practices and construction.</p> <p>F.5 Provide guidance to municipalities on how best to amend local regulations and ordinances to promote these technologies, including the installation of wind, solar and other alternative forms of energy.</p> <p>F.6 Focus on expanding business growth and the development of advanced manufacturing industries involved in renewable energy sources, parts and equipment production, and construction of energy-efficient buildings and homes.</p>
--	--



Economic Development

Goal G: Economic Development – Planning/Job Creation and Financial Resources

Support critical and key economic development planning actions at a scale that will have regional benefit. Ideally promote economic development opportunities among all the Core Goals of this Plan.

<p>Issues Addressed:</p> <ul style="list-style-type: none"> • Regional Economic Development Planning • Regional Dialogue • Funding <p>Leads:</p> <ul style="list-style-type: none"> • SNHPC • Metro Center-NH <p>Parties Involved:</p> <ul style="list-style-type: none"> • Regional Economic Development Corporations • Municipalities • NH DRED <p>Funding:</p> <ul style="list-style-type: none"> • U.S. Dept. of Commerce • Municipal • Tax Credits • CDBG 	<p>Key Actions:</p> <p>G.1 Utilize the services of Metro Center-NH and SNHPC to promote economic development opportunities equally among all the municipalities in the region and implement and update annually an economic development strategy, agenda and work plan for the region.</p> <p>G.2 Partner with and utilize the programs and support services of Rockingham Economic Development Corporation and the Capital Regional Economic Development Council to pursue economic development activities, community development block grant funding, financing business and site development, lending, and other revolving loan programs, including brownfields redevelopment.</p> <p>G.3 Work with municipalities to establish Economic Revitalization Tax Credit Zones as authorized under RSA 162 and Downtown Revitalization Districts under RSA 79-E as appropriate.</p> <p>G.4 Work with municipal, state, county and federal officials to seek support and funding to establish an ongoing Comprehensive Economic Development Strategy (CEDS) process for all the Hillsborough and Merrimack communities within the region, including the City of Manchester. Municipalities in Rockingham County are currently included in the Rockingham CEDS and Economic Development District.</p> <p>G.5 Involve every municipality regardless of size and population in all region-wide economic development planning activities and actions.</p> <p>G.6 Utilize the region’s exceptional interstate highway access, Boston-Manchester Regional Airport and central location within Southern New Hampshire as key economic development drivers in pursuing economic development, job growth, and financial resources.</p>
--	--



Entrepreneurship

Goal H: Entrepreneurship – Business Support and Development

Implement programs to support start-up of small companies, incubator resources, innovative businesses, and the creative arts and sustainable/agricultural economy.

<p>Issues Addressed:</p> <ul style="list-style-type: none"> • Business Incubation • Start Training • Arts/Tourism <p>Leads:</p> <ul style="list-style-type: none"> • NH DRED • NH Small Business Center • SNHU Center for Entrepreneurship <p>Parties Involved:</p> <ul style="list-style-type: none"> • ABI • Municipalities • Non-Profits <p>Funding:</p> <ul style="list-style-type: none"> • Federal/State Grants • Private Donations • Venture Capital 	<p>Key Actions:</p> <p>H.1 Pursue programs which support the growth of creative enterprises and businesses.</p> <p>H.2 Establish/expand implementation of local and regional incubator resources/programs such as the Amoskeag Business Incubator (ABI) in downtown Manchester and the Center for Entrepreneurship and Social Innovation at Southern New Hampshire University.</p> <p>H.3 Seek funding and investment in the cultural arts, art in public places, museums, and exhibition and performance venues.</p> <p>H.4 Support efforts to enhance the region’s tourism base, focusing on environmental, historic, recreation, culture and commercial attractions that draw tourists.</p> <p>H.5 Apply Dean Kamen’s “FIRST Program” to biomed and biotech/stem cell research.¹</p> <p>H.6 Embrace/implement local farmer’s markets and sustainable agricultural educational and employment opportunities.</p>
---	--

¹FIRST is an acronym, which means “For Inspiration and Recognition of Science and Technology.” The program inspires K-12 students to pursue careers in science and engineering.



Real Estate Development

Goal I: Real Estate Development: Site Readiness

Work with Metro Center-NH, local Chamber of Commerce and professional real estate and brokerage community to promote available sites and buildings for economic development and redevelopment purposes and create working groups of planners and economic development professionals to assure the resources are available to expand and attract target industries to the region.

<p>Issues Addressed:</p> <ul style="list-style-type: none"> • Site Inventory • Site Readiness • Site Marketing <p>Leads:</p> <ul style="list-style-type: none"> • SNHPC • Metro Center-NH <p>Parties Involved:</p> <ul style="list-style-type: none"> • Developers/Real Estate • Municipalities • NH DRED • Utilities <p>Funding:</p> <ul style="list-style-type: none"> • Private Donations • Venture Capital 	<p>Key Actions:</p> <p>I.1 Establish/maintain an economic development website through Metro Center-NH to act as the region’s informational portal to the world and national site selectors.</p> <p>I.2 Support the development and implementation of municipal economic development websites with links to the Metro Center-NH website and the professional real estate development and brokerage community.</p> <p>I.3 Develop and implement a <i>Certified Site Program</i> for the region to promote and market approved certified sites on local, regional, state-wide, and international websites and databases designed to convey key site information to site selectors and interested companies.</p> <p>I.4 Work with local planners and developers to draft innovative model ordinances and best planning practices for the Certified Site Program to (1) implement a planning board site review and approval process; and (2) establish a minimum level of site readiness or “shovel ready” status necessary for local approval of certified sites in targeted areas. These best practices should also include incentives to site owners/developers to pursue certified site approval.</p>
---	---



Funding Resources

Goal J: Funding Sources: Economic Development

Pursue funding opportunities to support Metro Center-NH, SNHPC, municipalities and stakeholders in promoting the core goals of this plan and the region’s economic development strategy and agenda

<p>Issues Addressed:</p> <ul style="list-style-type: none"> • Sustainability • Capacity/Growth • Regionalism <p>Leads:</p> <ul style="list-style-type: none"> • Metro Center-NH • SNHPC <p>Parties Involved:</p> <ul style="list-style-type: none"> • NH DRED • OEP • Municipalities <p>Funding:</p> <ul style="list-style-type: none"> • Federal/State Grants • CDBG/HUD/EPA • EDA/AARA • REGGI 	<p>Key Actions:</p> <p>I.5 Pursue economic and community development opportunities for the region through the Community Development Block Grant (CDBG) program and the new Sustainable Communities Act of 2009 offered by HUD.</p> <p>I.6 Continue to pursue and secure federal EPA funding to implement both municipal and regional brownfields assessment and clean-up programs designed to promote and carry out the redevelopment of vacant and underutilized properties.</p> <p>I.7 Apply for federal U.S. Department of Commerce Economic Development Administration (EDA) funding to support the implementation of an ongoing and comprehensive economic development strategy (CEDS) for Hillsborough and Merrimack municipalities located within the region, including the eventual development of an Economic Development District.</p> <p>I.8 Continue to explore and obtain American Recovery and Reinvestment Act of 2009 (AARA) funding as available for necessary economic development and infrastructure project which would benefit municipalities and the region as well as workforce training grant opportunities.</p> <p>I.9 Continue to secure appropriate state funding as may be offered through the Office of Energy and Planning (OEP) and the New Hampshire Department of Resources and Economic Development (DRED) to conduct economic development planning and implement important economic development programs and projects.</p> <p>I.10 Support implementation of the Metro Center-NH’s investor model to secure private and business funding support of this partnership and future economic development programs and projects.</p> <p>I.11 Examine “fees for services” as a potential model for economic development planning and explore opportunities for collaboration with our colleges and universities.</p> <p>I.12 Encourage municipalities and regional entities to pursue viable energy projects and alternative forms of energy through New Hampshire’s Regional Greenhouse Gas Initiative (RGGI) funds.</p>
--	---



Section Four: Strategic Initiatives

Strategic Initiatives/Catalytic Projects

In addition to the Vision/Economic Development Strategy, Core Goals and Key Actions, this plan recommends twelve important strategic initiatives or catalytic projects for enhancing the economic growth and development of the region (see list of strategic initiatives in Table 32).³³ These initiatives carry forth the Vision/Economic Development Strategy, Core Goals and Key Actions of the plan into specific and meaningful economic development programs and projects that can be implemented within the region. Table 29 also identifies the key stakeholders and primary parties that should have a major role and responsibility in project development and implementation.

The purpose of this chapter is to describe each strategic initiative and to discuss: (1) why these initiatives are important economic development projects for the region; (2) ideally when (i.e. what timeframe) the initiatives could best be implemented; and (3) who should be involved and participate in their implementation. Specific detailed background reports, project proposals and other documents related to each of the twelve initiatives as noted in this chapter are also provided within Volume II of the plan.

All twelve strategic initiatives identified in this chapter are recommended by the *Steering Committee* and by the consultants who conducted the basic underlying research for the plan as being important economic development projects for the region. Eight of the strategic initiatives (such as the Certified Site Program and Regional Business Incubator Development) are new and innovative projects never before considered within the region.

Four of the strategic initiatives (such as the NH Capitol Corridor Passenger Rail project as well as the initiatives to expand CTAP and the Regional Brownfields programs) are already in the works and are actively being pursued and implemented by the SNHPC and other stakeholders.

It should be noted here that participation in the implementation of this plan or any of the twelve strategic initiatives or economic development projects recommended by this plan is strictly a voluntary choice. While it is important that the identified key stakeholders be involved in project development and implementation, it is not the intent of this plan to require and/or impose any strategic initiative or economic development project upon any entity, organization or municipality that elects not to participate.

³³ A Catalytic Project is a project which can act as a catalyst to empower progress. Use of the specific term “Catalytic Project” was introduced in the federal guidelines for the Community Sustainability Initiative, p. 114.



In this regard, endorsement of this plan including the Core Goals, Key Actions and Strategic Initiatives in no way binds any entity, organization or municipality from having to participate in project development and implementation. Again this is a voluntary and optional decision.

Table 32
Recommended Strategic Initiatives
Catalytic Projects for the SNHPC Region

Strategic Initiatives Catalytic Projects	Responsible Parties for Implementation
Certified Site Program*	SNHPC; METRO; Municipalities; NH DRED
Expand CTAP Funding & Services to Municipalities	NH DOT; CTAP Steering Committee; RPCs; Municipalities
Best Planning Practices/Innovative Model Ordinances*	SNHPC; METRO; Municipalities
Regional Incubator Development*	CESI; METRO; SNHPC; Colleges & Universities; Municipalities/Businesses
Comprehensive Economic Development Strategy (CEDS)*	Central RPC and SNHPC; METRO; Municipalities; NH DRED; EDA
Expand Regional Brownfields Program	SNHPC; EPA; EDCs; Municipalities
College/University Economic Impact Study*	METRO; SNHPC; Colleges/Universities
Comprehensive Regional Sustainability/Energy Plan*	RPCs; Municipalities; HUD; OEP
Feasibility Study: Regional Public Transit System/Authority*	NH DOT; RPCs; Municipalities; METRO
Expand I-93 Commuter Bus Service Project	NH DOT; METRO; RPCs; Municipalities
NH Capitol Corridor Passenger Rail	NH DOT; NH Rail Transit Authority; METRO; SNHPC; NRPC; Municipalities
Regional Water/Wastewater Plan*	SNHPC; NH DES; METRO; Municipalities

*Note: These specific strategic initiatives are new and innovative to the region.

