



**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 II



# SNHPC

# Regional Economic Development Plan

*for the*  
Southern NH Planning  
Commission Region



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	

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Richard Snow	Bradley Benson	Dean Mehlhorn
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Don Moskowitz	William Dermondy	Keith Moon
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Carol Granfield, Town Manager, Town of Hooksett  
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Naomi Bolton, Town Administrator (former planning coordinator), Town of Weare

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*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

## VOLUME II



*Photo courtesy Glen Shaefer*



*Photo courtesy Rixon Photography*

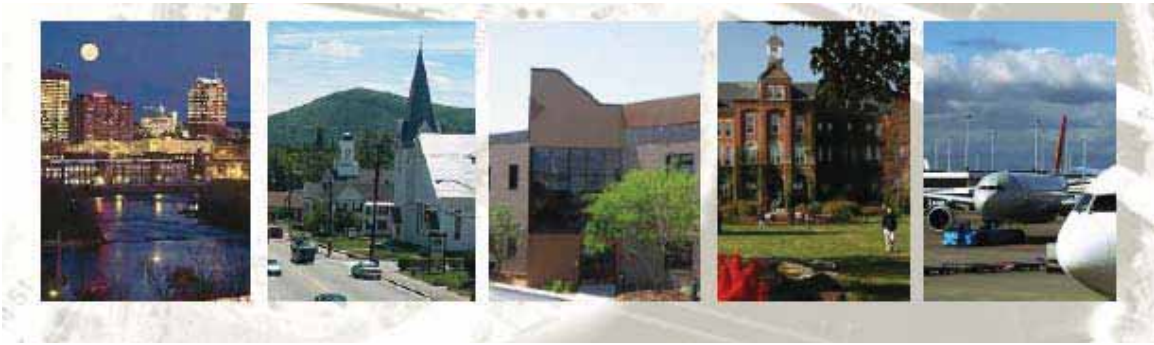
*Recent redevelopment of a blighted and long abandoned schoolhouse into a vibrant academic and dormitory facility for the New Hampshire Institute of Art in Downtown Manchester*

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**Section A: Metro Center NH Municipal Proclamations and Restrictions**



# TOWN OF GOFFSTOWN PROCLAMATION

**WHEREAS...** The Town of Goffstown recognizes that quality of life for many residents includes participation in social, cultural, and educational opportunities outside of our political boundary; and

**WHEREAS...** Employment and educational opportunities for many of our residents depends on a system of local, state, and federal roads and access to rail and air transportation that often extends past our boundaries; and

**WHEREAS...** The quality of life aspect of our community is enhanced by the many art museums, libraries, historic and cultural institutions as well as the entertainment and recreation opportunities that appeal to many different segments of our community are offered in our and nearby communities; and

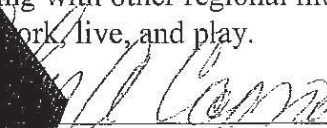
**WHEREAS...** Many of our residents enjoy employment opportunities that are offered in our and area communities; and

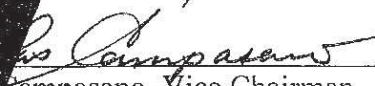
**WHEREAS...** We recognize the efforts of many organizations and people to attract quality businesses, organizations, and enthusiastic visitors to our region as a cooperative on-going effort; and

**WHEREAS...** Our emergency services provided to residents and visitors often depend on the mutual aid and support of our neighboring communities; and

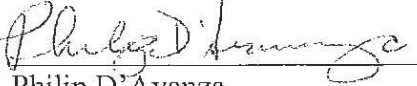
**WHEREAS...** The METROCENTER, representing regional municipalities, businesses, higher-education institutions, chambers of commerce, private and public agencies, is furthering the goals of our municipality and those of the region through collaboration, and the promotion of the region's quality of life to current and prospective employers, residents and visitors;

**THEREFORE,** We the BOARD OF SELECTMEN of TOWN OF GOFFSTOWN offer our encouragement and endorsement of the efforts of the METROCENTER and look forward to participating with other regional municipalities to provide a high quality regional environment in which we can work, live, and play.

  
\_\_\_\_\_  
John Campasano, Chairman

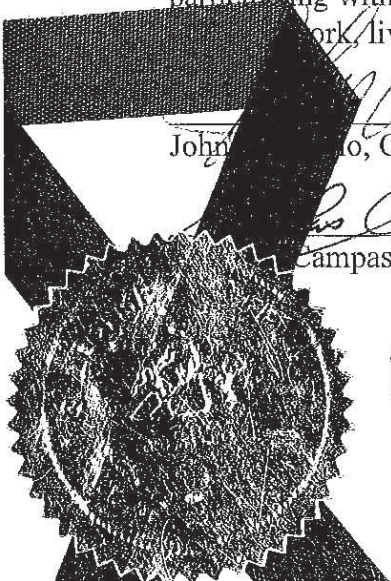
  
\_\_\_\_\_  
Campasano, Vice Chairman

  
\_\_\_\_\_  
Vivian Blondeau

  
\_\_\_\_\_  
Philip D'Avanza

  
\_\_\_\_\_  
Scott Gross

Dated: 6/25/07





## TOWN OF BEDFORD, NEW HAMPSHIRE RESOLUTION

**WHEREAS...**The Town of Bedford recognizes that quality of life for many residents includes participation in social, cultural, and educational opportunities outside of our political boundary; and

**WHEREAS...** Employment and educational opportunities for many of our residents depends on a system of local, state, and federal roads and access to rail and air transportation that often extends past our boundaries; and

**WHEREAS...**The quality of life aspect of our community is enhanced by the many art museums, libraries, historic and cultural institutions as well as the entertainment and recreation opportunities that appeal to many different segments of our community are offered in our and nearby communities; and


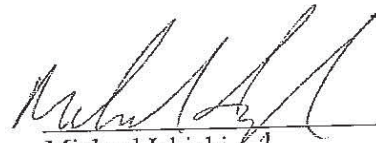
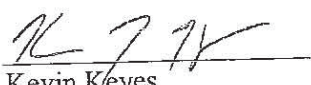
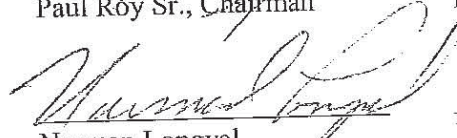
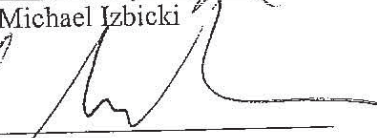
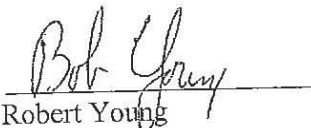
**WHEREAS...**Many of our residents enjoy employment opportunities that are offered in our and area communities; and

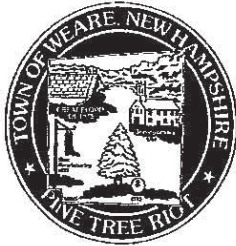
**WHEREAS...**We recognize the efforts of many organizations and people to attract quality businesses, organizations, and enthusiastic visitors to our region as a cooperative on-going effort; and

**WHEREAS...**Our emergency services provided to residents and visitors often depend on the mutual aid and support of our neighboring communities; and

**WHEREAS...**The **METROCENTER-NH** representing regional municipalities, businesses, higher-education institutions, chambers of commerce, private and public agencies, is furthering the goals of our municipality and those of the region through collaboration, and the promotion of the region's quality of life to current and prospective employers, residents and visitors;

**THEREFORE,** We the Town Council of the Bedford, New Hampshire, on this 23rd day of May, 2007, offer our encouragement and endorsement of the efforts of the **METROCENTER-NH** and look forward to participating with other regional municipalities to provide a high quality regional environment in which to work, live, and play.

 <hr style="width: 100%;"/> Paul Roy Sr., Chairman	 <hr style="width: 100%;"/> Michael Izbicki	 <hr style="width: 100%;"/> Kevin Keyes
 <hr style="width: 100%;"/> Norman Longval	 <hr style="width: 100%;"/> Michael Scanlon	 <hr style="width: 100%;"/> Robert Young



# Town of Weare

PO Box 190 • Weare, New Hampshire 03281  
Ph. 603-529-7525 • Fax 603-529-4554

**Board of Selectmen**  
Thomas S. Clow, Chairman  
Richard Butt, Vice Chairman  
Keith Lacasse  
Donna Osborne  
James Donison

*Naomi L. Bolton, Town Administrator*

## A PROCLAMATION

RECEIVED

**WHEREAS...**The Town of Weare recognizes that quality of life for many residents includes participation in social, cultural, and educational opportunities outside of our political boundary; and

**WHEREAS...** Employment and educational opportunities for many of our residents depends on a system of local, state, and federal roads and access to rail and air transportation that often extends past our boundaries; and

**WHEREAS...**The quality of life aspect of our community is enhanced by the many art museums, libraries, historic and cultural institutions as well as the entertainment and recreation opportunities that appeal to many different segments of our community are offered in our and nearby communities; and

**WHEREAS...**Many of our residents enjoy employment opportunities that are offered in our and area communities; and


**WHEREAS...**We recognize the efforts of many organizations and people to attract quality businesses, organizations, and enthusiastic visitors to our region as a cooperative on-going effort; and

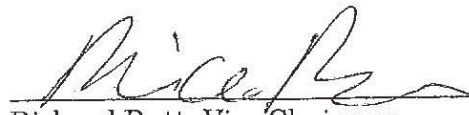
**WHEREAS...**Our emergency services provided to residents and visitors often depend on the mutual aid and support of our neighboring communities; and


**WHEREAS...**The METROCENTER, representing regional municipalities, businesses, higher-education institutions, chambers of commerce, private and public agencies, is furthering the goals of our municipality and those of the region through collaboration, and the promotion of the region's quality of life to current and prospective employers, residents and visitors;

**THEREFORE,** We the Selectmen of the Town of Weare offer our encouragement and endorsement of the efforts of the METROCENTER and look forward to participating with other regional municipalities to provide a high quality regional environment in which to work, live, and play.


Signed:

  
Thomas Clow, Chairman

  
Richard Butt, Vice Chairman

  
Donna Osborne, Selectman

\_\_\_\_\_  
Keith Lacasse, Selectman

  
James Donison, Selectman

## A PROCLAMATION

RECEIVED

WHEREAS...The Town of New Boston recognizes that quality of life for many residents includes participation in social, cultural, and educational opportunities outside of our political boundary; and

WHEREAS...Employment and educational opportunities for many of our residents depend on a system of local, state, and federal roads and access to rail and air transportation that often extends past our boundaries; and

WHEREAS...The quality of life aspect of our community is enhanced by the many art museums, libraries, historic and cultural institutions as well as the entertainment and recreation opportunities that appeal to many different segments of our community are offered in our and nearby communities; and

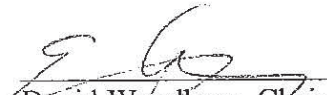
WHEREAS...Many of our residents enjoy employment opportunities that are offered in our and area communities; and

WHEREAS...Our emergency services provided to residents and visitors often depend on the mutual aid and support of our neighboring communities; and

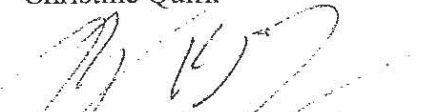
WHEREAS...The METROCENTER, representing regional municipalities, businesses, higher-education institutions, chambers of commerce, private and public agencies, is furthering the goals of our municipality and those of the region through collaboration, and the promotion of the region's quality of life to current and prospective employers, residents and visitors.

THEREFORE, We the Selectmen of New Boston offer our encouragement and endorsement of the efforts of the METROCENTER and look forward to participating with other regional municipalities to provide a high quality regional environment in which to work, live, and play.

Town of New Boston, Board of Selectmen

  
David Woodbury, Chairman

  
Christine Quirk

  
Rodney Towne



September 21, 2009

# TOWN OF HOOKSETT

## Proclamation

### METROCENTER

**WHEREAS**, the Town of Hooksett recognizes that quality of life for many residents includes participation in social, cultural, and educational opportunities in the Greater Manchester Region; and

**WHEREAS**, employment and educational opportunities for many of our residents depends on a system of local, state, and federal roads and access to private rail and air transportation that often extends past our boundaries and that of the Greater Manchester Region; and

**WHEREAS**, the quality of life aspect of our community is enhanced by the many art museums, libraries, historic, cultural and non-profit institutions as well as the entertainment and recreation opportunities that appeal to many different segments of our community are offered throughout the Greater Manchester Region; and

**WHEREAS**, many of our residents enjoy employment opportunities that are offered in Hooksett and throughout the Greater Manchester Region; and

**WHEREAS**, we recognize the efforts of many organizations and people to attract quality businesses, organizations, and enthusiastic visitors to our region as a cooperative on-going effort; and

**WHEREAS**, we also recognize the need for the communities in the Greater Manchester Region to work cooperatively to improve and expand public infrastructure, sewer, water, utilities and roads in furtherance of promoting economic development opportunities in the Greater Manchester Region; and

**WHEREAS**, our emergency services provided to residents and visitors often depend on the mutual aid and support of our neighboring communities in the Greater Manchester Region; and

**WHEREAS**, the **METROCENTER**, representing regional municipalities, businesses, higher-education institutions, chambers of commerce, private, public and non-profit agencies, is furthering the goals of our municipality and those of the region through collaboration and the promotion of the region's quality of life to current prospective employers, residents and visitors;

**THEREFORE, BE IT RESOLVED THAT THE HOOKSETT TOWN COUNCIL** offers its encouragement and endorsement of the efforts of the **METROCENTER** and looks forward to participating with other regional municipalities to provide a high quality regional environment in which to work, live, and play.

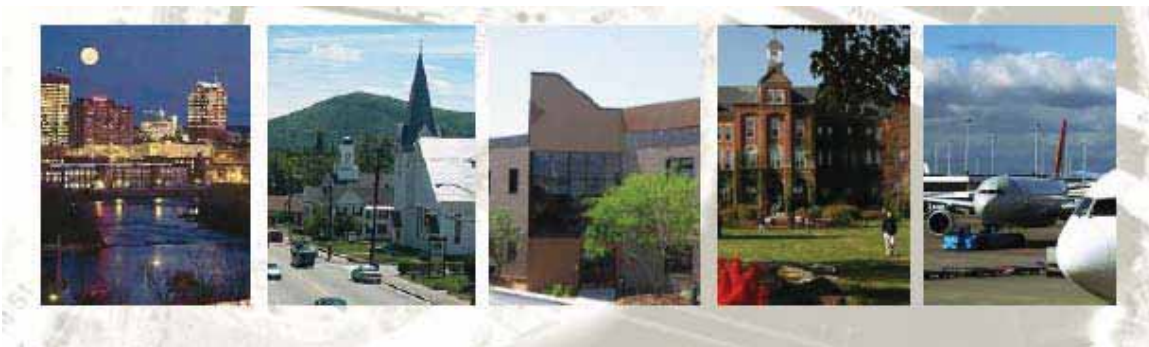
In Witness Whereof, I have hereunto set my Hand and Seal of Town this 9<sup>th</sup> day of September 2009.















William Gahara  
Chairman, Hooksett Town Council



## Section B: Economic Development Public Opinion Survey







## Regional Comprehensive Plan Update: SNHPC Economic Development Survey

1. In which community of the SNHPC Region do you currently reside?			
		Response Percent	Response Count
Auburn		0.0%	0
Bedford		11.8%	4
Candia		8.8%	3
Chester		2.9%	1
Deerfield		8.8%	3
Derry		14.7%	5
Goffstown		0.0%	0
Hooksett		8.8%	3
<b>Londonderry</b>		<b>17.6%</b>	<b>6</b>
Manchester		8.8%	3
New Boston		2.9%	1
Raymond		2.9%	1
Weare		5.9%	2
Other, please specify here:		5.9%	2
		<b><i>answered question</i></b>	<b>34</b>
		<b><i>skipped question</i></b>	<b>0</b>





**2. The 2006 SNHPC Regional Comprehensive Plan (RCP) identified a number of key economic development issues. Please rate the level of concern you have for the following economic issues of the region specified below.(Click next to the level of concern you agree with on the rating system provided below)**


	<b>Not concerned</b>	<b>Somewhat concerned</b>	<b>Concerned</b>	<b>Very concerned</b>	<b>Rating Average</b>	<b>Response Count</b>
Aging population and declining young adult population	15.2% (5)	27.3% (9)	<b>39.4% (13)</b>	18.2% (6)	2.61	33
Attracting high-paying skilled jobs	6.1% (2)	15.2% (5)	36.4% (12)	<b>42.4% (14)</b>	3.15	33
Improving & expanding infrastructure to support and encourage industrial/ commercial regional growth	15.2% (5)	18.2% (6)	24.2% (8)	<b>42.4% (14)</b>	2.94	33
Improving & expanding the local tax base through non-residential development	9.1% (3)	24.2% (8)	21.2% (7)	<b>45.5% (15)</b>	3.03	33
Seeking a balance in quality of life and growth management	3.0% (1)	12.1% (4)	39.4% (13)	<b>45.5% (15)</b>	3.27	33
Providing affordable housing	30.3% (10)	24.2% (8)	<b>33.3% (11)</b>	12.1% (4)	2.27	33
Provide affordable childcare	24.2% (8)	33.3% (11)	<b>36.4% (12)</b>	6.1% (2)	2.24	33
Providing adequate education	9.4% (3)	9.4% (3)	31.3% (10)	<b>50.0% (16)</b>	3.22	32
Encouraging green building and sustainable development	15.2% (5)	30.3% (10)	<b>36.4% (12)</b>	18.2% (6)	2.58	33
	<b><i>answered question</i></b>					<b>33</b>
	<b><i>skipped question</i></b>					<b>1</b>

**3. The Manchester-Boston Regional Airport is the state's largest economic engine. Strategically located in our region, how do you believe the airport can best support your community's economic development goals?**


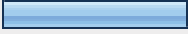




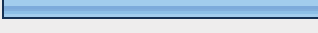

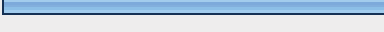





		Response Percent	Response Count
Create the region's intermodal transportation hub (aviation, rail, bus).		34.5%	10
Work with ground transportation entities to develop frequent, reliable connectivity from your community to the airport.		24.1%	7
Promote a direct airport highway link from Interstate 93 on the East; similar to the new Airport Access Road connecting the F.E. Everett Turnpike from the West.		6.9%	2
<b>All of the above.</b>		<b>44.8%</b>	<b>13</b>
Other (please specify)			4
		<i>answered question</i>	<b>29</b>
		<i>skipped question</i>	<b>5</b>



4. The Manchester-Boston Regional Airport is the state's largest economic engine. Strategically located in our region, how do you believe the airport can best support your community's economic development goals?			Response Percent	Response Count
Create the region's intermodal transportation hub (aviation, rail, bus).			38.1%	8
Work with ground transportation entities to develop frequent, reliable connectivity from your community to the airport.			19.0%	4
Promote a direct airport highway link from Interstate 93 on the East; similar to the new Airport Access Road connecting the F.E. Everett Turnpike from the West.			4.8%	1
<b>All of the above.</b>			<b>42.9%</b>	<b>9</b>
		Other (please specify)		6
		<i>answered question</i>		<b>21</b>
		<i>skipped question</i>		<b>13</b>

5. Historically the City of Manchester has been the economic center and economic engine of the SNHPC region. Do you believe this role is changing?			Response Percent	Response Count
Yes			30.3%	10
<b>No</b>			<b>57.6%</b>	<b>19</b>
Don't know			12.1%	4
		<i>answered question</i>		<b>33</b>
		<i>skipped question</i>		<b>1</b>

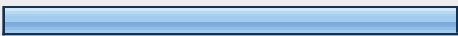




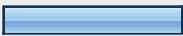




6. Please describe how and why you feel Manchester's role as an economic center is changing:		
		Response Count
		10
<i>answered question</i>		<b>10</b>
<i>skipped question</i>		<b>24</b>




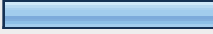
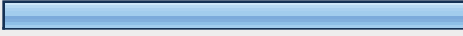
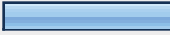



7. Creating and maintaining a diversified economic base is key to sustained economic growth and prosperity. If you could promote and target economic business development and growth – which of the following sectors would be a good fit for your community? (Check all that apply)			
		Response Percent	Response Count
Financial/Banking		45.5%	15
Insurance and real estate services		33.3%	11
Retail		42.4%	14
Light Industrial		60.6%	20
Heavy Industrial		12.1%	4
Wholesale/warehouse		45.5%	15
Health/Medical/Life services		57.6%	19
Automotive		9.1%	3
<b>Educational</b>		<b>69.7%</b>	<b>23</b>
Arts and Culture Leisure/Recreation/Entertainment/Hospitality services		60.6%	20
<b>Information/Computer</b>		<b>69.7%</b>	<b>23</b>
Defense/Advanced Security		30.3%	10
Aviation		18.2%	6
All of the above		6.1%	2
Other (please specify below)			5
<i>answered question</i>			<b>33</b>

*skipped question*




1

**8. Providing and finding available land to accommodate any of the above services is a planning challenge in many of the communities within the region. If you could help shape economic development in your community, what land use strategies would you favor or support? (Click next to each of the strategies you agree with)**

		Response Percent	Response Count
Promote compact and vibrant downtowns and village centers		69.7%	23
Promote business/industrial eco-parks and sustainable commercial shopping areas		60.6%	20
Renovate/recycle existing buildings and establish business incubators		66.7%	22
<b>Promote mixed use development</b>		<b>78.8%</b>	<b>26</b>
Encourage high density growth at interchanges/major intersections		30.3%	10
Encourage small scale development along rural corridors and crossroads		27.3%	9
Prevent/discourage strip development along transportation corridors		51.5%	17
Prevent premature and scattered development		63.6%	21
Encourage residential development		12.1%	4
Encourage transit-oriented development		51.5%	17
	Other (please specify below)		3
	<b><i>answered question</i></b>		<b>33</b>
	<b><i>skipped question</i></b>		<b>1</b>

9. The 2006 RCP states that one of the greatest barriers to the growth of economic development in the SNHPC region is the lack of infrastructure. Which of the following economic development or financing options has your community used or is considering to promote investment in new/existing infrastructure improvements?			Response Percent	Response Count
Tax Increment Financing (TIF) Districts			48.4%	15
<b>Impact fees</b>			<b>71.0%</b>	<b>22</b>
Specific Warrant Articles			35.5%	11
Bonds			32.3%	10
<b>Capital Improvement Program (CIP)</b>			<b>71.0%</b>	<b>22</b>
Capital Reserve Accounts: Federal and State Community Development Block Grant Funds			25.8%	8
Economic Revitalization Tax Credit Zones			22.6%	7
Foreign Trade Zones			16.1%	5
All of the above			6.5%	2
Economic Development/Financing Options				2
			<b><i>answered question</i></b>	<b>31</b>
			<b><i>skipped question</i></b>	<b>3</b>



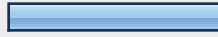
10. Where people live and work has a significant impact on economic development and quality of life. Many communities within the SNHPC region have become bedroom communities. The average daily commute time (one way) for SNHPC residents was 29.3 minutes in 2000. What actions has your community considered to help address this problem?

		Response Percent	Response Count
Improve marketing of job opportunities within the region to local residents		33.3%	5
Identify and establish more Park and Ride facilities and extend rideshare services and connections		60.0%	9
Improve or extend public transportation services		60.0%	9
Other (please specify below)			10
		<i>answered question</i>	15
		<i>skipped question</i>	19







11. In terms of regional employment, communities are advised to target economic development toward creating higher paid skilled job opportunities. What type of new businesses has your community been attracting to provide higher paid skilled jobs within the region? (Please specify briefly below)

		Response Count
		21
		<i>answered question</i>
		21
		<i>skipped question</i>
		13

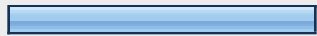

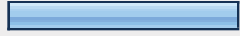
12. In an effort to keep highly educated personnel in the region, the RCP recommends municipalities encourage local businesses to employ college graduates. Has your community begun to work with local business owners and educational institutions to implement this recommendation?

		Response Percent	Response Count
Yes		12.9%	4
<b>No</b>		<b>54.8%</b>	<b>17</b>
Don't know		32.3%	10
		<i>answered question</i>	<b>31</b>
		<i>skipped question</i>	<b>3</b>




13. In an effort to better prepare and plan for economic development, the 2006 Regional Comprehensive Plan recommended that communities establish a local Economic Development Committee (EDC) to identify and develop strategic economic development goals, objectives, and strategies assisting in the creation of a Strategic Economic Development Plan (SEDP). Which of the following descriptions best fit your community's implementation progress towards this recommendation?

		Response Percent	Response Count
Our community has not established an EDC		33.3%	10
<b>Our community has established an EDC</b>		<b>43.3%</b>	<b>13</b>
Our EDC has begun to assist in the creation of a local SEDP		10.0%	3
Our SEDP has been completed		3.3%	1
The SEDP is currently being implemented		3.3%	1
Don't know		10.0%	3
		<i>answered question</i>	<b>30</b>
		<i>skipped question</i>	<b>4</b>

14. If your community has created an EDC, do you feel economic development planning has improved and been more effective in promoting economic vitality and quality of life?

		Response Percent	Response Count
Yes		47.1%	8
No		17.6%	3
Don't know		35.3%	6
		<i>answered question</i>	17
		<i>skipped question</i>	17

15. The 2006 RCP also recommended that communities could enhance local economic development planning through a three step process. Step 1: utilize community Master Plan or survey to identify types of businesses the community wishes to retain and attract. Step 2: build a database and atlas (maps) of existing businesses and properties available for development which can be used to promote business retention and new relocation. Step 3: establish a municipal webpage which links this information to the outside world. To your knowledge has your community implemented any of these basic steps?

		Response Percent	Response Count
Yes		71.0%	22
No		19.4%	6
Don't know		9.7%	3
		<i>answered question</i>	31
		<i>skipped question</i>	3

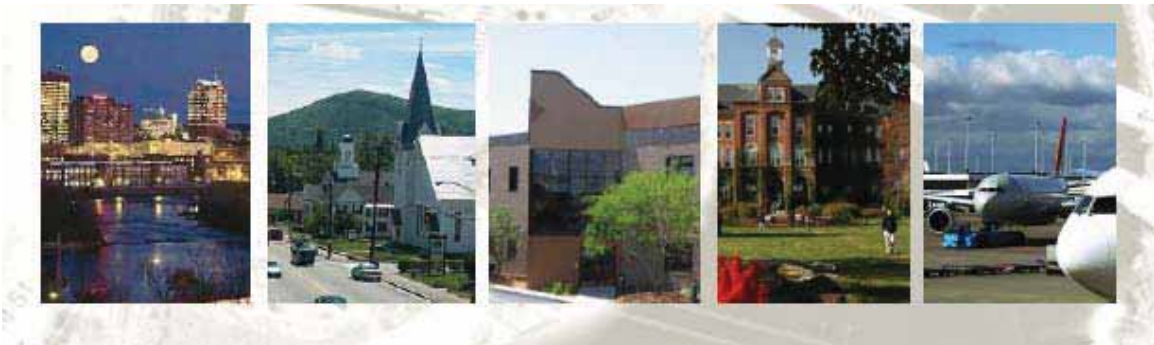
16. If yes, what steps has your community completed? (Click next to the appropriate step(s) below)			
		Response Percent	Response Count
Our community has not completed any of the steps yet	<input type="checkbox"/>	4.5%	1
<b>1.Utilize community master plan or survey to identify types of businesses the community wishes to retain and attract</b>	<input checked="" type="checkbox"/>	<b>81.8%</b>	<b>18</b>
2.Build a database and atlas (maps) of existing businesses and properties available for development which can be used to promote business retention and new relocation	<input checked="" type="checkbox"/>	63.6%	14
3.Establish a municipal webpage which links this information to the outside world	<input checked="" type="checkbox"/>	59.1%	13
		<i>answered question</i>	<b>22</b>
		<i>skipped question</i>	<b>12</b>

17. In order to promote sound economic development and improve quality of life, every community needs to have a vision for the future and know what are its strengths and selling points. To your knowledge does your community have a vision identifying its strengths and selling points?			
		Response Percent	Response Count
Yes	<input checked="" type="checkbox"/>	<b>64.5%</b>	<b>20</b>
No	<input checked="" type="checkbox"/>	32.3%	10
Don't know	<input type="checkbox"/>	3.2%	1
		<i>answered question</i>	<b>31</b>
		<i>skipped question</i>	<b>3</b>



18. If yes, what is your community's future vision and existing strengths/selling point? Please explain briefly below:		
		Response Count
		16
	<i>answered question</i>	16
	<i>skipped question</i>	18

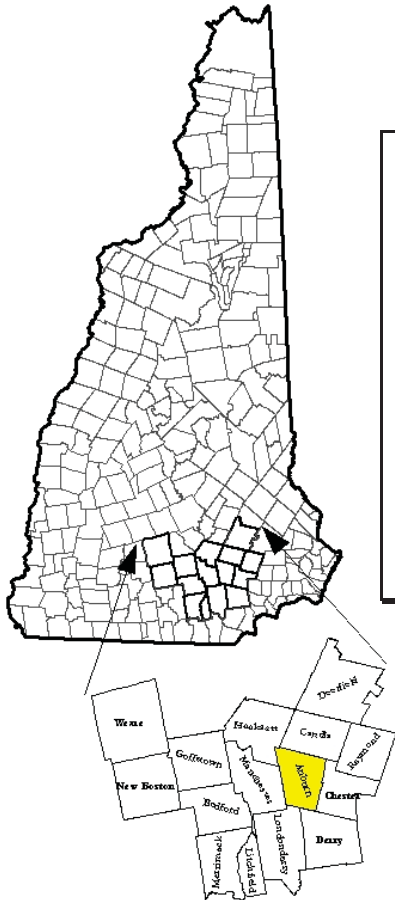
## Section C: Economic Assets Profiles



# Auburn, NH



## Economic Assets Profile



Contact:	William Herman, CPM Town Administrator PO Box 309 Auburn, NH 03032-0309		
Phone:	(603) 483-5052	Fax: (603) 483-0518	
E-mail:	<a href="mailto:adminassist@townofauburnnh.com">adminassist@townofauburnnh.com</a>		
US Congress	District 1	Carol Shea-Porter	
Executive Council	District 4	Raymond Wiczorek	
State Senate	District 14	Sharon Carson	
State Representatives	Rockingham County District 3		
	Clinton Bailey	Frank Emiro	Robert Introne
	Alfred Baldasaro	James Headd	Betsy McKinney
	Dudley Dumaine	Karen Hutchinson	Sherman Packard

Town of Auburn  
[www.auburnnh.us](http://www.auburnnh.us)

Rockingham County  
[www.co.rockingham.nh.us](http://www.co.rockingham.nh.us)

Rockingham Economic Development Corporation  
[www.redc.com](http://www.redc.com)

Metro Center-NH  
[www.manchester-chamber.org](http://www.manchester-chamber.org)



SNHPC Region  
[www.snhpc.org](http://www.snhpc.org)

County	Rockingham
Date of Incorporation	1845
Labor Market	Manchester NH Metro-NECTA (New England City and Town Area)
Tourism Region	Merrimack Valley
Planning Commission	Southern NH Planning
Regional Economic Development	METRO CENTER NH Rockingham Economic Development Corporation
Zoning Ordinance	1967/2009
Master Plan	2007

Source: NH Employment Security ELMIB, Town

Type of Government	Selectmen
Budget: Municipal Appropriations (2009)	\$5,009,300
Budget: School Appropriations (2009)	\$10,825,515
Capital Improvement Plan	Yes
Development Plans Reviewed by	Planning Board
Boards and Commissions	
Elected:	Selectmen
Appointed:	Planning
	Library
	Zoning
	Cemetery
	Conservation
	Police
	Budget
	Trust Funds
	Recreation
Public Library:	Griffin Free Public

Source: NH Employment Security ELMIB, Town

## Auburn's Key Economic Assets and Strengths

- **Proximity to airport**
- **Proximity to North-South and East-West corridors (NH Rts. 93 & 101)**
- **Available industrial land in ERZ with Fiber Optics**
- **High quality of life – town conducive to active/outdoor lifestyle**
- **Small town feel, but city-type employment nearby**

Source: Municipal SWOT Analysis, February 2010

### Auburn at a Glance

#### Geography

Total Area (sq mile)	28.8
Total Land	25.5
Total Water	3.3

Source: NH Employment Security ELMIB

#### Population

Total 2008 (OEP)	5,085
2000 Census Data	
Male	2,382
Female	2,300
Median Age	36.8 years
People per sq mile	200

Source: US Census Bureau, NH OEP

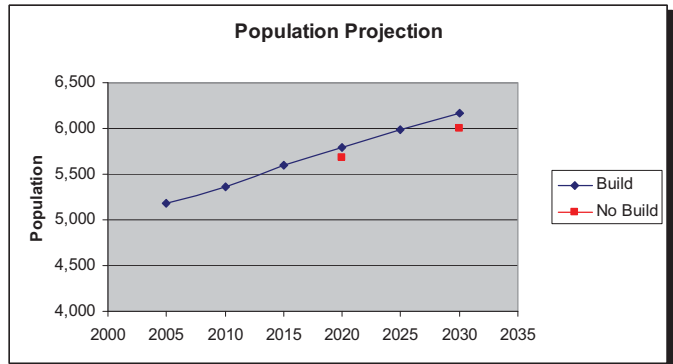
#### Manchester, NH Metro NECTA



Source: NHHFA

NECTA: New England City and Town Area

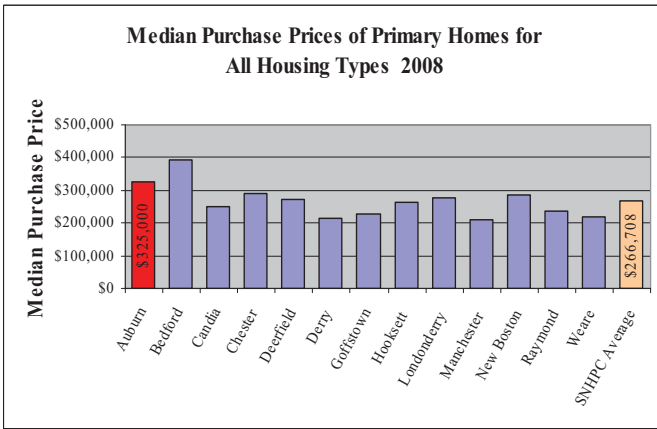
#### Population Projection



Source: NH OEP

\* I-93 Build refers to proposed widening. No Build is without widening.

#### Housing



Source: NHHFA

	2007	Percent
Total Housing Units	1,834	100.0%
Single-Family	1,727	94.1%
Multi-family	96	5.2%
Manufactured	11	0.6%
<b>2000</b>		
Owner Occupied	1,460	90.0%
Renter Occupied	120	7.4%
Vacant	42	2.6%

Source: NH OEP, NHHFA

## Education

High School Graduate or higher	91.7%	
Bachelor's degree or higher	27.0%	
	# Facilities	# Students
Elementary	1	565
Middle/Junior High	0	N/A
High School	0	N/A
Private/Parochial	0	N/A
School District	SAU 15	

Students Grades 9-12 are tuitioned to either Manchester Memorial or Pinkerton Academy in Derry.

Nearest Community/Technical	Manchester
Nearest Colleges/Universities	Chester College Hesser College UNH - Manchester

Source: NH Department of Education, Town

## Tax Rates

2009	(per \$1,000 of value)
Town Tax	\$ 3.29
Local Education Tax	\$ 8.88
State Education Tax	\$ 2.27
County Tax	\$ 0.99
Total Tax Rate	\$15.43
Town Valuation	\$692,774,959
2007	
Local Assessed Value by Property Type	
Residential Land and Buildings	92.3%
Commercial Land and Buildings	6.7%
Public Utilities, Current Use, and Other	0.9%

Source: NH Department of Revenue Administration, Town

## Employment

Annual Average	1997	2007	2008
Civilian Labor Force	2,592	3,167	3,163
Employed	2,526	3,079	3,067
Unemployed	66	88	96
Unemployment Rate	2.5%	2.8%	3.0%

Source: NH Employment Security ELMIB

## Income

1999 (2000 Census)	
Median Household Income	\$70,774
Median 4-Person Family Income	\$72,578
Per Capita Income	\$28,405
Median Earnings (Full time, Year-Round Workers)	
Male	\$45,000
Female	\$33,365
Families Below the Poverty Level	1.6%
2009 HUD	
Estimated Fiscal Year Median Family Income	\$95,200
Consumer Price Index (July 2009)	
CPI	% Change Over the Year
Not Seasonally Adjusted	215.4 -2.1%
Seasonally Adjusted	214.5 -1.9%

Source: NH Employment Security ELMIB

## Largest Employers

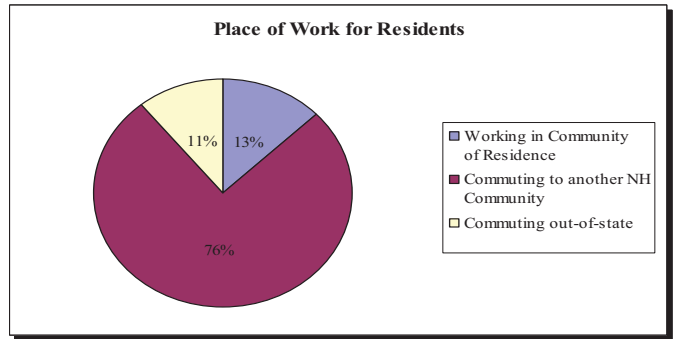
Employers	Employees
Personal Touch Home Aides	100-249
M E Drilling & Blasting	100-249
Builders Insulation Co	100-249
Maine Drilling & Blasting	100-249
Auburn Village School	50-99
Visiting Angels LLC	50-99
A Heritage Plumbing & Heating	50-99
Town of Auburn	50-99
Linear Technologies Inc	50-99
Daniels Equipment Co Inc	20-49
Atlas Security Systems	20-49
Pelmac Industries Inc	20-49
Stantec Consulting Services Inc.	20-49
Student Transportation	20-49
Sunrise Labs Inc	20-49
AAA Energy Svc Co	20-49
Personal Touch Home Care	20-49
NH Blacktop Sealers Inc	20-49
Alliance Core Technologies	20-49
Action Drywall Inc	20-49
ACS Corp	20-49
Syvertsen Corp	20-49
Gemini Electric	20-49
Holidays Bar & Grill	20-49
U.S. Veterans Administration	20-49
Fisher Sports	20-49

Source: NHNetwork, NH Employment Security ELMIB, infoUSA, Town

## Commuting

<b>Workers 16 years and over</b>	
Drove alone, car/truck/van	87.9%
Carpooled, car/truck/van	6.8%
Public transportation	0.4%
Walked	0.3%
Other Means	1.3%
Worked at Home	3.3%
<b>Mean Travel Time to Work</b>	
	26.7 minutes
<b>Percent of Working Residents</b>	
Working in Community of Residence	13%
Commuting to another NH Community	77%
Commuting out-of-state	11%

Source: US Census 2000



Source: US Census 2000

## Transportation

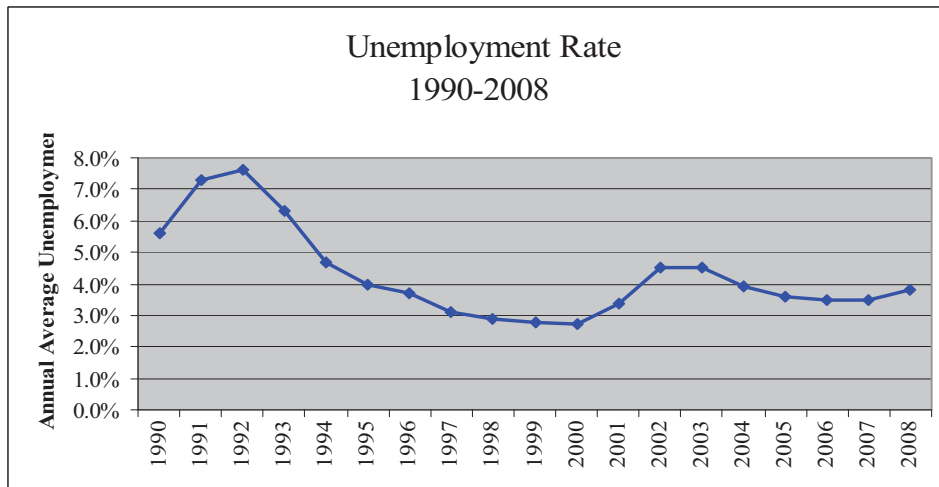
Road Access	US Routes	
	State Routes	101, 121, 28 Bypass
Nearest Interstate, Exit		I-93, Exit 7 (5 miles)
Railroad		No
Public Transportation		No
Nearest Airport with Scheduled Service		Manchester-Boston Regional
<b>Driving Distance to Selected Cities:</b>		
	Manchester, NH	7 miles
	Concord, NH	22 miles
	Portsmouth, NH	40 miles
	Boston, MA	56 miles
	Portland, ME	91 miles
	New York City, NY	259 miles
	Montreal, Quebec	264 miles

Source: NH Employment Security ELMIB

## Employment and Wages

2007 Industry	Work Sites	Annual Average Employment	Average Weekly Wage
Total, All Industries	146	1,439	\$824
Goods-Producing	53	665	\$891
Service-Providing	93	774	\$767

Source: NH Employment Security ELMIB



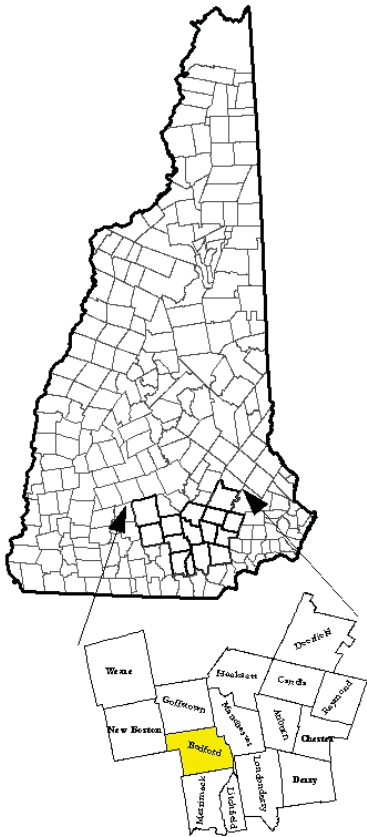
Source: NH Employment Security ELMIB

Sources for graphics: Heading and Seal: Town Website SNHPC Region: SNHPC



# Bedford, NH

## Economic Assets Profile



Contact:	Russell Marcoux Town Manager 24 North Amherst Road Bedford, NH 03110		
Phone:	(603) 472-5242	Fax: (603) 472-4573	
E-mail:	<a href="mailto:rmarcoux@bedfordnh.org">rmarcoux@bedfordnh.org</a>		
US Congress	District 1	Carol Shea-Porter	
Executive Council	District 4	Raymond Wieczorek	
State Senate	District 9	Sheila Roberge	
State Representatives	Hillsborough County District 18	John Cebrowski	Jayne Spaulding
		John Graham	Moe Villeneuve
		Ken Hawkins	
		Edward Moran	

Town of Bedford  
[www.bedfordnh.org](http://www.bedfordnh.org)

Hillsborough County  
[www.hillsboroughcountynh.org](http://www.hillsboroughcountynh.org)

Capital Regional Development Council  
[www.crdc-nh.com](http://www.crdc-nh.com)



SNHPC Region  
[www.snhpc.org](http://www.snhpc.org)

Metro Center- NH  
[www.manchester-chamber.org](http://www.manchester-chamber.org)

County	Hillsborough
Date of Incorporation	1750
Labor Market	Manchester NH Metro-NECTA (New England City and Town Area)
Tourism Region	Merrimack Valley
Planning Commission	Southern NH Planning
Regional Economic Development	METRO CENTER NH Capital Regional Development Council
Zoning Ordinance	1953/09
Master Plan	2000/ 2010 Update

Source: NH Employment Security ELMIB

Type of Government	Manager & Council	
Budget: Municipal Appropriations (2009)	\$24,596,051	
Budget: School Appropriations (2009)	\$56,428,229	
Capital Improvement Plan	Yes	
Development Plans Reviewed by	Planning Board	
Boards and Commissions		
Elected: Town Council	Appointed: Planning	
Library	Zoning	
School Board	Conservation	
	Historic	
	District	
Public Library:	Bedford Public	

Source: NH Employment Security ELMIB, Town data

## *Bedford's Key Economic Assets and Strengths*

- Access to highways (NH Rts. 293, 93, 101), Manchester/Boston region and airport
- Good school system and highly skilled workforce
- High quality of life, small town feel, recreation/cultural opportunities
- Performance zone ready for development as a mixed use district

Source: Municipal SWOT Analysis, February 2010

### Bedford at a Glance

#### Geography

Total Area (sq mile)	33.1
Total Land	32.8
Total Water	0.3

Source: NH Employment Security ELMIB

#### Population

Total 2008 (OEP)	20,807
2000 Census Data	
Male	8,988
Female	9,286
Median Age	39.2 years
People per sq mile	635.9

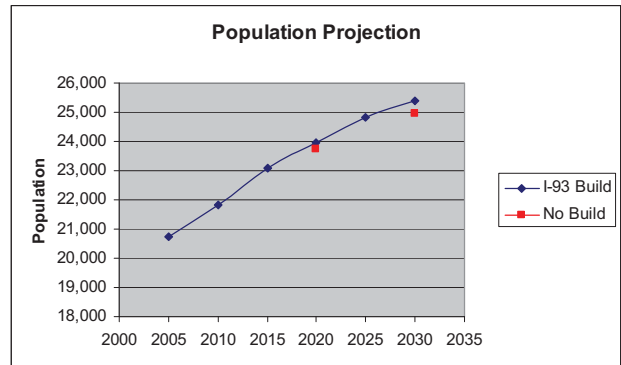
Source: US Census Bureau, NH OEP

#### Manchester, NH Metro NECTA



Source: NHHFA  
NECTA: New England City and Town Area

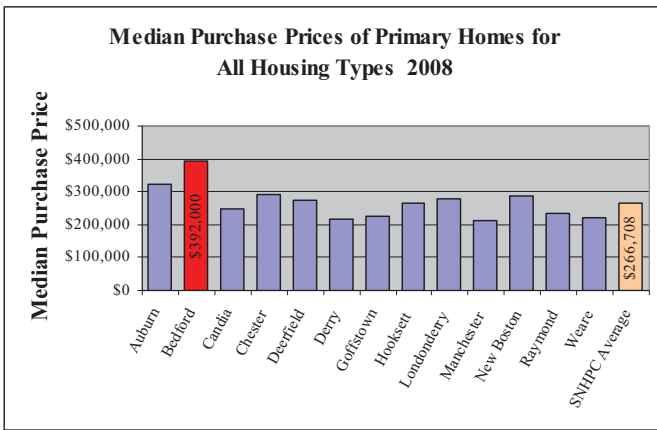
#### Population Projection



Source: NH OEP

\* I-93 Build refers to proposed widening. No Build is without widening.