Source: SNHPC

Each of the twelve strategic initiatives is discussed in the following sections. In addition, Table 33 identifies and recommends an implementation timeframe for each of the twelve initiatives. For the purposes of this plan, a Short Term implementation timeframe is between one to three years upon endorsement of this plan. Medium Term is between three and five years, and Long Term is greater than five years.

Also included in Table 32 is an overall project impact and feasibility rating of each initiative or economic development project. As noted in this table, all twelve strategic initiatives have been assigned a “High Impact” rating. This rating indicates that the project will have a positive impact in terms of improving the region’s overall quality of life, generating jobs and stimulating economic growth. A Medium or Low Project Impact means that the initiative would have little or no meaningful impact in improving the region’s economy. A “High Project Feasibility” rating indicates that the project has a very good chance of being implemented. A “Medium Project Feasibility” rating means that the project has a good chance of being implemented and a “Low Project Feasibility” rating indicates that the



project has or may experience some difficulties in implementation. A “Low Project Feasibility” rating, however, does not mean that the project can not be implemented only that certain obstacles and barriers will need to be overcome. These obstacles and barriers are more fully discussed in the following sections of this chapter.

Table 33
Project Implementation Timeframe, Impact and Feasibility

Strategic Initiatives Catalytic Projects	Implementation Timeframe	Project Impact/ Feasibility
Certified Site Program	Short Term	High/Medium
Best Planning Practices/Innovative Model Ordinances	Short Term	High/Medium
Regional Incubator Development	Short Term	High/Medium
Expand CTAP Funding and Services to Municipalities	Short Term	High/Medium
Establish a regional Comprehensive Economic Development Strategy (CEDS)	Short Term	High/Medium
Expand SNHPC’s Regional Brownfields Program	Short Term	High/High
Conduct a College/University Economic Impact Study	Short Term	High/High
Prepare a Comprehensive Sustainability/Energy Plan for the Region	Mid Term	High/High
Conduct Feasibility Study to Establish Regional Public Transit System/ Authority	Mid Term	High/Medium
Expand I-93 Commuter Bus Service Project	Mid Term	High/Medium
NH Capitol Corridor Passenger Rail	Long Term	High/Low
Regional Water/Wastewater Plan	Long Term	High/Medium

Source: SNHPC

Certified Site Program

The *Target Industry Analysis* report prepared by MS&B for this plan recommends that a **Certified Site Program** be established for the Southern New Hampshire Region.³⁴ This program is recommended because one of the region’s chief economic development weaknesses identified at the Metro Center December 10, 2009 Leadership Forum is the lack of readily available land and buildings properly zoned and permitted for immediate use.

While the region has many sites and properties at broad price ranges that are available and are being marketed for development purposes, most of these sites have a very low level of

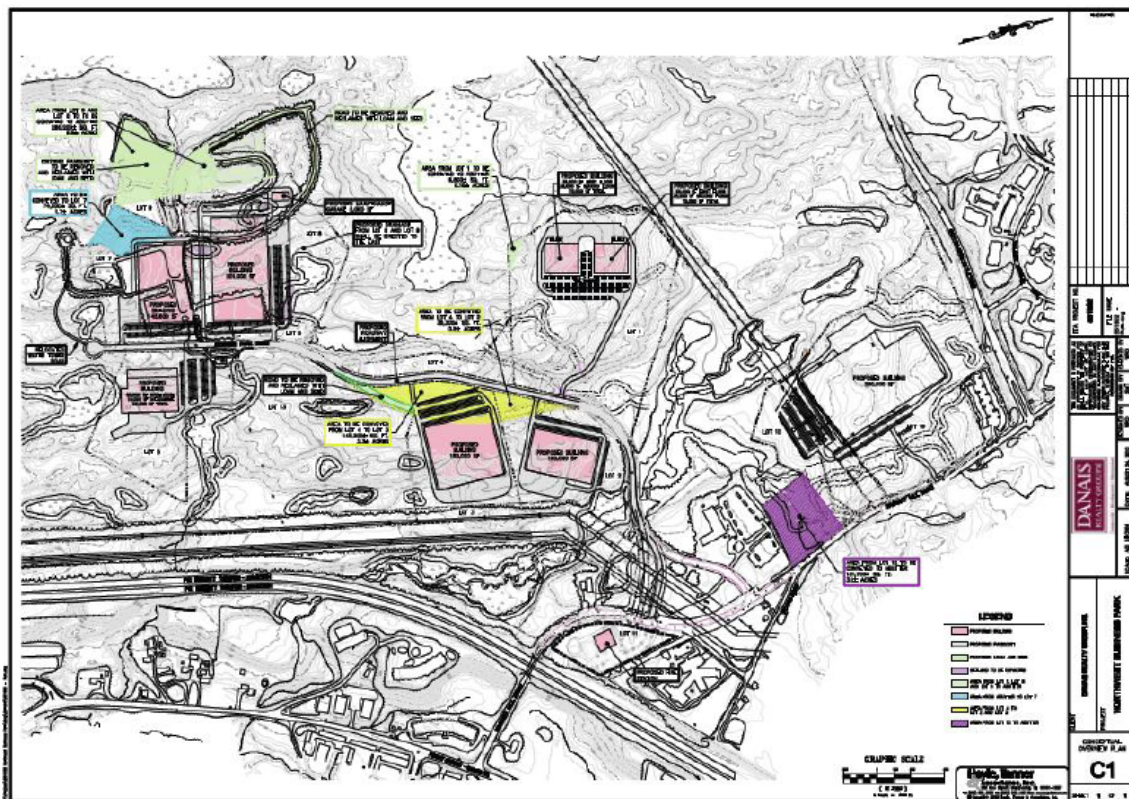
³⁴ Target Industry Analysis, Final Report Prepared by Moran, Stahl & Boyer, Site Selection and Economic Development Consultants, January 2010, Executive Summary (see page 117). Copy of the final report is available in Volume II of this plan as well on the SNHPC website at: <http://www.snhpc.org/>.



readiness.³⁵ Readiness in this case is defined as having the basic local approvals (site plan, zoning, building permits, etc.) in place which would allow for and facilitate timely development and use. The level of readiness of a site for development is a common issue throughout New Hampshire and in general is not a community specific problem. The land use, zoning and building regulations in every community in New Hampshire must be consistent with the enabling authority and standards provided by the laws and statutes of the state. While a number of innovative land use controls and planning tools are available and expressly authorized by state statute (RSA 674:21) to expedite and enhance the development review process, not all municipalities within the state have adopted and/or regularly use these techniques to improve site readiness.

National site locators and economic development professionals generally all agree that various planning solutions are needed to improve the overall “readiness” of sites and properties as development needs and potential companies and business look to grow and relocate to the region. The Certified Site Program is recommended as one solution (see Figure 23).

Figure 23
Plans for Northwest Business Park, Hackett Hill, Manchester, Possible Certified Site Program Candidate



³⁵ Ibid, page 117. See Chapter 12: Bibliography/Resources within “Preparing a Master Plan for Your Community” located on the SNHPC website: www.snhpc.org under Reports and Publications.



What is a Certified Site Program? In a nutshell, a Certified Site Program is an investment in economic development and the future. The program facilitates economic growth by certifying that specific land parcels and buildings that have been approved by a municipality (i.e. sites that are zoned for industrial, office use or mixed-use) have met established specifications and guidelines which define whether a site is “ready” or more precisely “shovel ready” for development purposes.

The overall benefit of the site certification process is that it conveys an important message to national site selectors, prospective companies, and the business community that: (1) there are certified sites and buildings located within the region and the municipality that are approved and ready to be developed; and (2) the municipality by participating in the program is conveying an important message that it is “open to business” and supports the development of the certified sites. There is also a direct monetary benefit resulting from such a program as it reduces the time, risk and upfront costs a business or prospective company may have in deciding to move to a community.

The certified sites/shovel ready concept was originally created to help market brownfields sites that were once environmentally contaminated and subsequently assessed and remediated and made ready for redevelopment and/or reuse. The usefulness and benefits of the concept has evolved and is now applied to open and vacant developable land zoned for specific industrial/office and mixed-uses.

Within the past several years, Certified Site Programs have gained substantial momentum across the US, and many states and municipalities are developing and/or participating in these programs to attract certain types of businesses to their communities (see following website which provides an overall summary: <http://uscertifiedsites.com/>).

Some of the long standing and more successful Certified Site Programs are located in:

- New York: <http://www.gorr.state.ny.us/BuildNow-NY/ShovelReady/SRhome.htm>
- North Carolina: <http://www.nccommerce.com/en/BusinessServices/LocateYourBusiness/BuildingsAndSites/>
- Michigan: http://www.medaweb.org/Certified_Business_Park_Web_Site.ihtml?id=290229
- Ohio: <http://www.odod.state.oh.us/edd/obd/jrs/>
- Oregon: <http://www.oregonprospector.com/about.htm>
- Pennsylvania: <http://www.pasitesearch.com/selectsites/index.shtml>).

Although these programs vary somewhat state-to-state, the underlying concept and goal is the same – reduce the time, risk and up-front costs related to site development – thereby expanding the opportunities available to companies considering expansion or relocation to the region and the community.



It is important to note that while most of the Certified Site Programs implemented in the US are administered as a state-wide or state-run program, the most cost effective approach to develop and implement a Certified Site Program in New Hampshire at this time is at the regional level as opposed to a state run program. In fact, the development of a certified site program at the regional level may be the only approach available within the State of New Hampshire given current economic conditions, the lack of staff, program capacity and funding support that would be necessary to administer such a program through the New Hampshire Department of Resources and Economic Development (NH DRED).

This conclusion was confirmed at a meeting held on February 4, 2010 with Mr. Roy Duddy, Interim Director and staff with the NH Division of Economic Development and the Office of Energy and Planning (OEP). Currently, neither the NH DRED nor OEP have the necessary funding nor grant opportunities available to support the implementation of a Certified Site Program in the State of New Hampshire.

However, despite these issues, NH DRED is in favor of developing a Certified Site program within the state and is willing to participate in such a program by posting the approved Certified Sites on the state's International Trade Data Network (ITDN). In addition, Metro Center-NH has expressed support and interest in the program and would be willing to post information on certified sites on the Metro Center-NH website with links set up to participating municipality's websites.

Given these parameters, this plan is recommending that a Certified Site Program be established for the Southern New Hampshire Planning Commission/Metro Center-NH region and that all municipalities within the region be given an opportunity to elect to participate in such a program.

In response to this recommendation, the SNHPC and Metro Center-NH have recently developed (working closely with community planners and economic development professionals), a proposal which includes an outline and scope of work for implementing the **Southern New Hampshire Certified Site Program**. A copy of the full and most current proposal dated Revised September 2010 is available in Volume II of this plan.

Basically, as recommended in the proposal, the Certified Site Program will be administered by the Southern New Hampshire Planning Commission and applied only to the Southern New Hampshire region and the thirteen municipalities located within the region at this time. In order to develop and roll out the program, funding will be required for initial program development. In addition, it is anticipated that to successfully administer and implement the program on an annual basis, an application fee will be necessary and that the specific guidelines for certifying sites will need to be both flexible and acceptable to local planning boards, and most importantly not overbearing or costly to the extent that program guidelines would prevent property owners and developers from participating in the program.



Overall Program Mission - What are the Main Goals of the Program? As currently stated in the full project proposal, the main goals of the **Southern New Hampshire Certified Site Program** are to: (1) engage property owners and municipalities to participate in the program; (2) build an inventory of sites and buildings that meet the program’s defined readiness needs; and (3) post essential information about Certified Sites on economic development websites to attract business growth and development to the region.

As noted earlier, certified sites will be posted on the Metro Center-NH economic development website and the State of New Hampshire’s International Trade Data Network (ITDN) to start. An important program goal in the future will be to expand the number of databases and websites for posting certified site data. Some of these databases may include commercial real estate market listings, and other similar sites, as well as offering links to local municipal economic development websites and national certified site websites such as USCertifiedSites.com. This web resource for example provides a single source on all certified sites and shovel ready programs nationwide.

Upon successful program implementation, it is a long-range goal that the **Southern New Hampshire Certified Site Program** eventually be expanded to include the entire state of New Hampshire. It is envisioned that this could be accomplished by obtaining: (1) statewide and legislative support for such a program through NH DRED; (2) support among all the regional planning commissions and economic development professionals within the state; and (3) finally support and participation among the developers, public utilities, real estate and other similar organizations actively involved in marketing and developing sites.

It must be noted however that just having a certified site available within the region and a municipality does not guarantee that *any* business will show up “knocking” on the door. Some types of companies and businesses are more interested in existing and readily available buildings that can be leased rather than buying raw land and building a new facility and/or buying and redeveloping an existing building.

However, posting a certified site on a widely viewed and respected website that is broadcast to interested site selectors and potential businesses and companies around the world will have tremendous visibility and positive economic gains for the region. Eventually the development of certified sites will lead to jobs within the construction industry and expand the customer base of the region’s utility companies. Most importantly the Southern New Hampshire Certified Site Program would greatly improve the economic competitiveness of the region by (1) bringing national and worldwide attention to the region and (2) improving the region’s standing among other states across the US which have been implementing and developing similar programs.

Based upon this review and discussion, the Certified Site Program strategic initiative has been assigned a “High Impact” rating in terms of improving the region’s economy and a “Medium” project implementation rating given the identified constraints and project development considerations.



Best Planning Practices/Innovative Model Ordinances

As noted in conjunction with the Certified Site Program, municipal planning boards within the State of New Hampshire need new and innovative planning tools and techniques which provide adequate safeguards in protecting public health, welfare and safety, but at the same time provide for greater predictability, expediency, and the timely review and approval of land and buildings for development purposes.

As identified and discussed at the Metro Center-NH December 10, 2009 Leadership Forum, there is a prevailing concern among the region’s developers, real estate professionals, and site selectors that many municipal planning board regulations impede rather than facilitate economic growth and development. Specifically, one of the key messages arising from the Forum is that the municipalities within the Southern New Hampshire region need to slim down their planning bureaucracy if they want to attract new business growth to the region.

This issue is not new to planners, nor is it easily resolved. The planning, building, community and economic development literature is full of publications, articles and best practices (American Planning Association, American Institute of Certified Planners, Urban Land Institute to name a few) which discuss and identify a variety of recommendations and solutions.³⁶ Many of these solutions range from developing user-friendly land use regulations to developing shorter and more predictable planning board review processes. Performance-based zoning, planned development review, planned unit development, flexible and discretionary zoning are all recognized and accepted techniques which have been established over the years not only to protect the public good, but also to expedite and improve the development review process.

Many of these same techniques and processes are permitted by the NH General Statutes under RSA 674:21, Innovative Land Use Controls. However, concerns still remain regarding the overall length of the site plan review process (currently under state law this process cannot exceed 65 days); the unpredictability of the review process and the conditions that can be imposed during the process, including the maximum length of time associated with the overall validity of the plan, upon approval.³⁷ All of these concerns to some degree can have an impact on a successful development project and improving the “readiness” of sites and properties for eventual development and use.

During the development of the Certified Site Program proposal, the region’s planners and economic development professionals meet several times and identified the following two improvements to the municipal planning board review process which could significantly

³⁶ An Economic Development Toolbox: Strategies and Methods. American Planning Association, PAS Report Number 541.

³⁷ Discussions held with local developers and real estate professionals.



improve the region’s economic growth and development: (1) establish a longer plan approval deadline (extending current plan approval deadlines from one to two years up to a maximum of five years); and (2) establish and/or recognize specific economic development or master planned zoning districts within the community where general plan approvals would be sufficient along with a development agreement in order to permit a development project proceed to building permit. These changes in local planning board site plan procedures and a community’s overall zoning policies would have significant benefits and improve the level and “readiness” of sites for development purposes, but at the same time ensure that adequate safeguards remain in place to protect the community.

Under the Certified Site Program initiative, three best planning or innovative model ordinances have been developed for municipal planning board use. These model ordinances will not only help to expedite the review of development proposals (projects identified as Certified Sites) but will help to improve overall site “readiness” for future development and use (these model ordinances are included within the Certified Site Program Proposal and Summary, dated Revised September 2010 included in Volume II of the plan).

Under this strategic initiative, it is the intent of the SNHPC and Metro Center-NH to work with all municipal planning boards within the region to put into place acceptable and appropriate best practices master planning ordinances as well as appropriate site plan/subdivision regulations and procedures which will have the benefit of (1) enabling planning boards to expedite and move preapproved certified sites to the top of their review timetables and processes; and (2) ensure longer plan approval periods. This will also involve identifying appropriate areas, zones and uses which are suitable for this type of growth.

Regional Incubator Program Development

As stated in Section II, one of the Core Goals (Goal H) and Key Actions (H.1 and H.2) of this plan is to implement programs to support start-up of small companies, incubator resources, innovative businesses, and the creative arts and sustainable/agricultural economy. In addressing this goal, the SNHPC retained Dr. Keith Moon, Professor and Director of the Center for Entrepreneurship and Social Innovation (CESI) located on the campus of Southern New Hampshire University (SNHU) to undertake research regarding business incubation in the region.

Specifically, Dr. Moon was retained to prepare an introduction to the incubation industry to communities within the SNHPC Region, and to identify the types of incubators that would be beneficial to the region given current trends and developments in the field, and existing conditions within the region. The final report *Community Introduction to Business Incubation: Model Recommendations* is provided within Volume II of this plan and is also available on the SNHPC website at: www.snhpc.org.

One of the key recommendations of this study is the development of a new and innovative creative business accelerator program which could (1) be applied region-wide among all 13



municipalities; (2) supplement rather than compete with the current operations, capacity and growth of the Amoskeag Business Incubator (ABI) located within the City of Manchester; and (3) directly help retain college graduates and young adults in the region who are seeking or are already engaged in starting businesses in various new and emerging creative industries.

A key finding of Dr. Moon’s study indicates that municipalities particularly in these economic times should avoid constructing the traditional “bricks and mortar mixed-use type incubator model in their community due to the high fixed and variable cost components associated with operating these facilities. However, as Dr. Moon points out if this is an approach a municipality desires to pursue, the community can utilize the existing Amoskeag Business Incubator in Manchester to their advantage. The ABI has a successful 12-year history of assisting businesses and it makes economic sense to utilize ABI’s existing services as opposed to replicating these expensive services elsewhere within the region.

Another key finding of Dr. Moon’s study is that the region faces two particular issues regarding regional incubation at this time, namely:

1. Lack of funding to pursue an incubation program. In fact, no funding is in existence at this time, and
2. Lack of an applied, versus a theoretical, regional approach to economic development.

While it is not a specific goal of the regional economic development plan to pursue or secure funding for a specific (incubation) program, relatively low cost models have been suggested in Dr. Moon’s study which would have significant value to the region given the lack of funding for traditional “bricks & mortar” type incubation programs.

The lower cost, relatively speaking, approach suggested by the study is one that utilizes a business accelerator concept versus a traditional incubation (bricks and mortar) approach. The type of businesses recommended for development in the accelerator fall into the category of “professional, technical, and scientific services”. This industry sector was one of the only categories identified in the Target Industry Analysis report that was recommended for all communities within the region. Focus on this category provides a starting point to consider particular niche areas in which to concentrate incubator service efforts.

Another new and important growth industry is the “creative business” sector. Some of the firms in the creative industries, for example include, but are not limited to architecture, communications, design and merchandising, digital media, engineering, fashion design, music, video, film, education/training, business consulting, production, graphic arts, information technology, multimedia design, photography, interior and industrial design, gaming and software development, culinary arts, etc.

As Dr. Moon points out in his study, while many of these businesses may be small as they begin operations, the impact of such businesses on New Hampshire and the SNHPC Region can not be overlooked. These microenterprises (firms with 1-5 employees, including owners)



comprise 87 percent of the businesses in New Hampshire and number approximately 124,000 firms that employ over 160,000 individuals. This represents nearly 20 percent of all private (non-farm) employment in New Hampshire (U.S. Census, 2000).

The types of businesses qualifying as creative businesses are also the types of businesses that appeal to the younger generation. Dr. Moon's study suggests that assisting in the creation of "new economy/knowledge businesses" would help to retain college graduates within the region -- a major goal and theme of this plan. In addition, many of these businesses in this industry are clean and environmentally friendly.

As a result of these findings, Dr. Moon has recommended that a **Creative Business Accelerator** (CBA) be pursued as a new and innovative industry targeted low-cost approach to promote regional business incubator development. As proposed, the CBA would be managed by the SNHU CESI and would be geared to an initial target of 10-15 businesses in year one of the program focusing specifically on small start-up companies involved in video gaming, software development and information technology, communications and the visual arts – basically those fields of study which make up the "creative industry".

This particular sector was selected due to the high-growth businesses within this category (e.g., digital media, gaming, graphic arts, et al). This business service niche is also appealing to young professionals and college graduates and the proposed CBA may well assist in efforts to retain these individuals in the SNHPC region. In addition, there is at present, no similar incubator/accelerator program existing with this specialized business focus located within the region or the State of New Hampshire.

It is important to note that there are several other business accelerator programs which are starting up and/or expanding across the state. The University of New Hampshire recently established the New Hampshire Innovation Commercialization Center (NHICC) at Pease International Tradeport. The purpose of this center is to nurture small business development in technology driven enterprises, some of which are developed at UNH. This new program will also be set up as a "business accelerator" similar to the CESI program concept, but not as narrowly focused on the creative industries.

In presenting the Incubator Study to the Metro Center-NH Steering Committee in July 2010, the Committee requested data and projections on the market and number of potential users of the CBA. In response, Dr. Moon recently compiled a "white paper" which shows that video gaming has become a powerful, high-growth industry employing thousands of individuals worldwide. Specifically, in the SNHPC Region as of July 2010 there are currently two college degree programs in this field of study at SNHU and NHTI within the state with approximately 250 students. When adding the number of students from various IT programs, graphic design/communications/visual art programs in other surrounding colleges, there is a potential market of well over 4,000 students who may be interested in obtaining business startup services.



This information was also presented to the Southern New Hampshire Planning Commission which subsequently endorsed the concept. With this endorsement to proceed, the SNHPC is helping Dr. Moon in seeking financial support and other assistance to establish the CBA within the region. This assistance includes helping CESI establish a coalition (CBA Advisory Board) of various higher education institutions, the regional business community, local municipal representatives, Metro Center-NH, as well as appropriate training/service providers for the CBA. Such a coalition of higher educational institutions is critical to the success of the CBA as each program has particular strengths and areas of expertise.

In addition, SNHPC would work with the CESI to promote the CBA program among all 13 municipalities as a major economic development “attraction” strategy that could bring (creative/knowledge) businesses into the communities through incentives and branding at the regional level. While further research and regional discussions is recommended regarding establishment of incentives, some local municipal-based incentives could include:

- Identifying areas that are appropriate for “work/live” mixed-use spaces for creative businesses and enact zoning to allow such use, such as including mixed-use and village zoning.
- Exemptions from municipal fees associated with building permits, inspections, and other regulatory fees associated with renovation of space to house specifically defined incubated creative businesses (as defined by the region/local towns); and,
- Reduced business license fees for incubated companies wishing to relocate or expand within the community.