#### Housing



Source: NHHFA

	2007	Percent
Total Housing Units	7,703	
Single-Family	6,330	82.2%
Multi-family	1,372	17.8%
Manufactured	1	0.0%
	<b>2000</b>	
Owner Occupied	5,507	86.0%
Renter Occupied	744	11.6%
Vacant	150	2.3%

Source: NH OEP, NHHFA



## Education

High School Graduate or higher	92.6%	
Bachelor's degree or higher	49.3%	
	# Facilities	# Students
Elementary (K-4)	3	1,698
Intermediate	1	755
Middle (7-8)	1	754
High School	1	1,217
Private/Parochial	0	N/A
School District	SAU 25	

Nearest Community/Technical	Manchester
Nearest Colleges/Universities	St. Anselm College Southern NH University Hesser College UNH – Manchester

Source: NH Department of Education, Town data

## Employment

Annual Average	1997	2007	2008
Civilian Labor Force	8,615	11,374	11,435
Employed	8,462	11,057	11,113
Unemployed	153	317	322
Unemployment Rate	1.8%	2.8%	2.8%

Source: NH Employment Security ELMIB

## Income

1999 (2000 Census)	
Median Household Income	\$84,392
Median 4-Person Family Income	\$91,868
Per Capita Income	\$37,730
Median Earnings (Full time, Year-Round Workers)	
Male	\$69,987
Female	\$39,507
Families Below the Poverty Level	1.6%
2009 HUD	
Estimated Fiscal Year Median Family Income	\$76,800
Consumer Price Index (July 2009)	% Change
CPI	Over the Year
Not Seasonally Adjusted	215.4 -2.1%
Seasonally Adjusted	214.5 -1.9%

Source: NH Employment Security ELMIB

## Tax Rates

2009	(per \$1,000 of value)
Town Tax	\$ 3.99
Local Education Tax	\$11.95
State Education Tax	\$ 2.30
County Tax	\$ 1.09
Total Tax Rate	\$19.33
Town Valuation	\$3,341,307,610
2009	
Local Assessed Value by Property Type	
Residential Land and Buildings	81.6%
Commercial Land and Buildings	17.4%
Public Utilities, Current Use, and Other	1.0%

Source: NH Department of Revenue Administration, Town data

## Largest Employers

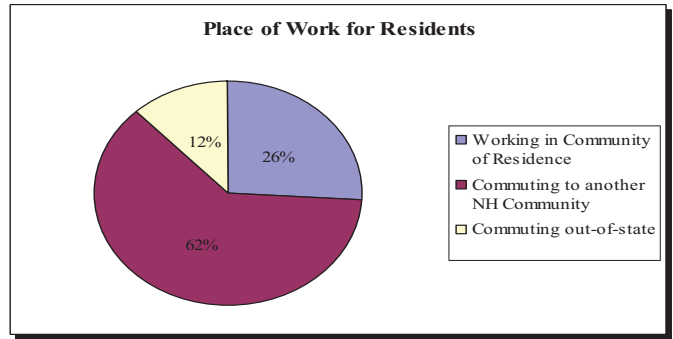
Employers	Employees
Wal-Mart	250-499
Event Center at CR Sparks	100-249
Harborside Healthcare - Northwood	100-249
Normandeau Associates	100-249
Target	100-249
Macy's	100-249
Liberty Mutual Insurance	100-249
Quality Inn- Manchester Airport	100-249
Ridgewood Nursing Center	100-249
US Post Office	100-249
Wayfarer Inn	100-249
Bedford Village Inn	100-249
Lowe's	100-249
Segway Llc	100-249
Riddle Brook School	100-249
Laurel Center	100-249
Keller Williams Realty	100-249
Applebee's Neighborhood Grill	100-249
Super Stop & Shop	100-249
Bedford High School	100-249
Interstate Electrical Svc	100-249
Graham Packaging Co	100-249
New Morning Schools	100-249
McKelvie School	100-249
Ferrotec USA Corp	100-249

Source: NHnetwork, NH Employment Security ELMIB, infoUSA

## Commuting

Workers 16 years and over	
Drove alone, car/truck/van	86.0%
Carpooled, car/truck/van	5.4%
Public transportation	0.3%
Walked	0.5%
Other Means	1.5%
Worked at Home	6.3%
Mean Travel Time to Work	
	27.2 minutes
Percent of Working Residents	
Working in Community of Residence	26%
Commuting to another NH Community	62%
Commuting out-of-state	12%

Source: US Census 2000



Source: US Census 2000

## Transportation

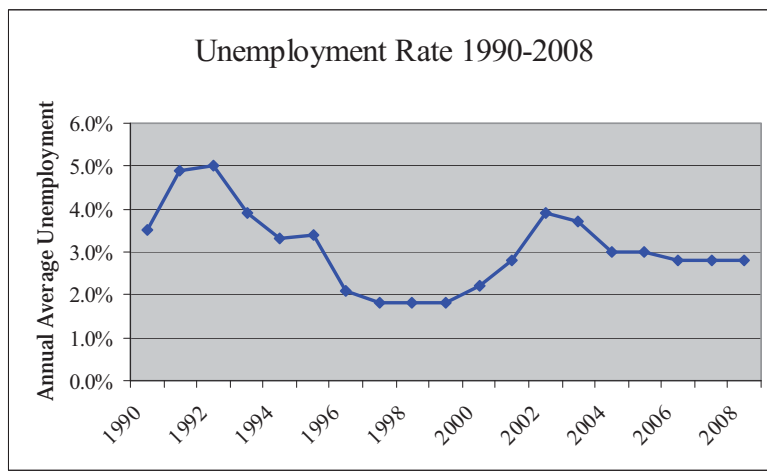
Road Access	US Routes	3
	State Routes	101, 114
Nearest Interstate, Exit	Everett Turnpike, I-293, Exit 3 (local)	
Railroad	Boston & Maine	
Public Transportation	Yes	
Nearest Airport with Scheduled Service	Manchester-Boston Regional	
Driving Distance to Selected Cities:		
	Manchester, NH	5 miles
	Concord, NH	23 miles
	Portsmouth, NH	50 miles
	Boston, MA	55 miles
	Portland, ME	101 miles
	New York City, NY	252 miles
	Montreal, Quebec	263 miles

Source: NH Employment Security ELMIB

## Employment and Wages

2007 Industry	Work Sites	Annual Average Employment	Average Weekly Wage
Total, All Industries	1,011	14,262	\$955
Goods-Producing	108	1,333	\$1,266
Service-Providing	903	12,929	\$923

Source: NH Employment Security ELMIB

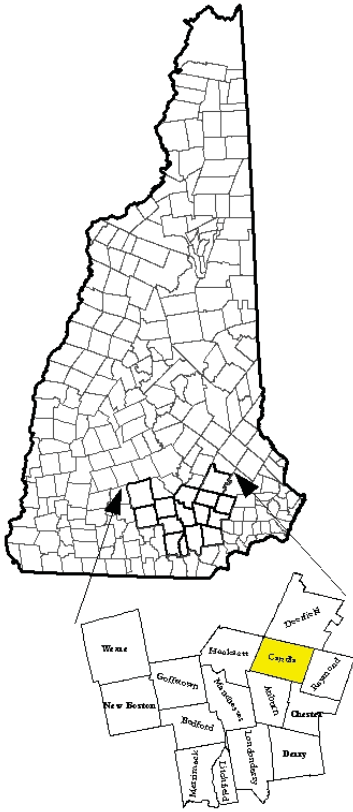


Source: NH Employment Security ELMIB

Sources for graphics: Heading and Seal: Town Website - SNHPC Region: SNHPC



# Economic Assets Profile



Contact:	Candia Selectmen's Office Board of Selectmen 74 High Street Candia, NH 03034		
Phone:	(603) 483-8101	Fax: (603) 483-0252	
E-mail:	None Available		
US Congress	District 1	Carol Shea-Porter	
Executive Council	District 4	Raymond Wieczorek	
State Senate	District 16	Theodore Gatsas	
State Representatives	Hillsborough County District 1	Frank Case	James Sullivan
		Maureen Mann	John Reagan

Town of Candia  
[www.candianh.org](http://www.candianh.org)

Rockingham County  
[www.co.rockingham.nh.us](http://www.co.rockingham.nh.us)

Rockingham Economic Development Corporation  
[www.redc.com](http://www.redc.com)



Metro Center - NH  
[www.manchester-chamber.org](http://www.manchester-chamber.org)

SNHPC Region  
[www.snhpc.org](http://www.snhpc.org)

County	Rockingham
Date of Incorporation	1763
Labor Market	Manchester NH Metro-NECTA (New England City and Town Area)
Tourism Region	Merrimack Valley
Planning Commission	Southern NH Planning
Regional Economic Development	METRO CENTER NH Rockingham Economic Development Corporation
Zoning Ordinance	1960/07
Master Plan	2004

Type of Government	Selectmen
Budget: Municipal Appropriations (2008)	\$2,321,660
Budget: School Appropriations	Unavailable
Capital Improvement Plan	Yes
Development Plans Reviewed by	Planning Board
Boards and Commissions	
Elected: Selectmen	Appointed: Conservation
Planning	Zoning
Budget	Heritage
	Solid Waste
Public Library: Smyth Public	

Source: NNetwork, NH Employment Security ELMIB

Source: NH Employment Security ELMIB

## *Candia's Key Economic Assets and Strengths*

- **Close proximity to Route 101 via Exit 3**
- **Rural setting and an agricultural history**
- **Short distance to services and retail opportunities in the Manchester/Portsmouth areas**

Source: Municipal SWOT Analysis, February 2010

### *Candia at a Glance*

#### Geography

Total Area (sq mile)	30.5
Total Land	30.3
Total Water	0.2

Source: NH Employment Security ELMIB

#### Manchester, NH Metro NECTA



Source: NHHFA

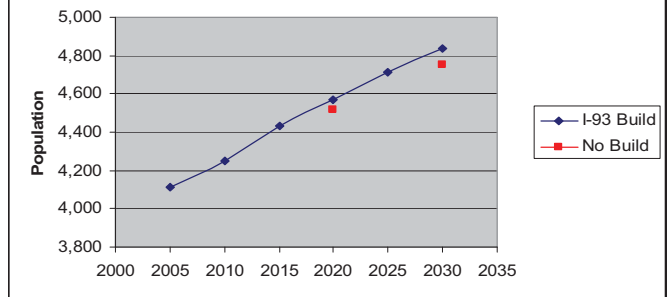
NECTA: New England City and Town Area

#### Population

Total 2008 (OEP)	4,085
2000 Census Data	
Male	1,976
Female	1,935
Median Age	37.6 years
People per sq mile	135.3

Source: US Census Bureau, NH OEP

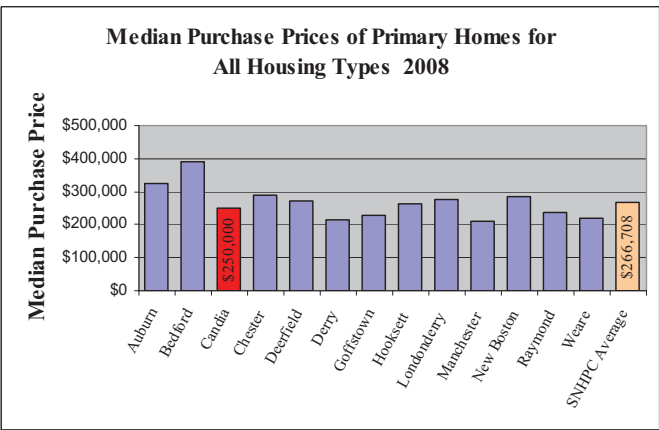
#### Population Projection



Source: NH OEP

\* I-93 Build refers to proposed widening. No Build is without widening.

#### Housing



Source: NHHFA

	2007	Percent
Total Housing Units	1,512	100.0%
Single-Family	1,375	90.9%
Multi-family	78	5.1%
Manufactured	59	3.9%
<b>2000</b>		
Owner Occupied	1,255	90.7%
Renter Occupied	104	7.5%
Vacant	25	1.8%

Source: NH OEP, NHHFA

## Education

High School Graduate or higher	92.5%	
Bachelor's degree or higher	28.9%	
	# Facilities	# Students
Elementary	1	474
Middle/Junior High	0	N/A
High School	0	N/A
Private/Parochial	1	41
School District	SAU 15	

Students Grades 9-12 are tuitioned to Manchester Central

Nearest Community/Technical	Manchester
Nearest Colleges/Universities	UNH Manchester St. Anselm College Hesser College Southern NH University

Source: NH Department of Education

## Tax Rates

2008	(per \$1,000 of value)
Town Tax	\$ 4.40
Local Education Tax	\$12.72
State Education Tax	\$ 2.69
County Tax	\$ 1.09
Total Tax Rate	\$20.90
Town Valuation	\$377,408,226
2007	
Local Assessed Value by Property Type	
Residential Land and Buildings	93.2%
Commercial Land and Buildings	6.0%
Public Utilities, Current Use, and Other	0.8%

Source: NH Department of Revenue Administration

## Employment

Annual Average	1997	2007	2008
Civilian Labor Force	2,127	2,629	2,629
Employed	2,073	2,547	2,551
Unemployed	54	82	78
Unemployment Rate	2.5%	3.1%	3.0%

Source: NH Employment Security ELMIB

## Income

1999 (2000 Census)	
Median Household Income	\$61,389
Median 4-Person Family Income	\$67,389
Per Capita Income	\$25,267
Median Earnings (Full time, Year-Round Workers)	
Male	\$43,260
Female	\$31,127
Families Below the Poverty Level	2.3%
2009 HUD	
Estimated Fiscal Year Median Family Income	\$95,200
Consumer Price Index (July 2009)	% Change
CPI	Over the Year
Not Seasonally Adjusted	215.4 -2.1%
Seasonally Adjusted	214.5 -1.9%

Source: NH Employment Security ELMIB

## Largest Employers

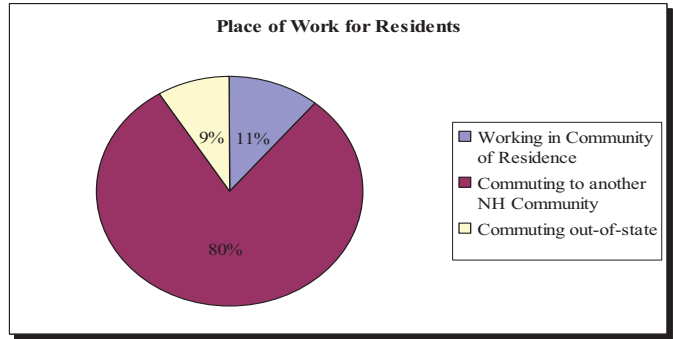
Employers	Employees
Severino Trucking	50-99
Candia Woods Golf Links	50-99
Henry W Moore School	50-99
Candia Fire Department	20-49
American Oil Burner Svc	20-49
C R Sarno Inc	20-49
Limfar Inc	20-49
JA	20-49
Sterling Quality Cleaners Inc	20-49
Charmingfare Carriage	20-49
Charmingfare Farm	20-49
Sunbelt Rentals	10-19
Jesse Remington High School	10-19
Carworld	10-19
Atlantic Bridge & Engineering Inc	10-19
C V Communications Inc	10-19
High Speed Technologies Inc	10-19
Candray Pet Care Ctr	10-19
Candia Trailers	10-19
Mechanical Concepts Inc	10-19
Blastech Corp	10-19
Powertronics	10-19
Hydro Grass Corp	10-19
Help With Dept	10-19
Commercial Insulator Llc	10-19

Source: NHnetwork, NH Employment Security ELMIB, info USA

## Commuting

<b>Workers 16 years and over</b>	
Drove alone, car/truck/van	86.5%
Carpooled, car/truck/van	9.4%
Public transportation	0.5%
Walked	0.3%
Other Means	0.2%
Worked at Home	3.1%
<b>Mean Travel Time to Work</b>	
	28.3 minutes
<b>Percent of Working Residents</b>	
Working in Community of Residence	11%
Commuting to another NH Community	80%
Commuting out-of-state	9%

Source: US Census 2000



Source: US Census 2000

## Transportation

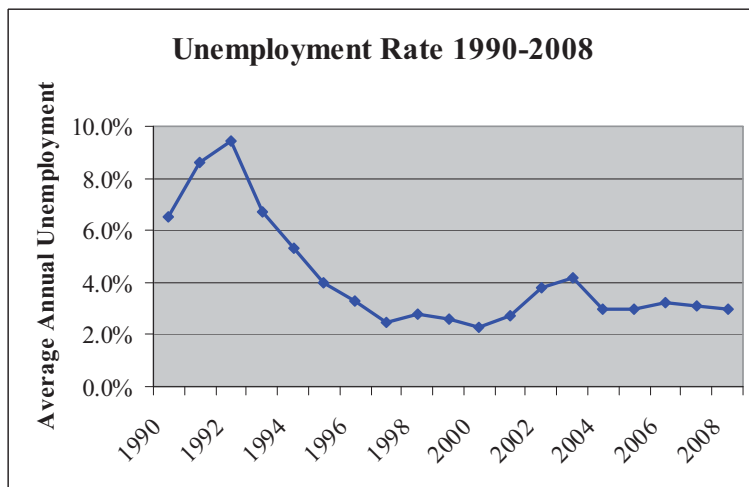
Road Access	US Routes	
	State Routes	27, 43, 101
Nearest Interstate, Exit		I-93, Exit 7 (8 miles)
Railroad		No
Public Transportation		No
Nearest Airport with Scheduled Service		Manchester-Boston Regional
<b>Driving Distance to Selected Cities:</b>		
	Manchester, NH	12 miles
	Concord, NH	26 miles
	Portsmouth, NH	38 miles
	Boston, MA	59 miles
	Portland, ME	89 miles
	New York City, NY	262 miles
	Montreal, Quebec	267 miles

Source: NH Employment Security ELMIB

## Employment and Wages

2007 Industry	Work Sites	Annual Average Employment	Average Weekly Wage
Total, All Industries	107	835	\$796
Goods-Producing	31	324	\$959
Service-Providing	76	511	\$692

Source: NH Employment Security ELMIB

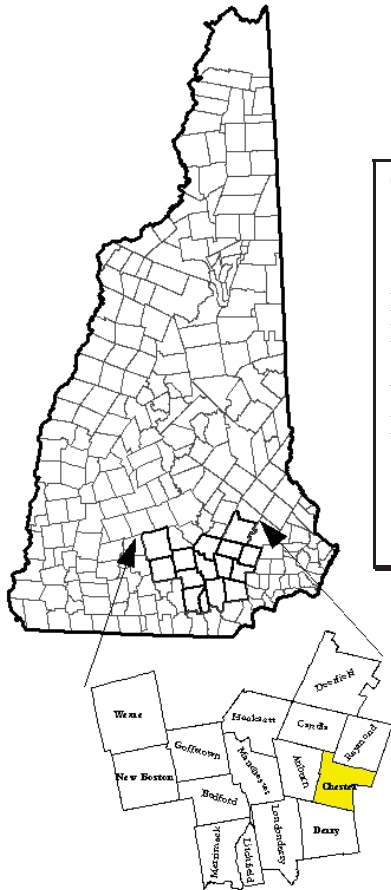


Source: NH Employment Security ELMIB

Sources for graphics: Heading and Seal: Town Website - State of NH and County Map: ELMIB - SNHPC Region: SNHPC



TOWN OF  
**CHESTER**  
NEW HAMPSHIRE, EST. 1722



# Economic Assets Profile

Contact:	Cynthia Robinson Planning Coordinator 84 Chester Street Chester, NH 03036		
Phone:	(603) 887-5629		
E-mail:	chstrpl@gsinet.net		
US Congress	District 1	Carol Shea-Porter	
Executive Council	District 3	Beverly Hollingworth	
State Senate	District 17	John Barnes, Jr.	
State Representatives	Hillsborough County District 7	Joseph Hagan	
	Gene Charron	Elisabeth Sanders	
	James Devine		

Town of Chester  
[www.chesternh.org](http://www.chesternh.org)

Rockingham County  
[www.co.rockingham.nh.us](http://www.co.rockingham.nh.us)

Rockingham Economic Development Corporation  
[www.redc.com](http://www.redc.com)



SNHPC Region  
[www.snhpc.org](http://www.snhpc.org)

Metro Center – NH  
[www.manchester-chamber.org](http://www.manchester-chamber.org)

County	Rockingham
Date of Incorporation	1722
Labor Market	Nashua NH Metro-NECTA (New England City and Town Area)
Tourism Region	Merrimack Valley
Planning Commission	Southern NH Planning
Regional Economic Development	METRO CENTER NH Rockingham Econ. Dev. Corp
Zoning Ordinance	1960/09
Master Plan	2006

Source: NH Employment Security ELMIB

Type of Government	Selectmen
Budget: Municipal Appropriations (2008)	\$3,310,470
Budget: School Appropriations	\$10,527,464
Capital Improvement Plan	Yes
Development Plans Reviewed by	Planning Board
Boards and Commissions	
Elected:	Selectmen
Appointed:	Conservation
	Library
	Budget
	Treasurer
	Road Agent
	Town Clerk/Tax Collector
	Moderator
Public Library:	Chester Public

Source: NH Employment Security ELMIB

## Chester's Key Economic Assets and Strengths

- **Access to NH Route 101 East**
- **Chester College of New England**
- **Highly educated workforce**
- **Comprehensive zoning**

Source: Municipal SWOT Analysis, February 2010

### Chester at a Glance

#### Geography

Total Area (sq mile)	26.1
Total Land	26.0
Total Water	0.1

Source: NH Employment Security ELMIB

#### Nashua, NH Metro NECTA Map



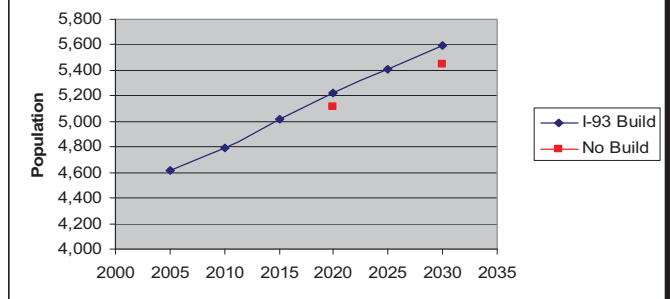
Source: NHHFA  
NECTA: New England City and Town Area

#### Population

Total 2008 (OEP)	4,621
2000 Census Data	
Male	1,875
Female	1,917
Median Age	35.7 years
People per sq mile	177.6

Source: US Census Bureau, NH OEP

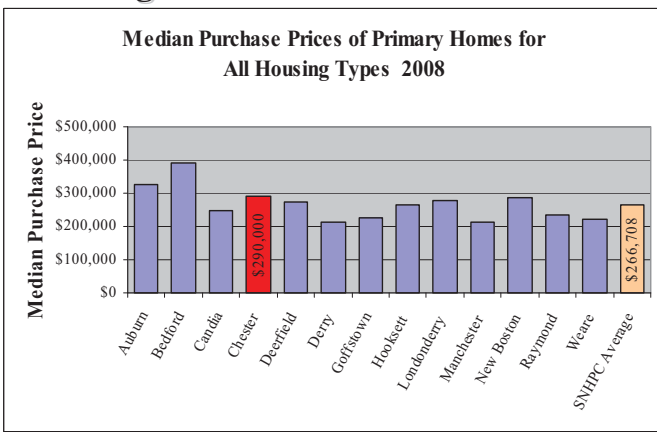
#### Population Projection



Source: NH OEP

\* I-93 Build refers to proposed widening. No Build is without widening.

#### Housing



Source: NHHFA

	2007	Percent
Total Housing Units	1,563	100.0%
Single-Family	1,408	90.1%
Multi-family	124	7.9%
Manufactured	31	2.0%
<b>2000</b>		
Owner Occupied	1,129	90.5%
Renter Occupied	85	6.8%
Vacant	33	2.6%

Source: NH OEP, NHHFA



## Education

High School Graduate or higher	92.0%	
Bachelor's degree or higher	31.1%	
	# Facilities	# Students
Elementary	1	650
Middle/Junior High	0	N/A
High School	0	N/A
Private/Parochial	0	N/A
School District	SAU 82	
Students Grades 9-12 are tuitioned to Pinkerton Academy		
Nearest Community/Technical	Manchester, Nashua	
Nearest Colleges/Universities	Chester College Hesser College Southern NH University UNH - Manchester	

Source: NH Department of Education

## Employment

Annual Average	1997	2007	2008
Civilian Labor Force	1,937	2,703	2,718
Employed	1,870	2,612	2,630
Unemployed	67	91	88
Unemployment Rate	3.5%	3.4%	3.2%

Source: NH Employment Security ELMIB

## Income

1999 (2000 Census)	
Median Household Income	\$68,571
Median 4-Person Family Income	\$75,092
Per Capita Income	\$23,842
Median Earnings (Full time, Year-Round Workers)	
Male	\$44,056
Female	\$35,382
Families Below the Poverty Level	3.4%
2009 HUD	
Estimated Fiscal Year Median Family Income	\$84,800
Consumer Price Index (July 2009)	% Change
CPI	Over the Year
Not Seasonally Adjusted	215.4    -2.1%
Seasonally Adjusted	214.5    -1.9%

Source: NH Employment Security ELMIB

## Tax Rates

2008	(per \$1,000 of value)
Town Tax	\$ 4.38
Local Education Tax	\$11.07
State Education Tax	\$ 2.22
County Tax	\$ 0.85
Total Tax Rate	\$18.52
Town Valuation	\$569,499,900
2007	
Local Assessed Value by Property Type	
Residential Land and Buildings	94.8%
Commercial Land and Buildings	2.0%
Public Utilities, Current Use, and Other	3.2%

Source: NH Department of Revenue Administration

## Largest Employers

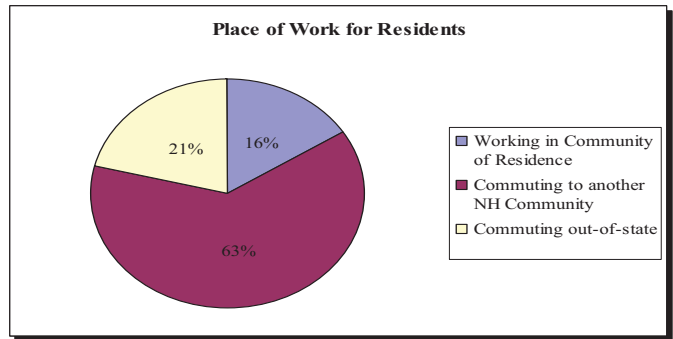
Employers	Employees
Chester College of New England	50-99
Town of Chester	50-99
Page Street Leasing LLC.	20-49
Stone Machine CO	10-19
Olde Post Restaurant	10-19
SWS Consulting Inc	10-19
Sus Karl	10-19
Automated Mailing Solutions	5-9
US Post Office	5-9
Spollett's General Store	5-9
Senator Bell Farm	5-9
Community House Calls	5-9
Dann Norris Batting Architects	5-9
Carp Industries	5-9
Chestnut Properties Realty	5-9
J R Pepper Electric Inc	5-9
Disaster Recovery Svc Inc	5-9
Crawford Software Consulting	5-9
Chester Rod & Gun Club	5-9
Edwards Mill Cabinetry	5-9

Source: NNetwork, NH Employment Security ELMIB, infoUSA

## Commuting

<b>Workers 16 years and over</b>	
Drove alone, car/truck/van	84.2%
Carpooled, car/truck/van	6.8%
Public transportation	1.2%
Walked	0.6%
Other Means	0.0%
Worked at Home	7.2%
Mean Travel Time to Work	32.2 minutes
<b>Percent of Working Residents</b>	
Working in Community of Residence	16%
Commuting to another NH Community	63%
Commuting out-of-state	21%

Source: US Census 2000



Source: US Census 2000

## Transportation

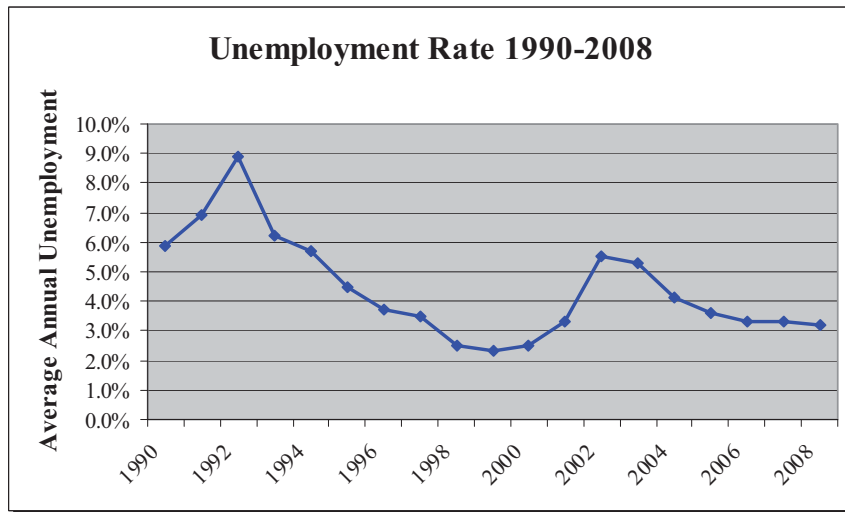
Road Access	US Routes	
	State Routes	102, 121, 121A
Nearest Interstate, Exit		I-93, Exit 4( 8 miles)
Railroad		No
Public Transportation		No
Nearest Airport with Scheduled Service		
	Manchester-Boston Regional	
Driving Distance to Selected Cities:		
Manchester, NH		14 miles
Concord, NH		22 miles
Portsmouth, NH		40 miles
Portland, ME		86 miles
Boston, MA		49 miles
New York City, NY		253 miles
Montreal, Quebec		269 miles

Source: NH Employment Security ELMIB

## Employment and Wages

2007 Industry	Work Sites	Annual Average Employment	Average Weekly Wage
Total, All Industries	82	452	\$697
Goods-Producing	25	95	\$991
Service-Providing	57	357	\$619

Source: NH Employment Security ELMIB

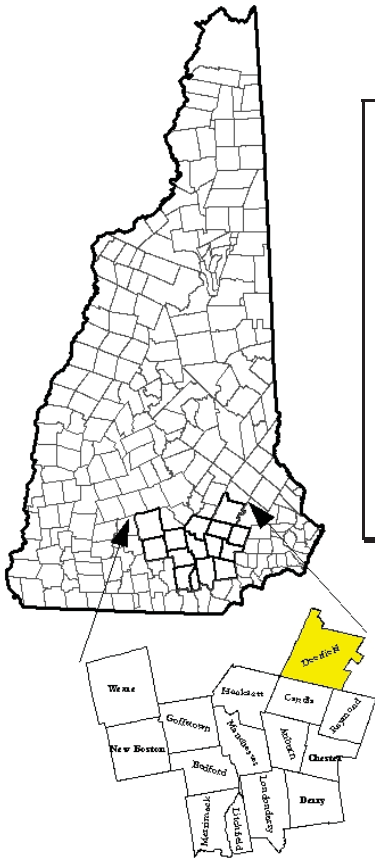



Source: NH Employment Security ELMIB

Sources for graphics: Heading and Seal: Town Website - State of NH and County Map: ELMIB - SNHPC Region: SNHPC



# Economic Assets Profile



Contact:	Cindy Heon Town Administrator 8 Raymond Road Deerfield, NH 03037		
Phone:	(603) 463-8811 x309	Fax: (603) 463-2820	
E-mail:	<a href="mailto:dfldbos@townofdeerfieldnh.com">dfldbos@townofdeerfieldnh.com</a>		
US Congress	District 1	Carol Shea-Porter	
Executive Council	District 2	John Shea	
State Senate	District 17	John Barnes, Jr.	
State Representatives	Rockingham County District 1		
	Frank Case	John Reagan	
	Maureen Mann	James Sullivan	
	Susi Nord		

Town of Deerfield  
[www.townofdeerfieldnh.com](http://www.townofdeerfieldnh.com)

Rockingham County  
[www.co.rockingham.nh.us](http://www.co.rockingham.nh.us)



Rockingham Economic Development Corporation  
[www.redc.com](http://www.redc.com)

Metro Center - NH  
[www.manchester-chamber.org](http://www.manchester-chamber.org)

SNHPC Region  
[www.snhpc.org](http://www.snhpc.org)

County	Rockingham
Date of Incorporation	1766
Labor Market	Unattached Area
Tourism Region	Merrimack Valley
Planning Commission	Southern NH Planning
Regional Economic Development	METRO CENTER NH Rockingham Economic Development Corporation
Zoning Ordinance	1970/08
Master Plan	1999

Type of Government	Town Meeting
Budget: Municipal Appropriations (2008)	\$3,529,193
Budget: School Appropriations	\$8,708,869
Capital Improvement Plan	Yes
Development Plans Reviewed by	Planning Board
Boards and Commissions	
Elected: Selectmen	Appointed: Conservation
Planning	Zoning
	Library
Public Library: Philbrick-James	

Source: NH Employment Security ELMIB

Source: NH Employment Security ELMIB

## Deerfield's Key Economic Assets and Strengths

- Rural/agricultural community
- Proximity to open space
- Sense of community – attractive feature
- Proximity to employment centers: Concord, Manchester, Seacoast
- Future development should be a “good fit” with environment

Source: Municipal SWOT Analysis, February 2010

### Deerfield at a Glance

#### Geography

Total Area (sq mile)	52.1
Total Land	50.8
Total Water	1.3

Source: NH Employment Security ELMIB

#### Population

Total 2008 (OEP)	4,366
2000 Census Data	
Male	1,800
Female	1,878
Median Age	36.2 years
People per sq mile	85.6

Source: US Census Bureau, NH OEP

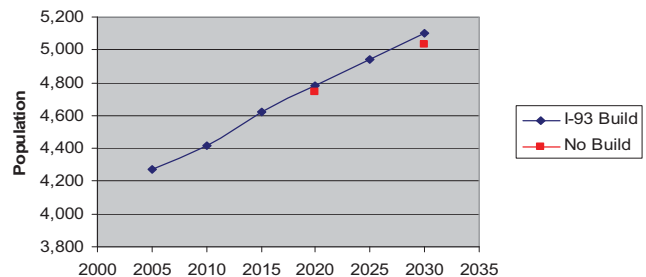
#### Unincorporated Area – Not In Any NECTA



Source: NHHFA

NECTA: New England City and Town Area

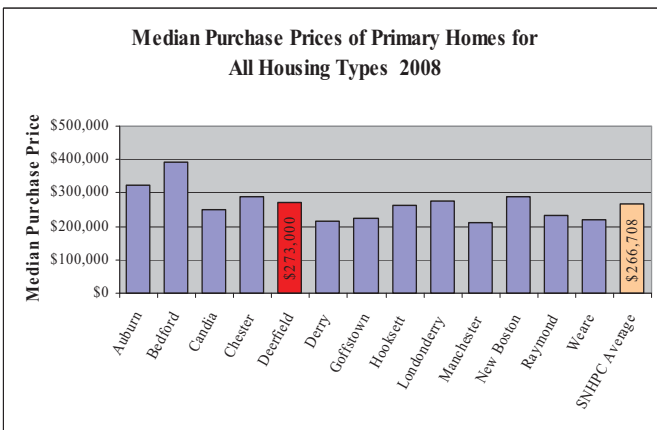
#### Population Projection



Source: NH OEP

\* I-93 Build refers to proposed widening. No Build is without widening.