Other incentives and inducements at the state level could also include:

- Industry specific tax credits for creative businesses. This strategy has been successful implemented in other states, such as Florida and Texas, which are similar to New Hampshire, and have no personal income tax. As mentioned earlier, this can also serve as a powerful attraction strategy for these types of businesses to locate to the region.

Expand CTAP Funding and Services to Municipalities

The New Hampshire Department of Transportation (NHDOT), with assistance from other State agencies, numerous municipalities and regional planning commissions, is currently implementing the widening of the I-93 corridor in the southeastern portion of the State. This project, which represents the most significant transportation improvement not only in the SNHPC region, but in the State of New Hampshire, involves improving the transportation efficiency and safety of a 19.8-mile section of the corridor between Manchester and the Massachusetts state line. Improvements include widening of the existing facility to four lanes in each direction, improvements to five existing interchanges, transit improvements and other measures designed to improve the safety and efficiency of the corridor.

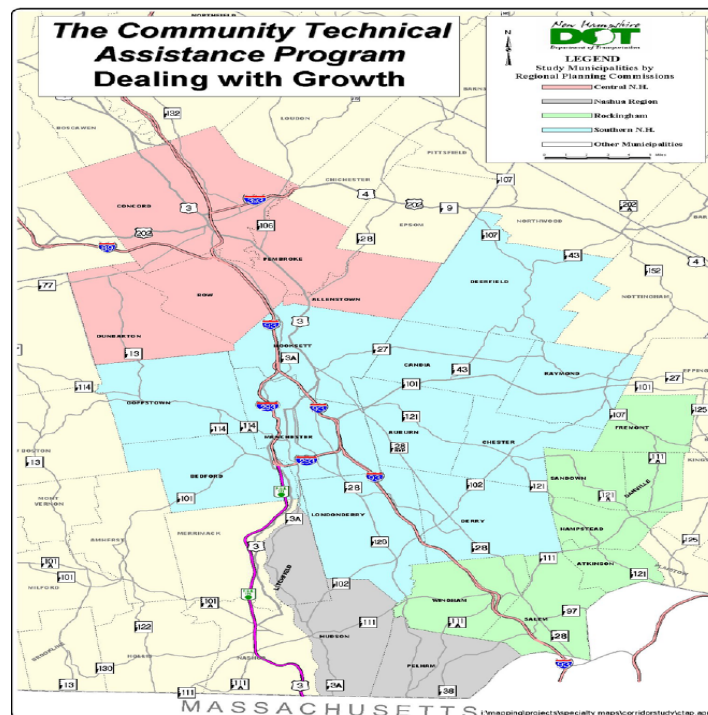


To assist communities in the I-93 area to plan for the growth anticipated to accompany the widening, the NHDOT has committed to a comprehensive five-year \$3.5M Community Technical Assistance Program (CTAP) which began in 2007 to provide technical assistance to the 26 towns and cities influenced by the I-93 improvements project (see following map of service area). Since 2007, the CTAP program has helped communities meet a wide range of challenges faced in the region by providing technical assistance and access to tools for innovative land-use planning. CTAP is a major initiative involving the 26 communities in the corridor, state and federal agencies, regional planning commissions, and several non-governmental organizations.

Municipalities within the SNHPC Region participating in the CTAP program include the towns of Auburn, Bedford, Candia, Chester, Deerfield, Derry, Goffstown, Hooksett, Londonderry and the City of Manchester.

Currently, the CTAP program is entering its third year of the five-year program which is scheduled to end in 2012. Because this program funds a significant level of regional and municipal planning work, it is critically important to the region and the region's municipalities that funding be extended to continue to address the growth challenges in the region. As such expanding CTAP funding and services to municipalities has been identified as a critical need and strategic initiative in this plan.

Map 10
CTAP Program Dealing with Growth



Source: NHDOT



The CTAP process consists of three main stages, including 1) “Community Assessment” designed to help communities determine where they are on the planning curve and where their current planning and zoning will take them in the future; 2) “Visioning and Planning” in which a community pictures the future it wants and plans how to achieve it, and 3) “Implementation” which involves utilizing the community assessment and the plans that have been developed to move the community forward to its ultimate vision.

Currently, the program is moving from the Visioning and Planning stage via the CTAP Road Map Planning Process to implementation. The Road Map Plan is a process designed to engage communities in discussing and evaluating how they can achieve their planning goals using the planning products and services available to them through CTAP, the Regional Planning Commissions, State Agencies, and other parties. Using the planning documents previously developed as a foundation, the process has helped communities evaluate the recommendations contained in the Assessments, identify priority actions, and develop a roadmap for using CTAP and other available resources to achieve those actions within the community. The Road Map Planning process consists of three simple steps. The first step involves an initial community engagement meeting to reintroduce CTAP to community officials, evaluate the CTAP products that were developed for each community to date and develop a prioritized action plan. In the second step, communities select a planning process. The final step consists of a concluding presentation to review the Road Map plan at an all boards meeting and determine how it can be implemented.

Other CTAP plans and products developed to date for each community within the SNHPC region include Digitized Land Use mapping, Community Planning Assessments, Build-Out Studies, and local Open Space Plans which are currently nearing completion. CTAP represents a significant effort and investment on the part of the SNHPC, its staff and member communities.

SNHPC is also currently involved in efforts to support economic vitality through participation in the CTAP “Community Infrastructure” and “Local Economy” themes. Potential strategies and actions included within these themes include identifying incentives, disincentives, barriers, and solutions to affordable housing and giving towns more authority to address and remove barriers to affordable housing. The CTAP program also addresses stimulating new business development and strengthening local economies through strategies such as development of local economic development plans and local advisory committees, agricultural markets and cooperatives and coordination of technical support for small businesses.

Through the efforts of SNHPC and the Towns of Goffstown, New Boston and Weare and the Central New Hampshire Regional Planning Commission, the General John Stark Scenic Byway was designated a New Hampshire State Scenic and Cultural Byway on June 5, 2008, by the State Scenic and Cultural Byways Council and NHDOT. The Byway showcases many cultural and historical features of regional, State and National significance. To facilitate ongoing management of the Byway, a series of goals and strategies as well as a corridor


Section 4: Strategic Initiatives



management plan have been identified and developed by the General John Stark Byway Council. These goals and strategies will be achieved by the measures outlined in this plan through coordination between the council, individual communities, state and federal agencies, local community groups, non governmental organizations, and regional planning commissions.

Economic development is also an important strategy of the General John Stark Scenic Byway supporting the Core Goals and Key Actions of this plan. Specifically, the Byway seeks to expand local economic development by; 1) expanding existing local businesses, including local artists, agriculture, and tourist-related businesses; 2) encouraging businesses and communities to market the Byway in their advertising; and 3) promoting new tourist-related businesses. The Council has designed a number of strategies to implement these goals including working with member communities to encourage incorporating the Byway into their economic development strategy. Support for small businesses applying for Tourist Oriented Directional Signs to help attract visitors to their business will also be provided and the Council will also work with business owners to participate in the Byway planning process. The project also includes an inventory and promotion of Community Supported Agriculture farms, local farm stands and farmer’s markets.


■ JOHN STARK RELATED SITES IN MANCHESTER:
The John Stark House
John Stark Statue and Gravesite at Stark State Park
Millyard Museum




Become a fan of the General John Stark Scenic Byway on Facebook!

The Byway is overseen by the General John Stark Scenic Byway Council.
438 Dubuque Street
Manchester, NH 03102
www.generalstarkbyway.org
info@generalstarkbyway.org

THE GENERAL JOHN STARK SCENIC BYWAY



*"Live free or die. Death is not the worst of evils."
- General John Stark*



* Scenic Byway *

A thirty-four mile state designated scenic byway connecting the towns of Goffstown, Dunbarton, New Boston, and Weare, New Hampshire.

Source: SNHPC General John Stark Scenic Byway Council

In addition to these technical services and studies, CTAP has also provided direct grant funding to municipalities in the form of discretionary grants, target grants and collaborative grants to undertake important planning projects in support of the CTAP goals and mission.



The collaborative grant funds through the support of the region's municipalities have in fact funded the development of this plan

Currently, through another collaborative regional grant project, SNHPC is involved in a project designed to determine the impact of the Londonderry Pettengill Road project on a study area in the vicinity of Manchester-Boston Regional Airport (MBRA). The purpose of the Pettengill Road/Airport Access Road Transportation/Land Use Plan is to determine if the planned roadway network in the vicinity of MBRA is adequate to accommodate additional traffic resulting from completion of the Pettengill Road project.

When constructed, Pettengill Road will create a new direct roadway link between the Manchester Boston Regional Airport, the Airport Access Road and approximately 1,000 acres of developable land in the northern portion of the Town of Londonderry – a critically important center for economic growth and development within the SNHPC Region.

Establish a Regional Comprehensive Economic Development Strategy (CEDS) Planning Process for the Region

One of the major issues confronting the SNHPC Region is how to proceed with establishing a Regional Comprehensive Economic Development Strategy (CEDS) planning process for the region. A CEDS is a formal economic development planning process funded through the U.S. Department of Commerce, Economic Development Administration (EDA) for the purpose of bringing together the public and private sectors in the creation of an economic roadmap to diversify and strengthen regional economies.

The CEDS process may sound like another government program, but it is an important and essential part of the strategic economic development planning process. By participating in the CEDS planning process, municipalities can qualify for EDA assistance under its Public Works or Economic Adjustment Assistance Program. In other words, having a CEDS in place is a prerequisite for a municipality or planning organization to apply for and obtain this important federal economic development funding.

Currently, there is only one EDA recognized and federally funded economic development district and CEDS within the entire southern region or lower half of the state of New Hampshire. This district and CEDS is administered by the Rockingham Economic Development Corporation primarily for municipalities located within Rockingham County and several municipalities located in the eastern portion of Hillsborough County, most located around the City of Nashua. Nashua, Portsmouth and Manchester, because they are entitlement cities, are eligible for federal funding to conduct their own CEDS program if they so choose (see following map). The balance of most of all the other municipalities in Hillsborough, Cheshire, Merrimack and Strafford counties have been left out of the CEDS process in New Hampshire.



Other than the City of Manchester, the following SNHPC communities located within the Rockingham Economic Development District are currently eligible for EDA funding: the towns of Auburn, Candia, Chester, Derry, Deerfield, Londonderry and Raymond. The towns of Bedford, Goffstown, Hooksett, New Boston and Weare, located in Hillsborough and Merrimack counties within the SNHPC Region, are currently not eligible for EDA funding.

As an example of what EDA funding can do, the Town of Londonderry recently applied for funding to construct the Pettengill Road Sewer Improvement Project. Londonderry has been developing this project over the last ten years and this sewer infrastructure project is now fully permitted and ready for construction. With the construction of the Manchester Airport Access Road, the upgrade of Pettengill Road, and this sewer infrastructure project, over 1,000 acres of prime industrial zoned land in Londonderry will be opened up for development. Because this project lies directly south of the Manchester Boston Regional Airport (a major economic engine for the state), this project has important economic development benefits for both New Hampshire and the region.

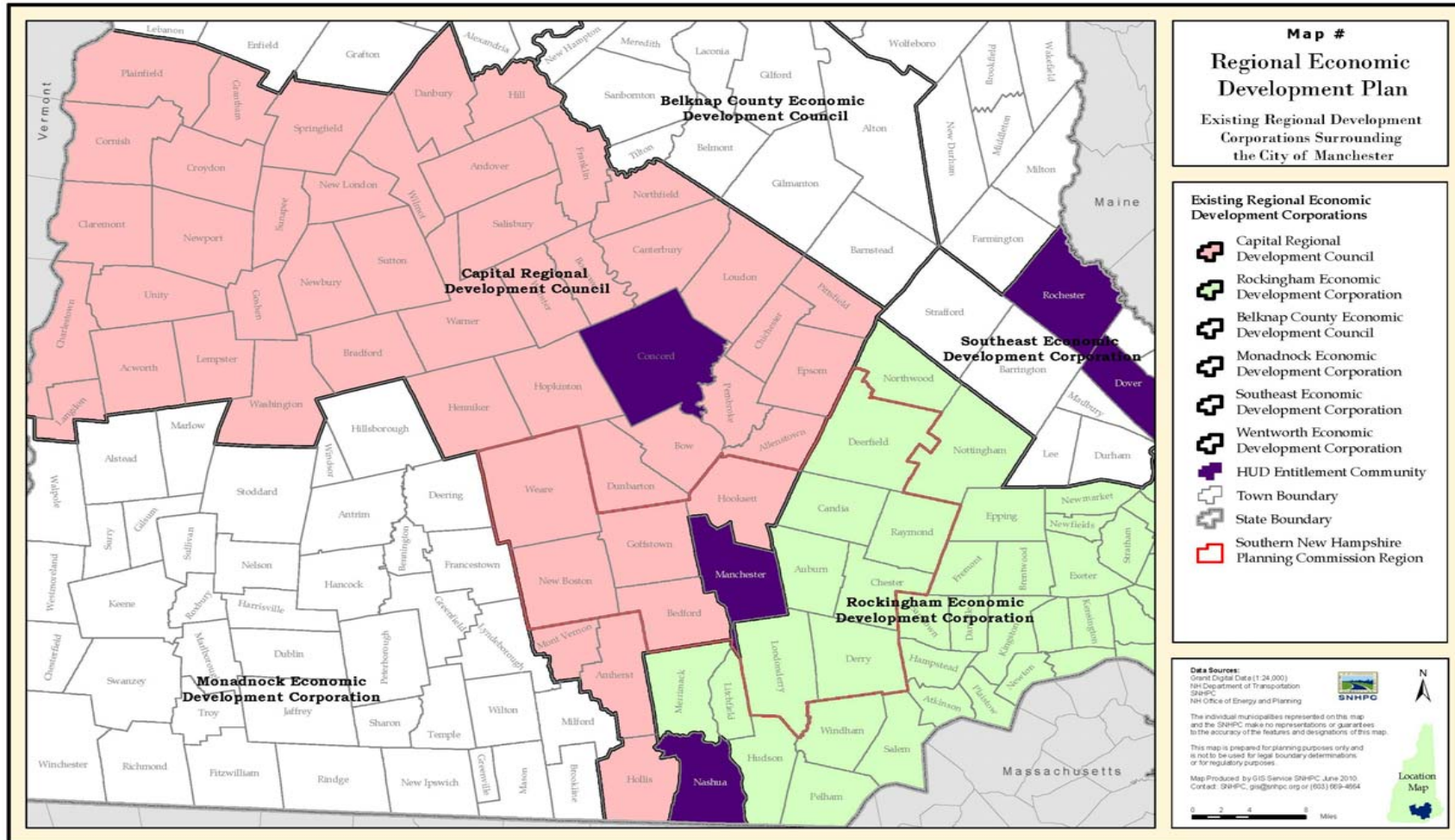
In seeking to establish a CEDS framework for continuous economic development planning within the region, the SNHPC and the Metro Center-NH Steering Committee approached the City of Manchester, the Rockingham EDC, NH DRED, and the EDA New England Regional Office to explore the feasibility of how a unified Economic Development District could be established for the region.

The most feasible approach identified is to explore the possibility of preparing a joint CEDS application for the municipalities in SNHPC and the Central New Hampshire Regional Planning Commission (CNHRPC) which are currently not covered by a CEDS, plus the City of Manchester if they opt to participate (see following map showing Future Regional Economic Development District). It is a key goal of this plan to establish an economic development district and implement a CEDS process for the region to enable grant funds through the EDA's Public Works program to go to the municipalities in the SNHPC Region which are currently not part of an existing district or CEDS process.

In discussing this strategic initiative with the EDA Regional Manager and the Executive Director of the CNHRPC, it was decided that CNHRPC will take the lead in preparing the application with SNHPC assistance and participation. As can be seen by the following map, there are significantly more municipalities located within the CNHRPC region and thus by combining the two regions as well as the Hillsborough and Merrimack counties, the feasibility of establishing a future economic development district stands a greater chance of being supported by NH DRED and formally adopted by the EDA. The following Table 33 provides a summary of the current status of economic development planning among all 13 municipalities within the SNHPC region.

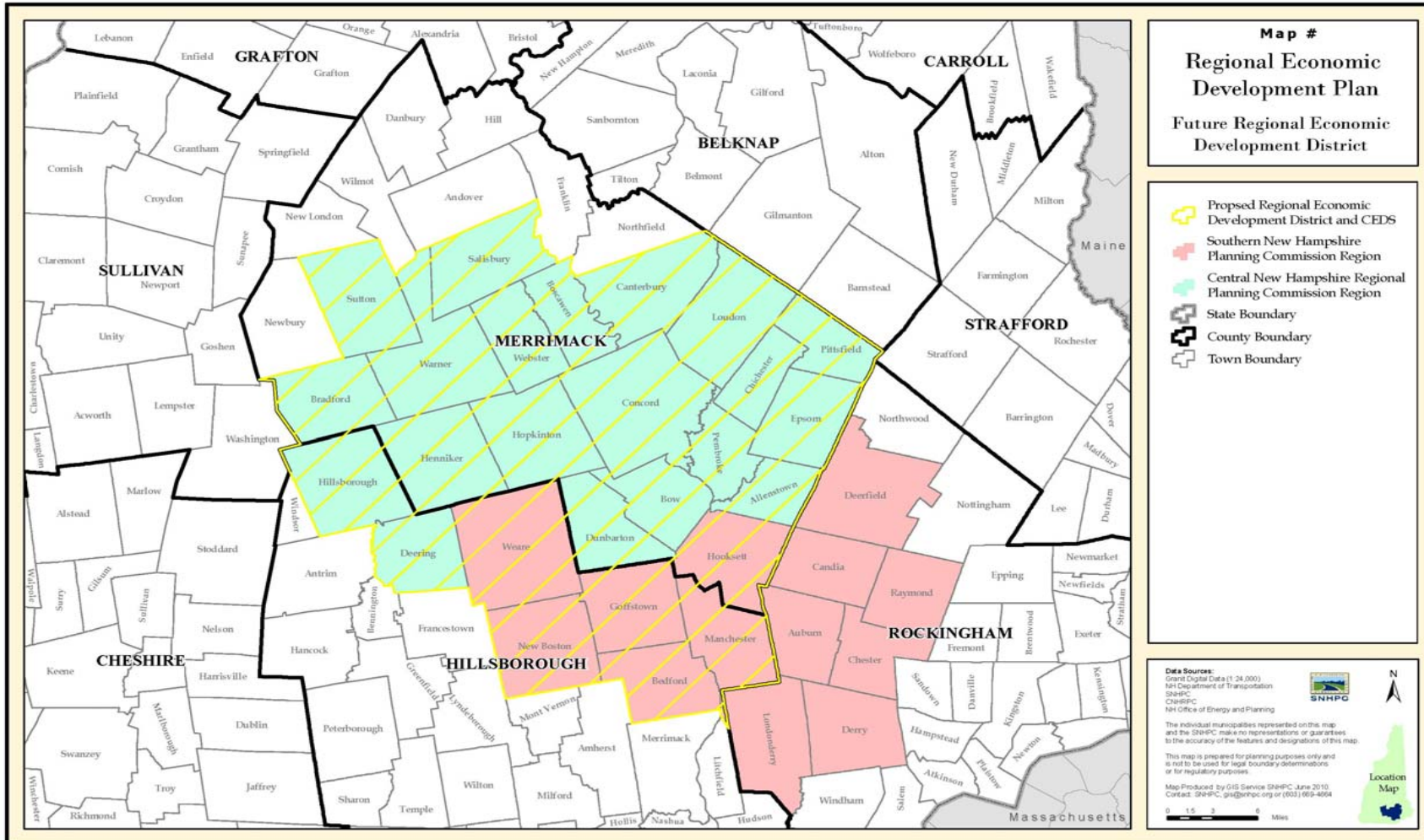


Map 11
Existing Regional Development Corporations Surrounding Manchester





Map 12
 Future Regional Development District Surrounding Manchester





Expand SNHPC's Existing Regional Brownfields Program

Since 2007, the SNHPC has successfully implemented a new community-wide Brownfields Program and initiative which provides assessment funding to conduct Phase I and Phase II environmental assessments of eligible brownfields sites and properties among all 13 communities in the region. To date this program has been funded through two EPA Brownfields Grants in the amount of \$200,000 and \$400,000 each, with primary focus on both petroleum and hazardous substance contamination.

A Brownfields as defined by EPA is “real property, the expansion, redevelopment, or reuse of which may be complicated by the presence of a hazardous substance, pollutant, or contaminant.” Examples include abandoned or underutilized factories, mills, service stations, dry cleaners, chemical storage facilities, salvage yards, and even commercial or public buildings that may contain hazardous building materials, such as lead-based paint, asbestos, or PCB-containing materials. Brownfields can diminish property values, challenge the economic vitality of an area, and hamper efforts to spur investment in the community.

The SNHPC Brownfields Program is guided by an Advisory Committee made up of 21 stakeholders, community representatives and environmental engineers as well as staff from the NH DES and EPA Brownfields Programs. In addition, SNHPC has retained two environmental consultants to help implement the program; conduct necessary public and property owner outreach; develop an inventory of sites; and prepare the environmental investigations.

Through development and implementation of the program, a total of eight Brownfields sites located in several communities within the region, including the City of Manchester (one site consisting of 3 lots) have been nominated into the program. These sites have resulted in a total of 10 Phase I Environmental Site Assessments and 7 Phase II Environmental Assessments. Also as part of the investigations, underground storage tanks have been pulled and several sites have been moved into final clean up programs offered by the State of New Hampshire. Because of the success of this program and the amount of available EPA grant monies remaining in the program, SNHPC has applied for a third EPA Brownfields community-wide assessment grant in the amount of \$400,000. If this grant is awarded, the new funds will extend the SNHPC program for another three years, until 2015.

An important element of the brownfields program is not only seeking the eventual clean up and reuse of contaminated sites, but also to see these properties redeveloped and placed back on the local tax rolls, generating jobs and enhancing economic growth. With the expansion of SNHPC's Brownfields Program, the SNHPC is exploring the possibilities of partnering with the City of Manchester and the Capital Regional Development Council to establish and implement in the future a new brownfields coalition program and a revolving loan fund that would be able to offer municipalities and private property owners additional funding for both assessment and clean up work.



This new initiative, however, while dependent upon successfully obtaining necessary EPA grant funding, will be significant for the region as the benefits to property owners and municipalities for both assessment and clean up funding will spur greater interest and opportunities for economic growth and revitalization. Such a partnership with City of Manchester and the Capital Regional Development Council will also expand SNHPC's role and its capacities for greater economic development planning in the future as these entities are able to take greater advantage of a variety of economic development funding opportunities, including community development block grants, the New Markets Tax Credit Program as well as other federal, state and Community Development Finance Authority funding available for various economic development projects.