#### Housing



Source: NHHFA

	2007	Percent
Total Housing Units	1,734	100.0%
Single-Family	1,537	88.6%
Multi-family	113	6.5%
Manufactured	84	4.8%
	<b>2000</b>	
Owner Occupied	1,098	78.1%
Renter Occupied	127	9.0%
Vacant	181	12.9%

Source: NH OEP, NHHFA

## Education

High School Graduate or higher	91.7%	
Bachelor's degree or higher	31.7%	
	# Facilities	# Students
Elementary	1	515
Middle/Junior High	0	N/A
High School	0	N/A
Private/Parochial	1	24
School District	SAU 53	
Students Grades 9-12 are tuitioned to Coe-Brown Academy, Manchester Central, or Concord		
Nearest Community/Technical	NHTI-Concord Manchester	
Nearest Colleges/Universities	Saint Anselm College Hesser College Southern NH University UNH - Manchester	

Source: NH Department of Education

## Employment

Annual Average	1997	2007	2008
Civilian Labor Force	2,070	2,302	2,301
Employed	2,017	2,213	2,221
Unemployed	53	89	80
Unemployment Rate	2.6%	3.9%	3.5%

Source: NH Employment Security ELMIB

## Income

1999 (2000 Census)		
Median Household Income	\$61,367	
Median 4-Person Family Income	\$64,737	
Per Capita Income	\$24,160	
Median Earnings (Full time, Year-Round Workers)		
Male	\$40,568	
Female	\$30,682	
Families Below the Poverty Level	1.3%	
2009 HUD		
Estimated Fiscal Year Median Family Income	\$95,200	
Consumer Price Index (July 2009)	% Change	
CPI	Over the Year	
Not Seasonally Adjusted	215.4	-2.1%
Seasonally Adjusted	214.5	-1.9%

Source: NH Employment Security ELMIB

## Tax Rates

2008	(per \$1,000 of value)
Town Tax	\$ 3.74
Local Education Tax	\$12.87
State Education Tax	\$ 2.08
County Tax	\$ 0.82
Total Tax Rate	\$19.51
Town Valuation	\$587,056,970
2007	
Local Assessed Value by Property Type	
Residential Land and Buildings	91.0%
Commercial Land and Buildings	3.5%
Public Utilities, Current Use, and Other	5.4%

Source: NH Department of Revenue Administration

## Largest Employers

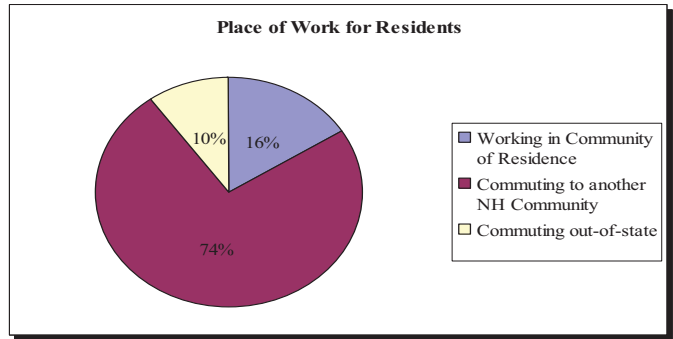
Employers	Employees
Deerfield Community School	100-249
Inn At Deerfield	20-49
East Coast Signals Inc	10-19
Rock Hill Contracting Inc	10-19
Emcare	10-19
Lazy Lion Café	10-19
Mr Mikes Mini Mart	10-19
Deerfield Police Dept	10-19
Longview School	10-19
Kids Konfort Zone	5-9
US Post Office	5-9
Deerfield Cooperative Preschool	5-9
Deerfield Family Dentistry	5-9
J & D Power Equipment Inc	5-9
YMCA	5-9
Van Berkum Wholesale Nursery	5-9
Coastal Bonding & Ins LLC.	5-9
Colorado Federal Saving Bank	5-9
Countryberries	5-9
PHH Mortgage	5-9

Source: NNetwork, NH Employment Security ELMIB, info USA

## Commuting

Workers 16 years and over	
Drove alone, car/truck/van	86.6%
Carpooled, car/truck/van	7.8%
Public transportation	0.0%
Walked	1.0%
Other Means	0.3%
Worked at Home	4.3%
Mean Travel Time to Work	
	33.9 minutes
Percent of Working Residents	
Working in Community of Residence	16%
Commuting to another NH Community	74%
Commuting out-of-state	10%

Source: US Census 2000



Source: US Census 2000

## Transportation

Road Access	US Routes	
	State Routes	43, 107
Nearest Interstate, Exit		I-93, Exit 7 (15 miles)
Railroad		No
Public Transportation		No
Nearest Airport with Scheduled Service		Manchester-Boston Regional
Driving Distance to Selected Cities:		
	Manchester, NH	18 miles
	Concord, NH	22 miles
	Portsmouth, NH	37 miles
	Boston, MA	66 miles
	Portland, ME	82 miles
	New York City, NY	269 miles
	Montreal, Quebec	269 miles

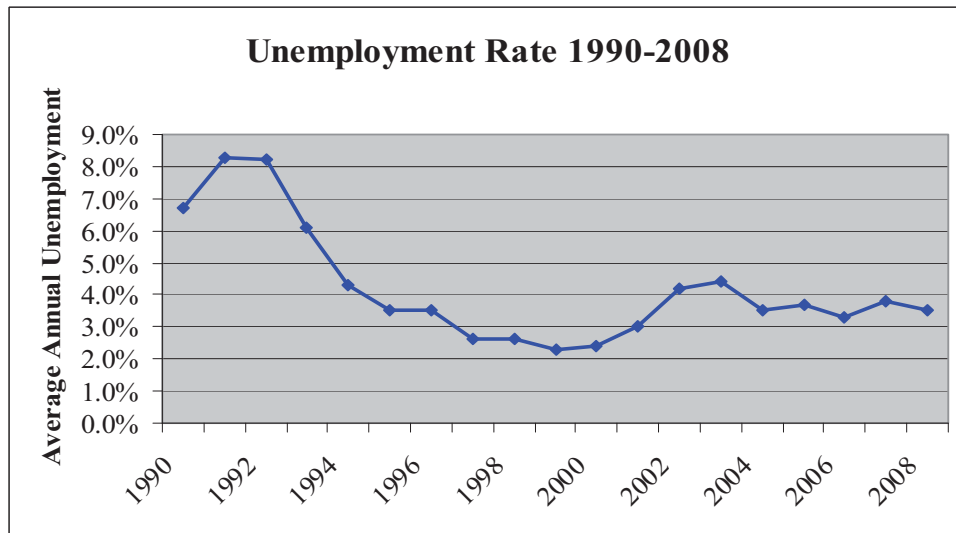
Source: NH Employment Security ELMIB

## Employment and Wages

2007 Industry	Work Sites	Annual Average Employment	Average Weekly Wage
Total, All Industries	68	437	\$612
Goods-Producing	19	69	\$926
Service-Providing	49	368	\$554

Source: NH Employment Security ELMIB

## Unemployment Rate 1990-2008

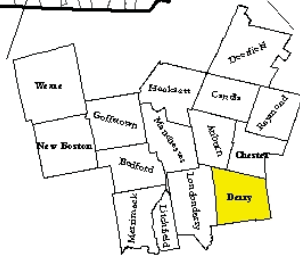
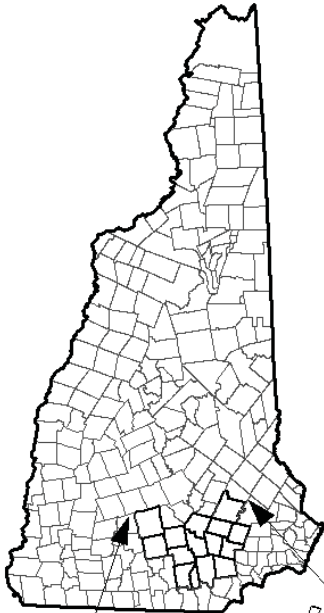



Source: NH Employment Security ELMIB

Sources for graphics: Heading and Seal: Town Website - State of NH and County Map: ELMIB - SNHPC Region: SNHPC



# Economic Assets Profile



Contact:	Gary Stenhouse Town Administrator 14 Manning Street Derry, NH 03038		
Phone:	(603) 432-6100	Fax: (603) 432-6131	
E-mail:	garystenhouse@ci.derry.nh.us		
US Congress	District 1	Carol Shea-Porter	
Executive Council	District 4	Raymond Wieczorek	
State Senate	District 19	Robert Letourneau	
State Representatives	Rockingham County District 5		
	Patricia Dowling	Kenneth Gould	Barbara McCarthy
	Beverly Ferrante	Gina Hutchinson	James Rausch
	Robert Fesh	George Katsakiores	Frank Sapareto
	John Gleason	Phyllis Katsakiores	

Town of Derry  
[www.derry-nh.org](http://www.derry-nh.org)

Rockingham County  
[www.co.rockingham.nh.us](http://www.co.rockingham.nh.us)

Rockingham Economic Development Corporation  
[www.redc.com](http://www.redc.com)



Metro Center - NH  
[www.manchester-chamber.org](http://www.manchester-chamber.org)

SNHPC Region  
[www.snhpc.org](http://www.snhpc.org)

County	Rockingham
Date of Incorporation	1827
Labor Market	Nashua NH-MA NECTA (New England City and Town Area)
Tourism Region	Merrimack Valley
Planning Commission	Southern NH Planning
Regional Economic Development	METRO CENTER NH Rockingham Economic Development Corporation
Zoning Ordinance Master Plan	1946/09 2002 – Update 2009

Type of Government	Town Admin/Council
Budget: Municipal Appropriations (2009)	\$40,167,118
Budget: School Appropriations	\$77,860,547
Capital Improvement Plan	Yes
Development Plans Reviewed by	Planning Board
Boards and Commissions	
Elected: Town Council	Appointed: Conservation Zoning Planning Heritage
Public Library: Derry Public; Taylor Library	

Source: NH Employment Security ELMIB

Source: NH Employment Security ELMIB

## Derry's Key Economic Assets and Strengths

- Proximity to interstate, airport, markets and people in Boston/Southern NH
- High educational attainment, good public education system/Pinkerton
- Natural, cultural, and historic amenities (downtown in particular)
- Small town feel, bigger community amenities
- Professional town staff with an expedited permitting process
- Prices of real estate, commercial sites, rents, wages are competitive
- Development financing available via Town and regional investment/loan funds, grants, and Enterprise zones

Source: Municipal SWOT Analysis, February 2010

### Derry at a Glance

#### Geography

Total Area (sq mile)	36.3
Total Land	35.4
Total Water	0.9

Source: NH Employment Security ELMIB

#### Nashua, NH Metro NECTA Map



Source: NHHFA

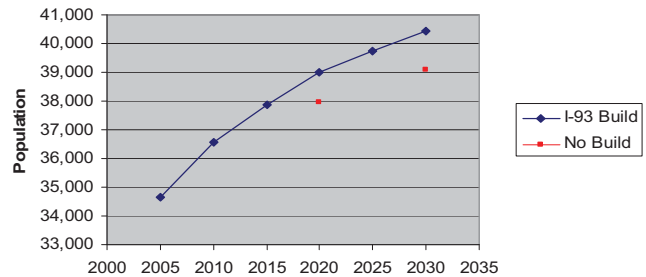
NECTA: New England City and Town Area

#### Population

Total 2008 (OEP)	34,071
2000 Census Data	
Male	16,893
Female	17,128
Median Age	33.6 years
People per sq mile	966.1

Source: US Census Bureau, NH OEP

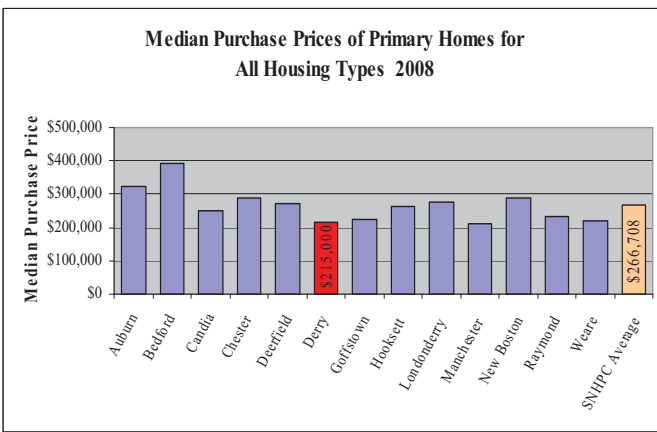
#### Population Projection



Source: NH OEP

\* I-93 Build refers to proposed widening. No Build is without widening.

#### Housing



Source: NHHFA

	2007	Percent
Total Housing Units	13,272	100.0%
Single-Family	6,733	50.7%
Multi-family	5,966	45.0%
Manufactured	573	4.3%
<b>2000</b>		
Owner Occupied	7,978	62.6%
Renter Occupied	4,349	34.1%
Vacant	408	3.2%

Source: NH OEP, NHHFA



## Education

High School Graduate or higher	90.9%	
Bachelor's degree or higher	26.3%	
	# Facilities	# Students
Elementary	5	2,229
Middle/Junior High	2	1,555
High School	1	3,329
Private/Parochial	4	546
School District	SAU 10 (K-8)	

Students Grades 9-12 are tuitioned to Pinkerton Academy

Nearest Community/Technical	Manchester, Nashua
Nearest Colleges/Universities	Chester College Hesser College Southern NH University UNH - Manchester Saint Anselm College

Source: NH Department of Education

## Employment

Annual Average	1997	2007	2008
Civilian Labor Force	19,008	20,141	20,033
Employed	18,213	19,333	19,153
Unemployed	795	808	880
Unemployment Rate	4.2%	4.0%	4.4%

Source: NH Employment Security ELMIB

## Income

1999 (2000 Census)	
Median Household Income	\$54,634
Median 4-Person Family Income	\$61,625
Per Capita Income	\$22,315
Median Earnings (Full time, Year-Round Workers)	
Male	\$41,271
Female	\$30,108
Families Below the Poverty Level	3.3%
2009 HUD	
Estimated Fiscal Year Median Family Income	\$84,800
Consumer Price Index (July 2009)	% Change
CPI	Over the Year
Not Seasonally Adjusted	215.4 -2.1%
Seasonally Adjusted	214.5 -1.9%

Source: NH Employment Security ELMIB

## Tax Rates

2009	(per \$1,000 of value)
Town Tax	\$ 9.39
Local Education Tax	\$14.85
State Education Tax	\$ 2.59
County Tax	\$ 1.05
Total Tax Rate	\$27.88
Town Valuation	\$2,481,007,745

2007

Local Assessed Value by Property Type	
Residential Land and Buildings	84.1%
Commercial Land and Buildings	15.2%
Public Utilities, Current Use, and Other	0.7%

Source: NH Department of Revenue Administration

## Largest Employers

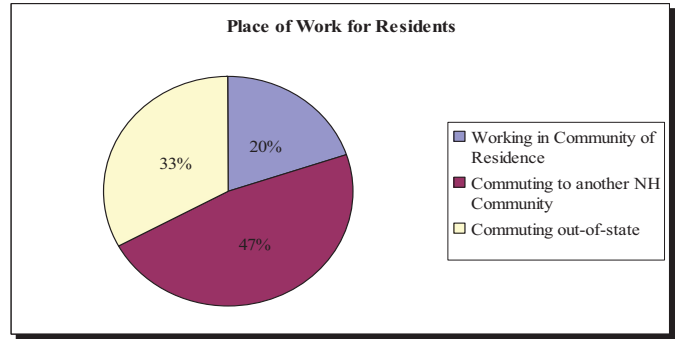
Employers	Employees
Parkland Medical Center	500-999
Pinkerton Academy	250-499
Wal-Mart	250-499
Cedar Point Communication	100-249
Fireeye Inc	100-249
Pleasant Valley Nursing Center	100-249
Center For Life Management	100-249
Merrimack Valley Wood Products	100-249
Gilbert H Hood Middle School	100-249
Hannaford Supermarket & Pharmacy	100-249
B E Peterson Inc	100-249
Shaw's Supermarket	100-249
Haven Health Center of Derry	100-249
Derry Medical Center	100-249
East Derry School	50-99
Derry Village Elementary School	50-99
Grinnell Elementary School	50-99
First Student Inc	50-99
Merrimac Tile Co Inc	50-99
Betley Chevrolet-Buick-Geo Inc	50-99
West Running Brook Middle School	50-99
Crotched Mountain Residential	50-99

Source: NHnetwork, NH Employment Security ELMIB, infoUSA

## Commuting

Workers 16 years and over	
Drove alone, car/truck/van	84.9%
Carpooled, car/truck/van	9.7%
Public transportation	0.8%
Walked	1.4%
Other Means	0.6%
Worked at Home	2.7%
Mean Travel Time to Work	
	31.1 minutes
Percent of Working Residents	
Working in Community of Residence	20%
Commuting to another NH Community	47%
Commuting out-of-state	33%

Source: US Census 2000



Source: US Census 2000

## Transportation

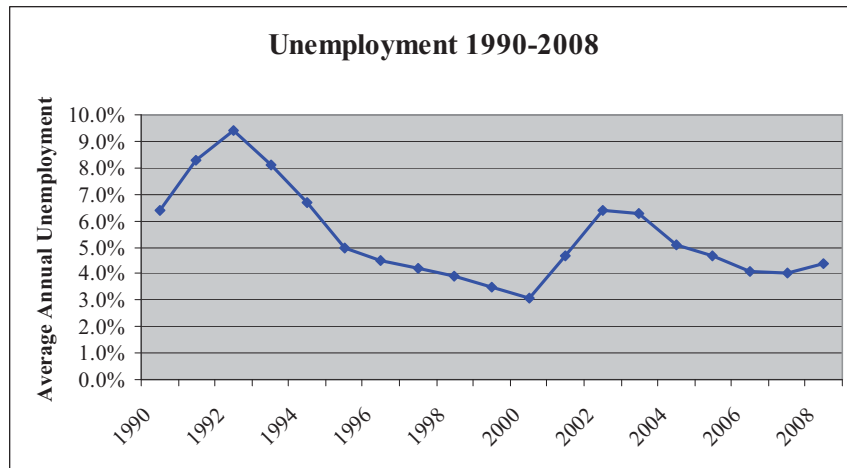
Road Access	US Routes	
	State Routes	28, 102, 111, 121, 28 Bypass
Nearest Interstate, Exit		I-93, Exit 4 (1 mile)
Railroad		No
Public Transportation		Yes, C.A.R.T. Van
Nearest Airport with Scheduled Service		Manchester-Boston Regional
Driving Distance to Selected Cities:		
	Manchester, NH	13 miles
	Concord, NH	28 miles
	Portsmouth, NH	28 miles
	Boston, MA	43 miles
	Portland, ME	94 miles
	New York City, NY	246 miles
	Montreal, Quebec	269 miles

Source: NH Employment Security ELMIB

## Employment and Wages

2007 Industry	Work Sites	Annual Average Employment	Average Weekly Wage
Total, All Industries	683	8,123	\$769
Goods-Producing	107	1,184	\$1,096
Service-Providing	576	6,939	\$713

Source: NH Employment Security ELMIB



Source: NH Employment Security ELMIB

Sources for graphics: Heading and Seal: Town Website - State of NH and County Map: ELMIB - SNHPC Region: SNHPC

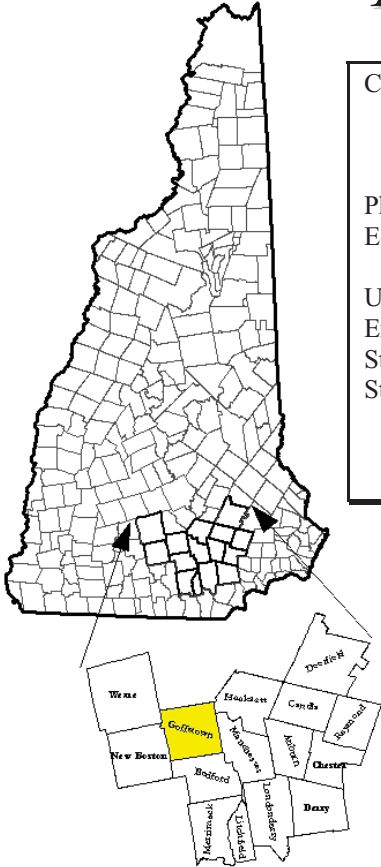



# TOWN OF GOFFSTOWN

## NEW HAMPSHIRE



## Economic Assets Profile



Contact:	Susan Desruisseaux Town Administrator 16 Main Street, Town Office Goffstown, NH 03045		
Phone:	(603) 497-8990 x100	Fax: (603) 497-8993	
E-mail:	<a href="mailto:sued@goffstownnh.gov">sued@goffstownnh.gov</a>		
US Congress	District 1	Carol Shea-Porter	
Executive Council	District 5	Debora Pignatelli	
State Senate	District 20	Lou D'Allesandro	
State Representatives	Hillsborough Country District 7		
	Russel Day	Kevin Hodges	Neal Kurk
	Larry Emerton	Rip Holden	Calvin Pratt
	John Hikel	Gary Hopper	

Town of Goffstown  
[www.goffstown.com](http://www.goffstown.com)

Hillsborough County  
[www.hillsboroughcountynh.org/](http://www.hillsboroughcountynh.org/)

Capital Regional Development Council  
[www.crdc-nh.com](http://www.crdc-nh.com)



Metro Center - NH  
[www.Manchester-Chamber.org](http://www.Manchester-Chamber.org)

SNHPC Region  
[www.snhpc.org](http://www.snhpc.org)

County	Hillsborough
Date of Incorporation	1761
Labor Market	Manchester NH Metro-NECTA (New England City and Town Area)
Tourism Region	Merrimack Valley
Planning Commission	Southern NH Planning
Regional Economic Development	METRO CENTER NH Capital Regional Development Council
Zoning Ordinance	1961/08
Master Plan	2006

Source: NH Employment Security ELMIB

Type of Government	Selectmen
Budget: Municipal Appropriations (2008)	\$18,322,442
Budget: School Appropriations	\$33,220,713
Capital Improvement Plan	Yes
Development Plans Reviewed by	Planning Board
Boards and Commissions	
Elected:	Selectmen
Appointed:	Conservation Cemetery Historic Economic Development Parks and Recreation
	Planning Budget Library School Zoning
Public Library:	Goffstown Public

Source: NH Employment Security ELMIB

## *Goffstown's Key Economic Assets and Strengths*

- **Quality of life/tourism from physical attributes (rivers, lakes, mountains)**
- **Employment in county offices, district court, and women's prison**
- **Main street organization and the Industrial Development Corp.**
- **Rails-Trails Program**
- **Workforce housing and ERZ tax credits**

Source: Municipal SWOT Analysis, February 2010

### *Goffstown at a Glance*

#### **Geography**

Total Area (sq mile)	37.6
Total Land	37.1
Total Water	0.5

Source: NH Employment Security ELMIB

#### **Population**

Total 2008 (OEP)	17,605
2000 Census Data	
Male	8,093
Female	8,836
Median Age	35.4 years
People per sq mile	476.8

Source: US Census Bureau, NH OEP

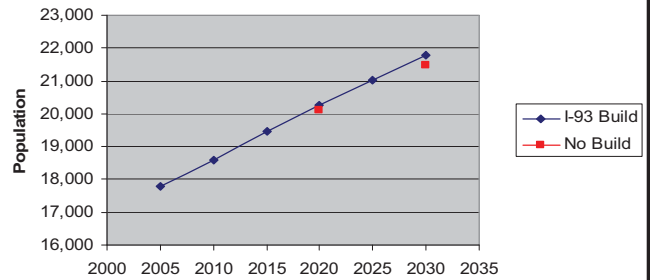
#### **Manchester, NH Metro NECTA**



Source: NHHFA

NECTA: New England City and Town Area

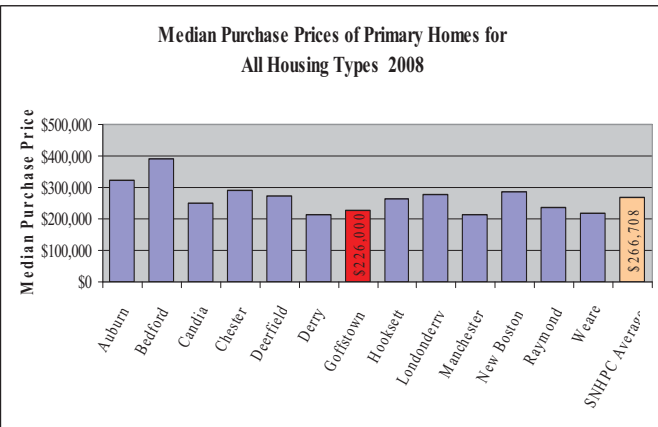
#### **Population Projection**



Source: NH OEP

\* I-93 Build refers to proposed widening. No Build is without widening.

#### **Housing**



Source: NHHFA

	<b>2007</b>	<b>Percent</b>
Total Housing Units	6,308	100.0%
Single-Family	4,425	70.1%
Multi-family	1,617	25.6%
Manufactured	266	4.2%
	<b>2000</b>	
Owner Occupied	4,505	77.7%
Renter Occupied	1,136	19.6%
Vacant	157	2.7%

Source: NH OEP, NHHFA

## Education

High School Graduate or higher	85.0%	
Bachelor's degree or higher	25.2%	
	# Facilities	# Students
Elementary	3	839
Middle/Junior High	1	982
High School	1	1,243
Private/Parochial	1	256
School District	SAU 19	
Nearest Community/Technical	Manchester	
Nearest Colleges/Universities	Saint Anselm College Hesser College Southern NH University UNH - Manchester	

Source: NH Department of Education

## Tax Rates

2008	(per \$1,000 of value)
Town Tax	\$ 8.37
Local Education Tax	\$10.69
State Education Tax	\$ 2.50
County Tax	\$ 1.13
Total Tax Rate	\$22.69
Town Valuation	\$1,405,043,730
2007	
Local Assessed Value by Property Type	
Residential Land and Buildings	89.2%
Commercial Land and Buildings	9.0%
Public Utilities, Current Use, and Other	1.8%

Source: NH Department of Revenue Administration

## Employment

Annual Average	1997	2007	2008
Civilian Labor Force	8,731	10,337	10,274
Employed	5,822	10,021	9,959
Unemployed	209	316	315
Unemployment Rate	2.4%	3.1%	3.1%

Source: NH Employment Security ELMIB

## Income

1999 (2000 Census)	
Median Household Income	\$55,833
Median 4-Person Family Income	\$61,718
Per Capita Income	\$21,907
Median Earnings (Full time, Year-Round Workers)	
Male	\$39,757
Female	\$55,833
Families Below the Poverty Level	2.6%
2009 HUD	
Estimated Fiscal Year Median Family Income	\$76,800
Consumer Price Index (July 2009)	% Change
CPI	Over the Year
Not Seasonally Adjusted	215.4 -2.1%
Seasonally Adjusted	214.5 -1.9%

Source: NH Employment Security ELMIB

## Largest Employers

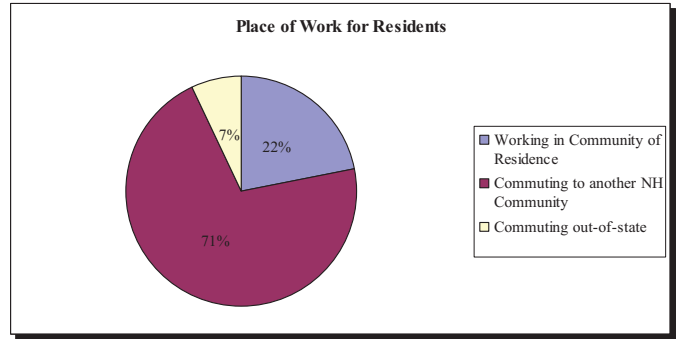
Employers	Employees
Hillsborough County Nursing Home	250-499
Goffstown High School	100-249
Mountain View Middle School	100-249
Northeastern Sheet Metal Inc	100-249
YMCA	100-249
Hillsborough County Sheriff's Office	100-249
Goffstown Truck Center, Inc.	50-99
Maple Avenue Elementary	50-99
Goffstown Police Dept	50-99
Goffstown Fire Dept	50-99
R & W Cleaning Svc	50-99
Goffstown Truck Ctr Inc	50-99
Bel-Air Nursing Home	50-99
Kids Block	20-49
Women's Prison	20-49
Sully's Superette	20-49
Villa Augustina School	20-49
Fibernext	20-49
Goffstown Public Works	20-49
Landscape Support Svc	20-49
McDonald's	20-49
Accurate Brazing Co	20-49
Re/Max Synergy Real Estate	20-49
New Hampshire Stamping Co	20-49
Educare Day Care & Learning	20-49
Louis P Cote Inc	20-49

Source: NHnetwork, NH Employment Security ELMIB, infoUSA

## Commuting

Workers 16 years and over	
Drove alone, car/truck/van	81.7%
Carpooled, car/truck/van	8.5%
Public transportation	0.1%
Walked	4.8%
Other Means	1.3%
Worked at Home	3.6%
Mean Travel Time to Work	
	26.1 minutes
Percent of Working Residents	
Working in Community of Residence	22%
Commuting to another NH Community	71%
Commuting out-of-state	7%

Source: US Census 2000



Source: US Census 2000

## Transportation

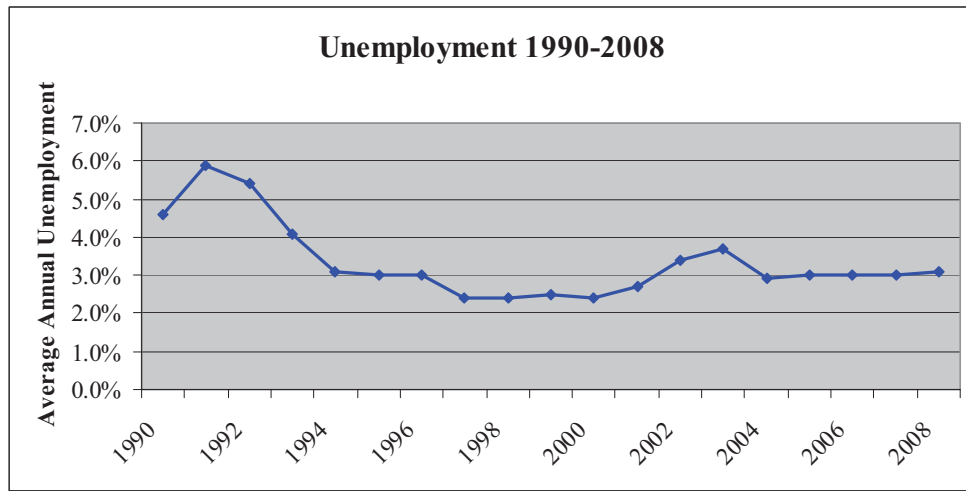
Road Access	US Routes	
	State Routes	13, 114
Nearest Interstate, Exit	I-293 Exit 4 (8 miles)	
Railroad	No	
Public Transportation	No	
Nearest Airport with Scheduled Service	Manchester-Boston Regional	
Driving Distance to Selected Cities:		
	Manchester, NH	8 miles
	Concord, NH	16 miles
	Portsmouth, NH	52 miles
	Boston, MA	61 miles
	Portland, ME	107 miles
	Montreal, Quebec	250 miles
	New York City, NY	258 miles

Source: NH Employment Security ELMIB

## Employment and Wages

2007 Industry	Work Sites	Annual Average Employment	Average Weekly Wage
Total, All Industries	287	3,544	\$598
Goods-Producing	67	463	\$853
Service-Providing	220	3,081	\$559

Source: NH Employment Security ELMIB



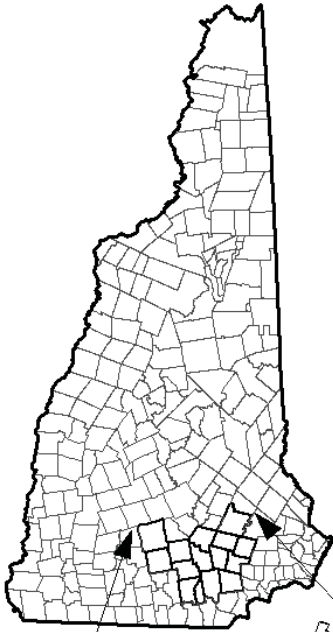
Source: NH Employment Security ELMIB

Sources for graphics: Heading and Seal: Town Website - State of NH and County Map: ELMIB - SNHPC Region: SNHPC

# Hooksett, NH



## Economic Assets Profile



<b>Contact:</b>	Carol Granfield Town Administrator 35 Main Street Hooksett, NH 03045	
<b>Phone:</b>	(603) 485-8472	<b>Fax:</b> (603) 485-4423
<b>E-mail:</b>	cgranfield@hooksett.org	
<b>US Congress</b>	District 1	Carol Shea-Porter
<b>Executive Council</b>	District 4	Raymond Wieczorek
<b>State Senate</b>	District 16	Theodore Gatsas
<b>State Representatives</b>	Merrimack Country District 9	
	David Boutin	Frank Kotowski
	David Hess	Todd Smith

Town of Hooksett  
[www.hooksett.org/](http://www.hooksett.org/)

Merrimack County  
[www.merrimackcounty.net/](http://www.merrimackcounty.net/)

Capital Regional Development Council  
[www.crdc-nh.com](http://www.crdc-nh.com)



Metro Center - NH  
[www.Manchester-Chamber.org](http://www.Manchester-Chamber.org)

SNHPC Region  
[www.snhpc.org](http://www.snhpc.org)

County	Merrimack
Date of Incorporation	1822
Labor Market	Manchester NH Metro-NECTA
Tourism Region	Merrimack Valley
Planning Commission	Southern NH Planning
Regional Economic Development	METRO CENTER NH Capital Regional Development Council
Zoning Ordinance	1957/08
Master Plan	2005

Source: NH Employment Security ELMIB

Type of Government	Administrator & Council	
Budget: Municipal Appropriations (2008)	\$15,961,440	
Budget: School Appropriations	\$25,821,466	
Capital Improvement Plan	Yes	
Development Plans Reviewed by	Engineering Consultant	
<b>Boards and Commissions</b>		
Elected:	Town Council	Appointed:
	Budget	Planning
	Cemetery	Zoning
	Library	Conservation
	Moderator	Building
	Sewer	Heritage
	Checklist	Police
	Trust Funds	Solid Waste
		Parks & Recreation
Public Library: Hooksett Public		

Source: NH Employment Security ELMIB

## *Hooksett's Key Economic Assets and Strengths*

- Proximity to key infrastructure (airport, highways, Manchester/Concord)
- East access (highway exits, NH Rts. 3, 3A, & 28) & Exit 10 retail center
- Moderate tax rates and balanced tax revenue (residential/business)
- Natural beauty (Merrimack River/green spaces)

Source: Municipal SWOT Analysis, February 2010

### Hooksett at a Glance

#### Geography

Total Area (sq mile)	37.1
Total Land	36.2
Total Water	0.9

Source: NH Employment Security ELMIB

#### Manchester, NH Metro NECTA



Source: NHHFA

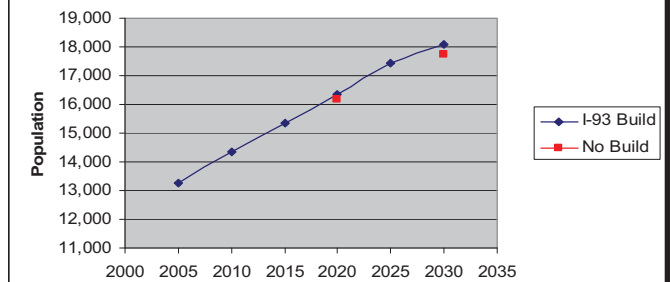
NECTA: New England City and Town Area

#### Population

Total 2008 (OEP)	13,483
2000 Census Data	
Male	5,858
Female	5,863
Median Age	35.3 years
People per sq mile	365.1

Source: US Census Bureau, NH OEP

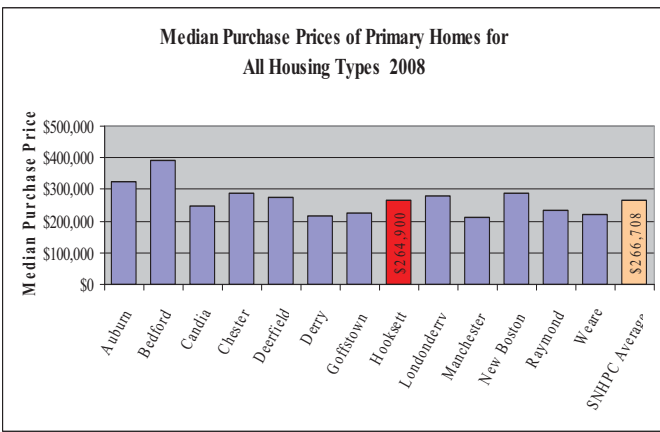
#### Population Projection



Source: NH OEP

\* I-93 Build refers to proposed widening. No Build is without widening.

#### Housing



Source: NHHFA

	2007	Percent
Total Housing Units	5,092	100.0%
Single-Family	3,230	63.4%
Multi-family	1,508	29.6%
Manufactured	354	7.0%
<b>2000</b>		
Owner Occupied	3,304	76.7%
Renter Occupied	843	19.6%
Vacant	160	3.7%

Source: NH OEP, NHHFA



## Education

High School Graduate or higher	88.6%	
Bachelor's degree or higher	29.4%	
	# Facilities	# Students
Elementary	2	995
Middle/Junior High	1	517
High School	0	N/A
Private/Parochial	2	157
School District	SAU 15	

Students Grades 9-12 are tuitioned to Manchester Central or Manchester West.

Nearest Community/Technical	NHTI-Concord; Manchester
Nearest Colleges/Universities	Southern NH University Hesser College St. Anselm College UNH - Manchester

Source: NH Department of Education

## Tax Rates

2008	(per \$1,000 of value)
Town Tax	\$ 5.41
Local Education Tax	\$10.64
State Education Tax	\$ 2.12
County Tax	\$ 2.65
Total Tax Rate	\$20.82
Town Valuation	\$1,595,105,965
2007	
Local Assessed Value by Property Type	
Residential Land and Buildings	73.8%
Commercial Land and Buildings	22.9%
Public Utilities, Current Use, and Other	3.3%

Source: NH Department of Revenue Administration

## Employment

Annual Average	1997	2007	2008
Civilian Labor Force	5,419	7,968	8,112
Employed	5,271	7,717	7,833
Unemployed	148	258	279
Unemployment Rate	2.7%	3.2%	3.4%

Source: NH Employment Security ELMIB

## Income

1999 (2000 Census)	
Median Household Income	\$61,491
Median 4-Person Family Income	\$68,673
Per Capita Income	\$24,629
Median Earnings (Full time, Year-Round Workers)	
Male	\$43,524
Female	\$31,341
Families Below the Poverty Level	3.2%
2009 HUD	
Estimated Fiscal Year Median Family Income	\$74,900
Consumer Price Index (July 2009)	% Change
CPI	Over the Year
Not Seasonally Adjusted	215.4    -2.1%
Seasonally Adjusted	214.5    -1.9%

Source: NH Employment Security ELMIB

## Largest Employers

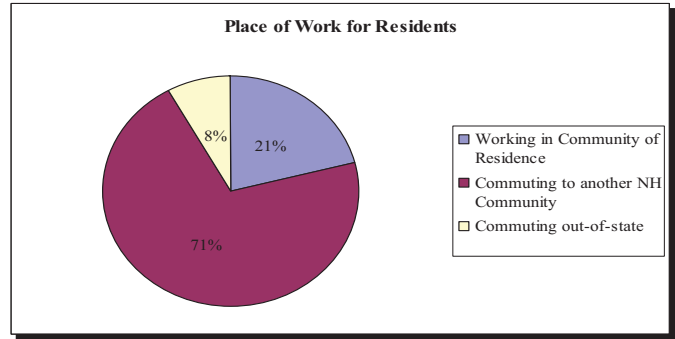
Employers	Employees
Southern New Hampshire University	> 1,000
GE Aircraft Engines	500-999
United Healthcare	500-999
Cigna Health Care	100-249
Shaw's Supermarket	100-249
Target	100-249
C B Sullivan Co Inc	100-249
Cummings Printing	100-249
Merchants Automotive Group	100-249
Pro Con Inc	100-249
Kohl's Department Store	100-249
Great State Beverages Inc	100-249
Home Depot	100-249
Procon Inc	100-249
Pike Industries	100-249
Hooksett Crushed Stone	100-249
Elliot Family Medical	100-249
K-Mart	100-249
Merchants Automotive Group	100-249
Wal-Mart	100-249
BJ's Wholesale Club	50-99
Ninety Nine Restaurant & Pub	50-99
Pro Con Inc	50-99
Hooksett Memorial Elementary School	50-99

Source: NNetwork, NH Employment Security ELMIB, info USA

## Commuting

Workers 16 years and over	
Drove alone, car/truck/van	82.0%
Carpooled, car/truck/van	8.8%
Public transportation	1.6%
Walked	3.6%
Other Means	0.4%
Worked at Home	3.6%
Mean Travel Time to Work	
	25.7 minutes
Percent of Working Residents	
Working in Community of Residence	21%
Commuting to another NH Community	71%
Commuting out-of-state	8%

Source: US Census 2000



Source: US Census 2000

## Transportation

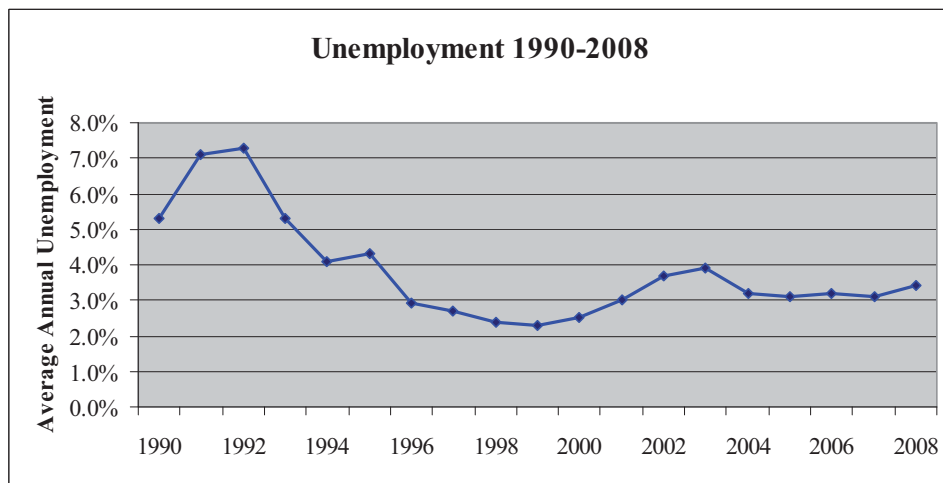
Road Access	US Routes	3
	State Routes	3A, 28, 28 Bypass
Nearest Interstate, Exit	I-93 Exit 9-11 (local)	
Railroad	Guilford Transportation	
Public Transportation	No	
Nearest Airport with Scheduled Service	Manchester-Boston Regional	
Driving Distance to Selected Cities:		
	Manchester, NH	9 miles
	Concord, NH	9.5 miles
	Portsmouth, NH	47 miles
	Boston, MA	59 miles
	Portland, ME	101 miles
	New York City, NY	263 miles
	Montreal, Quebec	252 miles

Source: NH Employment Security ELMIB

## Employment and Wages

2007 Industry	Work Sites	Annual Average Employment	Average Weekly Wage
Total, All Industries	491	8,033	\$834
Goods-Producing	106	1,865	\$1,176
Service-Providing	385	6,168	\$731

Source: NH Employment Security ELMIB



Source: NH Employment Security ELMIB

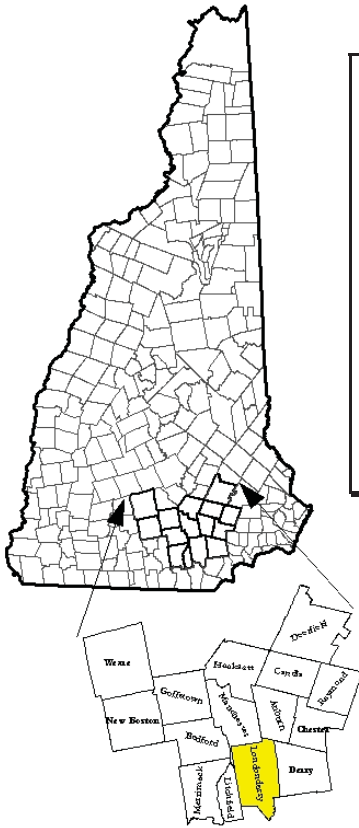
Sources for graphics: Heading and Seal: Town Website - State of NH and County Map: ELMIB - SNHPC Region: SNHPC

# WELCOME LONDONDERRY NEW HAMPSHIRE

268 B Mammoth Road Londonderry, NH 03053 603.432.1100



## Economic Assets Profile



Contact:	David Caron, Town Manager 268 B Mammoth Road Londonderry, NH 03053		
Phone:	(603) 432-1100 x120	Fax: (603) 432-1128	
E-mail:	<a href="mailto:dcaron@londonderrynh.org">dcaron@londonderrynh.org</a>		
US Congress	District 1	Carol Shea-Porter	
Executive Council	District 4	Raymond Wieczorek	
State Senate	District 14	Sharon Carson	
State Representatives	Rockingham Country District 3		
	Clinton Bailey	Frank Emiro	Robert Introne
	Alfred Baldasaro	James Headd	Betsy McKinney
	Dudley Dumaine	Karen Hutchinson	Sherman Packard

Town of Londonderry  
[www.londonderrynh.org](http://www.londonderrynh.org)

Rockingham County  
[www.co.rockingham.nh.us](http://www.co.rockingham.nh.us)

Rockingham Economic Development Corporation  
[www.redc.com](http://www.redc.com)



SNHPC Region  
[www.snhpc.org](http://www.snhpc.org)

Metro Center-NH  
[www.manchester-chamber.org](http://www.manchester-chamber.org)

County	Rockingham
Date of Incorporation	1722
Labor Market	Nashua NH-MA NECTA
Tourism Region	Merrimack Valley
Planning Commission	Southern NH Planning
Regional Economic Development	METRO CENTER NH Rockingham Economic Development Corporation
Zoning Ordinance	1962/09
Master Plan	2004

Source: NH Employment Security ELMIB, Town data

Type of Government	Town Council
Budget: Municipal Appropriations (2008)	\$33,328,808
Budget: School Appropriations	\$60,396,294
Capital Improvement Plan	Yes
Development Plans Reviewed by	Planning Board
Boards and Commissions	
Elected: Town Council	Appointed: Planning
School	Conservation
	Library
Public Library: Leach	

Source: NH Employment Security ELMIB

## *Londonderry's Key Economic Assets and Strengths*

- **1000 acres of commercially zoned land**
- **Access to: airport, highway, and good infrastructure**
- **Town services, low crime, and highly skilled workforce**
- **A stable tax structure and good school system**

Source: Municipal SWOT Analysis, February 2010

### *Londonderry at a Glance*

#### **Geography**

Total Area (sq mile)	42.1
Total Land	42.0
Total Water	0.1

Source: NH Employment Security ELMIB

#### **Population**

Total 2008 (OEP)	24,567
2000 Census Data	
Male	11,443
Female	11,793
Median Age	35.0 years
People per sq mile	585.5

Source: US Census Bureau, NH OEP

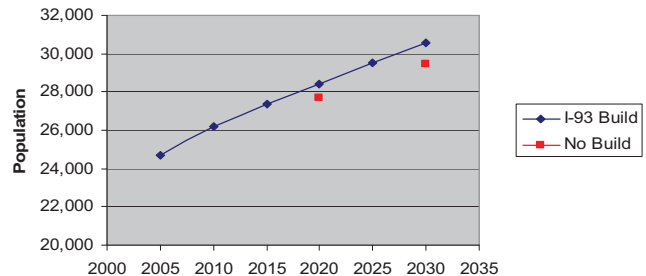
#### **Nashua, NH Metro NECTA Map**



Source: NHHFA

NECTA: New England City and Town Area

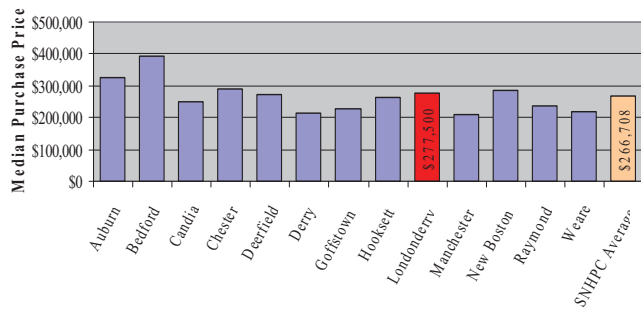
#### **Population Projection**



\* I-93 Build refers to proposed widening. No Build is without widening.