Conduct a College/University Economic Impact Study

There is a need to better understand the combined economic impacts of all the colleges, universities and professional schools located within the SNHPC Region. Recently, UNH Manchester conducted an economic impact study of that school alone, and determined that all of its programs and activities returned \$65 Million back to the Greater Manchester region. Additionally, the University Council published a similar report on a statewide level earlier this year – see http://www.nhcuc.org/pdfs/2010_impact_report.pdf.

A similar study needs to be conducted to assess the economic benefits and advantages all the colleges and universities in the region have with respect to the region's economy. This can be compared to other regions and other industries within the region to identify needs and target resources and programs.

The concept for conducting this College/University Economic Impact Study was suggested by a member of the Metro Center-NH Steering Committee, and this strategic initiative has been endorsed by the Steering Committee and included in Metro's Investor Model.

Prepare a Comprehensive Sustainability and Energy Plan for the Region

Energy is fundamental to the regional economy and the quality of life of the SNHPC Region's residents. Energy use from electricity, natural gas and transportation fuels also represent the region's largest source of greenhouse gases, contributing to climate change. Recognizing the need to prepare for the future, many municipalities and planning organizations are working across the world to develop energy and sustainability plans to guide the use and development of energy and alternative forms of energy. The goals of these plans aim to more efficiently expand energy supply and choices to reduce greenhouse gases and at the same time make considerations that help integrate energy and climate into land use and transportation planning to create more livable communities.



For example the “property-assessed clean energy” or PACE program, recently enacted legislation that would allow municipalities to form voluntary districts to enable homeowners and commercial property owners to finance retrofits through their property taxes. The Town of Durham, NH recently authorized and adopted such a district. There are many other energy-efficiency related planning measures and tax credit programs available to encourage greater use of renewable forms of energy. In addition as electric and gas powered vehicles are made more affordable, the provision and need for refueling stations will increase as will the role of municipalities and planning commissions in addressing these new alternative energy sources.

The SNHPC is well positioned to develop a comprehensive energy and sustainability plan for the region, but in order to accomplish this funding must be secured. Recently, the U.S. Department of Housing and Urban Development (HUD) and the U.S. Environmental Protection Agency (EPA) formed an interagency Sustainable Communities Partnership to implement a new Sustainable Communities Regional Planning Grant program to fund the development of these plans at the regional level. In anticipation of this funding all nine Regional Planning Commissions in the state formed a partnership and submitted a joint application. Unfortunately, the application was not funded because UNH submitted a similar proposal. The loss of this grant opportunity, however, should not discourage the SNHPC from exploring or seeking similar funds in the future.

Conduct a Study to Determine the Feasibility of Establishing Regional Public Transit System/Authority

SNHPC is actively involved in the development of public transit in the region, from collaborating with the Manchester Transit Authority in the provision of fixed-route transit services, participating in the design and management of new transit services (Cooperative Alliance for Regional Transportation) in the greater Derry-Salem area and participating with NHDOT and the New Hampshire Department of Health and Human Services in a project to coordinate community transportation services on a statewide basis. With its participation in these projects, SNHPC is actively engaged in the fulfillment of many of the Core Transportation Goals and Key Actions of this plan such as continuing to support the MTA in its efforts to provide efficient and cost-effective bus services and investigating opportunities for and promote the expansion of public transportation services on a regional scale.

Some of SNHPC’s current initiatives with regards to transit deal with continuing support and assistance for existing transit services in the region such as the MTA and CART. Other initiatives, such as the pursuit of a fully regional transit system and expansion of passenger rail services into southern New Hampshire, involve proposals for new transit services. One element that all of existing and future services have in common is their need for new dedicated sources of funding for operations and capital replacement. Because transit funding projections for the region in the near future have been determined



to be sufficient only for maintaining the current service levels and replacement of capital, additional funding will be required for growth and expansion of transit in the region. It appears evident that, in order to expand transit in the SNHPC region, sources of dedicated transit revenue must be identified as well as an operator willing to provide these services. In recognition of this need, it is a strategic initiative of this plan to seek funding through the state Transportation Improvement Plan (TIP) to conduct a study to determine the feasibility of establishing a regional public transit authority for the region. One important component of this study would expand SNHPC's work on current projects designed to improve accessibility to Manchester Boston Regional Airport (MBRA) through improved links with bus and rail public transportation modes. Based on the completion of a SNHPC/Rockingham Planning Commission study designed to determine the demand for regularly scheduled bus service between the Portsmouth Transportation Center and MBRA, the NHDOT recently applied for CMAQ funding to implement this service and is currently in the process of selecting an operator.

In addition to this goal, this Feasibility Study should build upon the SNHPC's existing Regional Transit Feasibility Study which looked at expanding the scope of the transit services presently provided by the Manchester Transit Authority (MTA) (see following MTA system map). The study should also examine how existing services provided by the MTA and other organizations can be more effectively used and used more efficiently through a "transit brokerage" concept. In addition, the study should focus on existing models in New Hampshire (i.e. COAST, Greater Derry-Greater Salem Regional Transportation Council, MTA) and how regional transit systems has been successfully developed in other areas.

In addition, the feasibility study should also involve the Cooperative Alliance for Regional Transportation (CART) and consider if this system could be expanded within the SNHPC Region. CART, which has been in operation since October 2006 in the Greater Derry/Salem area, also provides out of region service to eight specific destinations, including Elliot Hospital and Catholic Medical Center in Manchester and Dartmouth Hitchcock Clinics in Bedford and Manchester.

CART was formed as a result of a critical need for transportation identified in a regional study funded by the NHDOT from 2001 to 2003. On behalf of the Greater Derry/Greater Salem Regional Transportation Council (RTC), the Rockingham Planning Commission (RPC), SNHPC and Nashua Regional Planning Commission (NRPC) conducted a study to develop a regional transit plan for the area. A plan developed through the recommendations of the study called for improving transit service in the region through 1) a combination of coordination and expansion of existing demand response transportation services and 2) development of standard fixed route public transportation service in areas with adequate population to support it. The RTC and RPC developed draft legislation to establish CART that was subsequently introduced during the 2004-2005 legislative session. Enabling legislation (HB 568) providing for the establishment of CART was passed by the New Hampshire General Court in June 2005.

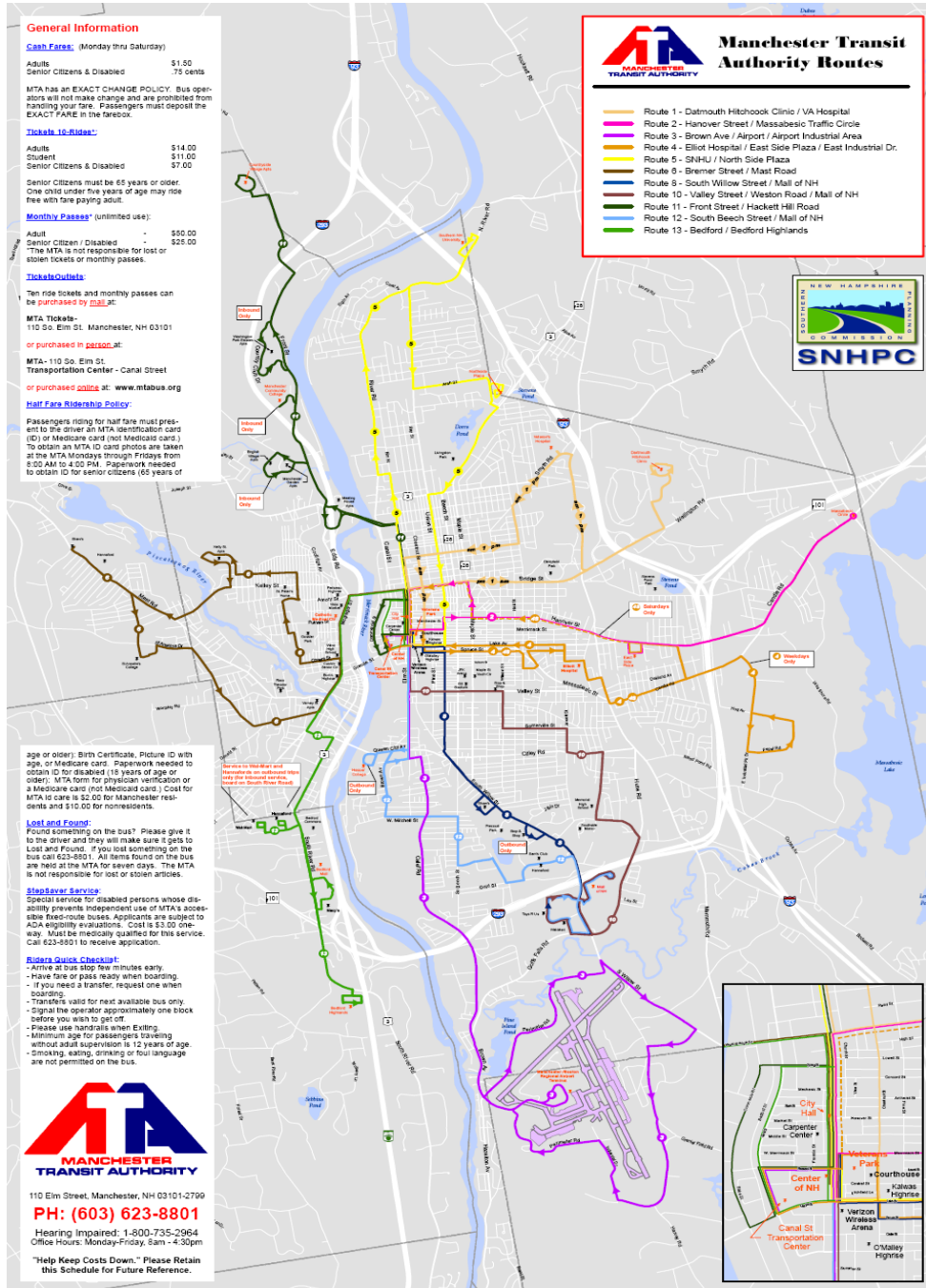


Increasing accessibility and mobility of people and freight is essential to sustain the economy of the region. The ability of people and goods to move throughout the region has a direct impact on quality of life for residents and employees in the area. Increased accessibility and mobility in turn, depend on the development and maintenance of an efficient transportation system that utilizes various modes.

As the region grows, it is evident that the increasing dispersion of land development in the area is leading to socio-economic and demographic changes. In turn, these changes are resulting in increased regional trip-making, travel across municipal boundaries, and a growing need to ensure mobility and accessibility on a regional scale. The need for this mobility will become increasingly essential to sustain our region's economic competitiveness and to maintain the quality of life for those who live and work in the area. Innovation and a willingness to explore new solutions to these issues will be required in the face of diminishing funding for public transportation.



Map 13 MTA System Map





Expand I-93 Commuter Bus Service Project

Another important Core Transportation Goal of this plan is to expand inter-city bus services through out the region and in particular expand the existing I-93 Commuter Bus Service Project to serve other destinations within the region.

While the Manchester Transit Authority (MTA) provides fixed route transit service to approximately 90 percent of Manchester residents in addition to demand response services, some intercity bus travel is available through providers such as Concord Coach, Vermont Transit and Peter Pan Bus Lines. Boston Express primarily offers I-93-based commuter services to Boston and Logan Airport. Manchester-Boston Regional Airport also provides regularly scheduled passenger service through six-passenger carriers in addition to general aviation and cargo services.