#### **Housing**

**Median Purchase Prices of Primary Homes for All Housing Types 2008**



Source: NHHFA

	2007	Percent
Total Housing Units	8,544	100.0%
Single-Family	5,953	69.7%
Multi-family	2,262	26.5%
Manufactured	329	3.9%
<b>2000</b>		
Owner Occupied	6,637	86.0%
Renter Occupied	986	12.8%
Vacant	95	1.2%

Source: NH OEP, NHHFA

## Education

High School Graduate or higher	93.4%	
Bachelor's degree or higher	35.9%	
	# Facilities	# Students
Elementary	4	2,285
Middle/Junior High	1	1,300
High School	1	1,828
Private/Parochial	1	78
School District	SAU 12	
Nearest Community/Technical	Nashua	
Nearest Colleges/Universities	Chester College Hesser College Southern NH University UNH - Manchester	

Source: NH Department of Education

## Tax Rates

2009	(per \$1,000 of value)
Town Tax	\$ 4.65
Local Education Tax	\$11.79
State Education Tax	\$ 2.30
County Tax	\$ 0.94
Total Tax Rate	\$19.68
Town Valuation	\$3,309,970,202
2007	
Local Assessed Value by Property Type	
Residential Land and Buildings	72.9%
Commercial Land and Buildings	16.6%
Public Utilities, Current Use, and Other	10.5%

Source: NH Department of Revenue Administration, Town data

## Employment

Annual Average	1997	2007	2008
Civilian Labor Force	12,747	14,592	14,587
Employed	12,345	14,084	14,050
Unemployed	402	508	537
Unemployment Rate	3.2%	3.5%	3.7%

Source: NH Employment Security ELMIB

## Income

1999 (2000 Census)	
Median Household Income	\$70,501
Median 4-Person Family Income	\$73,513
Per Capita Income	\$26,491
Median Earnings (Full time, Year-Round Workers)	
Male	\$50,566
Female	\$33,821
Families Below the Poverty Level	1.6%
2009 HUD	
Estimated Fiscal Year Median Family Income	\$95,200
Consumer Price Index (July 2009)	
CPI	% Change Over the Year
Not Seasonally Adjusted	215.4 -2.1%
Seasonally Adjusted	214.5 -1.9%

Source: NH Employment Security ELMIB

## Largest Employers

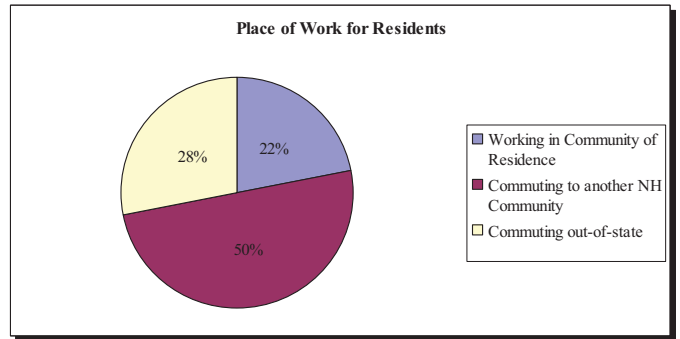
Employers	Employees
Insight Technology, Inc.	> 999
Harvey Industries Inc	500-999
Stoneyfield Yogurt	250-499
BSP Airfreight	250-499
Vibro-Meter Inc	250-499
Herrington Catalog	250-499
Home Depot	250-499
Eco Shoe	100-249
Continental Paving Inc	100-249
Hampshire Fire Protection Co	100-249
Market Basket	100-249
CTS Electronics Mfg Solutions	100-249
Shaw's Supermarket	100-249
Matthew Thornton Elementary	100-249
Concrete Systems Inc	100-249
Wire Belt Co of America	100-249
Thibeault Corp of New England	100-249
Londonderry Junior Middle School	100-249
Cracker Barrel Old Country Str	100-249
South Elementary School	100-249
South Londonderry School	100-249
RGIS	100-249
Workout Club & Wellness Ctr	100-249
North Londonderry School	100-249
Sears Roebuck & Co	100-249
Uni Care	100-249
Uni-Cast Inc	100-249

Source: NHnetwork, NH Employment Security ELMIB, infoUSA

## Commuting

<b>Workers 16 years and over</b>	
Drove alone, car/truck/van	86.3%
Carpooled, car/truck/van	7.9%
Public transportation	1.3%
Walked	0.6%
Other Means	0.7%
Worked at Home	3.2%
<b>Mean Travel Time to Work</b>	
	29.7 minutes
<b>Percent of Working Residents</b>	
Working in Community of Residence	22%
Commuting to another NH Community	50%
Commuting out-of-state	28%

Source: US Census 2000



Source: US Census 2000

## Transportation

Road Access	US Routes	
	State Routes	28,102,128
Nearest Interstate, Exit	I-93 Exit 9-5 (local)	
Railroad	No	
Public Transportation	No	
Nearest Airport with Scheduled Service	Manchester-Boston Regional	
<b>Driving Distance to Selected Cities:</b>		
	Manchester, NH	10 miles
	Concord, NH	30 miles
	Boston, MA	44 miles
	Portsmouth, NH	47 miles
	Portland, ME	96 miles
	New York City, NY	247 miles
	Montreal, Quebec	270 miles

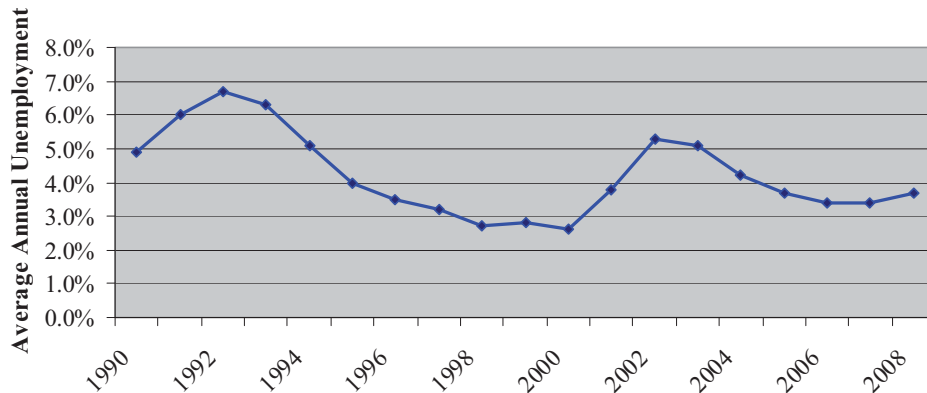
Source: NH Employment Security ELMIB

## Employment and Wages

2007 Industry	Work Sites	Annual Average Employment	Average Weekly Wage
Total, All Industries	806	13,579	\$832
Goods-Producing	146	3,797	\$1,073
Service-Providing	660	9,783	\$739

Source: NH Employment Security ELMIB

## Unemployment 1990-2008



Source: NH Employment Security ELMIB

Sources for graphics: Heading and Seal: Town Website -SNHPC Region: SNHPC

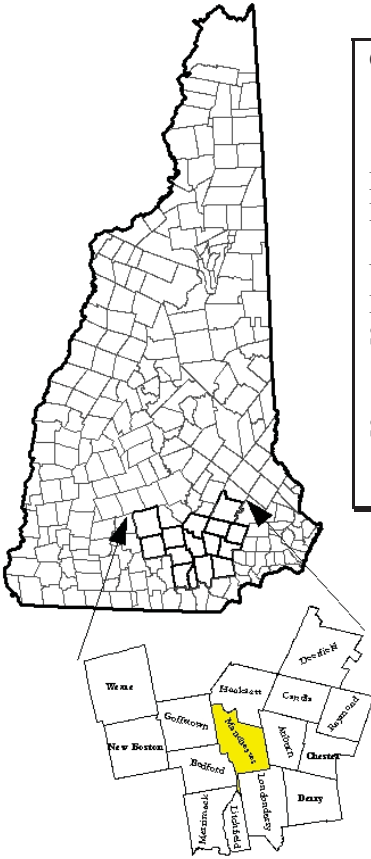


MANCHESTER, NH

Birthplace of *your* American Dream.



# Economic Assets Profile



Contact:	Jay Minkarah Economic Development Director One City Hall Plaza, Suite 110 Manchester, NH 03101-2099	
Phone:	(603) 624-6505	Fax: (603) 624-6308
E-mail:	econdev@manchesternh.gov	
US Congress	District 1	Carol Shea-Porter
Executive Council	District 4	Raymond Wieczorek
State Senate	District 16	Theodore Gatsas
	District 18	Betsi DeVries
	District 20	Lou D'Allesandro
State Representatives	Hillsborough County Districts 8-17 There are 51 Representatives for Wards 1-12 (See City Clerk's Office for names)	



City of Manchester  
[www.ManchesterNH.gov](http://www.ManchesterNH.gov)

Hillsborough County  
[www.hillsboroughcountynh.org/](http://www.hillsboroughcountynh.org/)

Manchester Economic Development  
[www.manchesternh.gov/economy](http://www.manchesternh.gov/economy)



Metro Center - NH  
[www.Manchester-Chamber.org](http://www.Manchester-Chamber.org)

SNHPC Region  
[www.snhpc.org](http://www.snhpc.org)

County	Hillsborough
Date of Incorporation	1751
Labor Market	Manchester NH Metro-NECTA
Tourism Region	Merrimack Valley
Planning Commission	Southern NH Planning
Regional Economic Development	METRO CENTER NH Manchester Development Corporation
Zoning Ordinance	1927/01
Master Plan	1993

Type of Government	Mayor and 14 Aldermen
Budget: Municipal Appropriations (2008)	\$121,108,008
Budget: School Appropriations	\$147,250,000
Capital Improvement Plan	Yes
Development Plans Reviewed by	Planning Board
Boards and Commissions	
Elected: Mayor	Appointed: Planning
Aldermen	Conservation
	Library
	25 Others
Public Library:	Manchester City, West Side Community

Source: NH Employment Security ELMIB

Source: NH Employment Security ELMIB

## *Manchester's Key Economic Assets and Strengths*

- **Manchester-Boston Regional Airport**
- **Business center of New Hampshire**
- **Diverse economic base**
- **Largest city in Northern New England**
- **Arts and cultural attractions**
- **Good highway access/proximity to Boston**
- **11 colleges and universities**

Source: Municipal SWOT Analysis, February 2010

### *Manchester at a Glance*

#### **Geography**

Total Area (sq mile)	34.9
Total Land	33.0
Total Water	1.9

Source: NH Employment Security ELMIB

#### **Manchester, NH Metro NECTA**



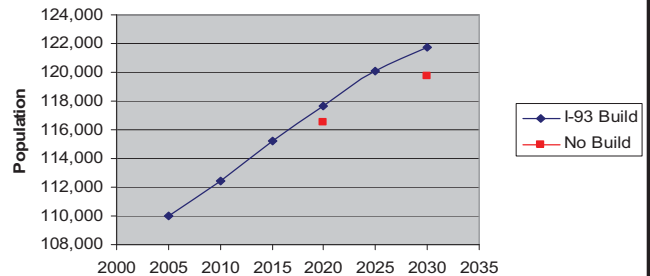
Source: NHHFA  
NECTA: New England City and Town Area

#### **Population**

Total 2008 (Census)	108,874
2000 Census Data	
Male	52,394
Female	54,612
Median Age	34.9 years
People per sq mile	3,241.6

Source: US Census Bureau, NH OEP

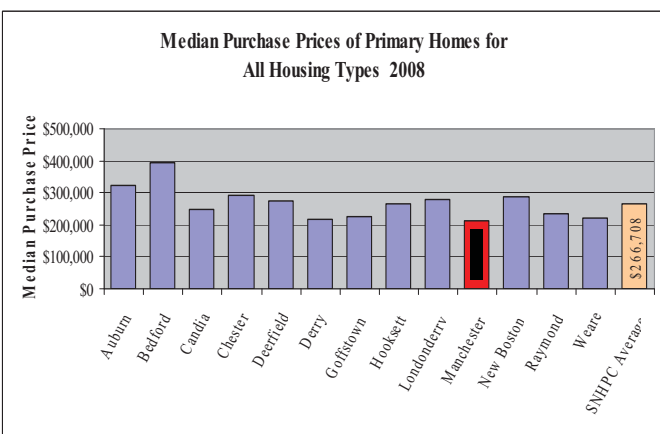
#### **Population Projection**



Source: NH OEP

\* I-93 Build refers to proposed widening. No Build is without widening.

#### **Housing**



Source: NHHFA

	<b>2007</b>	<b>Percent</b>
Total Housing Units	48,618	100.0%
Single-Family	17,966	37.0%
Multi-family	30,491	62.7%
Manufactured	161	0.3%
<b>2000</b>		
Owner Occupied	20,367	44.4%
Renter Occupied	23,880	52.0%
Vacant	1,645	3.7%

Source: NH OEP, NHHFA



## Education

High School Graduate or higher	80.7%	
Bachelor's degree or higher	22.3%	
	# Facilities	# Students
Preschool	1	289
Elementary	14	6,494
Middle/Junior High	4	3,400
High School	4	5,696
Private/Parochial	12	2,363
School District	SAU 37	
Nearest Colleges/Universities		
Manchester Community College	Franklin Pierce Univ.	
Manchester School of Technology	Hesser College	
Saint Anselm College	Granite State College	
Southern NH University	NH Institute of Art	
UNH – Manchester	Springfield College	
Mass. College of Pharmacy and Health Sciences		

Source: NH Department of Education

## Employment

Annual Average	1997	2007	2008
Civilian Labor Force	56,302	62,106	61,851
Employed	54,663	59,684	59,196
Unemployed	1,639	2,422	2,655
Unemployment Rate	2.9%	3.9%	4.3%

Source: NH Employment Security ELMIB

## Income

1999 (2000 Census)		
Median Household Income	\$40,774	
Median 4-Person Family Income	\$50,039	
Per Capita Income	\$21,244	
Median Earnings (Full time, Year-Round Workers)		
Male	\$34,287	
Female	\$26,584	
Families Below the Poverty Level	7.7%	
2009 HUD		
Estimated Fiscal Year Median Family Income	\$76,800	
Consumer Price Index (May 2009)	% Change	
CPI	Over the Year	
Not Seasonally Adjusted	215.4	-2.1%
Seasonally Adjusted	214.5	-1.9%

Source: NH Employment Security ELMIB

## Tax Rates

2008	(per \$1,000 of value)
Town Tax	\$ 8.05
Local Education Tax	\$ 5.98
State Education Tax	\$ 2.28
County Tax	\$ 1.04
Total Tax Rate	\$17.35
Town Valuation	\$9,718,783,150
2007	
Local Assessed Value by Property Type	
Residential Land and Buildings	64.6%
Commercial Land and Buildings	33.9%
Public Utilities, Current Use, and Other	1.5%

Source: NH Department of Revenue Administration

## Largest Employers

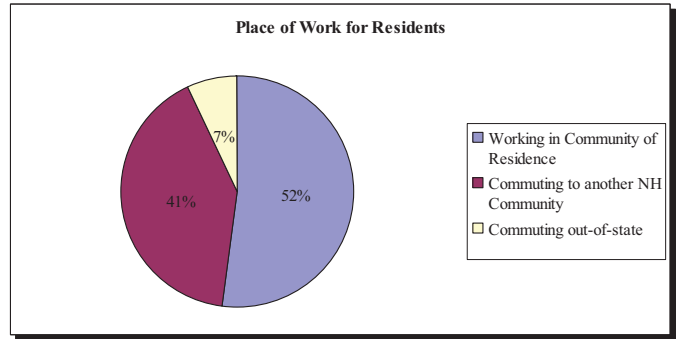
Employers	Employees
Elliot Hospital	1,000-4,999
Elliot Health System	1,000-4,999
Catholic Medical Ctr Rehab	1,000-4,999
Osram Sylvania	500-999
St Anselm College	500-999
US Veterans Medical Ctr	500-999
Vibracoustic Division	500-999
Velcro USA Inc	500-999
Dartmouth Hitchcock Med Ctr	500-999
Kalwall Corp	500-999
Ira Toyota of Manchester	500-999
Public Service Co of NH	500-999
Union Leader Corp	250-499
Ira Lexus of Manchester	250-499
Keller Co	250-499
Southern NH Svc	250-499
Moore Center Svc Inc	250-499
Mental Health Ctr	250-499
Summit Dispensing Systems Inc	250-499
Tru Serv	250-499
Visiting Nurse Assoc-Manchester	250-499
Associated Grocers-New England	250-499
Autofair Honda-Jaguar	250-499
Sanmina-Sci Corp	250-499
Ladeco Inc	250-499

Source: NNetwork, NH Employment Security ELMIB, info USA

## Commuting

Workers 16 years and over	
Drove alone, car/truck/van	81.0%
Carpooled, car/truck/van	11.9%
Public transportation	1.4%
Walked	2.9%
Other Means	0.7%
Worked at Home	2.2%
Mean Travel Time to Work	
	21.3 minutes
Percent of Working Residents	
Working in Community of Residence	52%
Commuting to another NH Community	41%
Commuting out-of-state	7%

Source: US Census 2000



Source: US Census 2000

## Transportation

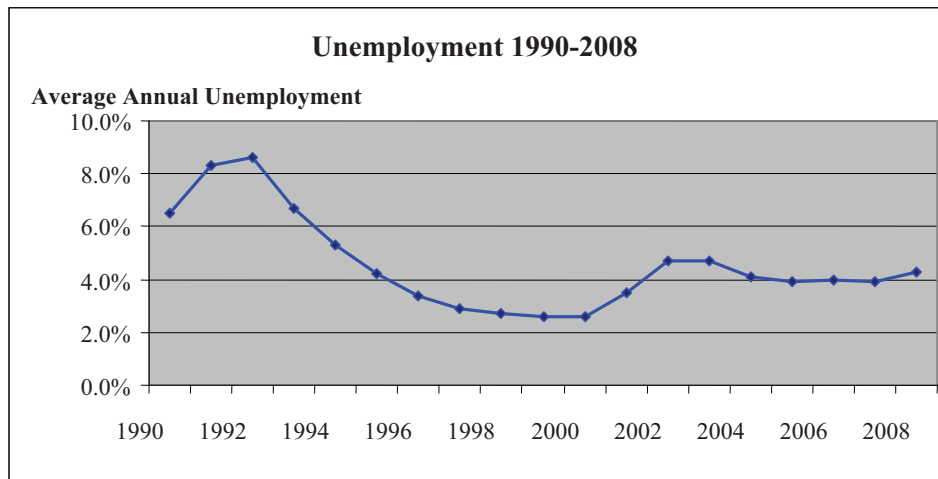
Road Access	US Routes	3
	State Routes	3A, 28, 28A, 101, 114, 114A
Nearest Interstate, Exit		I-93 Exits 6-8 (local) I-293 Exits 1-7 (local)
Railroad		Boston & Maine
Public Transportation		Yes
Nearest Airport with Scheduled Service		
Manchester-Boston Regional		
Driving Distance to Selected Cities:		
	Concord, NH	18 miles
	Portsmouth, NH	45 miles
	Portland, ME	95 miles
	Boston, MA	53 miles
	New York City, NY	252 miles
	Montreal, Quebec	259 miles

Source: NH Employment Security ELMIB

## Employment and Wages

2007 Industry	Work Sites	Annual Average Employment	Average Weekly Wage
Total, All Industries	3,334	67,349	\$910
Goods-Producing	406	9,255	\$999
Service-Providing	2,928	58,094	\$896

Source: NH Employment Security ELMIB



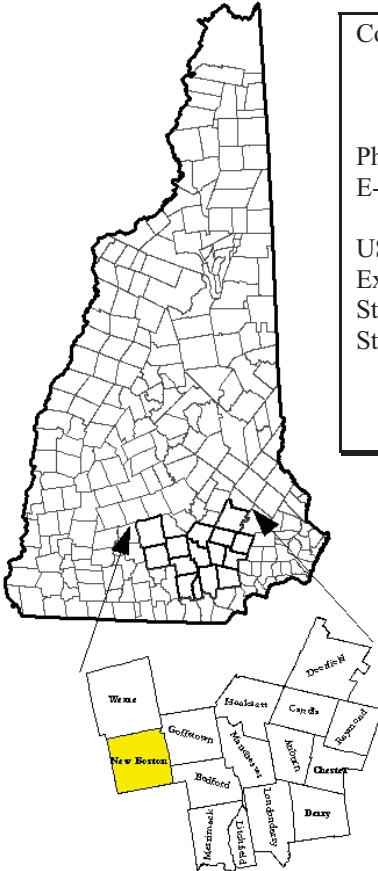
Source: NH Employment Security ELMIB

Sources for graphics: Heading and Seal: Town Website - State of NH and County Map: ELMIB - SNHPC Region: SNHPC


# Town of New Boston

*New Hampshire*

## Economic Assets Profile



Contact:	Burton Reynolds Town Administrator P.O. Box 250 New Boston, NH 03070	
Phone:	(603) 487-5504 x103	Fax: (603) 487-2975
E-mail:	<a href="mailto:townadministrator@new-boston.nh.us">townadministrator@new-boston.nh.us</a>	
US Congress	District 2	Paul Hodes
Executive Council	District 5	Debora Pignatelli
State Senate	District 9	Sheila Roberge
State Representatives	Hillsborough County District 4	
	Linda Foster	Robert Mead
	Frank Holden	William O'Brien



Town of New Boston  
[www.new-boston.nh.us](http://www.new-boston.nh.us)

Hillsborough County  
[www.hillsboroughcountynh.org](http://www.hillsboroughcountynh.org)

Capital Regional Development Council  
[www.crdc-nh.com](http://www.crdc-nh.com)



Metro Center-NH  
[www.manchester-chamber.org](http://www.manchester-chamber.org)

SNHPC Region  
[www.snhpc.org](http://www.snhpc.org)

County	Hillsborough
Date of Incorporation	1763
Labor Market	Manchester NH Metro-NECTA
Tourism Region	Merrimack Valley
Planning Commission	Southern NH Planning
Regional Economic Development	METRO CENTER NH Capital Regional Development Council
Zoning Ordinance	1977/09
Master Plan	2006

Source: NH Employment Security ELMIB, Town data

Type of Government	Selectmen
Budget: Municipal Appropriations (2008)	\$4,171,238
Budget: School Appropriations	\$7,819,365
Capital Improvement Plan	Yes
Development Plans Reviewed by	Planning Board
Boards and Commissions	
Elected: Selectmen	Appointed: Planning Zoning Conservation Library Cemetery
Public Library: Whipple Free	

Source: NH Employment Security ELMIB

## *New Boston's Key Economic Assets and Strengths*

- **Master Plan which identifies and supports commercial endeavors**
- **Commercial District zoning which reflects Master Plan revisions**
- **Town permits in-home business**
- **Supports the use of technology and telecommuting abilities**

Source: Municipal SWOT Analysis, February 2010

### *New Boston at a Glance*

#### **Geography**

Total Area (sq mile)	43.2
Total Land	43.0
Total Water	0.2

Source: NH Employment Security ELMIB

#### **Manchester, NH Metro NECTA**



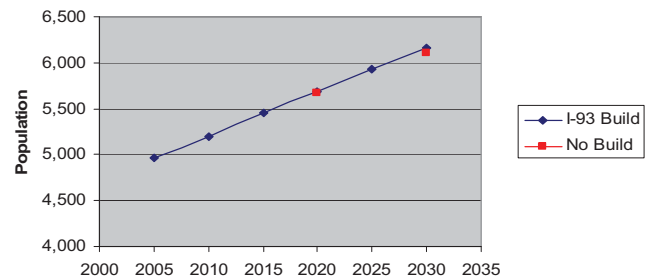
Source: NHHFA  
NECTA: New England City and Town Area

#### **Population**

Total 2008	5,129
2000 Census Data	
Male	2,071
Female	2,067
Median Age	36.2 years
People per sq mile	118.2

Source: US Census Bureau, NH OEP

#### **Population Projection**

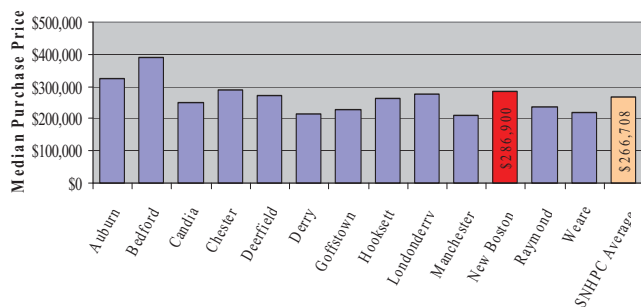


Source: NH OEP

\* I-93 Build refers to proposed widening. No Build is without widening.

#### **Housing**

**Median Purchase Prices of Primary Homes for All Housing Types 2008**



Source: NHHFA

	<b>2007</b>	<b>Percent</b>
Total Housing Units	1,891	100.0%
Single-Family	1,672	88.4%
Multi-family	162	8.6%
Manufactured	57	3.0%
	<b>2000</b>	
Owner Occupied	1,434	44.4%
Renter Occupied	190	52.0%
Vacant	28	3.7%

Source: NH OEP, NHHFA

## Education

High School Graduate or higher	93.9%	
Bachelor's degree or higher	36.0%	
	# Facilities	# Students
Elementary	1	547
Middle/Junior High	0	N/A
High School	0	N/A
Private/Parochial	0	N/A
School District	SAU 19	

Students grades 7-12 are tuitioned to Goffstown.

Nearest Community/Technical	Manchester
Nearest Colleges/Universities	St. Anselm College Hesser College Southern NH University UNH - Manchester

Source: NH Department of Education

## Employment

Annual Average	1997	2007	2008
Civilian Labor Force	2,089	3,006	3,031
Employed	2,048	2,922	2,943
Unemployed	41	84	88
Unemployment Rate	2.0%	2.8%	2.9%

Source: NH Employment Security ELMIB

## Income

1999 (2000 Census)	
Median Household Income	\$66,020
Median 4-Person Family Income	\$69,458
Per Capita Income	\$26,488
Median Earnings (Full time, Year-Round Workers)	
Male	\$47,173
Female	\$32,417
Families Below the Poverty Level	3.1%
2009 HUD	
Estimated Fiscal Year Median Family Income	\$77,000
Consumer Price Index (July 2009)	% Change
CPI	Over the Year
Not Seasonally Adjusted	215.4 -2.1%
Seasonally Adjusted	214.5 -1.9%

Source: NH Employment Security ELMIB

## Tax Rates

2008	(per \$1,000 of value)
Town Tax	\$ 3.14
Local Education Tax	\$ 8.57
State Education Tax	\$ 2.04
County Tax	\$ 0.96
Total Tax Rate	\$14.71
Town Valuation	\$644,892,403
2007	
Local Assessed Value by Property Type	
Residential Land and Buildings	95.3%
Commercial Land and Buildings	3.4%
Public Utilities, Current Use, and Other	1.3%

Source: NH Department of Revenue Administration

## Largest Employers

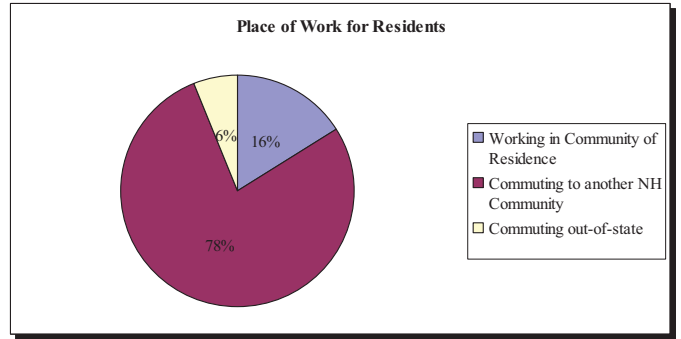
Employers	Employees
New Boston Elementary School	50-99
Renshaw's Truck & Auto	20-49
New Boston Tavern	20-49
R E Jenkins Construction Co	20-49
Rose Meadow Farm	20-49
Damians on the River	10-19
John E Neville Excavating	10-19
Retcomp	10-19
New Boston Dental Care	10-19
New Boston Video	10-19
New Boston Pizza	10-19
Emilee's Orchard	10-19
TRG Learning Ctr	10-19
Mr Gee's Tire Corp	10-19
Dodge's Store	10-19
Heidi Palmer Real Estate	10-19
Sandford Surveying-Engineering	10-19
New Boston Police Dept	5-9
New Boston Primary Care	5-9
Farms & Barns Real Estate	5-9
New Boston Recreation Program	5-9
US Post Office	5-9
US Air Force	5-9
New Boston Highway Dept	5-9
Hillsboro County 4H	5-9

Source: NNetwork, NH Employment Security ELMIB, infoUSA

## Commuting

Workers 16 years and over	
Drove alone, car/truck/van	82.4%
Carpooled, car/truck/van	10.5%
Public transportation	0.5%
Walked	1.3%
Other Means	0.6%
Worked at Home	4.7%
Mean Travel Time to Work	
	32.7 minutes
Percent of Working Residents	
Working in Community of Residence	16%
Commuting to another NH Community	78%
Commuting out-of-state	6%

Source: US Census



## Transportation

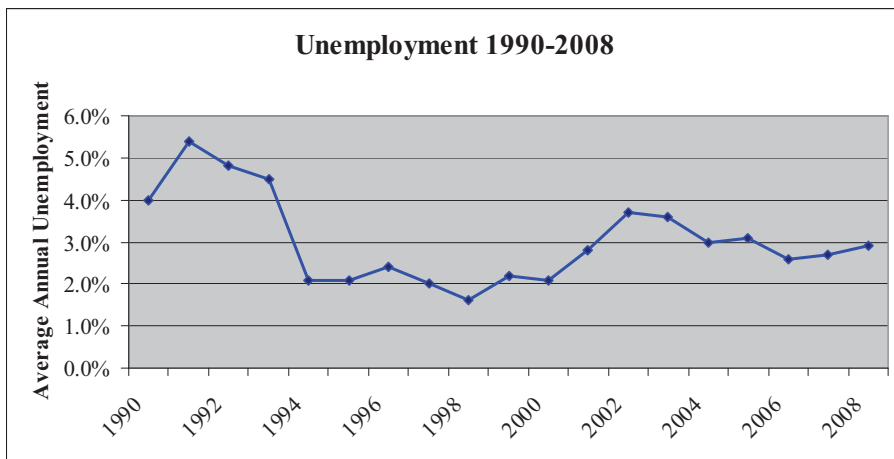
Road Access	US Routes	
	State Routes	13, 77, 114, 136
Nearest Interstate, Exit	I-293 Exit 4	(14 miles)
Railroad	No	
Public Transportation	No	
Nearest Airport with Scheduled Service	Manchester-Boston Regional	
Driving Distance to Selected Cities:		
	Manchester, NH	14 miles
	Concord, NH	23 miles
	Portsmouth, NH	61 miles
	Boston, MA	67 miles
	Portland, ME	113 miles
	New York City, NY	235 miles
	Montreal, Quebec	261 miles

Source: NH Employment Security ELMIB

## Employment and Wages

2007 Industry	Work Sites	Annual Average Employment	Average Weekly Wage
Total, All Industries	107	681	\$681
Goods-Producing	34	122	\$714
Service-Providing	73	558	\$674

Source: NH Employment Security ELMIB



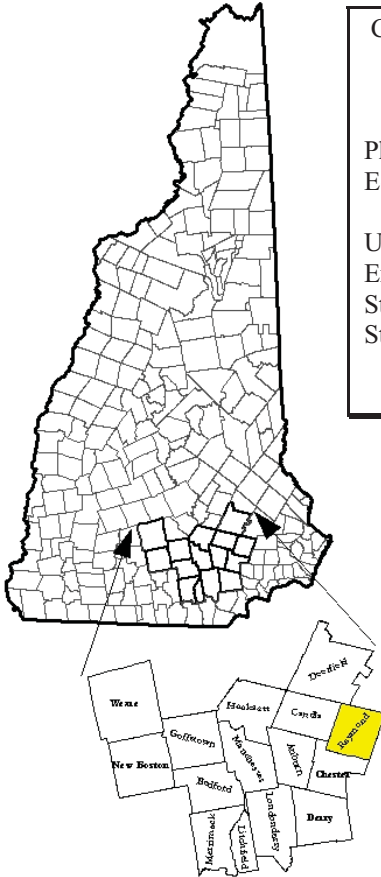
Source: NH Employment Security ELMIB


Sources for graphics: Heading and Seal: Town Website SNHPC Region: SNHPC



Town of Raymond, NH

# Economic Assets Profile



Contact:	Christopher Rose Town Manager 4 Epping Street Raymond, NH 03077		
Phone:	(603) 895-4735	Fax: (603) 895-0903	
E-mail:	crose@raymondnh.gov		
US Congress	District 1	Carol Shea Porter	
Executive Council	District 4	Raymond Wieczorek	
State Senate	District 17	John Barnes, Jr.	
State Representatives	Rockingham County District 2	L. Mike Kappler	
	Franklin Bishop		
	Kathleen Hoelzel		

Town of Raymond  
[www.raymondnh.gov](http://www.raymondnh.gov)

Rockingham County  
[www.co.rockingham.nh.us](http://www.co.rockingham.nh.us)

Rockingham Economic Dev. Corp.  
[www.redc.com](http://www.redc.com)



Metro Center - NH  
[www.Manchester-Chamber.org](http://www.Manchester-Chamber.org)

SNHPC Region  
[www.snhpc.org](http://www.snhpc.org)

County	Rockingham
Date of Incorporation	1764
Labor Market	Nashua NH-MA NECTA
Tourism Region	Merrimack Valley
Planning Commission	Southern NH Planning
Regional Economic Development	Metro Center -NH Rockingham Economic Development Corporation
Zoning Ordinance	1970/07
Master Plan	2002

Source: NH Employment Security ELMIB

Type of Government	Selectmen/Town Manager
Budget: Municipal Appropriations (2009)	\$7,617,043
Budget: School Appropriations (2009-10)	\$22,329,985
Capital Improvement Plan	Yes
Development Plans Reviewed by	Planning Board
Boards and Commissions	
Elected:	Selectmen
	School
	Budget
	Planning
	Library
	Ethics
Public Library:	Dudley-Tucker
Appointed:	Zoning
	Conservation
	Cemetery
	Historic
	Econ.Dev.
	Recreation
	and 6 Others

Source: NH Employment Security ELMIB

## *Raymond's Key Economic Assets and Strengths*

- **Location:** equidistant from Salem/Concord and Portsmouth/Manchester
- **Moderately priced commercial real estate/housing for labor pool**
- **Considerable employee recruitment pool**
- **Freeway accessibility (NH Rt. 101, I-95, I-93) and two exits on Rt. 101)**
- **Availability of large parcels**
- **Attractive setting and high quality of life**
- **Great access to high speed internet**
- **Community is business/industry friendly with support services**

Source: Municipal SWOT Analysis, February 2010

### *Raymond at a Glance*

#### Geography

Total Area (sq mile)	29.6
Total Land	28.8
Total Water	0.8

Source: NH Employment Security ELMIB

#### Nashua, NH Metro NECTA Map

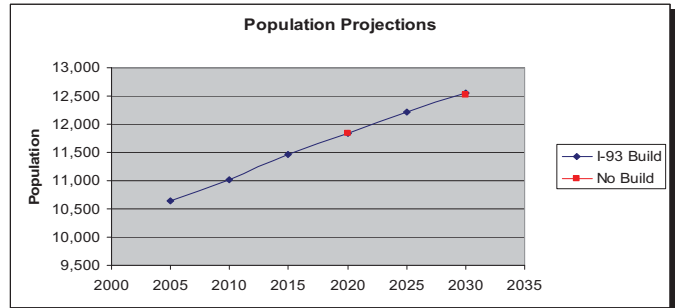


Source: NHHFA  
NECTA: New England City and Town Area

#### Population

Total 2008 (OEP)	10,825
2000 Census Data	
Male	4,843
Female	4,831
Median Age	34.4years
People per sq mile	374.5

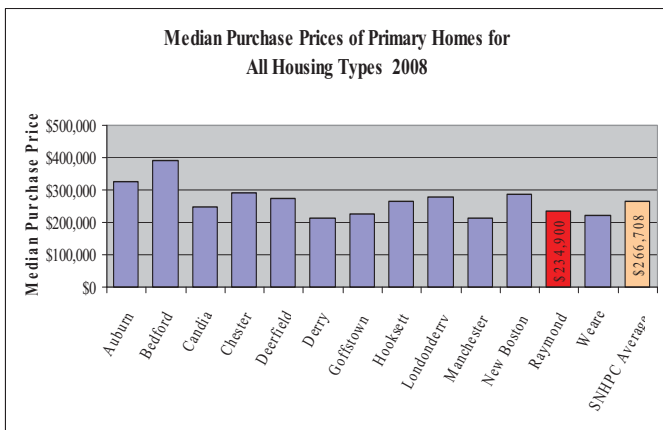
Source: US Census Bureau, NH OEP



Source: NH OEP

\* I-93 Build refers to proposed widening. No Build is without widening.