Principally because of its location at a junction of the regional interstate system, Manchester is the focus of ground transportation movements in the region and State. Despite the current emphasis on road-based ground transportation, local and regional officials are becoming increasingly aware that, in order to sustain general economic productivity and economic growth, funding for transportation projects promoting a multi-modal transportation system, including transit and bus service needs to be increased in order to improve traffic efficiency and safety for commercial and private vehicles.

Provided below is a brief summary of the region's existing inter-city bus services:

Concord Coach Lines

This carrier provides service between Concord, New Hampshire and Boston, Massachusetts, including limited stops at I-93 Exit 5 in Londonderry. Monday through Friday there are two (2) southbound trips and two (2) northbound trips serving Londonderry. On the weekends there is (1) southbound trip and two (2) northbound trips service Londonderry.

Concord Coach/Boston Express

This carrier provides service between Concord, New Hampshire and Boston, Massachusetts, including stops at Manchester and Londonderry. However, Manchester and Londonderry are not located on the same line. Instead, they are served by different and distinct routes. Monday through Friday, there are eight (8) southbound trips and nine (9) northbound trips serving Manchester, twenty-one (21) southbound trips and twenty (20) northbound trips serving I-93 Exit 5 in Londonderry and seven (7) southbound trips and ten (10) northbound trips serving I-93 Exit 4 in Londonderry. On the weekends there are six (6) southbound trips and seven (7) northbound trips serving Manchester. Additionally, there are seventeen (17) southbound and (17) northbound trips serving exit 5 in Londonderry on the weekends.

Vermont Transit Lines

Vermont Transit Lines now operates as Greyhound Lines. There are stops at the Manchester-Boston Regional Airport from various locations in New Hampshire, Vermont, Massachusetts and Montreal.



Peter Pan Trailways

This carrier currently includes a stop in Manchester as part of a limited daily service between Concord, New Hampshire and Connecticut.

Implement the NH Capitol Corridor Passenger Rail

Increasing accessibility and mobility of people and freight is essential to sustain the economy of the region. The ability of people and goods to move throughout the region has a direct impact on quality of life for residents and employees in the area. Increased accessibility and mobility in turn, depend on the development and maintenance of an efficient transportation system that utilizes various modes.

Plans to expand rail service in the SNHPC Region and proposals to develop multimodal transportation hubs at locations such as downtown Manchester and at Manchester-Boston Regional Airport (MBRA) have the potential to improve accessibility and mobility for individuals and freight and facilitate access to goods and services. The SNHPC is participating as a member of the New Hampshire Rail Transit Authority created by the State Legislature in 2007 to develop commuter and passenger rail and related public rail transportation services in the State. The Authority is pursuing the implementation of passenger rail service on the New Hampshire Main Line (Capitol Corridor) as the first phase of a Boston to Montreal rail service (see following map of the corridor). An economic impact study of intercity passenger rail service on the Capitol Corridor was completed in March 2010 to document the long-term effects of improvements in rail service on job creation, increased labor income and improved business output.

In 2008, an I-93 Transit Investment Study was completed through a cooperative agreement between the NHDOT, the Massachusetts Executive Office of Transportation, Federal Highway Administration (FHWA) and Federal Transit Administration (FTA). A Stakeholder Committee that included SNHPC was responsible for monitoring and providing input to the study. The overall objective of the study was to identify what transit investments are needed and feasible to accommodate future travel demand within the I-93 corridor and determine when and how those investments should be implemented.

The study concluded that, of the options considered, the M&L corridor which runs east of I-93 in the southeastern portion of the State had the potential to provide highly effective future transit services that would provide direct benefits to the I-93 corridor. However, the corridor also had the greatest challenges to implementation in terms of costs and cost effectiveness. The study also concluded that, due to the fact that rail service along the M&L corridor was not feasible in the near term, 1) service along the New Hampshire Main Line should be maintained as the primary focus for implementation of commuter rail service in New Hampshire and 2) in order to address mobility issues in the I-93 corridor, New Hampshire and Massachusetts should begin phased implementation of bus services using a “Bus-on-Shoulder” strategy between Manchester and Boston while conditions are periodically reassessed to determine if potential for M&L service implementation is possible.



In continuing pursuit of extending passenger rail service in New Hampshire, SNHPC is participating as a member of the New Hampshire Rail Transit Authority created by the State Legislature in 2007. The mission of the Authority is to “[d]evelop and provide commuter and passenger rail and related public rail transportation services in New Hampshire”. The vision of the Authority is to “[d]evelop and implement comprehensive, coordinated and prioritized project and funding plans for passenger rail services that provide New Hampshire citizens:

- Commuter rail services to in-state and out-of-state employment centers,
- Tourist services to recreation areas,
- Easy access to regional inter-city passenger rail services and other multi-modal transportation systems.

The next steps in the development of passenger rail service include securing Federal Railroad Administration funding for preliminary engineering, finalizing required operating agreements, securing capital and operating funding and pursuing public-private partnerships for station development. The New Hampshire Rail Transit Authority is also committed to continuing to work with State and Federal legislators and local businesses and residents to discuss the economic and quality of life benefits of passenger rail.

Through a State Planning and Research Grant awarded in 2008, SNHPC participated in the completion of a Preliminary Site Evaluation for a passenger rail station at MBRA. The Preliminary Site Evaluation represented an the initial step in a process to determine the feasibility of constructing an MBRA passenger rail station in a location near the planned U.S. Route 3 interchange for the Bedford-Manchester-Londonderry Airport Access Road. The feasibility of the site was determined through a conceptual evaluation of general accessibility, environmental constraints (i.e. wetlands, hazardous materials, etc.) and suitability to accommodate initial and expanded parking and station layouts required to operate passenger rail service. SNHPC directed the activities of the project staff to complete a Preliminary Commuter Rail Station Site Evaluation that included a conceptual station site plan including layout, parking configuration and internal roadway system. The conceptual site plan also indicates how trips to/from the station will be linked to the external roadway system and the planned interchange for the Airport Access Road. As a result of progress completed in the development of passenger rail services in the region, including the completion of the Preliminary Site Evaluation, the Town of Bedford is currently developing the preliminary design for the proposed station.



Map 14
Capitol Corridor



Source: Nashua Regional Planning Commission

Prepare a Regional Water/Wastewater Plan

The need to develop a region-wide comprehensive Water and Wastewater Planning Study has been identified in many SNHPC long range plans. The provision of water and sewer services with adequate capacity is essential to economic growth of the region. Provided in Volume II of this plan are maps showing the most up-to-date water and sewer service areas in the region.

Without exception the City of Manchester provides the largest treatment and distribution of public water and sewer in the region. The safe yield of Massabesic Lake in Manchester and Auburn as the city's primary drinking water supply is nearing capacity. It is expected that water demand will exceed a safe yield from the lake in the very near future. This water is currently treated at the Lake Shore Road Treatment Plant in Manchester. In anticipation of the need for new water supply, the U.S. Army Corps of Engineers is currently conducting a study on the Merrimack River to confirm that the river could serve as a supplemental water source for the city and the region with proper treatment. The Manchester Water Works is also conducting a \$28M upgrade at the treatment plant to improve capacity.

The City of Manchester is also currently working towards completing Combined Sewer Overflow (CSO) discharges into the Piscataquog and Merrimack Rivers and has recently



developed plans for a new wastewater treatment facility to address service and capacity needs for the next twenty years.

In addition to these efforts, the towns of Bedford, Derry, Hooksett, Goffstown, and Londonderry have been working to expand and upgrade their facilities. Raymond is in a unique position and needs to develop a new wastewater system for the community. Weare has a small system primarily servicing the town's new middle school.

Many of the smaller communities surrounding Manchester such as Weare, New Boston, Chester, Auburn, Candia and Deerfield have no water and sewer service at all, and as private septic systems in these communities and the village centers fail, there will be an increasing need to expand and/or provide water and/or sewer services to these communities. A regional water and wastewater study is needed to explore this issue in greater detail and develop plans and proposals for these communities in case of public health issues. Such a study could also look at region-wide public water and sewer as an economic incentive to grow certain locations within these areas.

A number of new water infrastructure financing acts have been recently introduced in Congress to help pay for critical water infrastructure needs – not only to reduce stormwater and wastewater pollution but to also fund critical drinking water needs (see S 1005, introduced by Senators Boxer, Cardin, Inhofe and Crapol. If this or other similar funding is approved there is the possibility that Section 208 funding which has been in the Clean Water Act since its enactment could be available to regional planning commissions in the future to address this and other similar needs. This strategic initiative recommends that the SNHPC position itself to be ready to address available funding if community needs arise in the future.



Section Five: Priority Public Projects

Top Public Projects

As part of the development of this plan, members of the *Regional Economic Development Plan Steering Committee* as well as municipal officials -- town planners and economic development directors were asked to complete and submit a list of the top public projects -- proposed, planned or underway for the region and their municipality. This information was specifically requested to identify and prioritize the public projects the *Steering Committee* and municipal officials view as significant to the region and their municipality for economic development purposes. The results of this request are summarized in this chapter.

Participating in this process, the following municipalities prepared and submitted a list of public projects: the City of Manchester and the towns of Auburn, Bedford, Derry, Goffstown, Londonderry and Raymond (the public project list provided by each of these municipalities is contained within Volume II). From among these municipalities, a total of 58 projects were identified, of which 49 projects were considered to be of regional significance. In addition, the Steering Committee considered and ranked the twelve strategic initiatives that are recommended and included as part of this plan (see Chapter Four: Strategic Initiatives).

At the May 24, 2010 meeting, *Steering Committee* members reviewed all the public projects of regional significance and prioritized what they believed to be the top public projects and strategic initiatives for the region (see results as shown in the following Table 34). This prioritization was conducted for two reasons: (1) to implement a CEDS like process as part of this plan; and (2) to identify the highest ranked projects/initiatives for the region.

It is important to note here that the final prioritization results shown in Table 35 are **only advisory** and do not in any way represent an official list of public projects for the region. The development of an official prioritized list of public projects for the region is currently not required by any federal and/or state statute. However, this project by project prioritization conducted as part of a Comprehensive Economic Development Strategy (CEDS) process is a requirement when seeking federal U.S. Department of Commerce, Economic Development Administration funding. The following criteria and numeric scoring was used by the *Steering Committee* in ranking the projects.

<u>Criteria</u>	<u>Score</u>
<ul style="list-style-type: none"> • The Public Project will have little or no importance in creating jobs or improving the region’s economy.....0 • The Public Project is important in creating jobs and improving the region’s economy..... 1 • The Public Project is absolutely important in creating 	



jobs and improving the economy.....2

After reviewing and discussing each of the identified public projects of regional significance as well as the strategic initiatives recommended by this plan, the following results were obtained. The public projects benefiting the region which received the highest scores are as follows:

<u>Public Project Benefiting Region</u>	<u>Score</u>
• Job Corps Center, City of Manchester	22
• UNH Manchester Expansion, City of Manchester	22
• Pettengill Road Upgrade/Sewer Pump Station, Town of Londonderry	22
• Route 101 Widening, Town of Bedford	19
• Northwest Business Park/Hackett Hill Phase II, City of Manchester	19
• Manchester Sewer Plan Upgrades, City of Manchester	18
• Exit 6/7 Improvements, City of Manchester	18
• Exit 4A, Town of Derry, Londonderry	18
• Phase I Wastewater Expansion, Wellington Business Park, Town of Auburn	18
• Extension Water/Sewer Rt. 114, Town of Goffstown	18
• I-93 Widening, City of Manchester and towns of Derry and Londonderry	17
• Customs/Boarder Protection, Manchester-Boston Regional Airport	17
• Northwest Business Park, Hackett Hill, City of Manchester	17
• Manchester Airport Access Road, City of Manchester	16
• River's Edge, City of Manchester	16
• Metro Center Webpage	15
• Metro Center Marketing	15
• Mast Road Sewer Replacement, Town of Goffstown	15
• Exit 4 Sewer Overlay District Development, Town of Raymond	15

The strategic initiatives of this plan which received the highest scores are as follows:

<u>Strategic Initiative Benefiting Region</u>	<u>Score</u>
• NH Capitol Corridor Passenger Rail	17
• Expand CTAP Funding & Services to Municipalities	15
• Feasibility Study: Regional Public Transit System/Authority	13
• Expand I-93 Commuter Bus Service Project	13
• Regional Incubator Development	11
• Certified Site Program	11
• Comprehensive Economic Development Strategy (CEDS)	10

Before reaching any conclusion about these results, it is important to note that the tabulation of total scores does mean that the project is not important to the region only that the *Steering Committee* believed that the highest scoring projects/strategic initiatives would have better results in (1) creating jobs and (2) improving the region's economy. This is an important consideration as the Regional Economic Development Plan is implemented and updated and



if an official CEDS project prioritization process is ever carried out for the region in the future.



Table 34 - List of Top Public Projects Submitted by Municipalities in the Region

Project Name	Project Description	Project Proponent	Estimated Cost	Funding Source(s)	Goals Addressed	Term	Regional Impact	Total Score
Job Corps Center	NH's 1st Job Corps Facility	UD Dept. Labor/NH Workforce Opportunity Council/City of Manchester	\$33 Million	US Dept. of Labor/City	D,G	Short	Yes	22
UNH Manchester Expansion	Applied Technology Programming Program	University System, UNH City of Manchester	\$25 Million +	State/Federal/Private	E	Mid	Yes	22
Pettengill Road Upgrade/Sewer Pump Station	New 4 Lane Blvd Style Road with Sewer Improvements	Town of Londonderry/NH DOT	\$12.3 Million	State/Federal/Town		Mid		
Rt. 101 Widening	2 to 5 Lanes - Wallace to Constitution Road	Town of Bedford/NH DOT	\$13 Million	NH DOT	A2	Long	Yes	19
Northwest Business Park	Remaining 280 Acres	City of Manchester	TDB	City/Private Sector		Mid		
Hackett Hill Phase II		MHRA		Possibly EDA/State	C,G		Yes	19
Manchester Sewer Plan Upgrades	20-yr Upgrades	City of Manchester/Towns of Bedford Londonderry/Goffstown	\$50 Million +	State/Federal/Local	B1	Long	Yes	18
Exit 6/7 Improvements	Develop Full Interchange at Exit 7 with improvements at Exit 6	City of Manchester/NH DOT	TBD	State/Federal		Long		
Exit 4A	New Interchange	Town of Derry/Londonderry/NH DOT	\$30 Million	Municipalities/NH DOT Federal Highway Adm	B1	Long	Yes	18
Phase I Wastewater Expansion	Wellington Business Park	Town of Auburn	\$20,787,200	TBD	B1	Short	Yes	18
Extension Water/Sewer Rt. 114	Future Business Park/St. Anselm	Property Owner/Town/EDC	TBD	Private/Possible TIFD	B1	Long	Yes	18
I-93 Widening	Widening from 2 to 4 lanes Mass border to Manchester	NH DOT/Municipalities/RPC/MPOs	\$800 Million	NH DOT/Federal		Short		
Customs/Boarder Protection	International Arrivals/Airport	City of Manchester/NH DOT/FAA	\$25 Million	State/Federal/City	A1	Long	Yes	17
Northwest Business Park	12 Lot Office/R&D/Light Ind.	City of Manchester	\$5 to \$7 Million	City/Private Sector		Short		
Hackett Hill Phase 1	Subdivision on City Land	MHRA		Possibly EDA	C,G		Yes	17
Manchester Airport Access Road	New Access Road to Airport	NH DOT/Manchester-Boston Reg. Airport Town of Londonderry	\$170 Million	State/Federal	A2	Short	Yes	16
River's Edge	Urgent Care Facility/Medical Office/Retail/Residential/Park	Anagnost Investments/City/BFA MHRA/Elliot Hospital	\$140 Million	Private Sector/City/BFA Other		Short		
METRO Center Webpage	Regional Website	METRO	TBD	Private Sector	G	Short	Yes	15

Section 5 – Priority Public Projects



METRO Marketing	METRO Region Business Marketing	METRO	TBD	Private Sector	G	Short	Yes	15
Mast Road Sewer Replacement	Upgrade Sewer Trunk Line	Town of Goffstown	\$2,500,000	ARRA	A1	Short	Yes	15
Exit 4 Sewer Overlay District Development	TIFD for Wastewater Treatment Facility/Brownfields/Mixed-Use	Raymond Business & Economic Council Board of Selectmen/Developer	\$64 Million/1st Phase	TIFD/Private Sector/Town	B1,C,G	Short	Yes	15
Rt. 28 Utility Extension	Expansion Water/Sewer Lines	Town of Derry	\$1.2 Million	Town of Derry/Private Sector/EDA	B1	Long	Yes	15
Phase 2 Wastewater Expansion	Exit 2/Rockingham Rt.	Town of Auburn	\$15,686,825	TBD	B1	Mid	Yes	15
New Rt. 114 Intersection	New Signalized Intersection	Property Owner/Town/EDC	TBD	Private/NH DOT	A1	Long	Yes	13
Phase 1A Wastewater Expansion	Manchester Rd. Area	Town of Auburn	\$964,874	TBD	B1	Short	Yes	12
Phase 3 Wastewater Expansion	Hooksett Rt./Village Center	Town of Auburn	TBD	TBD	B1	Long	Yes	12
Broad Band	State Broad Band Mapping	State/RPCs/UNH	TBD	State/Federal	G	Short	Yes	11
Rt. 101 Area Infrastructure	Extend Water/Sewer to Comm Zones and Interconnecting Lots	Town of Bedford	TBD	State/Federal/Local	B1	Long	Yes	11
Rt. 28 TIFD	Business Development	Town of Derry	TBD	Town/Private Sector	C,G	Mid	Yes	10
Gas Light South Elm Improvements	Sidewalk/Landscaping/Lighting Other Improvements	City of Manchester	\$5 to \$6 Million	City/CDBG/other Federal	C,G	Mid	Yes	10
Exit 5 Development	Road Access/Zoning	Raymond Business & Economic Council	\$10,000 Planning	\$10,000 CTAP		Short		
Planning/Sewer Feasibility Study	Sewer Feasibility	Exit 5 Special Advisory Council	\$20,000 Sewer	\$18,000 Private Sector \$2,000 Town	B1,C,G		Yes	9
Public Transit to Manchester and Pease Airports	Public Transit	SNHPC/Manchester-Boston Regional Airport	TBD	TBD	A3	Long	Yes	9
Rt. 3 Widening	Widening/Signalization from Hawthorne Drive	Town of Bedford/NH DOT	TBD	NH DOT	A2	Long	Yes	8
Rt. 3 Bridge Replacement	Replacement	Town of Bedford/NH DOT	TBD	State/Federal	A2	Long	Yes	8
Convention Center Expansion	Double Facility Capacity	City of Manchester/Chamber/Private	\$25 Million +	State/Federal/Private	C,G	Long	Yes	8
Hillsborough County Master Plan	Project Implementation	Commissioners/County Delegation	TBD	County	C	Mid	Yes	8
General Stark Byway	Signage/Trail Head Access	Byway Council/Municipalities	\$10,000	State/Municipalities	C,G	Mid	Yes	6
Rt. 28 Road Widening	Transportation	Town of Derry	\$5.2 Million	Town/NH DOT	A2		Yes	6
North Fire Station	New Fire Station	Town of Londonderry	\$1.655 Million	Federal/Town	C	Short	Yes*	3
The following Public Projects were not considered to be of Regional Importance and as a result were not Ranked:								
Piscataquog Boat Access	Develop Ramp at Pump Station	Town of Goffstown	\$5,000	Town	C	Short		NA
Site Marketing	Market Existing Business Parks	Economic Development Committee (EDC)						

Section 5 – Priority Public Projects



Website Update	Pond View and Tatro Drive Revise Website/Link to METRO	Town of Goffstown EDC/Town of Goffstown	TBD \$16,100	TBD Town/EDC/CTAP	G G	Long Short	NA NA
Business/Real Estate Lists	Add to Website/Marketing	EDC/Town of Goffstown	None	Town/EDC	G	Short	NA
Local Business Expo	Marketing	EDC/Town of Goffstown	TBD	Town/EDC	G	Mid	NA
News Articles	Monthly Newsletter	EDC/Town of Goffstown	None	Town/EDC	G	Short	NA
					A2		NA
Derry Bike Trail	Bike Path	Town of Derry	\$250,000	Town/NH DOT/DRED			
				Private Sector	A3,C	Mid	NA
Downtown Parking	Parking Facility	Town of Derry	\$350,000	Town of Derry	C	Short	NA
Flint Hill Green Business Park	Green (energy efficient/low impact) Business Park	Raymond Business & Economic Council	TBD	TBD		Long	
					C,G		NA



List of Top Projects/Strategic Initiatives recommended by the Regional Economic Development Plan	Table 35							
NH Capitol Corridor Passenger Rail	Passenger/Freight Rail - Boston to Manchester	METRO; NH DOT/Municipalities	TBD	Federal/State/User	A4	Long	Yes	17
Expand CTAP Funding & Services to Municipalities	Planning Assistance Municipalities Impacted by I-93 Widening	NH DOT/RPCs/Municipalities	TBD	Federal	C,J	Short	Yes	15
Feasibility Study: Regional Public Transit System/Authority	Evaluate Feasibility of Establishing Regional Transit System	NH DOT/RPCs/Municipalities	TBD	Federal/State	A3	Mid	Yes	13
Expand I-93 Commuter Bus Service Project	Expand Intercity/Commuter Bus Service in Region	NH DOT/RPCs/Municipalities/Airport	TBD	Federal/State	A3	Mid	Yes	13
Regional Incubator Development	Program Development/Business Support Services	METRO/SNHPC/Southern NH University Municipalities	TBD	Private/User	H	Short	Yes	11
Certified Site Program	Marketing of Certified Sites on State and Regional Websites	METRO/SNHPC/Municipalities		Private/User	I	Short	Yes	11
Comprehensive Economic Development Strategy (CEDS)	Manchester to Concord Region Future Economic District	METRO/RPCs/REDCs/Municipalities	TBD	Federal/Local	J	Short	Yes	10
Best Planning Practices/Innovative Model Ordinances	Enhance Certified Site Program Expand Incentives to Participate	SNHPC/Municipalities	TBD	Part of Certified Site	I	Short	Yes	8
Regional Water/Wastewater Plan	Determine Water/Wastewater Regional Improvement Needs	METRO; NH DRED/Municipalities	TBD	Federal/State/Private	B1	Mid	Yes	8
Expand Brownfields Programs	Assess/Clean Up Brownfields Sites through Assessment/RLF Grants	SNHPC/Municipalities/Regional Economic Development Corporations	\$1 Million	Federal EPA Funds	C,J	Short	Yes	7
Region-wide Energy Plan	Renewable/sustainable local energy/green technologies	METRO/Universities/Colleges/RPC/Municipalities	TBD	Federal/State/Private	F	Mid	Yes	6
College/University Impact Study	Determine Economic Impact Colleges/Universities to Region	METRO/Universities/Colleges	TBD	State/Private	E	Short	Yes	4