#### Housing



Source: NHHFA

	2007	Percent
Total Housing Units	4,348	100.0%
Single-Family	2,751	63.3%
Multi-family	911	21.0%
Manufactured	686	15.8%
<b>2000</b>		
Owner Occupied	2,724	73.4%
Renter Occupied	769	20.7%
Vacant	217	5.8%

Source: NH OEP, NHHFA



## Education

High School Graduate or higher	83.5%	
Bachelor's degree or higher	13.0%	
	# Facilities	# Students
Elementary	1	587
Middle/Junior High	1	419
High School	1	518
Private/Parochial	0	N/A
School District	SAU 33	
Nearest Community/Technical	Manchester; Great Bay	
Nearest Colleges/Universities	Chester College of New England Hesser College Southern NH University UNH Manchester	

Source: NH Department of Education

## Employment

Annual Average	1997	2007	2008
Civilian Labor Force	5,231	6,109	6,100
Employed	4,989	5,858	5,826
Unemployed	242	251	274
Unemployment Rate	4.6%	4.1%	4.5%

Source: NH Employment Security ELMIB

## Income

1999 (2000 Census)	
Median Household Income	\$48,829
Median 4-Person Family Income	\$50,889
Per Capita Income	\$18,430
Median Earnings (Full time, Year-Round Workers)	
Male	\$35,493
Female	\$26,778
Families Below the Poverty Level	5.3%
2009 HUD	
Estimated Fiscal Year Median Family Income	\$84,800
Consumer Price Index (July 2009)	
CPI	% Change Over the Year
Not Seasonally Adjusted	215.4 -2.1%
Seasonally Adjusted	214.5 -1.9%

Source: NH Employment Security ELMIB

## Tax Rates

2009	(per \$1,000 of value)
Town Tax	\$ 4.45
Local Education Tax	\$10.93
State Education Tax	\$ 2.09
County Tax	\$ 0.87
Total Tax Rate	\$18.34
Town Valuation	\$1,017,435,946
2007	
Local Assessed Value by Property Type	
Residential Land and Buildings	85.4%
Commercial Land and Buildings	12.8%
Public Utilities, Current Use, and Other	1.8%

Source: NH Department of Revenue Administration

## Largest Employers

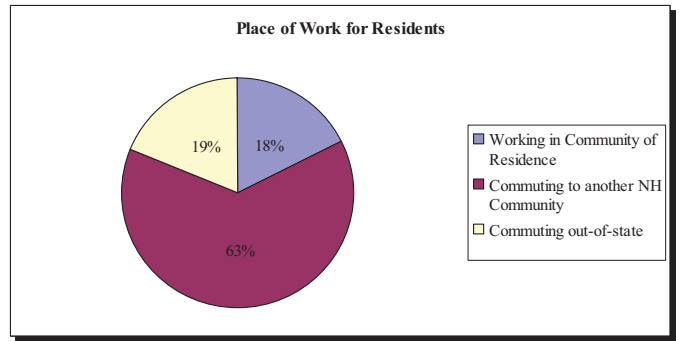
<u>Employers</u>	<u>#Employees</u>
Wal-Mart	500-999
Hannaford Supermarket and Pharmacy	100-249
Raymond High School	100-249
Lamprey River Elementary School	100-249
Iber Holmes Gove Middle School	100-249
Jackson Lumber & Millwork	50-99
Ben Franklin	50-99
Aggregate Industries	50-99
JCR Construction	50-99
McDonald's	50-99
Gemini Valve	50-99
Freetown Yankee Market	50-99
Town of Raymond (municipal, police, fire)	50-99
Dunkin' Donuts	20-49
I C Reed & Sons, Inc	20-49
Lamprey Health Care	20-49
Raymond Food Svc Program	20-49
Hudson/Rpm LLC	20-49
Infinity Constructors Inc	20-49
Apria LifePlus	20-49
Walgreen's	20-49
Argo Cycles, Inc.	20-49
Strikers East	20-49

Sources: NHnetwork, NH Employment Security ELMIB, info USA  
Town of Raymond Community Development Department

## Commuting

Workers 16 years and over	
Drove alone, car/truck/van	83.7%
Carpooled, car/truck/van	12.3%
Public transportation	0.2%
Walked	1.5%
Other Means	0.2%
Worked at Home	1.9%
Mean Travel Time to Work	31.6 minutes
Percent of Working Residents	
Working in Community of Residence	18%
Commuting to another NH Community	64%
Commuting out-of-state	19%

Source: US Census 2000



## Transportation

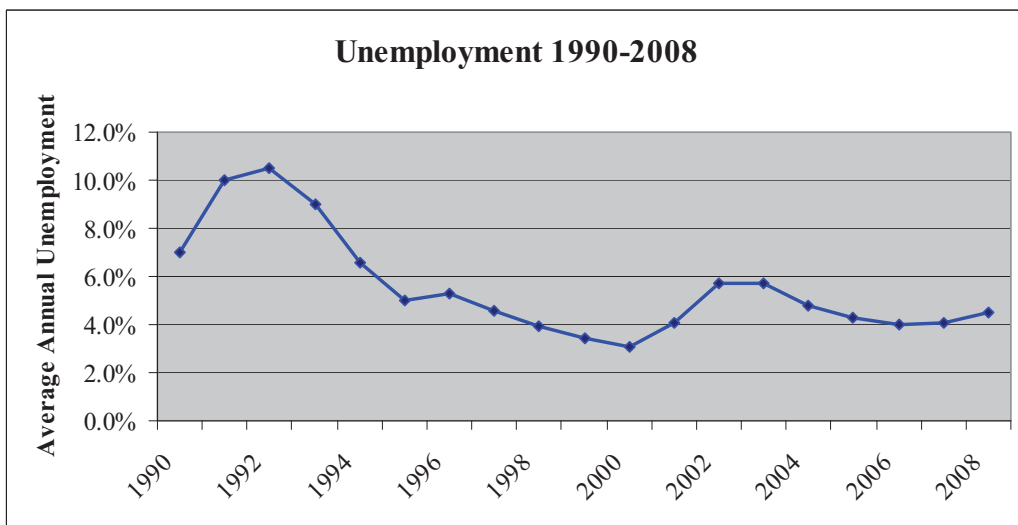
Road Access	US Routes	
	State Routes	27, 101, 102, 107, 156
Nearest Interstate, Exit	I-93 Exit 7 (15 miles)	
Railroad	No	
Public Transportation	No	
Nearest Airport with Scheduled Service	Manchester-Boston Regional	
Driving Distance to Selected Cities:		
Manchester, NH	17 miles	
Portsmouth, NH	29 miles	
Concord, NH	31 miles	
Portland, ME	80 miles	
Boston, MA	64 miles	
New York City, NY	268 miles	
Montreal, Quebec	272 miles	

Source: NH Employment Security ELMIB

## Employment and Wages

2007 Industry	Work Sites	Annual Average Employment	Average Weekly Wage
Total, All Industries	178	2,981	\$699
Goods-Producing	39	401	\$1,070
Service-Providing	140	2,580	\$641

Source: NH Employment Security ELMIB



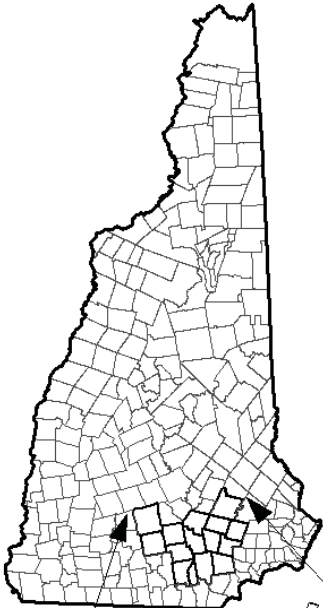
Source: NH Employment Security ELMIB

Sources for graphics: Heading and Seal: Town Website - State of NH and County Map: ELMIB - SNHPC Region: SNHPC

# Weare, New Hampshire

*A Part of Yesterday in Touch With Tomorrow*

## Economic Assets Profile



Contact:	Naomi Bolton Town Administrator P.O. Box 190 Weare, NH 03821		
Phone:	(603) 529-7535	Fax:	(603) 529-4554
E-mail:	townadmin@weare.nh.gov		
US Congress	District 2	Paul Hodes	
Executive Council	District 2	John Shea	
State Senate	District 7	Harold Janeway	
State Representatives	Hillsborough County District 7		
	Russel Day	Kevin Hodges	Neal Kurk
	Larry Emerton	Rip Holden	Calvin Pratt
	John Hikel	Gary Hopper	

Town of Weare

[www.weare.nh.gov](http://www.weare.nh.gov)

Hillsborough County

[www.hillsboroughcountynh.org/](http://www.hillsboroughcountynh.org/)

Capital Regional Development Council

[www.crdc-nh.com](http://www.crdc-nh.com)

Metro Center - NH

[www.Manchester-Chamber.org](http://www.Manchester-Chamber.org)

SNHPC Region

[www.snhpc.org](http://www.snhpc.org)

County	Hillsborough
Date of Incorporation	1764
Labor Market	Manchester NH Metro-NECTA
Tourism Region	Merrimack Valley
Planning Commission	Southern NH Planning
Regional Economic Development	METRO CENTER NH Capital Regional Development Council
Zoning Ordinance	1988/09
Master Plan	2005

Source: NH Employment Security ELMIB

Type of Government	Selectmen
Budget: Municipal Appropriations (2009)	\$5,065,803
Budget: School Appropriations	\$11,332,689
Capital Improvement Plan	Yes
Development Plans Reviewed by	Planning Board
Boards and Commissions	
Elected: Selectmen	Appointed: Planning
Library	Zoning
	Conservation
	Cable
Public Library: Weare Public	

Source: NH Employment Security ELMIB

## Weare's Key Economic Assets and Strengths

- Rural character of the community
- A lot of undeveloped land – potential for farming/high tech industry
- Preserved conservation land and open space
- Being a “bedroom” town of Manchester

Source: Municipal SWOT Analysis, February 2010

## Weare at a Glance

### Geography

Total Area (sq mile)	60.1
Total Land	59.1
Total Water	1.0

Source: NH Employment Security ELMIB

### Manchester, NH Metro NECTA



Source: NHHFA

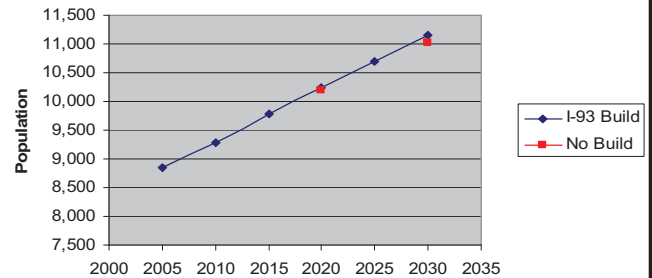
NECTA: New England City and Town Area

### Population

Total 2008 (OEP)	8,993
2000 Census Data	
Male	3,910
Female	3,866
Median Age	34.1years
People per sq mile	151.5

Source: US Census Bureau, NH OEP

### Population Projection

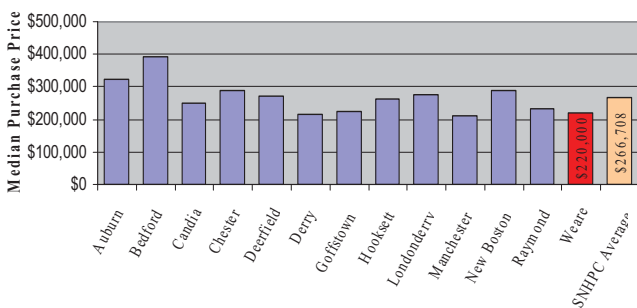


Source: NH OEP

\* I-93 Build refers to proposed widening. No Build is without widening.

### Housing

Median Purchase Prices of Primary Homes for All Housing Types 2008



Source: NHHFA

	2007	Percent
Total Housing Units	3,431	100.0%
Single-Family	2,750	80.2%
Multi-family	385	11.2%
Manufactured	296	8.6%
	<b>2000</b>	
Owner Occupied	2,278	80.6%
Renter Occupied	340	14.9%
Vacant	210	9.2%

Source: NH OEP, NHHFA

## Education

High School Graduate or higher	88.0%	
Bachelor's degree or higher	25.1%	
	# Facilities	# Students
Elementary	1	540
Middle/Junior High	1	545
High School	1	839
Private/Parochial	0	N/A
School District	SAU 24	
Nearest Community/Technical	NHTI-Concord	
Nearest Colleges/Universities	Chester College of New England Hesser College Southern NH University UNH - Manchester	

Source: NH Department of Education

## Employment

Annual Average	1997	2007	2008
Civilian Labor Force	3,985	5,169	5,259
Employed	3,898	5,009	5,084
Unemployed	87	160	175
Unemployment Rate	2.2%	3.1%	3.3%

Source: NH Employment Security ELMIB

## Income

1999 (2000 Census)	
Median Household Income	\$59,924
Median 4-Person Family Income	\$62,661
Per Capita Income	\$22,217
Median Earnings (Full time, Year-Round Workers)	
Male	\$38,986
Female	\$27,643
Families Below the Poverty Level	1.5%
2009 HUD	
Estimated Fiscal Year Median Family Income	\$76,800
Consumer Price Index (July 2009)	% Change
CPI	Over the Year
Not Seasonally Adjusted	215.4    -2.1%
Seasonally Adjusted	214.5    -1.9%

Source: NH Employment Security ELMIB

## Tax Rates

2009	(per \$1,000 of value)
Town Tax	\$ 2.76
Local Education Tax	\$10.78
State Education Tax	\$ 2.12
County Tax	\$ 0.94
Total Tax Rate	\$16.60
Town Valuation	\$930,809,800
2007	
Local Assessed Value by Property Type	
Residential Land and Buildings	93.4%
Commercial Land and Buildings	5.0%
Public Utilities, Current Use, and Other	1.6%

Source: NH Department of Revenue Administration

## Largest Employers

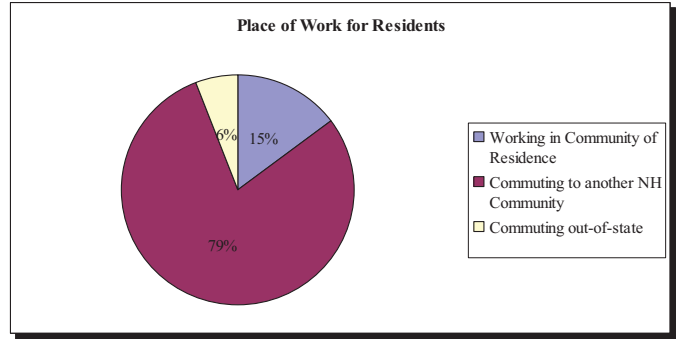
Employers	Employees
John Stark High School	100-249
Center Woods Elementary School	50-99
Weare Middle School	50-99
Granite State Telephone	50-99
Goffstown Truck Center Inc	50-99
John Brown & Sons Inc	50-99
Weare Fire Dept	20-49
Cold Springs RV Co	20-49
Tri-State Curb	20-49
Universal Steel Erectors Inc	20-49
D & S Excavating Inc	20-49
Country Three Corners	20-49
Dunkin' Donuts	20-49
Granite State Telephone	20-49
Weare Town Administration	20-49
Gary Chicoine Construction	20-49
Weare Emergency Management	10-19

Source: NNetwork, NH Employment Security ELMIB, info USA

## Commuting

<b>Workers 16 years and over</b>	
Drove alone, car/truck/van	81.6%
Carpooled, car/truck/van	11.5%
Public transportation	0.4%
Walked	2.1%
Other Means	0.4%
Worked at Home	3.9%
<b>Mean Travel Time to Work</b>	
	35.1 minutes
<b>Percent of Working Residents</b>	
Working in Community of Residence	15%
Commuting to another NH Community	80%
Commuting out-of-state	6%

Source: US Census 2000



Source: US Census 2000

## Transportation

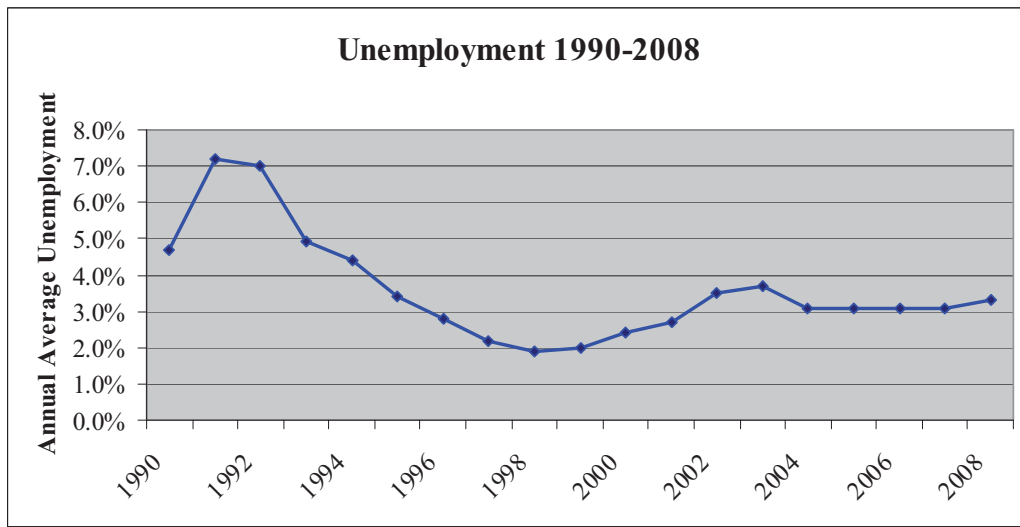
<b>Road Access</b>	US Routes	
	State Routes	77, 114, 149
<b>Nearest Interstate, Exit</b>	I-89 Exit 2 (12 miles)	
<b>Railroad</b>	No	
<b>Public Transportation</b>	No	
<b>Nearest Airport with Scheduled Service</b>	Manchester-Boston Regional	
<b>Driving Distance to Selected Cities:</b>		
	Concord, NH	16 miles
	Manchester, NH	18 miles
	Portsmouth, NH	63 miles
	Portland, ME	117 miles
	Boston, MA	71 miles
	New York City, NY	243 miles
	Montreal, Quebec	242 miles

Source: NH Employment Security ELMIB

## Employment and Wages

2007 Industry	Work Sites	Annual Average Employment	Average Weekly Wage
Total, All Industries	144	1,542	\$728
Goods-Producing	43	352	\$949
Service-Providing	101	1,190	\$663

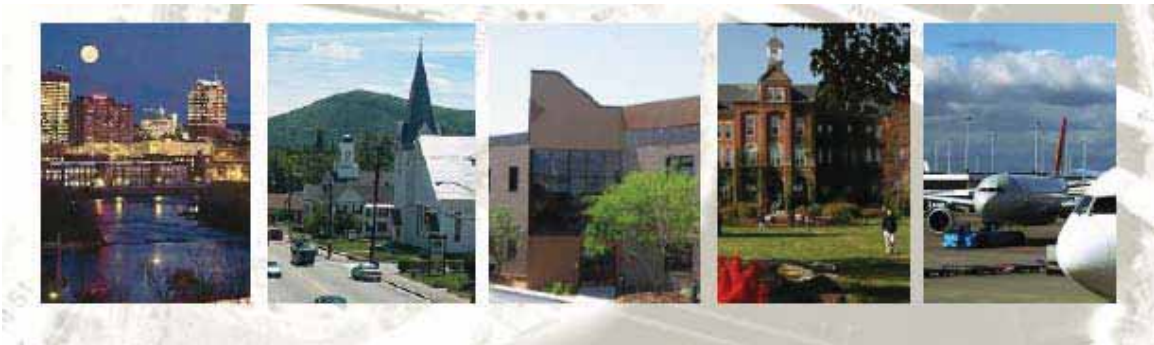
Source: NH Employment Security ELMIB



Source: NH Employment Security ELMIB

Sources for graphics: Heading and Seal: Town Website - State of NH and County Map: ELMIB - SNHPC Region: SNHPC

## Section D: Current Economic Data and Trends Report





## The Region's Important Economic Data and Trends

**AUGUST 2010**





## The Region's Important Economic Data and Trends



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<b>Taxes / Utilities</b> .....	<b>19</b>

## CREDITS

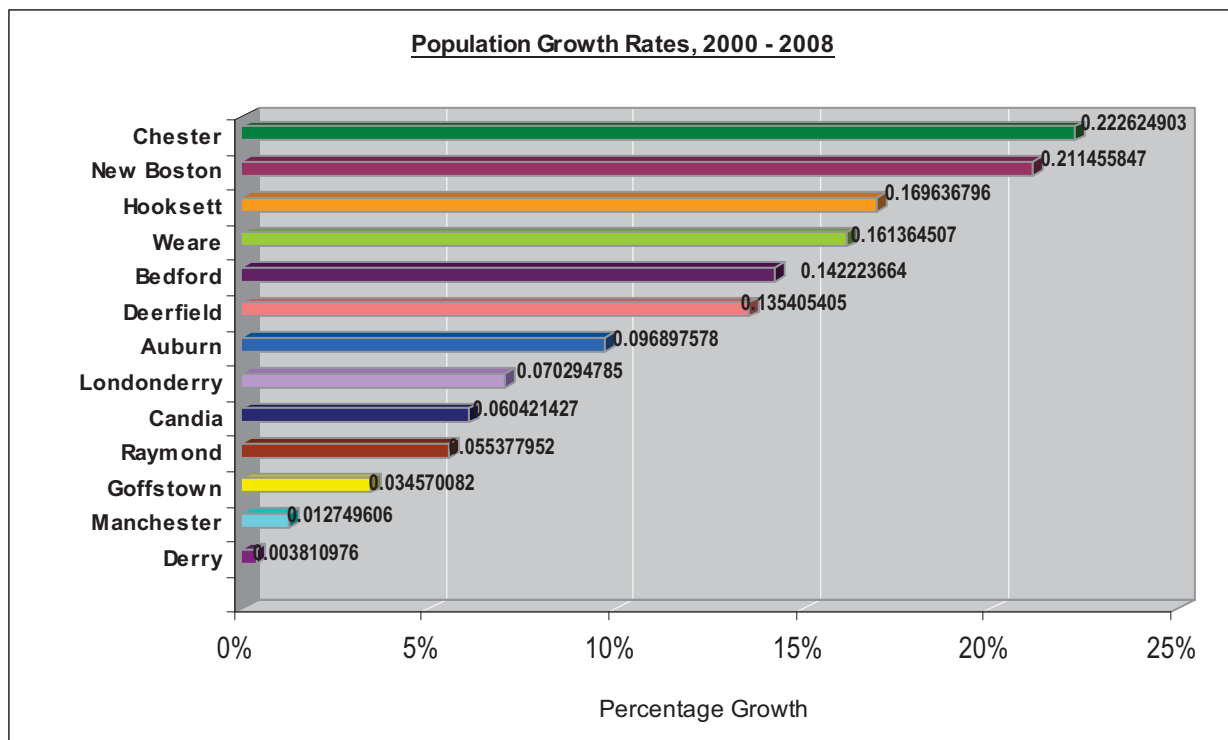
This report was compiled by Jack Munn, Chief Planner, and Mark Connors, Planning Intern, Southern New Hampshire Planning Commission.

Images: Images in this report reflect historic photographs of Manchester courtesy of the N.H. Historic Society and SNHPC photographs

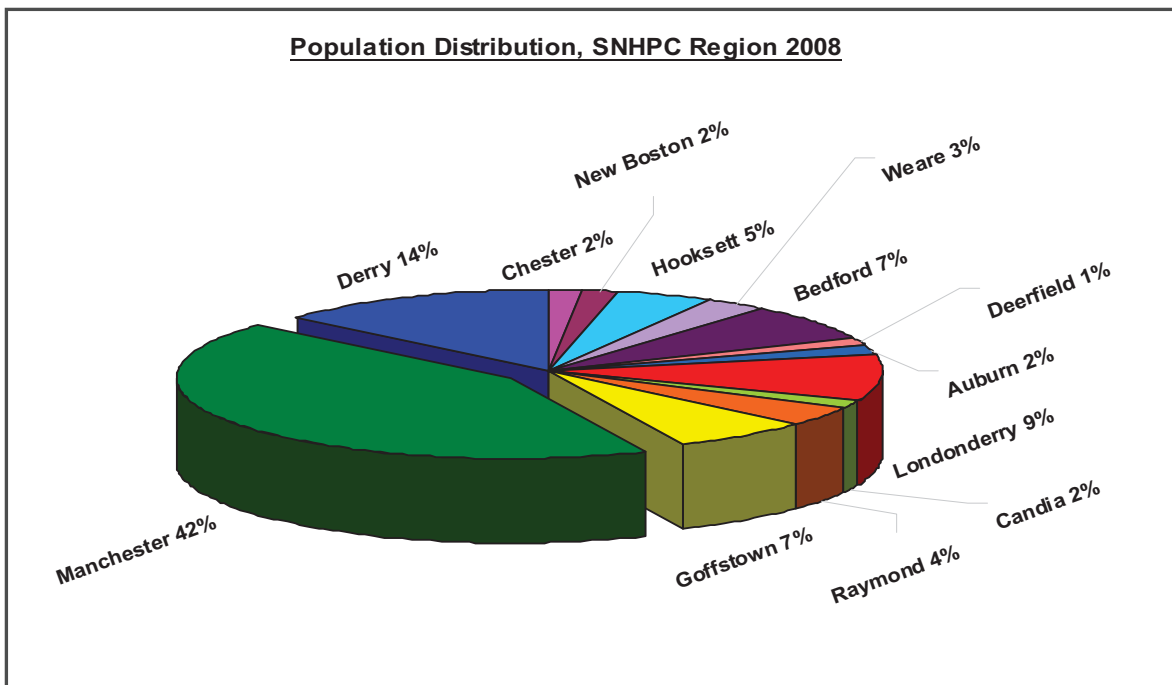
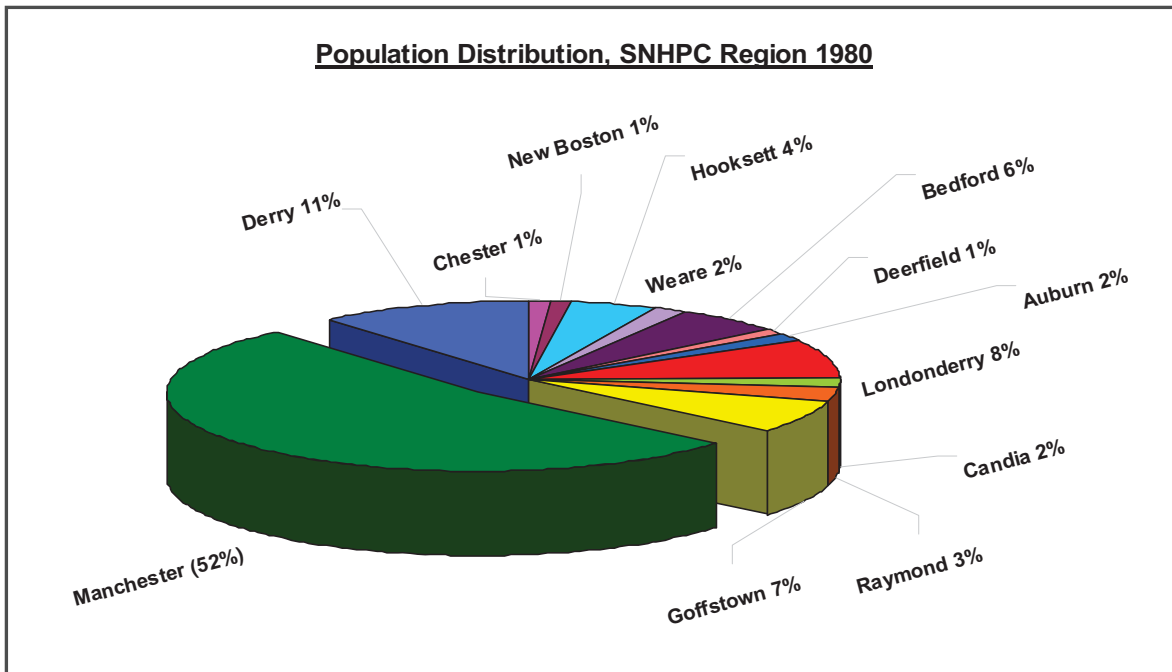
## POPULATION TRENDS

SNHPC Municipality	Population, 2000	Population, 2008 (estimate)	Population Growth	
			Increase, 2000 - 2008	Percent Increase, 2000 - 2008
Auburn	4,706	5,162	456	9.7%
Bedford	18,492	21,122	2,630	14.2%
Candia	3,939	4,177	238	6.0%
Chester	3,863	4,723	860	22.3%
Deerfield	3,700	4,201	501	13.5%
Derry	34,112	34,242	130	0.4%
Goffstown	16,980	17,567	587	3.5%
Hooksett	11,784	13,783	1,999	17.0%
Londonderry	23,373	25,016	1,643	7.0%
Manchester	107,219	108,586	1,367	1.3%
New Boston	4,190	5,076	886	21.1%
Raymond	9,697	10,234	537	5.5%
Weare	7,827	9,090	1,263	16.1%
SNHPC Region	249,882	262,979	13,097	5.2%

Sources: 2000 U.S. Census, 2008 U.S. Census Population Estimates



Sources: 2000 U.S. Census, 2008 U.S. Census Population Estimates

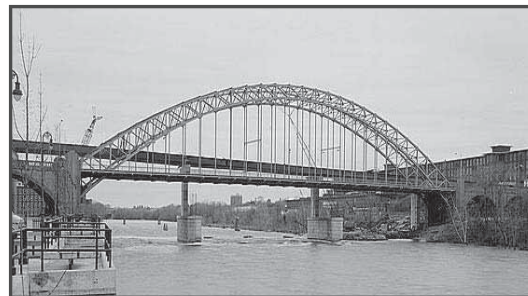


Sources: 2000 U.S. Census, 2008 U.S. Census Population Estimates



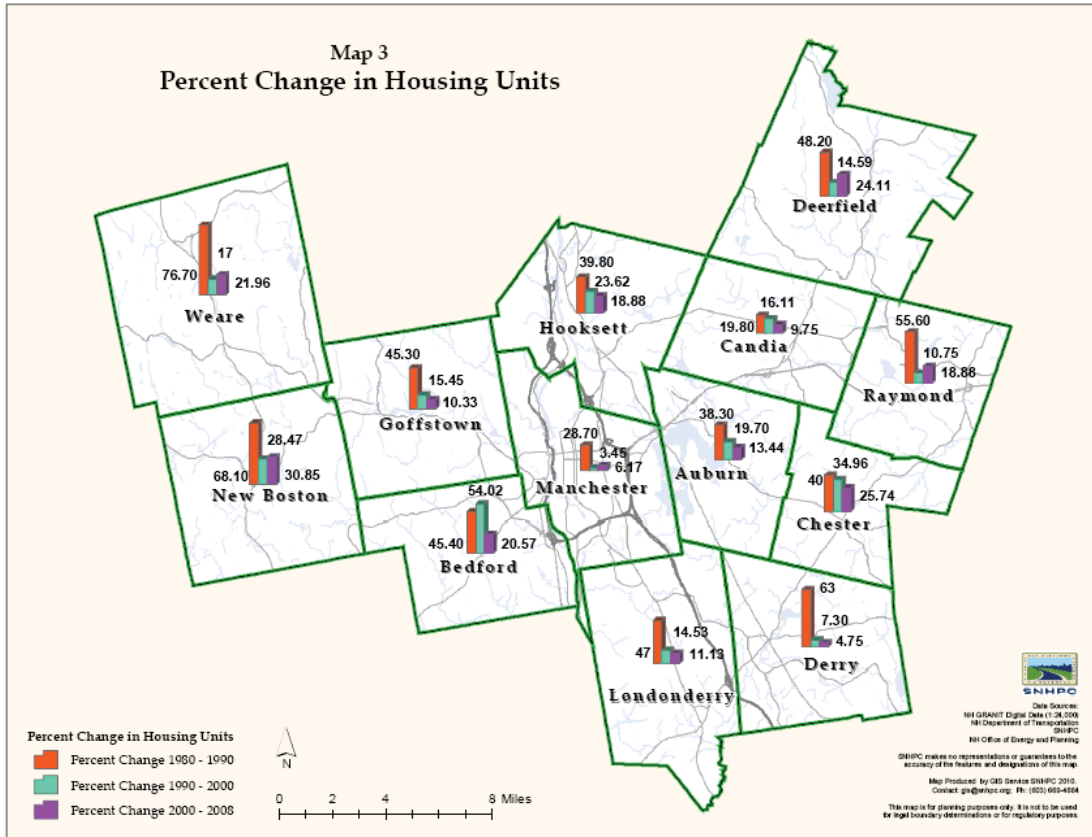
Amoskeag Mill

Source: N.H. Historical Society



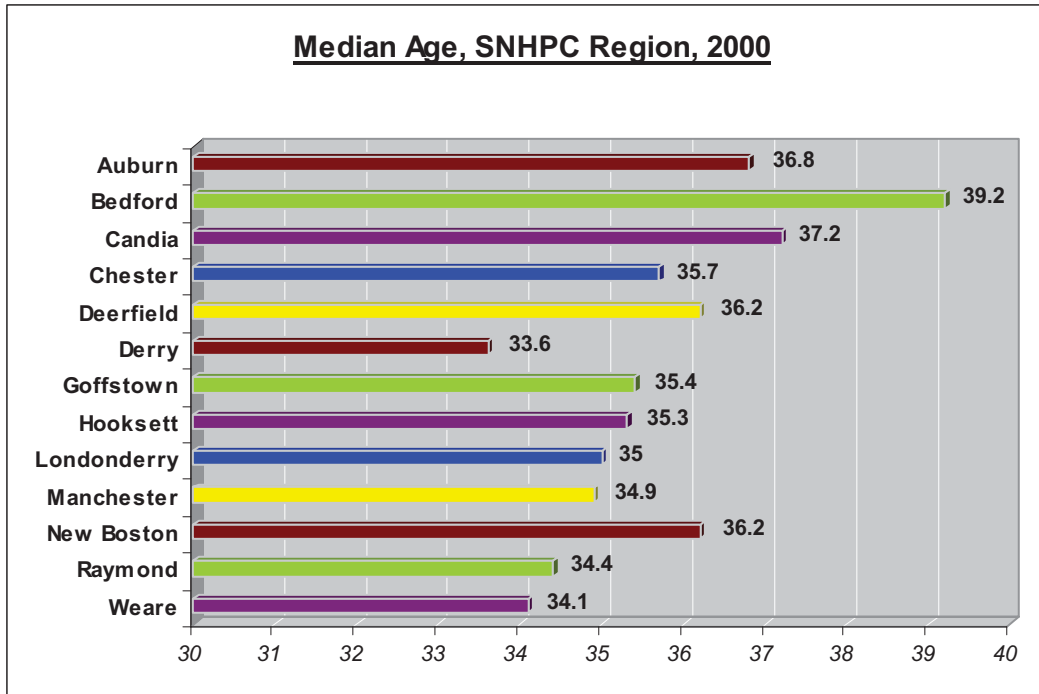
The old Notre Dame Bridge (demolished 1989)

Source: N.H. Historical Society

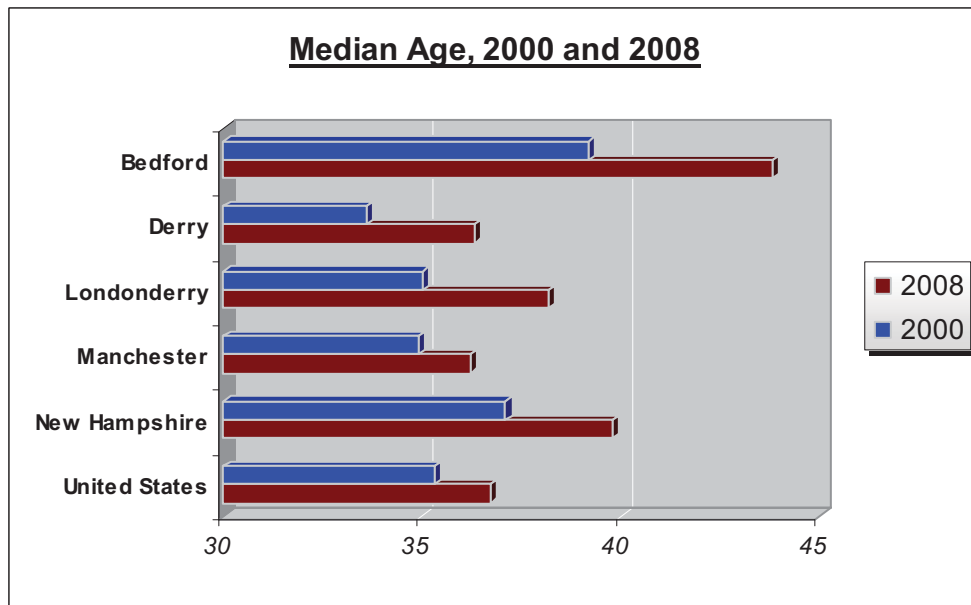


The Amoskeag Millyard in the early 1900's.  
 Source: N.H. Historical Society

# DEMOGRAPHICS



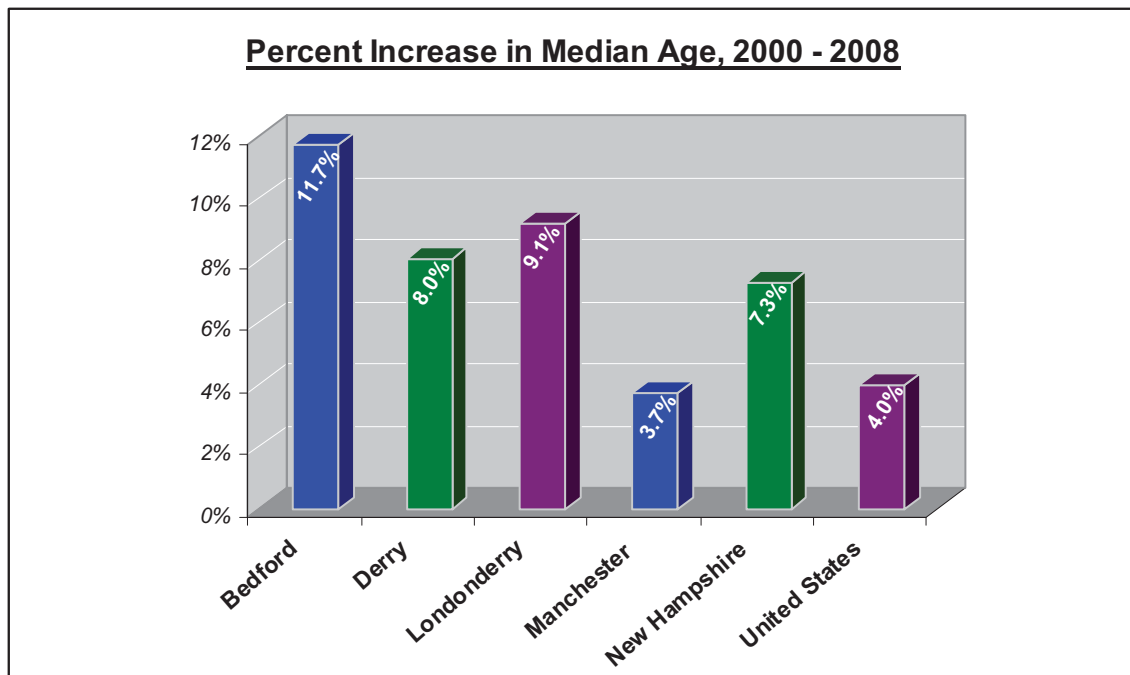
Source: American Community Survey, 2006-2008



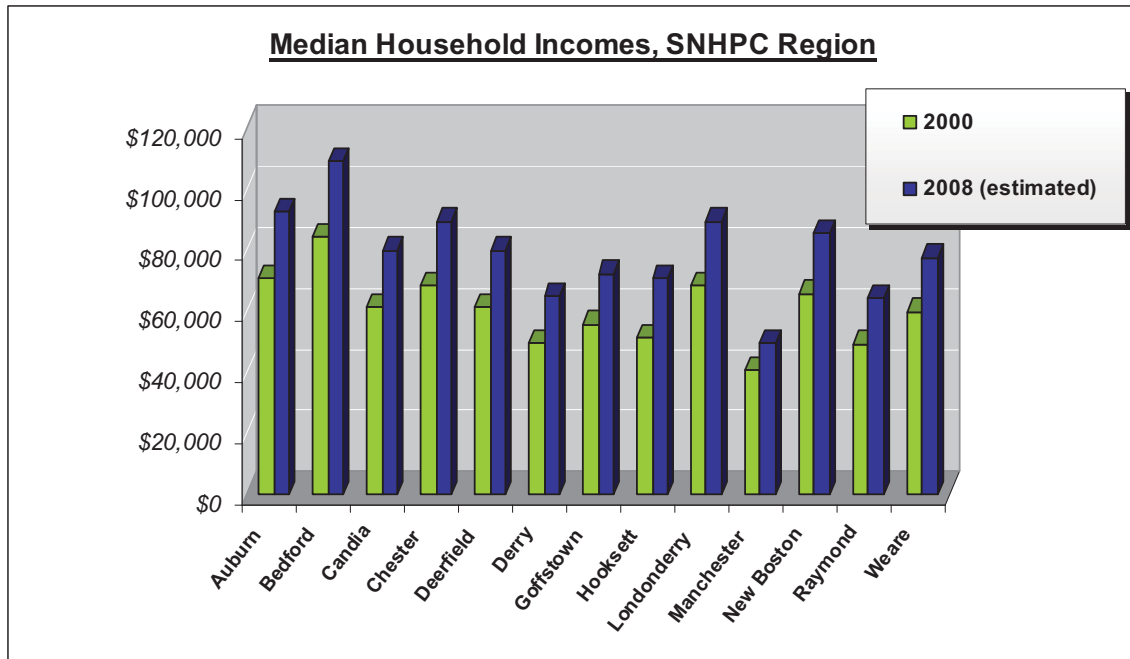
**Note:**

1.) Median age figures for 2008 were not available for municipalities with fewer than 20,000 residents.

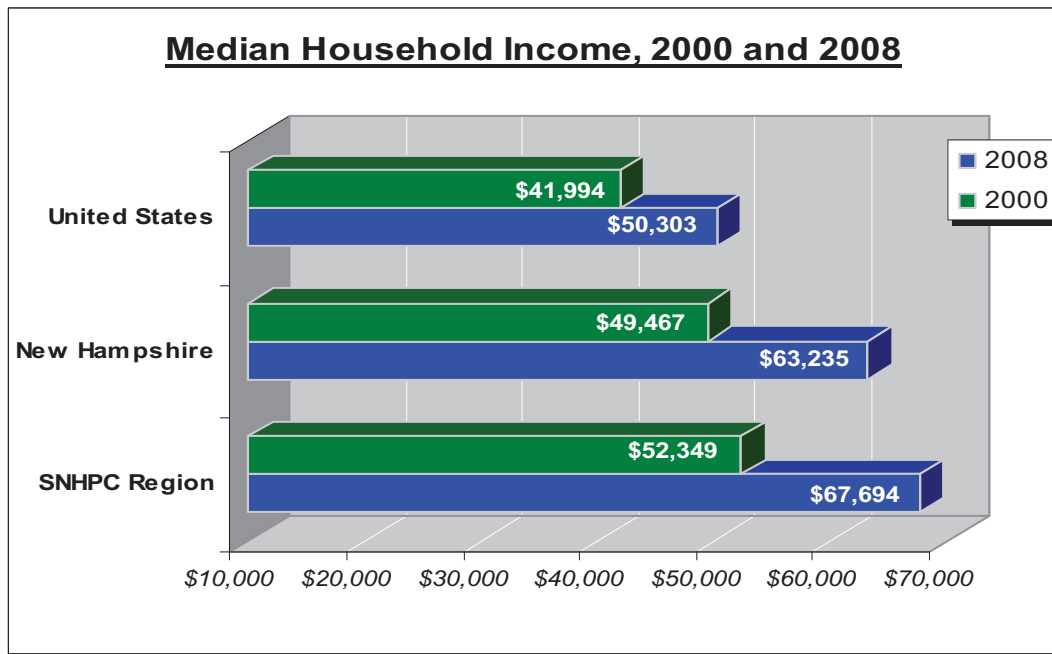
Sources: 2000 U.S. Census and American Community Survey, 2006-2008



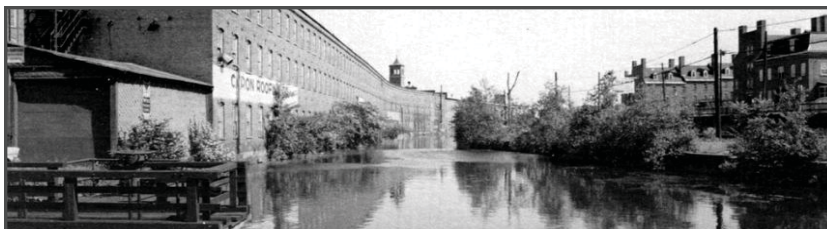
Source: New Hampshire Historical Society



Sources: 2000 U.S. Census, 2008 U.S. Census Population Estimates



Sources: 2000 U.S. Census, 2008 U.S. Census Population Estimates



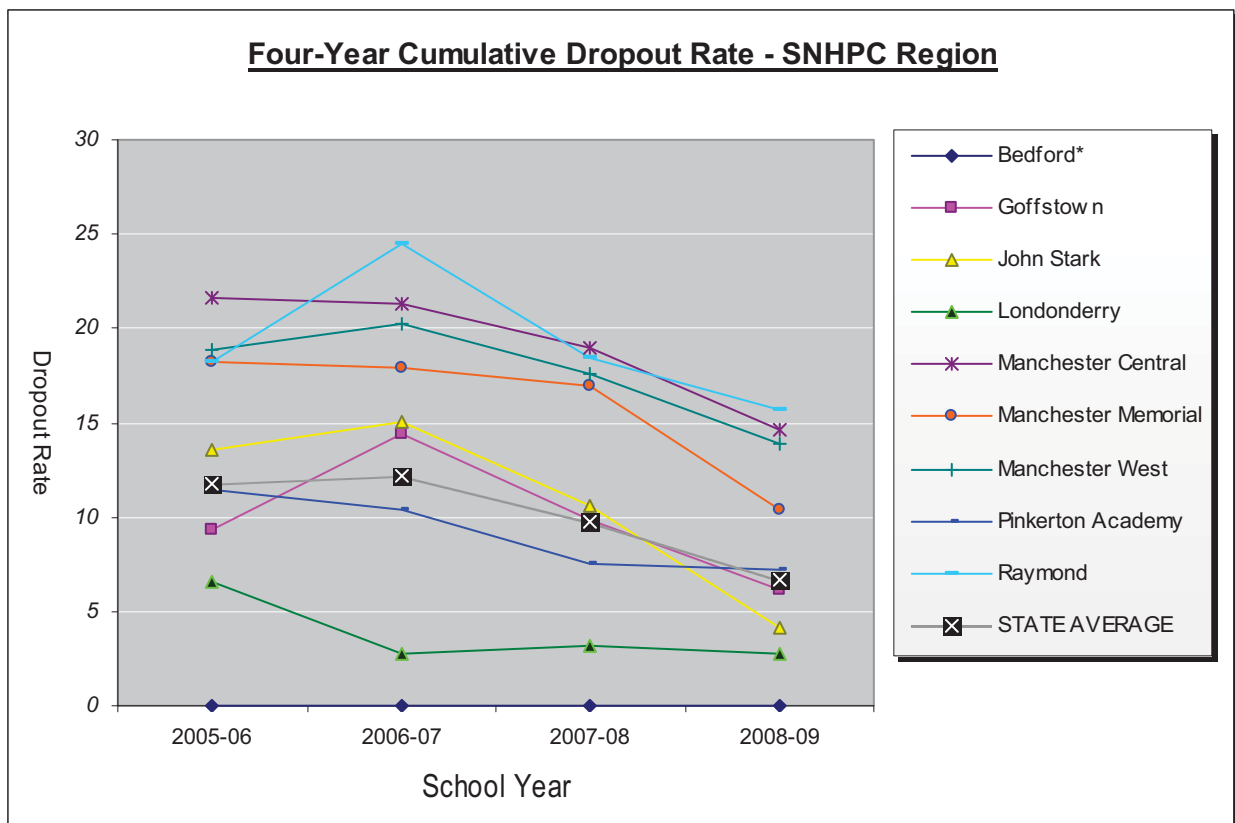
Canals used to run through the Amoskeag Mill in Manchester. They were filled in in the late 1960's.

Source: N.H. Historical Society

# EDUCATION

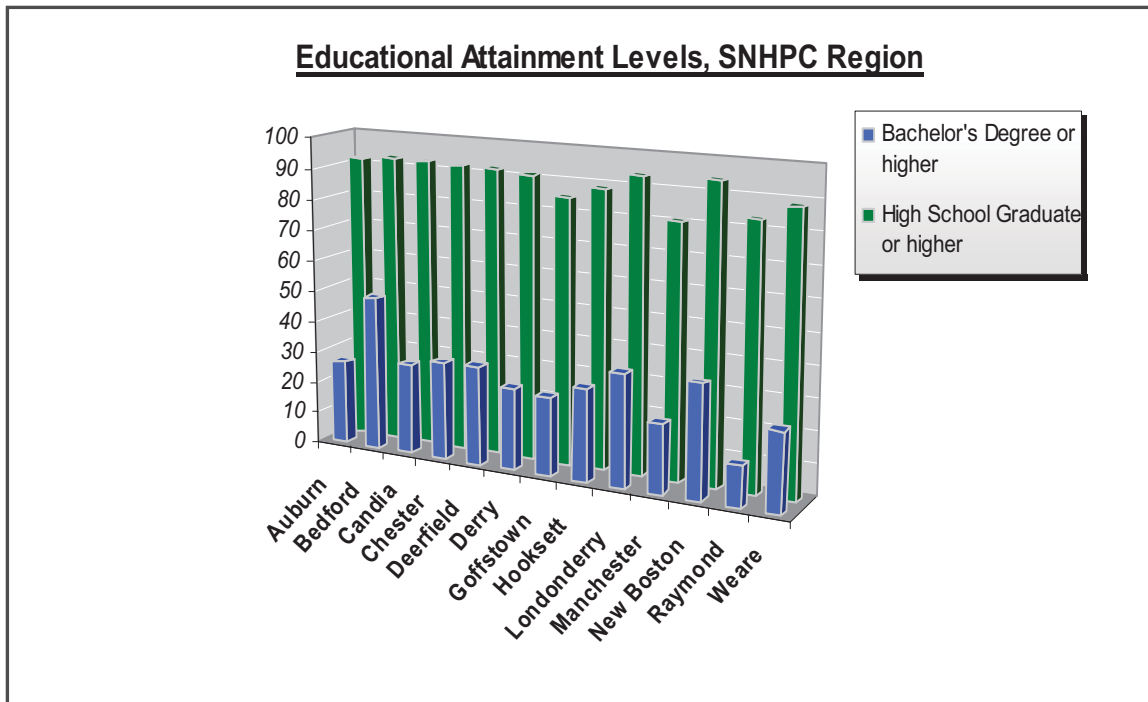
<u>TOWN</u>	<u>HIGH SCHOOL</u>
Auburn	Manchester Memorial High School or Pinkerton Academy
Bedford	Bedford High School
Candia	Manchester Central High School
Chester	Pinkerton Academy (Derry)
Deerfield	Concord High School <sup>1</sup>
Derry	Pinkerton Academy (Derry)
Goffstown	Goffstown High School <sup>2</sup>
Hooksett	Manchester Central, West, or Memorial High Schools
Londonderry	Londonderry High School
Manchester	Manchester Central, West and Memorial High Schools
New Boston	Goffstown High School
Raymond	Raymond High School
Weare	John Stark High School <sup>3</sup>

<sup>1</sup> - Concord High School is located outside the SNHPC region.  
<sup>2</sup> - Students from Dunbarton, a non-SNHPC region town, also attend Goffstown.  
<sup>3</sup> - Students from Henniker, a non-SNHPC region town, also attend John Stark.

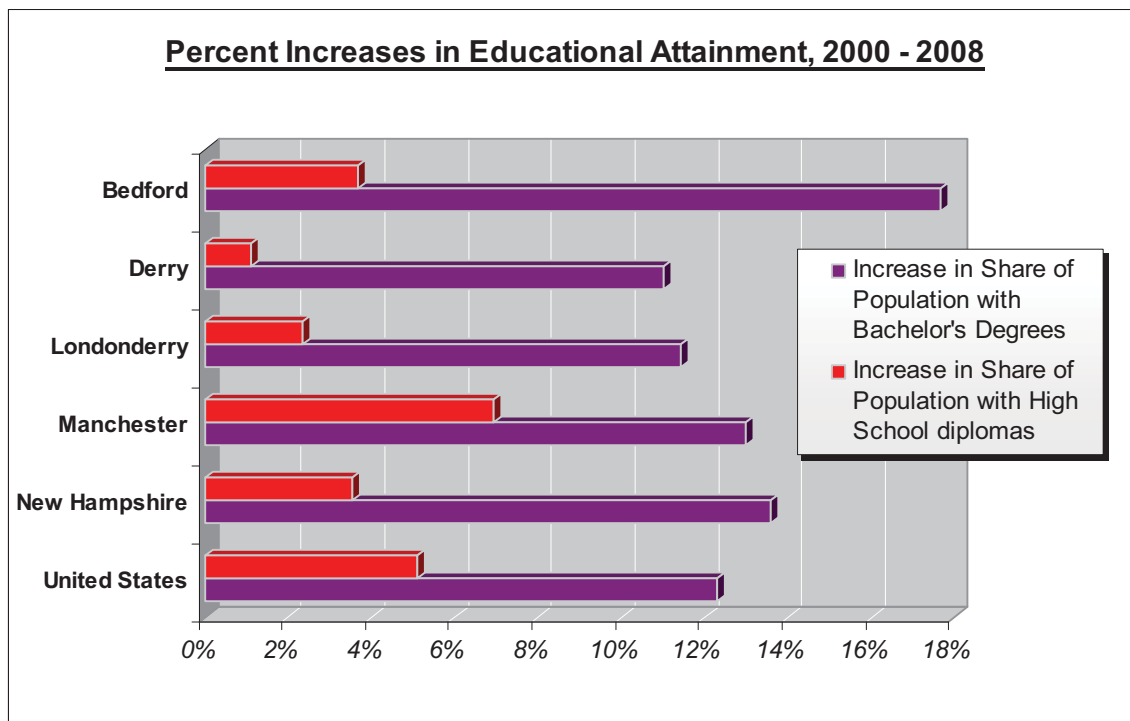


**Note:** Rate includes the cumulative four-year dropout rate for each year's graduating class.  
**Source:** New Hampshire Department of Education



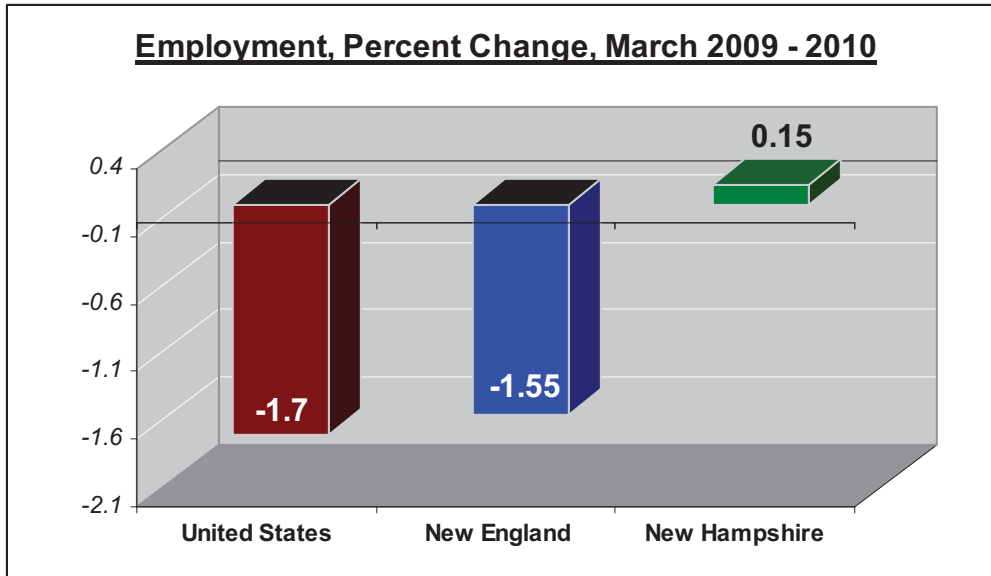


Source: 2000 U.S. Census



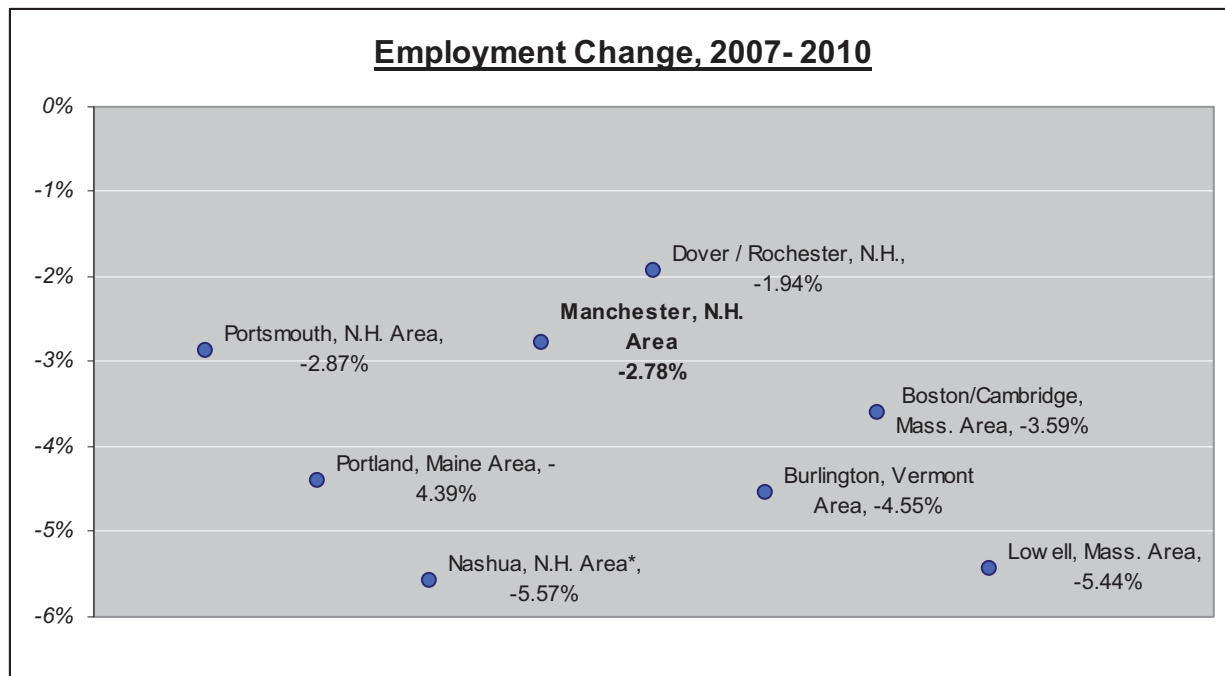
Note: Rates for 2008 were only available for SNHPC towns with populations exceeding 20,000 residents.  
 Source: U.S. Census American Community Survey, 2006-2008

## LABOR FORCE

**Note:**

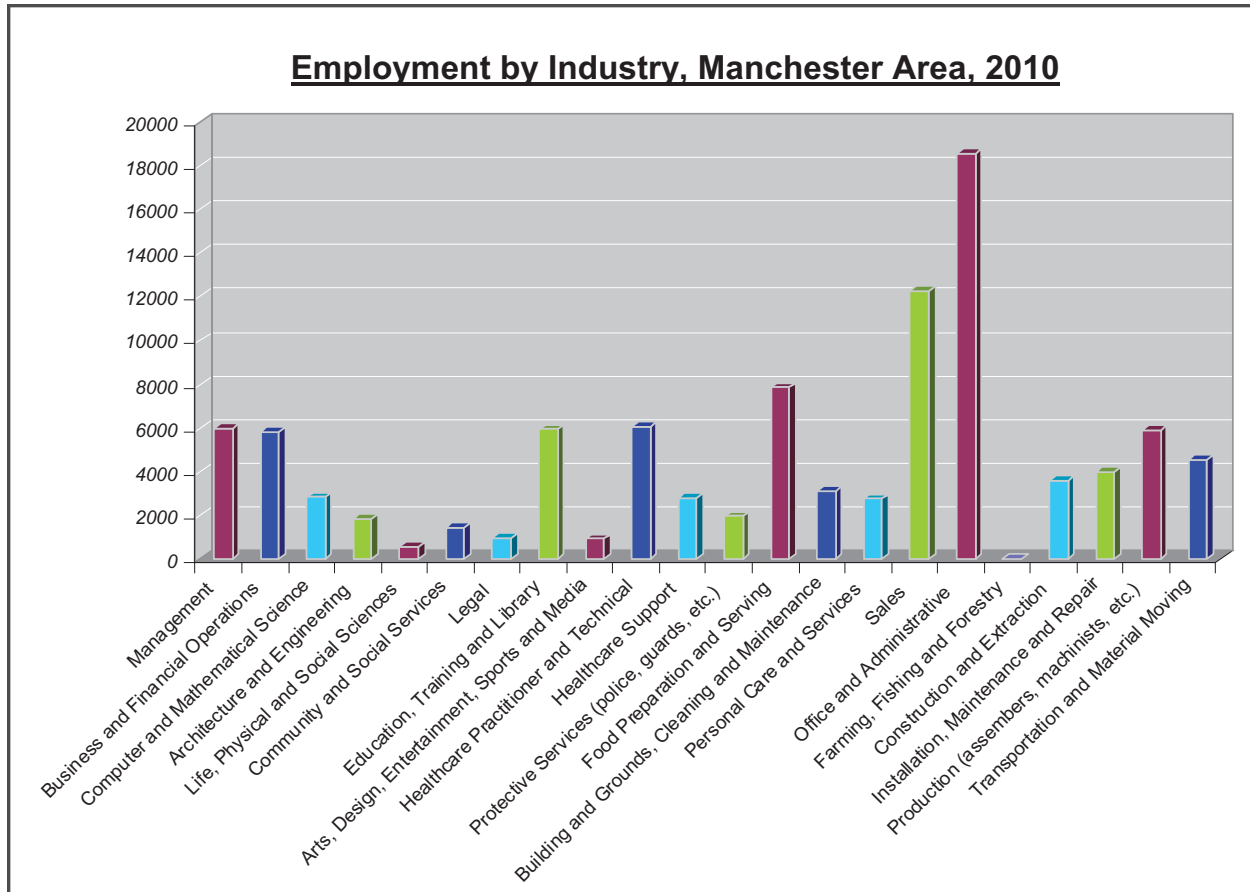
1). Data reflects changes in non-agricultural employment between 2009 and 2010.

**Source:** U.S. Bureau of Labor Statistics

**Note:**

1.) The 2007 benchmark represents average annual employment for that year, while the 2010 employment data is derived from conditions in March of 2010.

**Source:** U.S. Bureau of Labor Statistics

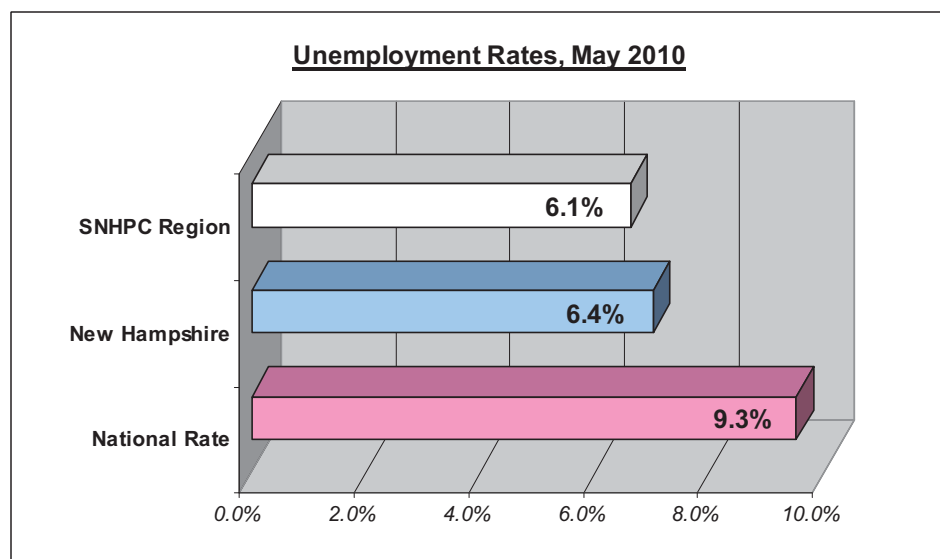


**Notes:**

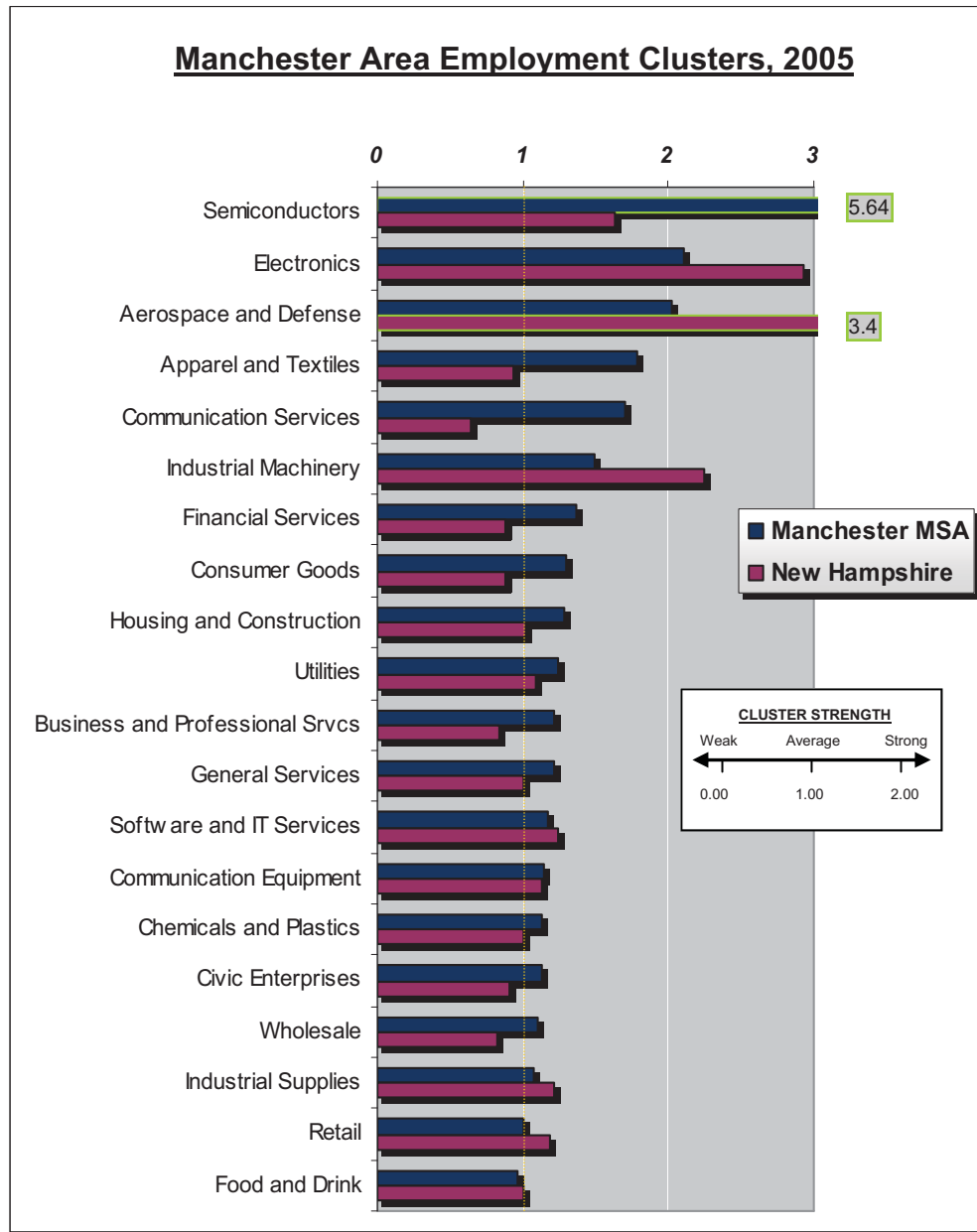
1.) Information is for the Manchester MSA Region, and includes the municipalities of Manchester, Auburn, Bedford, Candia, Dunbarton\*. Goffstown, Hooksett, New Boston and Weare (\* - Dunbarton is not a SNHPC region community). The SNHPC region municipalities of Chester, Deerfield, Derry, Londonderry and Raymond are not included in this data.

2.) Agricultural employment is not included in this data.

**Source: U.S. Bureau of Labor Statistics**



**Sources: U.S. Bureau of Labor Statistics, N.H Department of Employment Security**

**Notes:**

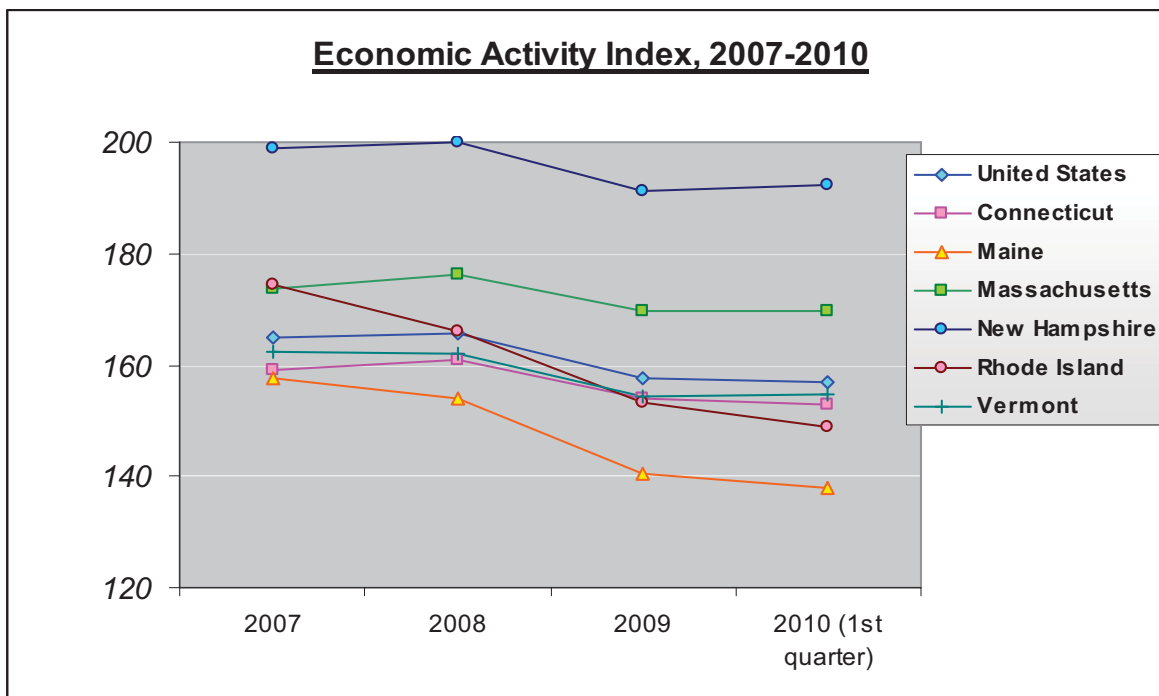
1.) A rating of 1.00 indicates that employment in a particular industry is equally proportional to the national share of employment. A higher figure indicates a stronger regional employment presence in an industry, while a figure lower than 1.00 indicates that regional employment is lower than the national share.

2.) Information is for the Manchester MSA Region, and includes the municipalities of Manchester, Auburn, Bedford, Candia, Dunbarton\*. Goffstown, Hooksett, New Boston and Weare (\* - Dunbarton is not a SNHPC region community). The SNHPC region municipalities of Chester, Deerfield, Derry, Londonderry and Raymond are *not included* in this data.

**Source:** Angelou Economics



*Manchester residents converge in the Amoskeag Millyard near the turn of the 19th Century.  
Source: New Hampshire Historical Society*

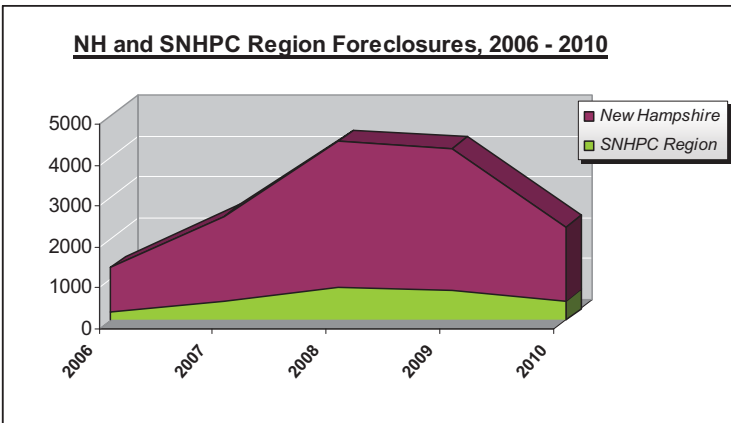
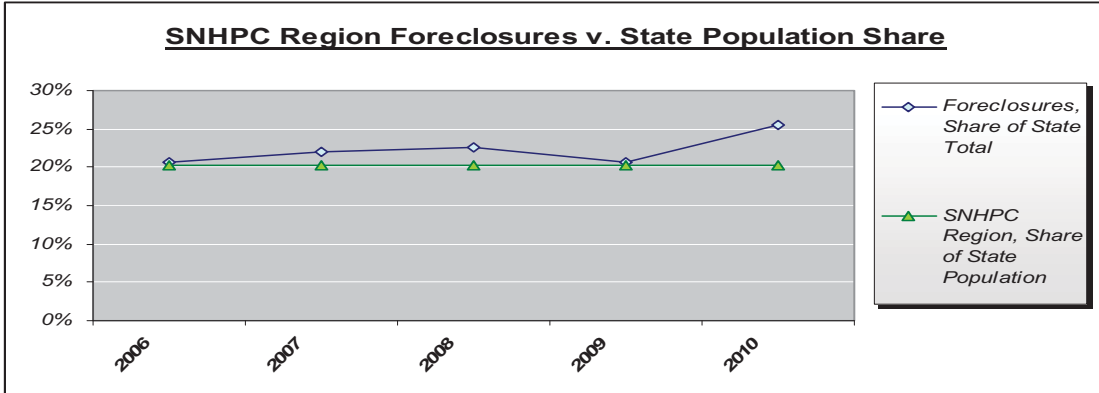


**Note:**

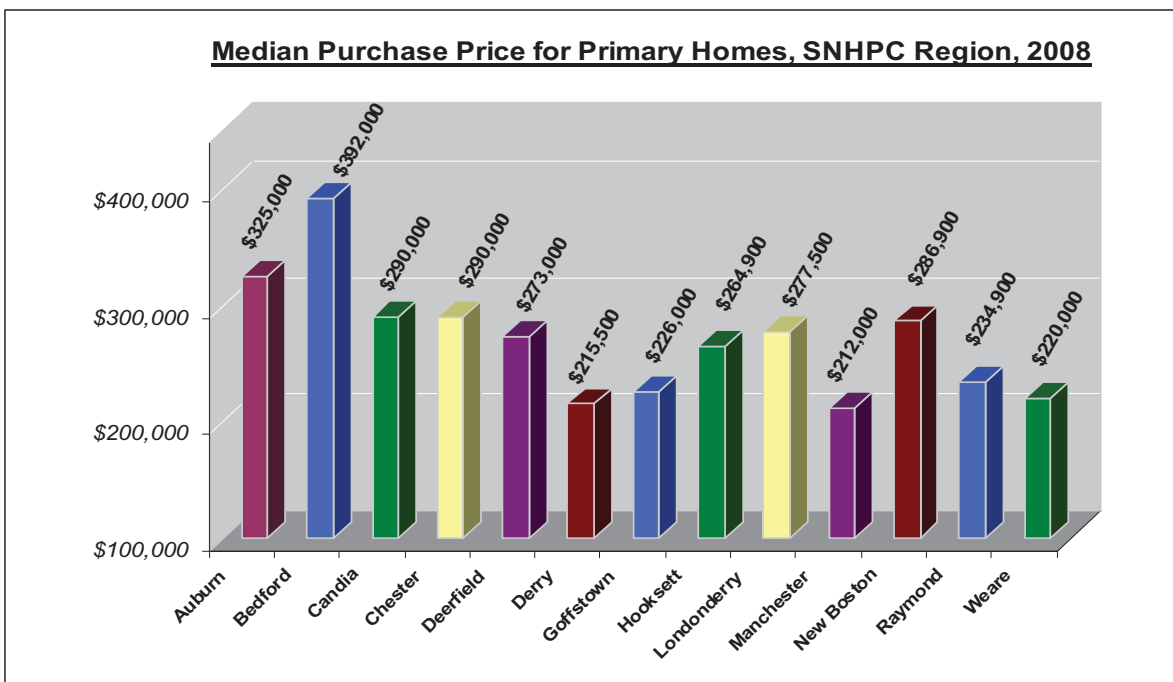
1). Figures reflects several economic conditions including payroll employment, average hours worked in manufacturing, unemployment rate, wage and salary disbursements and state gross domestic products.

**Source: Federal Reserve Bank of Philadelphia**

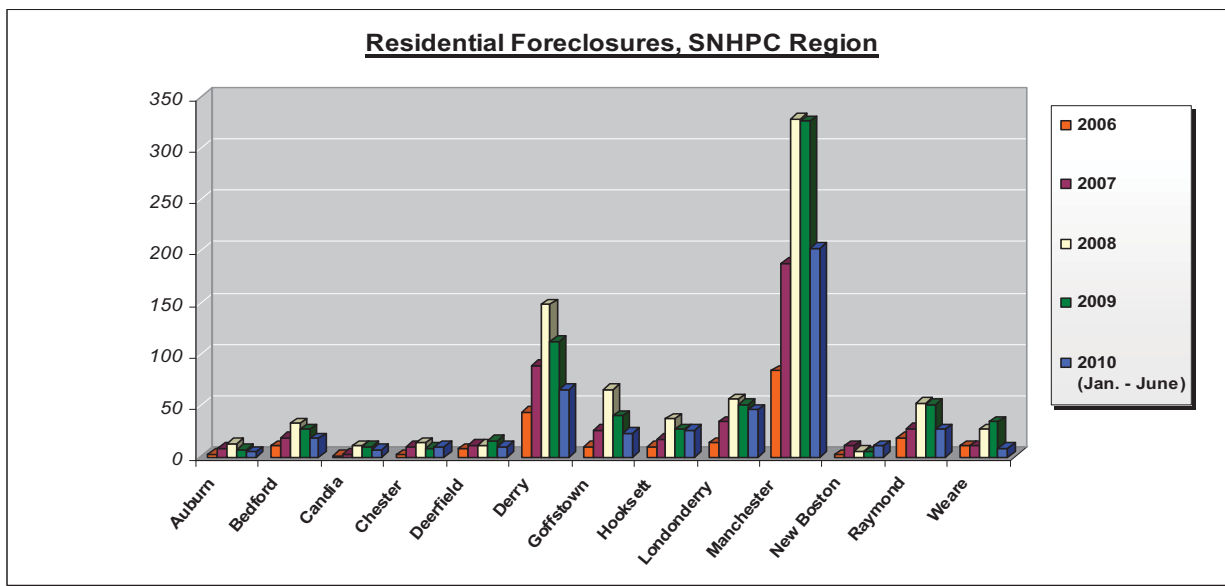
# HOUSING



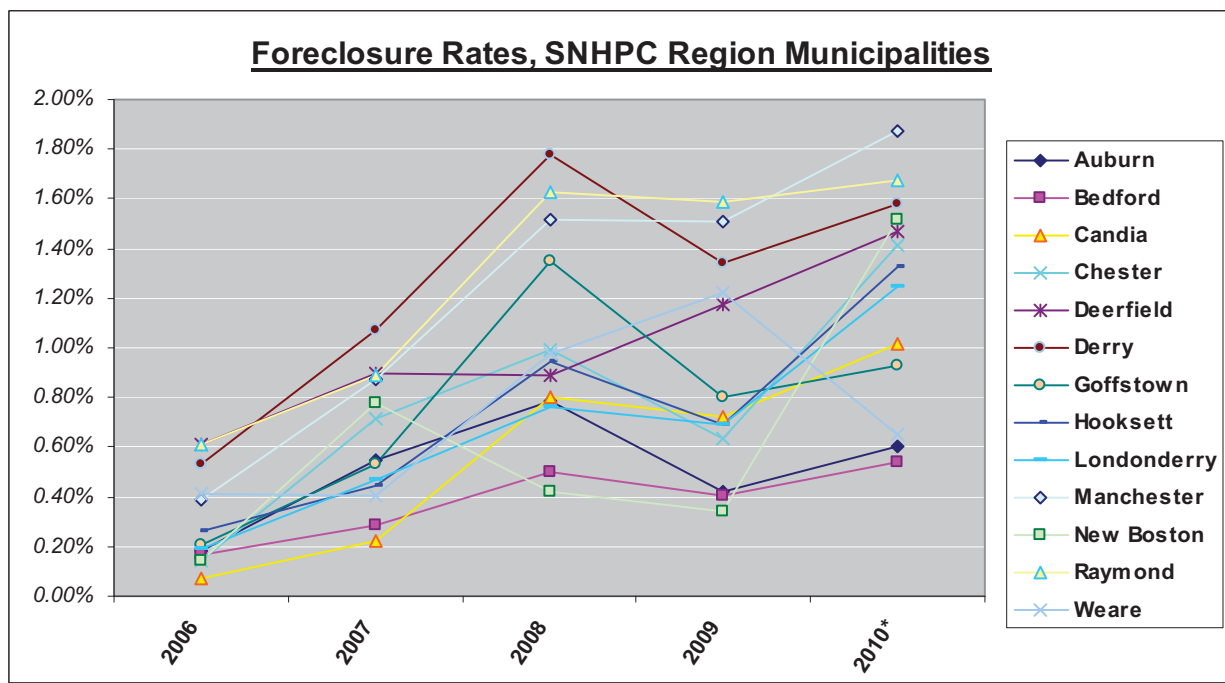
Source: N.H. Housing Finance Authority



Source: New Hampshire Housing Finance Authority



Source: New Hampshire Housing Finance Authority



**Notes:**

1.) The foreclosure rate was determined by computing each municipality's number of foreclosures against the total number of owner-occupied housing units for each year.

2.) Total housing units were assumed to be level between 2009 and 2010 and the overall percentage of owner-occupied housing was assumed level from the 2000 Census.

3.) The 2010 rate is projected, assuming that foreclosures in January through June will remain constant for the rest of the year.

Sources: 2000 U.S. Census, New Hampshire Office of Energy and Planning and the New Hampshire Housing Finance Authority

# COMMUTING

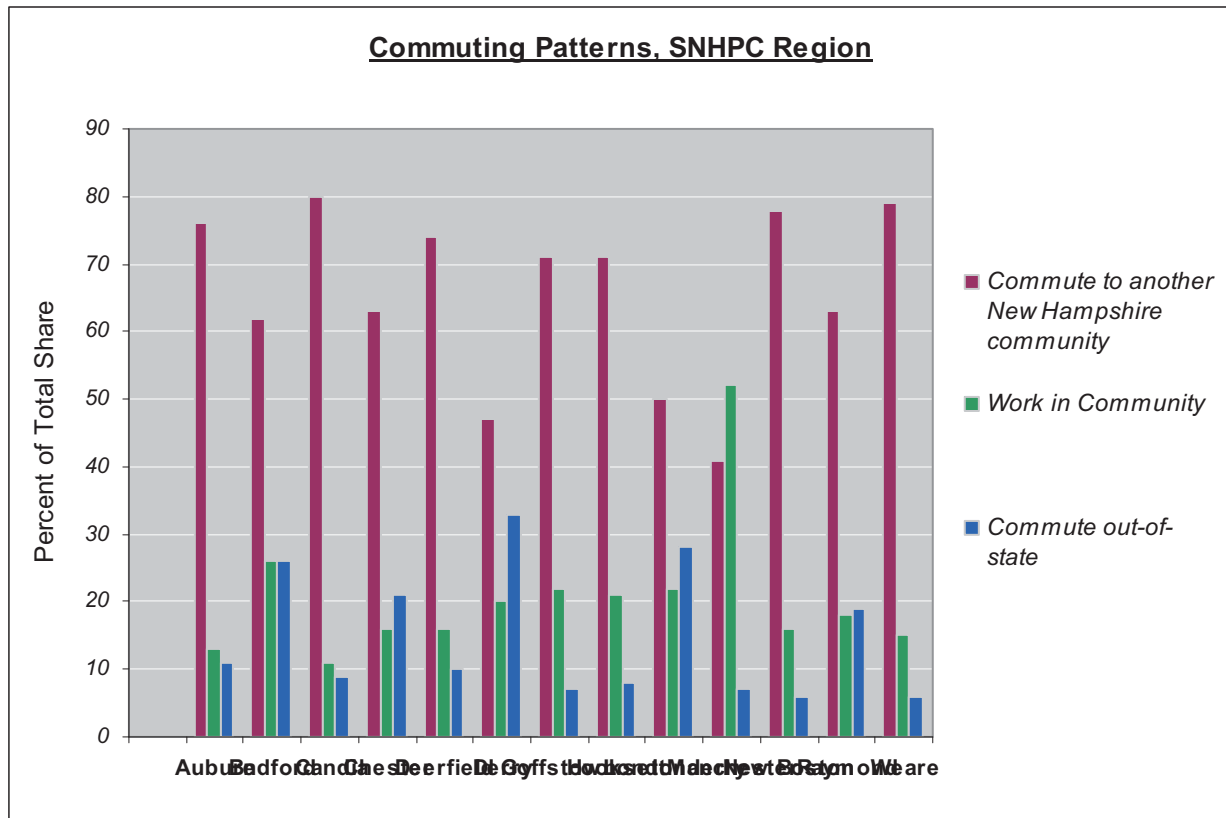


Table 3- Mode of Work Trip Travel

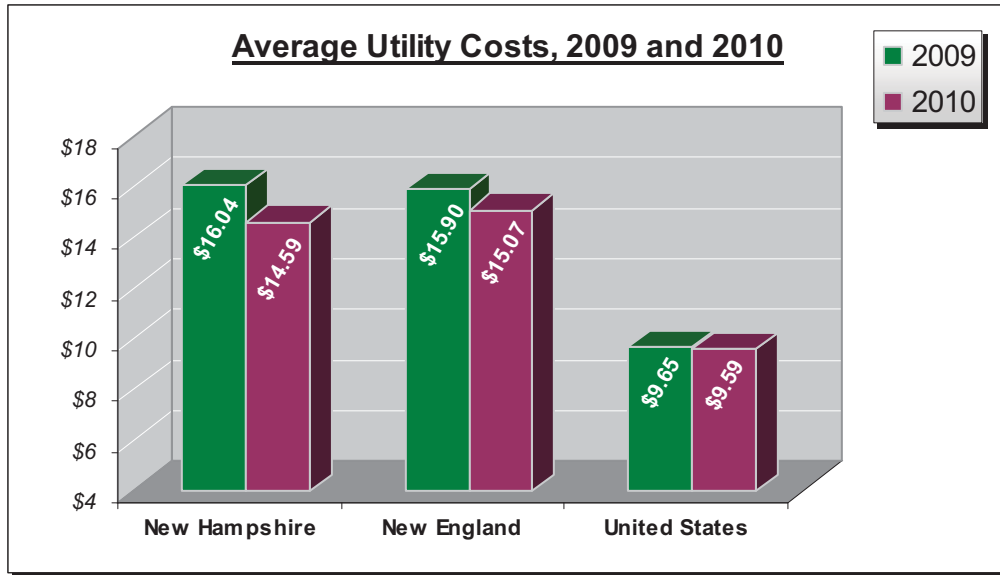
Towns	Total Workers 16 and Over	Mode of Travel									
		Drove Alone	Percent Drove Alone	Carpooled	Percent Carpooled	Total Using Public Transportation	Percent Using Public Transportation	Total Bicycle/Walked	Percent Bicycle/Walked	Other *	Percent Other
Auburn	2,644	2,324	87.9	180	6.8	11	0.42	7	0.3	122	4.6
Bedford	9,066	7,798	86.0	486	5.4	26	0.29	49	0.5	707	7.8
Candia	2,196	1,899	86.5	206	9.4	12	0.55	12	0.5	67	3.1
Chester	2,013	1,695	84.2	136	6.8	25	1.24	13	0.6	144	7.2
Deerfield	1,897	1,653	87.1	148	7.8	0	0.00	20	1.1	88	4.6
Derry	18,251	15,493	84.9	1,778	9.7	137	0.75	252	1.4	591	3.2
Goffstown	8,912	7,284	81.7	756	8.5	7	0.08	454	5.1	411	4.6
Hooksett	6,285	5,153	82.0	553	8.8	103	1.64	226	3.6	250	4.0
Londonderry	12,516	10,803	86.3	988	7.9	160	1.28	90	0.7	475	3.8
Manchester	54,808	44,394	81.0	6,497	11.9	746	1.36	1,722	3.1	1,449	2.6
New Boston	2,311	1,905	82.4	242	10.5	12	0.52	30	1.3	122	5.3
Raymond	5,279	4,419	83.7	651	12.3	13	0.25	81	1.5	115	2.2
Weare	4,120	3,362	81.6	475	11.5	18	0.44	87	2.1	178	4.3
Region	130,298	108,182	83.0	13,096	10.1	1,270	0.97	3,043	2.3	4,719	3.6

\* Motorcycle, worked from home or other means

Source: CTPP 2000



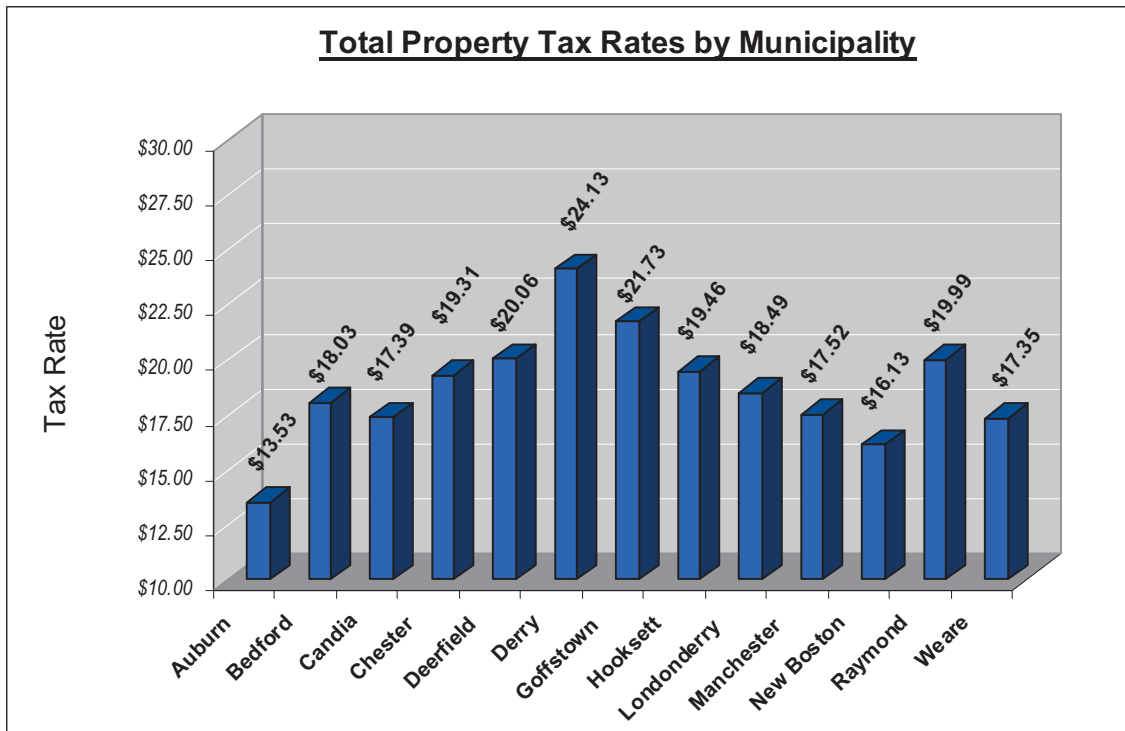
## TAXES / UTILITIES



**Notes:**

1.) Graph displays average retail price of electricity per kilowatt hour to ultimate customers as measured in April of 2009 and 2010.

Source: U.S. Energy Information Administration

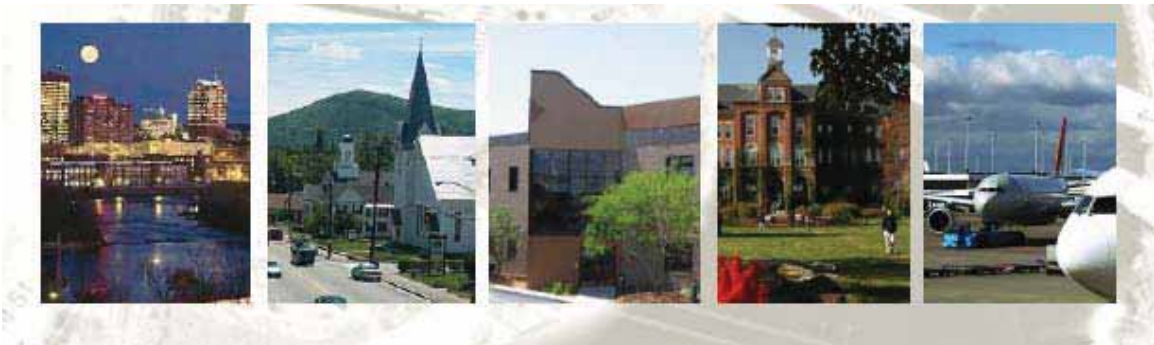


**Note:**

1.) Graph does not display actual tax rates, but equalized tax rates as determined by the N.H. Department of Revenue Administration.

Source: N.H. Department of Revenue Administration

## Section E: Regional SWOT Report



# **Regional SWOT Analysis**

**Southern New Hampshire  
Planning Commission  
Manchester, New Hampshire**

*March 2010*

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### **Introduction and Executive Summary**

The following report documents the results of two public workshops which explored strengths, opportunities, weaknesses, and threats (SWOT) in southern New Hampshire. The goal of this project was part of a plan to provide the Southern New Hampshire Planning Commission (SNHPC) and each municipality with a picture of the strengths and weaknesses of each community and the region as a business location; evaluate existing and future business clusters; and recommend target industries for each community and the region as a whole.

Public officials from all 13 municipalities within the region as well as members and representatives assigned to the SNHPC Regional Economic Development Plan Steering Committee were invited to participate in the SWOT analysis. During these workshops the attendees identified issues/needs of regional priority and developed an overall vision statement, major goals, objectives, strategies and recommendations for the plan. The first workshop was held on November 16<sup>th</sup>, 2009 and the second was held on January 25<sup>th</sup>, 2010.

The SWOT analysis is only a portion of a larger strategic plan for SNHPC. The purpose of this plan is to set forth an economic development strategy for the region for identifying and implementing both short-term and long-term economic projects and services and to expand the role of the Greater Manchester Chamber of Commerce Metro Center-NH economic development initiative from an advocacy role to an action-driven

organization in promoting economic growth and development of the region. The Regional Economic Development Plan will also provide opportunities for the public and all thirteen municipalities within the region to come together to collectively promote the Greater Manchester region as a desirable place to live and work as well as discuss economic issues and needs of regional importance.

### **What is a SWOT Analysis?**

SWOT (Strength, Weakness, Opportunity, Threat) is an analytical and strategic planning tool often used in a participatory planning approach. Originally the method was developed for strategic planning for marketing purposes.

SWOT is only a tool in a planning process and has to be based on a sound knowledge of the present situation and trends. The outputs of a SWOT analysis are structured basic information, a common understanding of reality and a set of common strategic options.

The two main components of SWOT are:

- indicators of the *internal situation* described by existing strengths and weaknesses:
  - 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 fight off 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,

- indicators of the *external environment* described by existing threats and unexplored 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 matrix is shown on the following chart:

	<b>POSITIVE</b>	<b>NEGATIVE</b>
<b>INTERNAL</b>	Strengths	Weaknesses
<b>EXTERNAL</b>	Opportunities	Threats

The analysis of the SWs and OTs results in a provisional goal formulation, a provisional development strategy and a priority ranking of actions to be undertaken on the short, medium and long terms to attain the development goal.

A SWOT analysis is divided into two seminars or work sessions. During the first SWOT seminar an inventory is made of the internal situation and the external environment responsible for the present situation in the Region. The second SWOT seminar is intended to integrate the results obtained by the analysis carried out in the

work groups and to obtain a consensus on goals and policy.

### **Structure of the SNHPC SWOT Analysis**

Initial analysis at November 16<sup>th</sup>, 2009 meeting included a SWOT brainstorming exercise. Participants identified each municipal's current performance (strengths and weaknesses) and factors in the external environment (opportunities and threats) that might affect the municipals' future. The purpose of the SWOT exercise was to help decision makers share and compare ideas, bring a clearer common purpose and understanding of factors for success, organize the important factors linked to success and failure in economic development, analyze issues that have led to failure in the past, and finally provide linearity to the decision making process allowing complex ideas to be presented systematically.

Each participant in the November 16th exercise was asked to complete a SWOT template. The template included an operational definition of each strength, weakness, opportunity and threat, and a set of suggested questions for each SWOT area. The November session was a group discussion exercise, facilitated by the consultant, and including prioritization of each point.

Once the SWOT analysis was completed, each member of the groups marked each point with:

- Things that MUST be addressed immediately.
- Things that can be handled now.



- Things that should be researched further.
- Things that should be planned for the future.

SWOT items that were marked as “must be addressed immediately” and “can be handled now” were given priority for the next phase of the SWOT analysis.

At the second meeting on January 25<sup>th</sup>, 2010 the attendees moved from the initial SWOT analysis to strategies, which pair opportunities with strengths, threats with weaknesses, etc. This meeting focused on prioritizing and plan development. For each area the group identified a specific objective, a strategy for reaching that objective, and policies to achieve the objectives and strategies. Operational strategies were developed with a concentration on costs, quality/reliability, flexibility and availability. Criteria for the strategies included:

- Consistency – a strategy should not present inconsistent goals and policies
- Consonance – a strategy must represent an adaptive response to the external and internal environment
- Feasibility – a strategy must neither overtax available resources (abilities, competencies, skills and talents) nor create unsolvable problems.
- Advantage – a strategy must provide for the creation and/or maintenance of a competitive advantage in resources, skills and position.

**Initial SWOT Session – November 16, 2009**

Prior to the SWOT analysis work the SNHPC reviewed several initiatives, including a draft cluster and market analysis, municipal economic asset profiles and public infrastructure inventories. The consultant reviewed the purpose, theory and implementation of the SWOT process utilizing slides and hand out materials. Workshop participants working together in smaller groups began to discuss and report out their key points which SNHPC staff recorded on four flip charts.

The results of the work groups in the first session are shown in the following tables:

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

Southern New Hampshire's internal strengths include the Manchester/Boston Regional airport, strong university/research capabilities, the interstate highway system, lack of a sales or income tax, and a high quality of life.

<b>Weaknesses</b>	
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

Southern New Hampshire internal weaknesses are the loss of young, educated workers, lack of a major public transit system, high business taxes and lack of economic development funding and affordable housing .

## Regional SWOT Analysis

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## Southern New Hampshire Planning Commission

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

Southern New Hampshire's external opportunities include the potential expansion of passenger and freight rail in the region, access to the Route 495 engineering/technology beltway, and the fact that other regions have been slower to transition to new economy.

## Regional SWOT Analysis

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## Southern New Hampshire Planning Commission

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

Southern New Hampshire's external threats include other regions being more attractive to young, educated workers (like the Sunbelt), the perception of New Hampshire as a retirement state, and the stronger "brands" of other regions.

## Regional SWOT Analysis

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### Southern New Hampshire Planning Commission

After all the key points were reported out and recorded, workshop participants next placed colored dots next to the points utilizing the criteria and color code system described below:

GREEN - Things that MUST be addressed now.

BLUE - Things that can be handled now.

YELLOW - Things that should be researched further.

RED - Things that should be planned for the future.

The following table shows the results of top five SWOT items that were coded requiring immediate attention (the most green and blue dots):

<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

Dennis Delay; March 2010

**Regional SWOT Analysis**  
**Southern New Hampshire Planning Commission**  
**Second SWOT Session – January 25, 2010**

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At the second SWOT session the above matrix was presented to the attendees. The purpose of the second session was to have the participants in the workshop use the initial SWOT analysis to develop strategies that would turn negatives into positives. Strengths need to be maintained, built upon or leveraged. Weaknesses need to be remedied or stopped. Opportunities need to be prioritized and optimized. Threats need to be countered or minimized.

The attendees were divided into four working groups, each charged with creating an action plan to address each of the four areas. The groups were asked to match SWOT areas according to the following:

- S-O strategies: build on success, good practices, models
- S-T strategies: use success to minimize threats
- W-O strategies: use opportunities to address weaknesses
- W-T strategies: defensive actions vs susceptible areas

The proposed strategies from the January 25, 2010 work session are shown in the following table;



**Regional SWOT Analysis**

**Southern New Hampshire Planning Commission**

Matching SWOT areas 11/16/09 regional exercise with top regional economic development issues	<b>Strengths</b>	<b>Weaknesses</b>
<b>Things that MUST be addressed now</b>	Airport University/Research Capabilities Manageable Size of NH Highway System Location	Losing Educated Workers Lack of Public Transit Lack of Economic Development Funding Tax Structure Water and Wastewater Infrastructure
<b>Things that can be Handled now</b>		
<b>Opportunities</b>	<b>S-O STRATEGIES</b>	
Regional Perspective on Economic Development	<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
Expansion of Passenger Rail/Freight Rail	<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
Ahead in Economic Transition	<input type="checkbox"/> Increase business to college communication in the region	<input type="checkbox"/> Promote nightlife for younger workers.
Connecting Young Workforce with Opportunities Accessible Government	Link Airport to commute rail	<input type="checkbox"/> Amend tax structure to encourage sewer/water expansion.
<b>Threats</b>	<b>S-T STRATEGIES</b>	
Retention Rate of College Grads	<input type="checkbox"/> Create statewide broadband network	<input type="checkbox"/> Forgiveness policy for student loans
Property Taxes	<input type="checkbox"/> Promote young" lifestyles; shopping entertainment, attractions	<input type="checkbox"/> Promote high density housing to improve affordability and maximize infrastructure
Lack of Tax Incentives	<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.
Lack of High Speed Communication Ability		<input type="checkbox"/> Examine resource of old copper in buildings
Loss of Young, Educated Workforce		

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 Pettingill Road improvements in Londonderry
- Increase business to college communication in the region
- Link 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.

**Regional SWOT Analysis****Page  
15****Southern New Hampshire Planning Commission**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” program to biotech/biomed research.<sup>1</sup>
- Examine resource of old copper in buildings.<sup>2</sup>

---

<sup>1</sup> 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.

<sup>2</sup> With the move to cellphones and other wireless technology, there is probably significant unused copper wiring in residential and commercial buildings.

**Regional SWOT Analysis****Page  
16****Southern New Hampshire Planning Commission****Notes on Strategy Development for Each Group**

The SO group matched up Strengths with Opportunities to build on existing success.

**Strengths**

Airport  
University/Research Capabilities  
Manageable Size of NH  
Highway System  
Location

**MATCHED TO:****Opportunities**

Regional Perspective on Economic Development  
Expansion of Passenger Rail/Freight Rail  
Ahead in Economic Transition  
Connecting Young Workforce with Opportunities  
Accessible Government

The group began making various connections from the list of determined strengths to the list of determined opportunities. After discussion on the best approach to discuss these topics, the group decided to focus on particular strengths and expand on them. Each expanded strength takes a well structured foundation of ideas and policy's and hopes to encourage more economic development and increasing connectivity in future projects.

**Airport:**

Build an International Customs Facilities: it was thought the creation of this would foster more international flights into the region which in turn would promote more low cost flight carriers to the region such as JetBlue. The goal was to expand the overall role of the Manchester Airport that should include supporting and expanding industrial zoning of the airport and to further attract aviation and airport related businesses.

**Highway:**

Focusing on highway infrastructure will enhance the strength of NH's location. The group discussed several projects that need future support such as:

- Accelerating the I-93 widening project
- Increase CTAP financial support
- Completing the exit 6/7 improvements
- Developing Pettingill Rd improvements in Londonderry

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- Develop exit 4A
- Increase the Commercial Base on Exit 3

Paying close attention to the role of Land use in relation to transportation was also a key theme.

**Universities:**

Support the existing colleges within the region with special attention to the expanding school programs in Manchester including the colleges of Southern New Hampshire University, the Art Institute, and UNH Manchester. Increase the communications with colleges to local business within the region, facilitating programs such as cooperatives and continuing education. Overall the major goal discussed was the importance of increasing the percentage of college graduates that stay to work and live in the area.

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The ST group was charged with developing strategies that will use existing success to minimize threats.

**Strengths**

Airport  
University/Research Capabilities  
Manageable Size of NH  
Highway System  
Location

MATCHED TO:

**Threats**

Retention Rate of College Grads  
Property Taxes  
Lack of Tax Incentives  
Lack of High Speed Communication Ability  
Loss of Young, Educated Workforce

Although the group did not come up with that much in term of actual results (and what got put down on paper) the discussion that occurred was very intensive. They started by bouncing a few ideas back and forth on the items that came to attention first. Since the proximity to Boston is mentioned several times on the SWOT chart, they talked about what Boston has to offer and how things could be adapted to the Greater Manchester Area. After a good amount of discussion, it became clear that there are several factors that make Boston an attractive place to live and do business (from a variety of social and economic perspectives) so it would be best to focus the conversation on items from the chart and try to create objectives, strategies, and policies to reach conclusions.

The first thing they came up with regards southern NH's highly educated workforce and Manchester as a "well connected" area in terms of internet capability and how they could go together. The group members agreed that Manchester has good broadband connectivity but the municipalities on the periphery of the SNHPC region are not as well connected with many underserved areas. They also agreed that any plans regarding broadband access should be statewide to benefit NH as a whole. Thus, they created:

- An objective to create a statewide broadband communications network
- Strategies to obtain this include:
  - Use university/research capabilities to assist with the process
  - Encourage open competition
  - Support the inventory of existing resources that SNHPC and UNH are conducting (I informed them about the broadband plan that SNHPC is currently working on so they kind of changed gears to move on with the subject)

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- The result of this is that quick funding/policies are in order to utilize the findings of such a project so it can be applied a.s.a.p. and get people in NH more connected (especially in the more rural areas). Also, it was identified that building political support with this would move the process along quicker.

The other item that the group discussed, which is a big issue in NH, is the retention of college graduates. The group talked about how the Southern NH should make use of its highly educated workforce to attract businesses in more advanced sectors. Also, to get people like this to stay, there needs to be a certain amount commitment by towns outside of the core area of Manchester to make housing available for people in this age group. There is a certain stigma associated with the rural towns that draws in people from older generations who desire the peace and comfort of living in a less dense area. In order to retain younger people, the places on the periphery should be able to support a younger crowd who maybe work in Manchester and live just outside of it. Some strategies for this include:

- Strategize with the NH High Tech Council to get ideas of how to expand business
- Work with local high tech companies to try and draw in younger generations
- Make available affordable housing to younger populations (especially outside of Manchester)
- Promote “young” lifestyles, i.e. shopping, entertainment, attractions, etc.

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The WO group was charged with developing strategies that used opportunities to address internal weaknesses.

**Opportunities**

Regional Perspective on Economic Development  
Expansion of Passenger Rail/Freight Rail  
Ahead in Economic Transition  
Connecting Young Workforce with Opportunities  
Accessible Government

**MATCHED UP WITH:****Weaknesses**

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

The WO group focused on several areas:

- Lack of transportation to the Manchester Airport: Great opportunity to have an airport in the area but no bus systems or shuttles to access it easily. Required to drive or get dropped off.
- The physical attributes of the land in the area can be considered a weakness. Land features such as lakes, steep slope, rivers, hills, limit where roads can be created and sometimes create hardship for traveling around the area. Example: Auburn's lakes right in the center of town.
- Strength: Bus routes stop at Logan Airport in Boston and connect to Manchester.
- Strength: The Londonderry North bus system goes from Exit 5 and stops at South Station and Logan Airport in Boston.
- Weakness: Londonderry North bus system does not connect anywhere in between its two main stops. An opportunity could be created if it stopped in Manchester and other areas in between. Such as Auburn, Derry and other regional towns.
- Weakness: Lack of Economic Development throughout the region does not provide current and new residents with job opportunities in the area. As a result people must travel out of the region to work.
- Lack of economic development also does not provide young working professionals and recent college graduates with the atmosphere and night life that they look for and want to live near.
- Opportunity: by increasing the number of businesses this will provide the specific lifestyle young professionals are searching for.

**Dennis Delay; March 2010**

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- Weakness: Auburn is bound by water and therefore has no town sewer or water
- Derry is looking to extend the town's sewer and water. This is difficult because of the high cost of this project and the lack of funding for it.
- Weakness: Lack of sewer and water in towns is a major reason that businesses do not want to develop in this area.
- Weakness: Tax Structure – could be developed better with more industrial and businesses in the area. Would create a great deal of opportunity overall.



**Regional SWOT Analysis**

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**Southern New Hampshire Planning Commission**

Finally, the WT group was charged with developing defensive actions for susceptible areas:

**Weaknesses**

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

MATCHED WITH:

**Threats**

Retention Rate of College Grads  
Property Taxes  
Lack of Tax Incentives  
Lack of High Speed Communication Ability  
Loss of Young, Educated Workforce

- Education: Contact states pursuing forgiveness policies for student loans...
- Brain Drain: Incentives are needed to keep over 55 workers in the workforce
- Affordable Housing:
  - affordable housing campaign is needed to overcome negative issues and perceptions
  - need large industries involved in buying/building real estate
  - need investment plans and housing coops
- Transportation:
  - Public transit needs to be addressed at a regional level and it also needs to receive subsidies
  - Public transit needs to be connected to airport.
- Land Use
  - higher densities are needed in close-in locations to promote both affordable housing and public transit
  - locate development in concentrated areas through water and sewer – this lowers cost; promotes mixed-use/non-residential development – will help to reduce property taxes
- Tax Structure:
  - Tax structure in NH needs to be based on ability to pay
  - Need to look at taxes as an investment rather than an assessment
  - Businesses need state and local tax incentives.
- Encourage Main Street Program

**Dennis Delay; March 2010**

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- Innovation: Apply Dean Kamen's "First Program" to biomed and biotech/stem cell research
- Manufacturing:
  - promote advanced manufacturing in region – promote Southern NH's own version of industrial revolution
  - Components need to be build here – needs federal/state PWA type funding
  - Photovoltaic revolution (Boston on cutting edge technologies)
  - Retool factories/mills – promote production not service industries
- Communications:
  - Broad Band Study -needs to identify gaps in region – DSL has last mile issue and need for power boosting
  - Improve local police/fire communications dead zone issues
  - Examine what to do with old copper/phone lines in buildings
- Water and Wastewater:
  - upgrades need to be regional (Allenstown and Hooksett – good example)
  - health impacts with very old lines – need education not just an economic development issue

**Appendix 1****Regional Economic Development Steering Committee****Public Workshop Meeting****November 16, 2009 3:00 PM – 5:00 PM, PSNH Energy Park**

Members Attending

Stoney Worster, Auburn

Jim Lagana, Auburn

William Dermody, Bedford

Paul Goldberg, Bedford

Richard Snow, Candia

John Cole, Candia

Scott Komisarek, Candia

George Sioras, Derry

Stu Arnett, Derry

Gerald Coogan, Deerfield

Dan Reidy, Goffstown

Keith Moon, Hooksett

Carol Granfield, Hooksett

Don Moskowitz, Londonderry

Andre Garron, Londonderry

Dan O'Neil, Manchester

Jay Minkarah, Manchester

Dani-Jean Stuart, Weare

Erica Menard, PSNH

Rich Sawyer, Bedford

Stephen Griffin, Goffstown

Jo Ann Duffy, Hooksett

Stephen Heavener, Capital Regional Development Corporation

William Sirak, Metro Center NH

Meena Gyawali, Manchester

Chris Wellington, Manchester

David Preece, SNHPC

Jack Munn, SNHPC

Brian Deguzis, SNHPC

Linda Madorma, SNHPC

Rachel Kelly, SNHPC

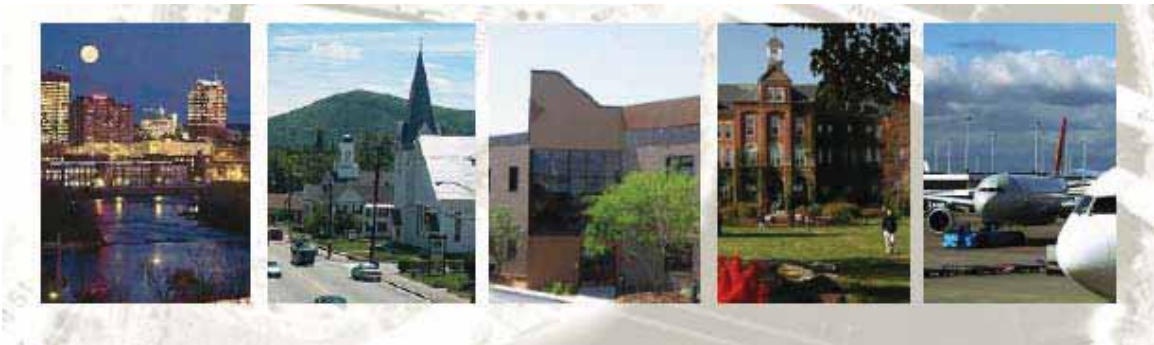
**Regional SWOT Analysis****Page  
25****Southern New Hampshire Planning Commission****Regional Economic Development Steering Committee  
Public Workshop Meeting  
January 25, 2010 3:00 PM – 5:00 PM, PSNH Energy Park**Members Attending

Jim Lagana, Auburn  
William Dermody, Bedford  
Paul Goldberg, Bedford  
Rich Sawyer, Bedford  
Henry Bechard, Bedford  
Scott Kowisarek, Candia  
George Siroas, Derry  
Jack Dowd, Derry  
Gerald Coogan, Deerfield  
Dan Reidy, Goffstown  
Stephen Griffin, Goffstown  
Matt Monahan, Goffstown  
Keith Moon, Hooksett  
Don Moskowitz, Londonderry  
Scott Benson, Londonderry  
Steve Young, Londonderry  
Dan O'Neil, Manchester  
Jay Minkarah, Manchester  
Chris Wellington, Manchester  
Stuart Lewin, New Boston  
Dani-Jean Stuart, Weare

Mark Brewer, MHT Airport  
Erica Menard, PSNH  
Dennis Delay, Consultant  
David Preece, SNHPC  
Jack Munn, SNHPC  
Alex , SNHPC  
Derek Search, SNHPC  
Rachel Kelly, SNHPC

**Dennis Delay; March 2010**

## Section F: Target Industry Analysis



# TARGET INDUSTRY ANALYSIS



*Prepared for:*  
**Southern New Hampshire  
Planning Commission**

*November 2009*

Manchester



**Moran, Stahl & Boyer**

Site Selection and Economic Development Consultants

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*This document was prepared by:*

John M. Rhodes, Senior Principal

**Moran, Stahl & Boyer**

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## EXECUTIVE SUMMARY WITH RECOMMENDATIONS

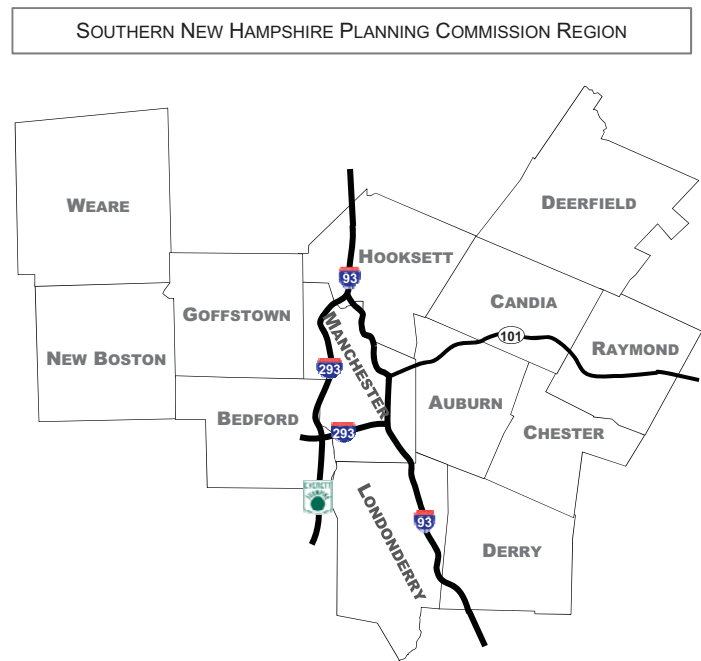
The Southern New Hampshire Planning Commission (SNHPC) consists of the City of Manchester along with twelve (12) towns located within Merrimack, Hillsborough and Rockingham Counties. The Commission is in the process of preparing an economic development plan for the region that includes the identification of target industries for future growth in each community. The target industry study involves both a macro level review of the three counties 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. The end result is the identification of target industries for the region and each community.

### The Process of Identifying Target Industries

The process incorporates multiple considerations that include the following:

1. Historic presence of any industries to indicate the potential for residual competencies.
2. Current employment by industry within the three-county area.
3. Market trends that impact the growth of a specific industry.
4. Local interest and business environment that supports a given industry.
5. Availability of resources required to support an industry, including:
  - Labor availability/cost and education/training
  - Transportation access (interstate, rail and air)
  - Utilities (availability, backup potential and cost)
  - Sites and buildings (location, cost and readiness)
  - Services to support industry cluster (transportation, consulting services, etc.)
  - Types of financial and incentive resources
  - Quality of life attributes to help attract talent.



### Target Industries Defined

Ten (10) growth options were defined by type:

#### Type 1 - Expand/Attract/Start-Up Businesses:

- ▶ Back Office, Shared Service and Customer Interface.
- ▶ Headquarters Operations.
- ▶ Manufacturing of Parts, Components and Assemblies.
- ▶ Manufacturing of Machinery and Equipment.
- ▶ Professional, Technical and Scientific Services.

#### Type 2 - Expand With Regional Economy:

- ▶ Regional Retail.
- ▶ Regional Health Care.
- ▶ Regional Distribution.

#### Type 3 - Enhance Existing Segments:

- ▶ Tourism-Related: outdoor activities, B&B's, culture and arts, destination restaurants (activity package)
- ▶ Agricultural-Related: more destination farms with bakeries, sandwich shops, zoos, tours, rides, etc.

There is something for every community.



## EXECUTIVE SUMMARY WITH RECOMMENDATIONS

### Application of Target Industries to Individual Communities

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

(1) Rural community without limited access highway. Smaller scale operations would be more appropriate in these towns.

The identification of a target industry for a specific community does not guarantee success. The community must assure that the right resources are in place and the location is properly marketed.

### 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.

SECTION



Southern New Hampshire Regional Planning Commission

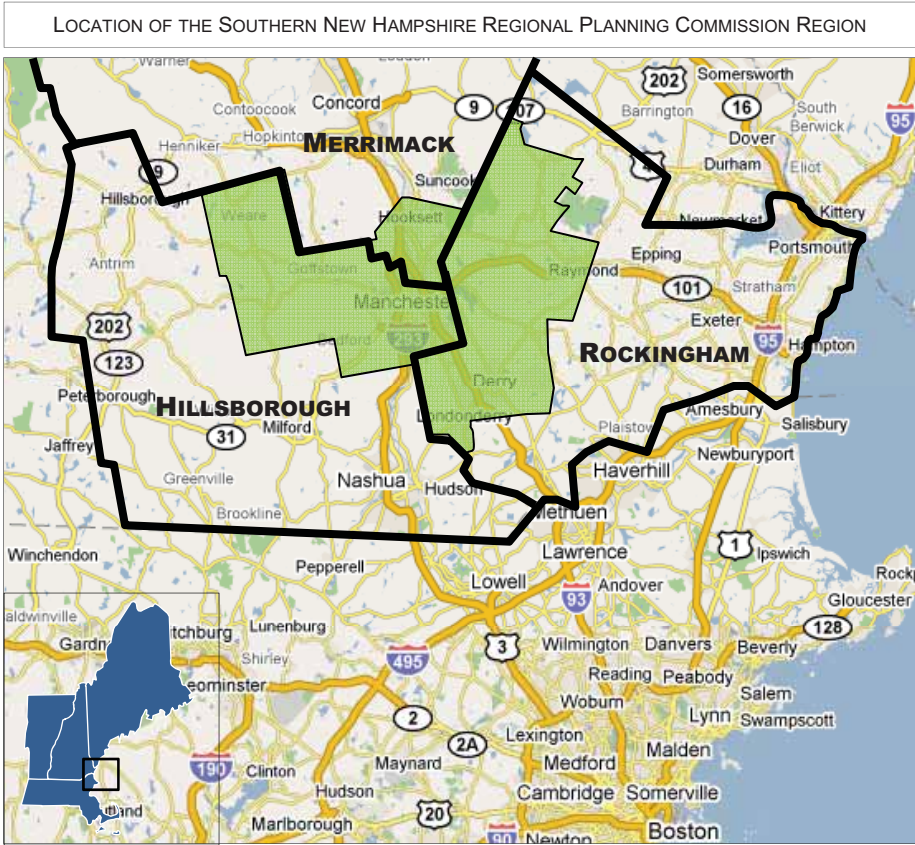
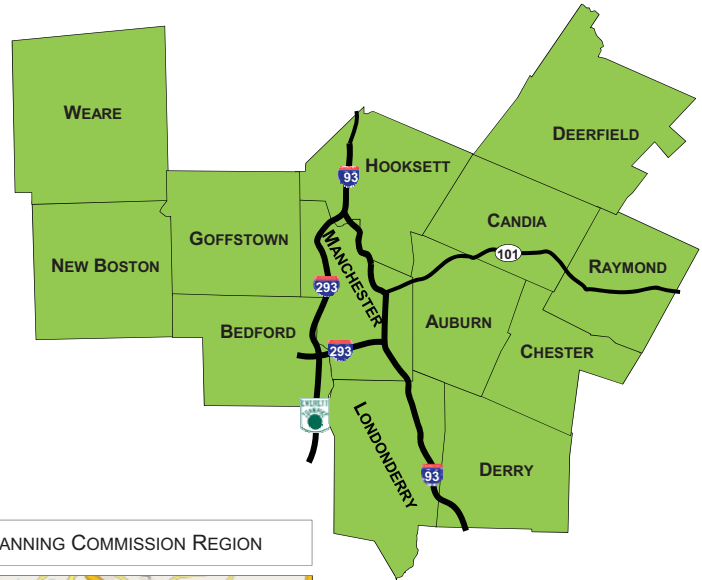
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BACKGROUND INFORMATION

■ PROJECT BACKGROUND

The Southern New Hampshire Planning Commission (SNHPC) region consists of the City of Manchester along with twelve (12) towns located within Merrimack, Hillsborough and Rockingham Counties. The Commission is in the process of preparing an economic development plan for the region that includes the identification of target industries for the future growth of each community. The target industry study involves not only a macro level review of the three counties but also focuses 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 and its communities as well as published data sources, interviews with selected companies, and internet-based research on multiple topics. The end result is the identification of target industries for the region and for each city and town.



■ OVERVIEW ON REGIONAL ECONOMIES, TARGET INDUSTRY ANALYSIS AND SITE SELECTION

**Composition of a Regional Economy**

A typical regional economy is comprised of three levels of employers that make up their *economic portfolio*. The Level 1 or Primary Industries consist of those companies and federal/state 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 with a particular emphasis on manufacturing, back office/shared services/customer service and distribution operations.

Level 2 businesses 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 defined as an economic development target because of its derivative relationship with Level 1 businesses.

Level 3 businesses include all of 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 a target for some communities if they are seeking to expand their tax base in conjunction with Level 1 business expansion/attraction.

Rural, suburban and urban settings within a region will tend to attract a different mix and size of businesses. The larger Level 1 businesses will typically be located closer to urban locations that have access to transportation while smaller companies can be located in multiple settings. Within this report, there will be an effort to define the best economic alternatives for each setting.



**Consideration:** Quality/Diversity of Jobs and Size of Tax Base vs. Demand for Local Services

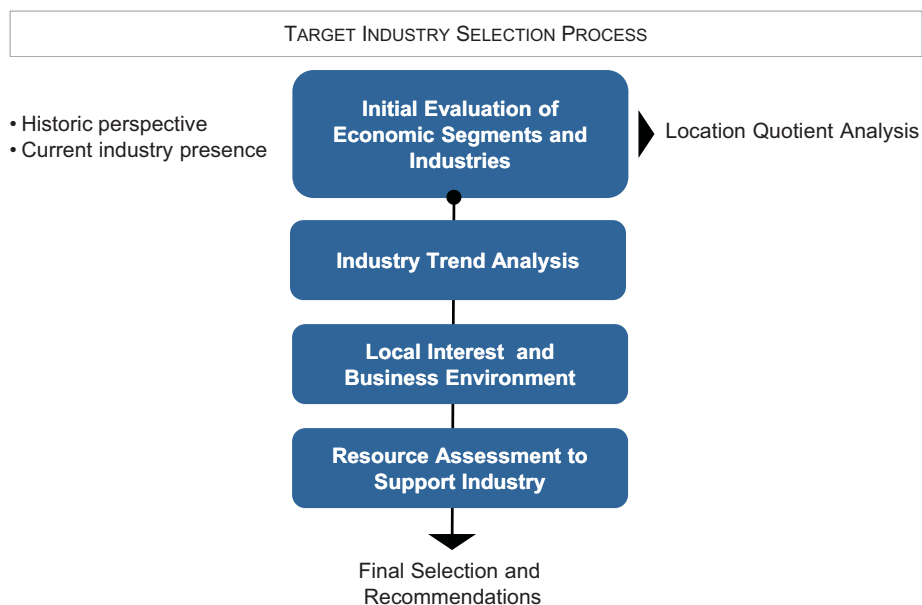
## ■ OVERVIEW ON REGIONAL ECONOMIES, TARGET INDUSTRY ANALYSIS AND SITE SELECTION

### Identifying Target Industries

Moran, Stahl & Boyer takes a comprehensive approach to selecting target industries for a given region. The process incorporates multiple considerations that include the following:

1. Historic presence of any industries to indicate the potential presence of residual competencies as well as an understanding of culture and perspective for the community.
2. Current employment within specific industries/economic segments within the three-county area that encompasses the SNHPC region.
3. Overall trends in a particular industry at a national/global level that may impact future growth.
4. Local interest and business environment to support a given industry.
5. Availability of resources required to support an industry, including:
  - ▶ Labor presence and education/training (supply and cost)
  - ▶ Transportation access (interstate, rail and air)
  - ▶ Utilities (availability, backup potential and cost)
  - ▶ Sites and buildings (location, cost and level of readiness)
  - ▶ Services to support industry cluster (transportation, marketing, specialized legal, etc.)
  - ▶ Financial/incentive resources
  - ▶ Quality of life attributes to help attract key talent (availability/cost of housing, education resources, healthcare facilities and costs, diverse cultural/recreation options, restaurant and retail options, religious and social organizational options, etc.).

Target industries for the SNHPC region are identified and evaluated in the next two sections of this report and applied to each city/town within the region at the back of the report.



■ OVERVIEW ON REGIONAL ECONOMIES, TARGET INDUSTRY ANALYSIS AND SITE SELECTION

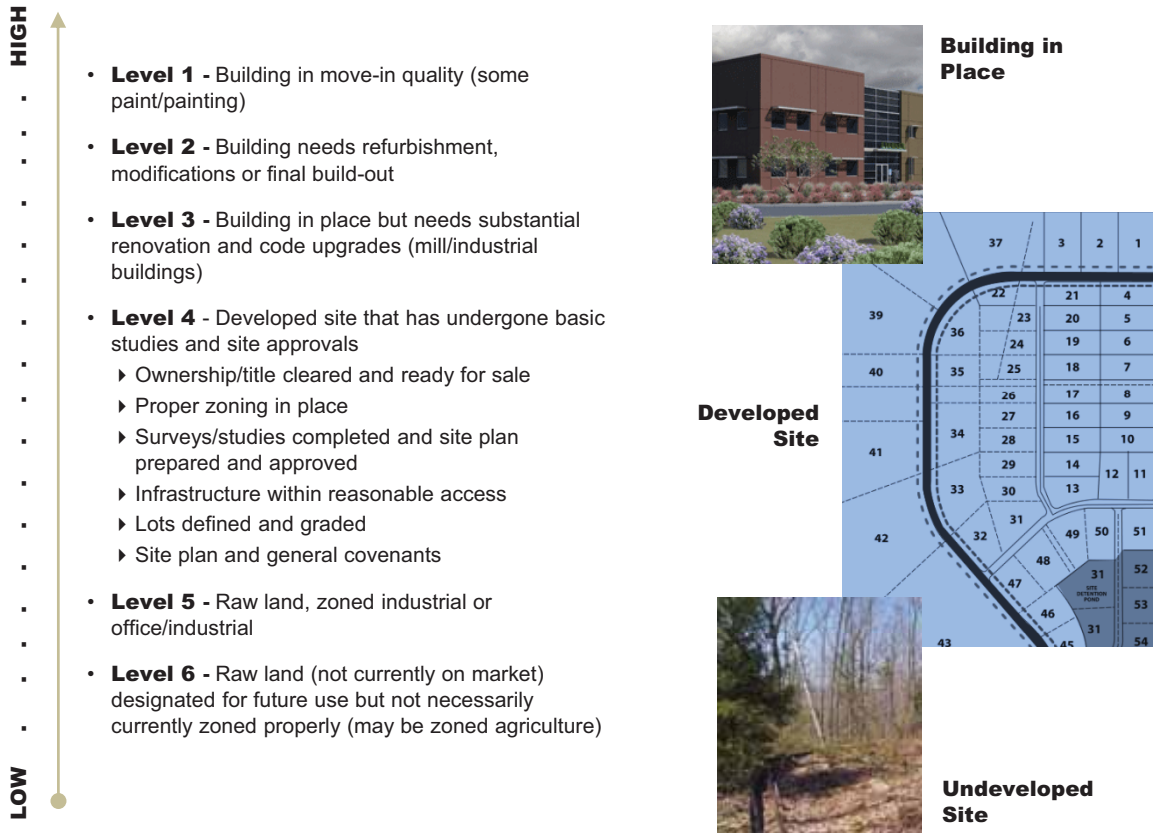
**Level of Site Readiness is Critical**

When making real estate decisions, companies seek out options that minimize startup time and limit potential risks. If the type of facility required is relatively generic, the company will first screen the real estate listings for buildings then for building sites. If the building requirements are fairly unique (extra large site or building size, very specialized space layouts in need of high-end architectural features), the company will seek a building site. Different companies and types of operations will be attracted to different levels of readiness – from a developed site to a shell building in place to a move-in quality building.

MS&B developed a multi-level scale for determining the level of site readiness (see figure below). The scale ranges from raw land currently zoned agriculture up to a fully developed site with a building in place. Each level indicates an incremental amount of effort that reduces the time to startup for the prospective company. When a community is considering the development and marketing of a particular site, make an effort to determine what level of readiness will be needed to assure that certain types of businesses will be attracted to the site.

DESCRIPTION OF SITE READINESS LEVELS

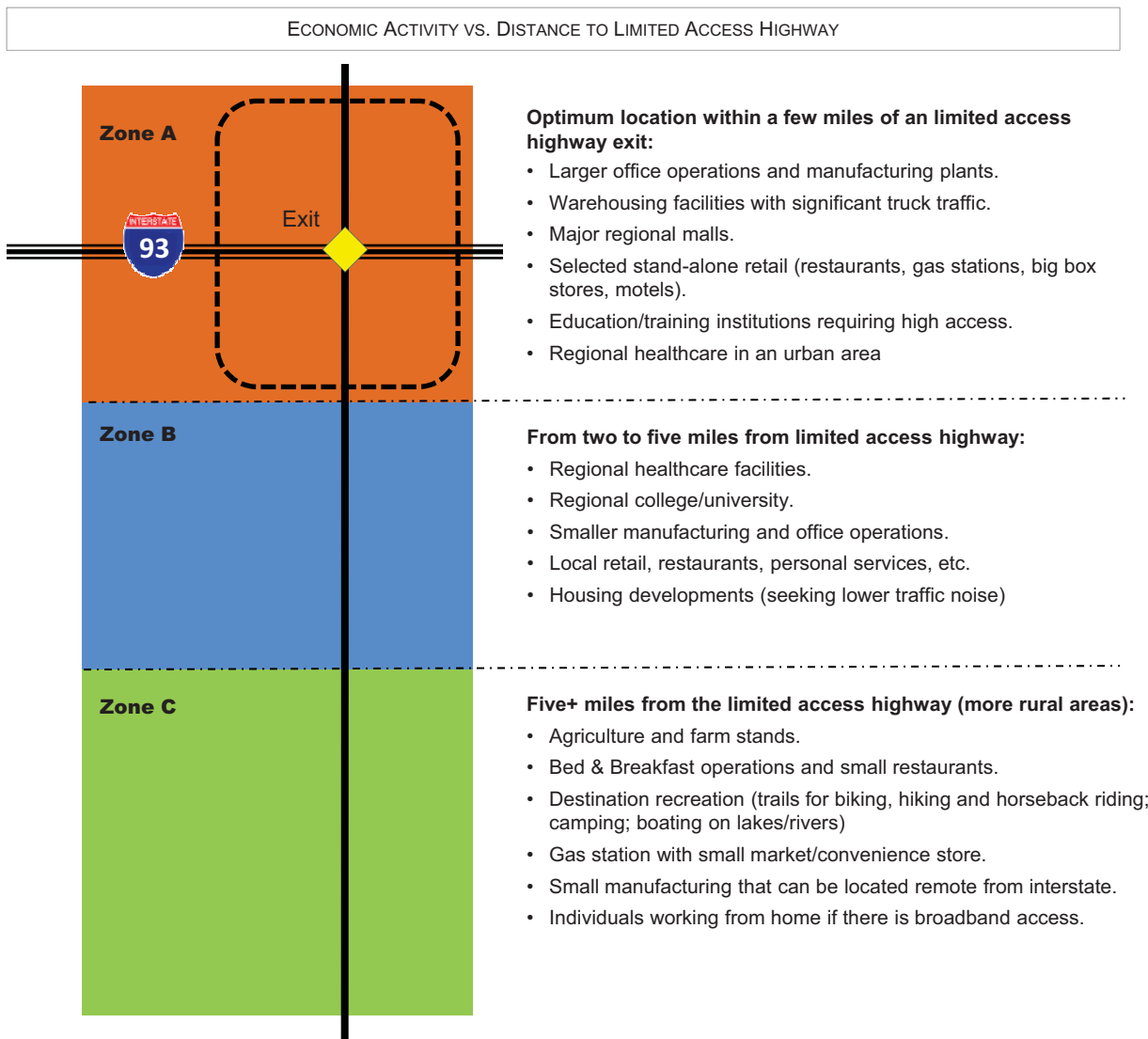
Readiness is ultimately defined by prospective companies as the time required to obtain occupancy in a building on a site.



## ■ OVERVIEW ON REGIONAL ECONOMIES, TARGET INDUSTRY ANALYSIS AND SITE SELECTION

### Site Selection Based on Distance From Limited Access Highway

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 away from the limited access highway increases, the profile of businesses change. For example, a major manufacturing operation with 500+ employees and substantial truck traffic will tend to locate within 1-2 miles 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. In essence, there are opportunities for each community within the region but the opportunities will vary by remoteness and access to certain resources.



## ■ OVERVIEW ON REGIONAL ECONOMIES, TARGET INDUSTRY ANALYSIS AND SITE SELECTION

### The Four Levels of Site Evaluation

When a prospective company views an area and its real estate options, there are four levels of evaluation (as outlined below) that frequently incorporated into the decision. Having identified a particular 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. The evaluation team then reviews the local amenities and interstate access that are within a few miles of the site. Lastly, the team focuses on the overall site and the details of the building(s), if present. In the final analysis, it is the site with the best access to resources at a manageable risk with the overall lowest cost vs. functionality and flexibility for expansion that will most likely be selected.

#### FOUR LEVELS OF SITE EVALUATION

##### Level 1: General Proximity

(30-45 minutes travel time)

- Airport access (distance to county general aviation service and regional commercial airport).
- Labor resources within the commute zone based on demographics and industry presence.
- Quality of life/cost of housing for attracting individuals to relocate from other locations
- Access to business/R&D partners that require frequent interface

##### Level 2: Local Access

(Easily accessible to site)

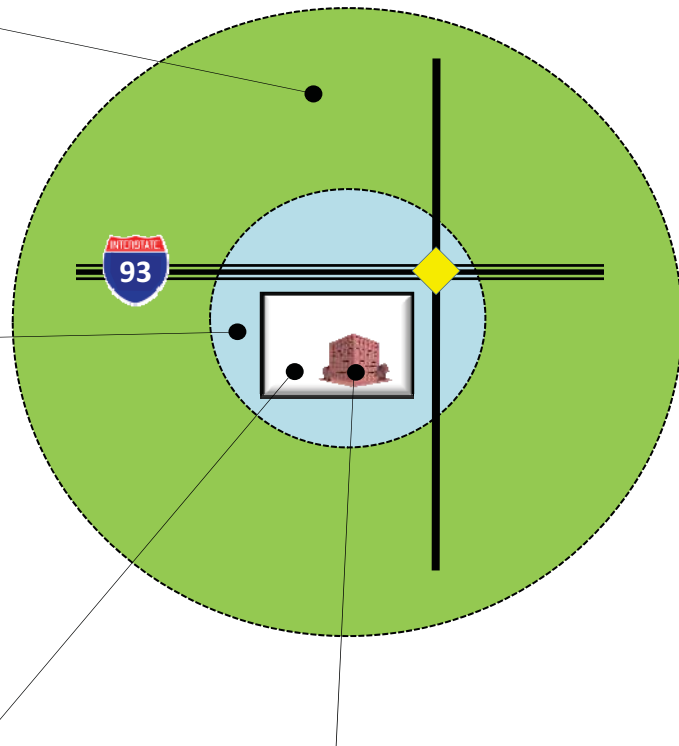
- Travel distance to interstate and the existence of "sensitive" activities between the site and the interstate (e.g., schools, hospitals, parks and shopping malls). These can be a concern for trucking operations.
- Access to public transportation (for certain types of operations)
- Access to restaurants, shopping, banking, daycare, personal services, exercise facilities, etc.
- Access to business support services

##### Level 3: Site Characteristics and Conditions

- Overall size of development and individual lot sizes with potential for future expansion
- Level of site visibility and security (general visibility from interstate, perimeter fence, controlled access, etc.)
- Level of site readiness
- General soil conditions, access to ground water, presence of wetlands and proximity to the 100-year flood plain
- Utility capacity, cost, reliability and backup capability (water, sewer, power, gas, telecom/broadband)
- Zoning/land use of site and adjacent sites, any site covenants and other restrictions
- Transportation access: interstate, rail, air, river or lake/inland sea port

##### Level 4: Evaluate Existing Building(s)

- Size/age/condition of building
- Single or multi-tenant use
- Level of readiness (time prior to occupancy)
- Layout, types of space and flexibility of use
- Cost and buy vs. lease options
- Parking capacity
- Special requirements based on type of operation





■ OVERVIEW ON REGIONAL ECONOMIES, TARGET INDUSTRY ANALYSIS AND SITE SELECTION

Case Study on Site Selection: Fidelity Site (Town of Merrimack)

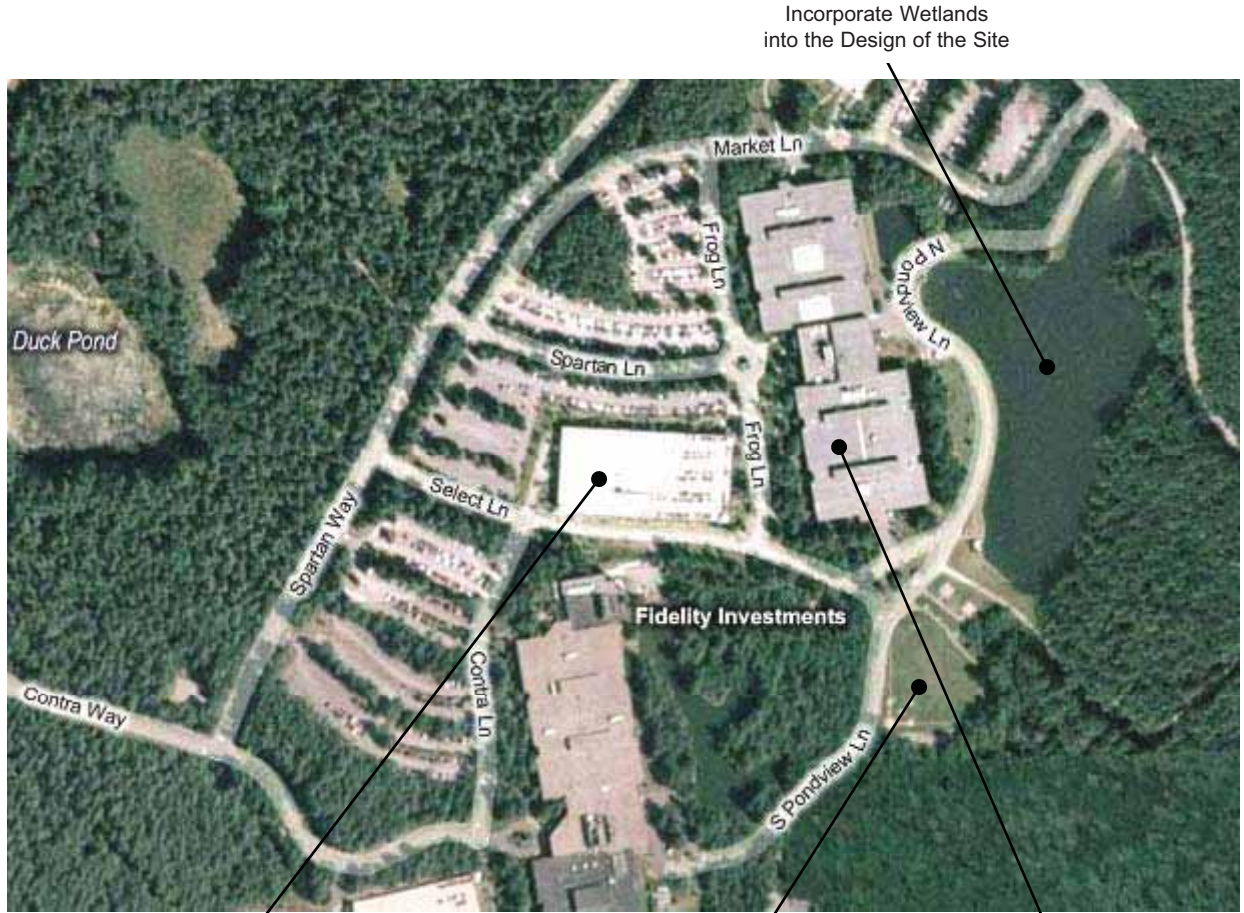
The Fidelity Investments (former Digital Equipment Corporation) site in Merrimack is an example of a well placed and well designed facility. It is located near an Everett Turnpike exit and with access to significant shopping and other amenities.



■ OVERVIEW ON REGIONAL ECONOMIES, TARGET INDUSTRY ANALYSIS AND SITE SELECTION

Case Study on Site Selection: Fidelity Site (Town of Merrimack)

The site is well buffered with room for expansion, has substantial parking as well as outdoor facilities for exercise corporate team building (see below).



Incorporate Wetlands into the Design of the Site

Plenty of Parking (Open and in Garage)

Amenities on the Site:

- Walking Trails
- Basketball Courts
- Soccer Field
- Softball Field
- Water Access

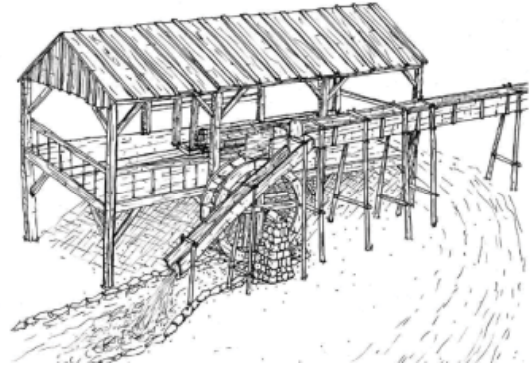


Well-Designed Buildings That are not Easily Dated

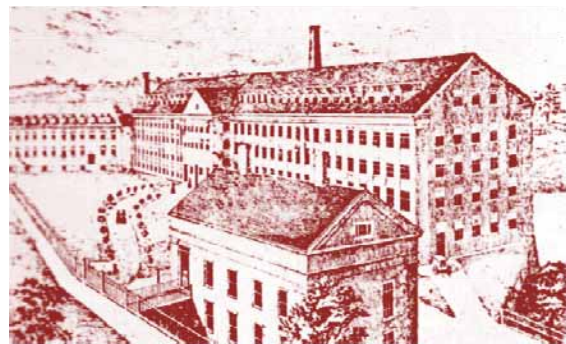
## ■ OVERVIEW ON THE REGIONAL ECONOMY

### Historical Perspective

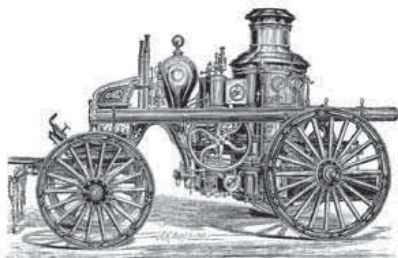
For over 250 years, the region has been host to a diversity of industries that have grown and matured over time. In the early 18<sup>th</sup> century, the waters of the Merrimack and Piscataquog Rivers were harnessed for lumber and grist mills. In the early 19<sup>th</sup> century, investors saw the potential of the Amoskeag Falls to power a textile mill and other industries. In 1810, the small settlement of Derryfield had its name changed to Manchester after the great English textile city.



The journey from these humble beginnings would witness the rise of the Amoskeag Manufacturing Company that ultimately built and operated an industrial complex that had over 8 million square feet of manufacturing space and became the largest cotton mill in the world. The company even supplied heavy denim fabric to jean manufacturer Levi Straus to make his famous work pants for the California gold miners.



Amoskeag Manufacturing Company not only built Manchester into a city and manufacturing center, they also branched out from textiles into steam-power fire engines as well as Winchester rifles



for the military. It also began building steam locomotives that it ultimately sold off to the Manchester Locomotive Company that became part of the American Locomotive Company. Other local products included axes and other implements made by the Blodgett Tool Company that changed ownership several times and shoes that began in the 1870's. The W.H. McElwain Company built the world's largest shoe factory under one roof in 1912.



By the 1890's, the City of Manchester had a population of just over 44,000 people with an industrial base producing textiles and textile machinery, shoes, sewing machines, metal fabricated products, carriages, hosiery, agricultural implements and others. Many of skills in making machinery and fabricated metal products during this era are still in use today throughout the region.



■ OVERVIEW ON THE REGIONAL ECONOMY

Historical Perspective

A timeline that identifies the different industrial eras within the region is presented below along with the key dates noting when some of the major service industry employers (healthcare, education and financial services) came to the region.

An important observation that can be derived from the timeline is that this region has been in the metal fabrication, machine building and technical services businesses since the 1830's. Many of these early skills are still being utilized along with the work ethic and *Yankee ingenuity* that have allowed the region to make the transition from one industry to the next.

- St. Anselm College** (Manchester)
- NH Institute of Art** (Manchester) ▶
- Elliot Hospital** (Manchester)
- Hesser College** (Manchester) ▶
- Catholic Medical Center** (Manchester) ▶

- Manchester Airport Established** ▶
- Southern NH Univ.** (Manchester) ▶

- Manchester Com. College** (Manchester) ▶
- US Veterans Center** (Manchester) ▶

- UNH-Manchester** (Manchester) ▶

- Insurance/Back Office** ●
- Since Fidelity came to the area in 1995, a number of insurance companies have established operations in the area to gain access to lower cost and the available workforce. ↓



1800
1810
1820
1830
1840
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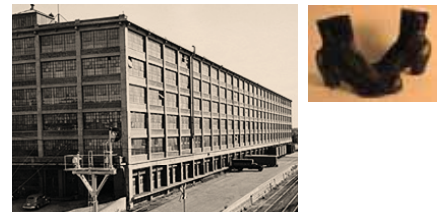


● **Textile Industry**

Manchester was home to Amoskeag Manufacturing Company with the world's largest cotton mill and staffed its own engineering team, brickyard (in Hooksett) and machine building. Amoskeag also built steam-powered fire engines and locomotives, sewing machines, and guns for the military. At its peak, the company employed over 15,000 workers and produced nearly 260 million yards of cloth per year in over 8 million square feet of facilities. Competition from the South took hold in the 1930's.

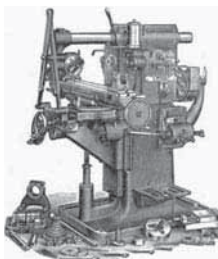
● **Shoe Industry**

The shoe industry expanded over the years and in 1912, the WH McElwain Company opened the largest shoe manufacturing operation under one roof. Shoes produced at multiple companies eventually took over as the area's major industry but saw its demise by the 1960's due to low cost competition.



● **Machining and Machine Mfg.**

These industries owe their roots to the textile industry of the 19<sup>th</sup> and 20<sup>th</sup> century.



● **Electronics/Computer Industry**

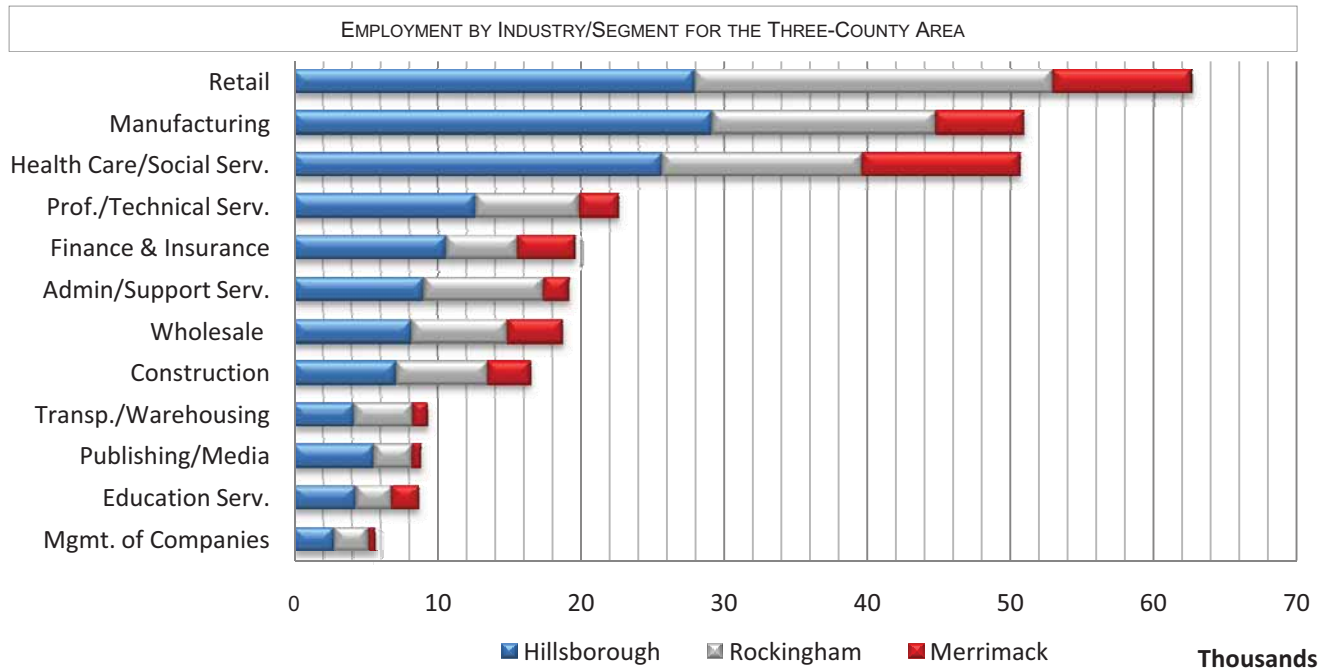
Spillover of defense, computer and electronics firms from Massachusetts occurred in the 1960's to take advantage of lower costs. There have been many acquisitions and spinoffs over the years with many companies currently producing specialty components for a global market.



■ OVERVIEW ON THE REGIONAL ECONOMY

**Current Employment Profile by Industry**

A number of the economic segments are population driven and will reflect the overall growth, age demographics and demands of the consumer – they include health care services, retail, wholesale and construction. In contrast, segments such as manufacturing, finance and insurance, certain professional/technical services and the 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.



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: U.S. Department of Labor

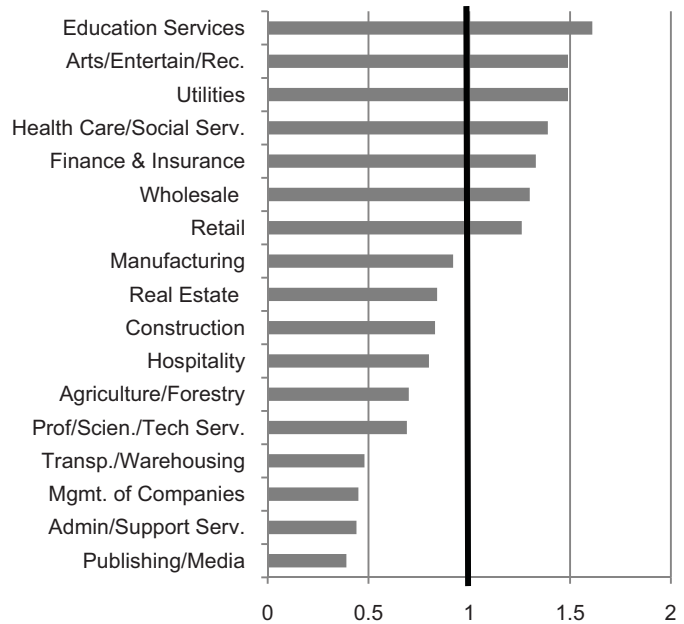
■ OVERVIEW ON THE REGIONAL ECONOMY

Location Quotients for Each County

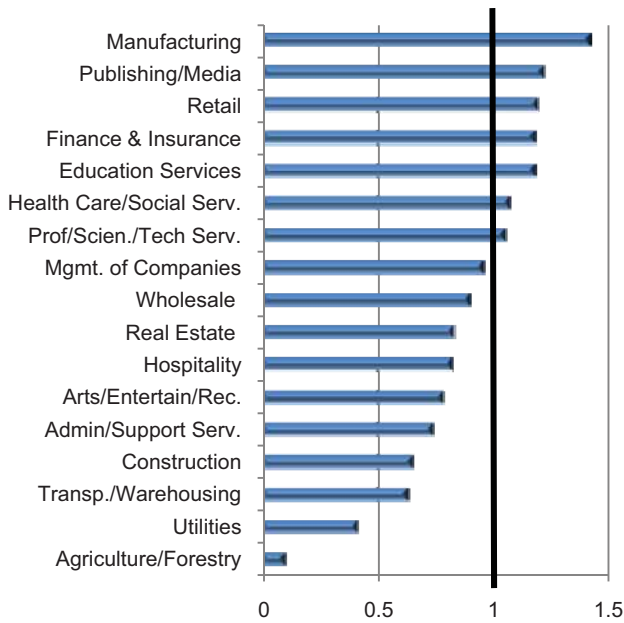
The Location Quotient gauges the strength of an economic segment by comparing local employment levels within an industry/economic segment to national averages.

- **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 cities provide a significant amount of regional retail.
- **Wholesale:** is low due to much on the activity takes place further south in New England or in New York State.
- **Insurance:** back office operations represent a significant portion of this industry segment in Hillsborough and Merrimack Counties.
- **Construction:** not high level of activity in the region.
- **Professional, Scientific and Technical Services:** emerging segment with significant home-based business potential

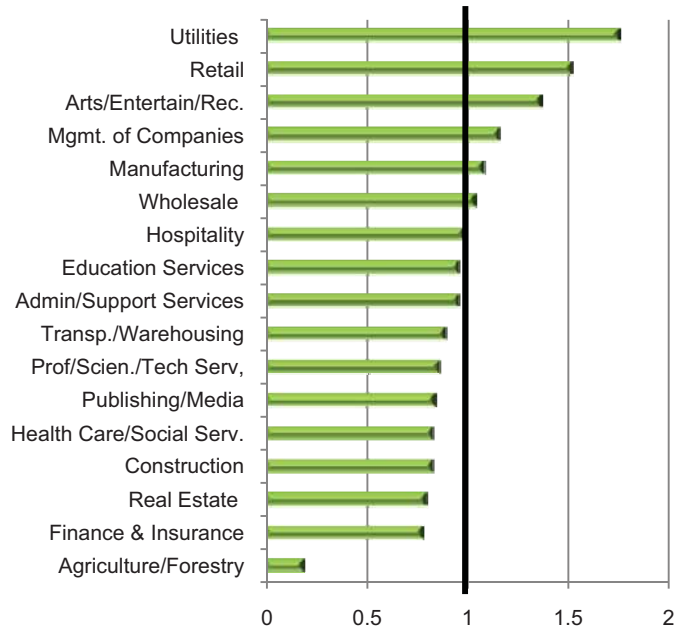
**MERRIMACK COUNTY**



**HILLSBOROUGH COUNTY**



**ROCKINGHAM COUNTY**



Source: U.S. Department of Labor (2008 data)

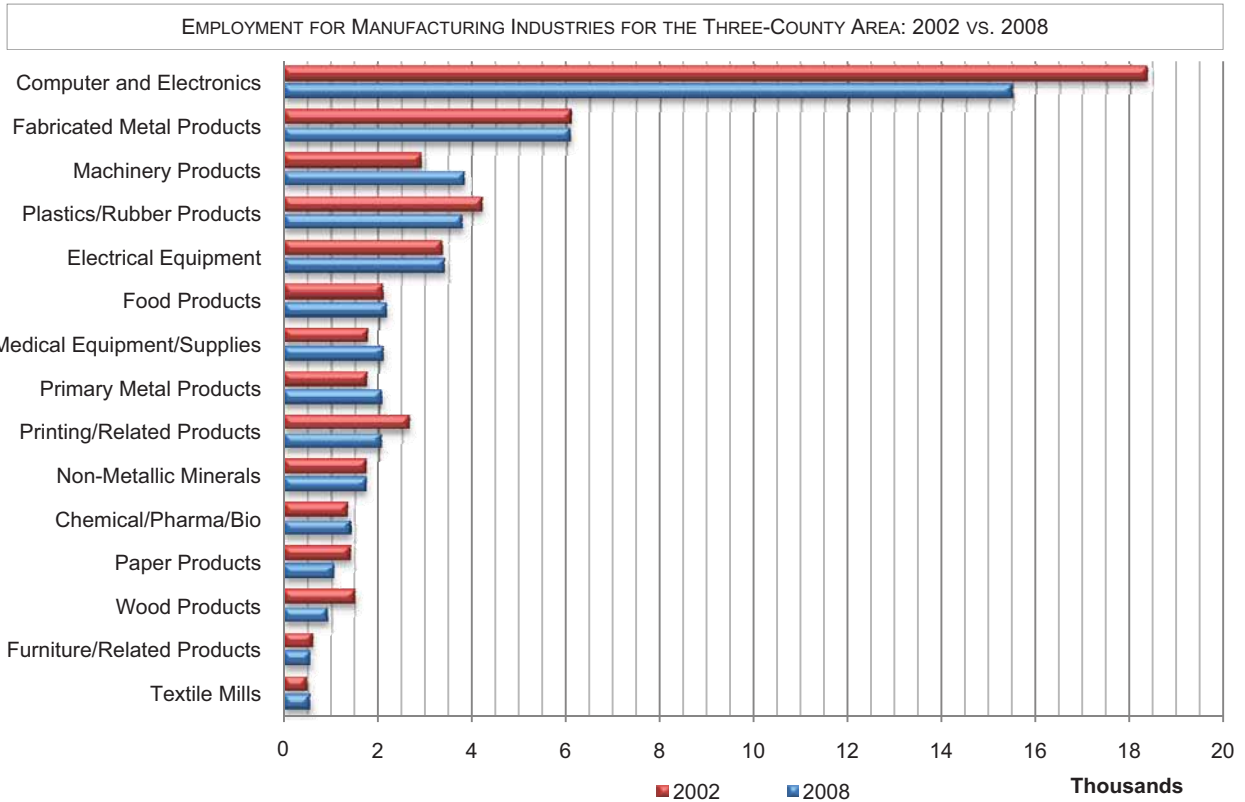
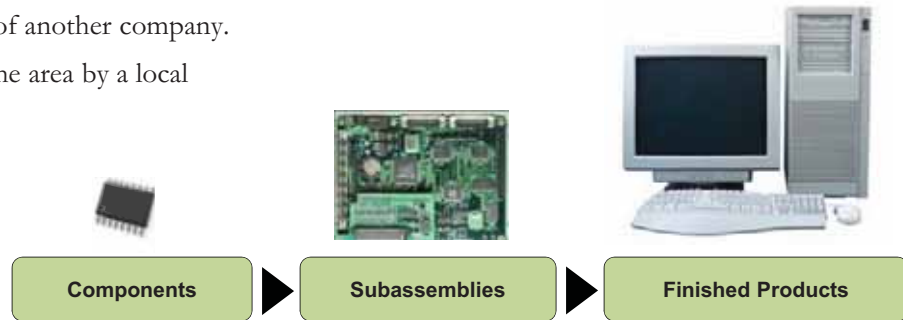
■ OVERVIEW ON THE REGIONAL ECONOMY

**Details on Manufacturing Industries**

Manufacturing in southern New Hampshire is dominated by the computer/electronics industry with other key industries including fabricated metal products, machinery, plastics and an emerging medical instruments. 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. In addition, there are producers of high value machines and equipment such as the Segway *Personal Transporter* and the Insight Technology night vision weapons and detection systems.

The basis for manufacturing companies being in the area can be categorized as follows:

- 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.

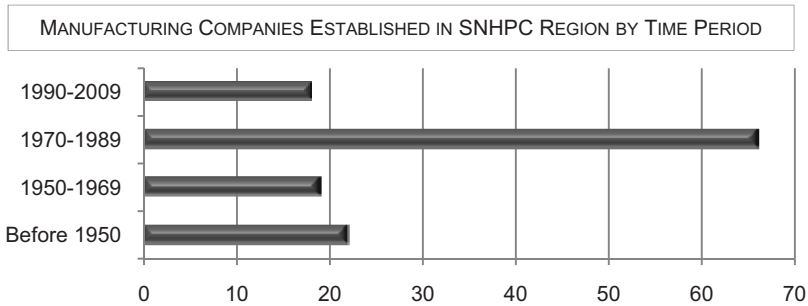


Source: U.S. Department of Labor

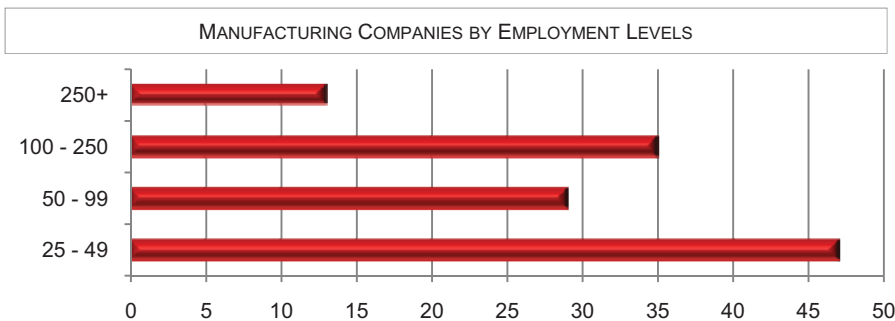
■ OVERVIEW ON THE REGIONAL ECONOMY

**Details on Manufacturing Industries**

A list of approximately 125 manufacturing companies (see Appendix) were identified within the SNHPC region that currently have over 25 employees. As noted in the chart below, the majority of the existing companies in the region were established between 1970 and 1989 – a period of very high growth. Also noted, there are about ten (10) companies that are foreign owned by either Japanese or Western European companies.



The size range in employment for the manufacturing firms is plotted below to determine any bias for a particular size range. There is a fairly balanced range in size.



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



## ■ OVERVIEW ON THE REGIONAL ECONOMY

### Manufacturing Employment Trends and Projections

The data provided below is several years old and did not take into account the recession of the last 18 months, but it does give a general indication of what segments of the local economy may see growth. Even though the electronics segment is projected to lose 7% employment throughout the state, it still represents a substantial number of jobs that are preserved. This industry represents such diversity that local growth really has to do with the market potential and life cycle stage of each company in the segment.

The region has a long history of supporting the fabrication of machinery and fabricated metal products and as long as the local firms continue to innovative and adapt with niche product offerings they will be in the market. The region is essentially very good at producing unique/complex/short run components constructed from metal, plastics and other materials, as well as electronic/electrical and mechanical assemblies, and selling them to a global market.

PAST AND FUTURE GROWTH TRENDS BY MANUFACTURING SEGMENT AND KEY DRIVERS OF GROWTH

Manufacturing Segment	Growth: 2002-2008 (For 3 Counties)	Projected: 2006-2016 (State-Wide)	Market Drivers and Competition
Computer & Electronics	-16%	-7%	Economic growth, competition from low cost areas.
Fabricated Metal Prod.	0%	6%	Business growth in region.
Machinery Products	31%	4%	Industrial investment from overall economic growth.
Plastics/Rubber Products	-10%	-4%	Overall economic growth, competition from low cost areas.
Electrical Equipment	2%	9%	Industrial investment, disposable personal income.
Food Products	3%	6%	Population growth, market demand for certain foods.
Medical Equip/Supplies	18%	Not defined	Aging population, expansion of global markets, new ideas.
Primary Metal Products	17%	4%	Overall market growth, competition from other materials.
Printing/Related Products	-22%	-12%	Impact from Internet, population /business growth.
Chemical/Bio/Pharma	3%	11%	Product under patent protection, new product roll-outs.
Paper Products	-26%	-74%	Global paper supply levels and cost of production.
Wood Products	-39%	-12%	Uniqueness of product, competition from low cost areas.
Textile Mills	15%	-3%	Uniqueness of product, competition from low cost areas.

SECTION

B

Southern New Hampshire Regional Planning Commission

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TARGET INDUSTRY ANALYSIS

## ■ POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES

### Overview on Target Industry Selection Process

The basis for selecting target industries was outlined in Section A on page A-3 and further discussed below.

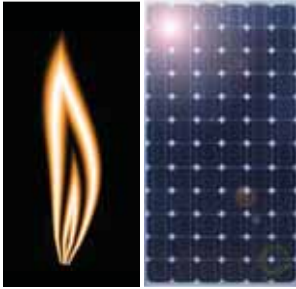
1. **Historic presence of any industries.** The region has been engaging in metal fabrication and machine building since the early 1800's and has continuously adapted to new opportunities to apply those skills over the years. Regional retail has also been a part of the region since the early days. Regional health care came in the 1890's
2. **Current employment within specific industries/economic segments within the three-county area and the SNHPC region.** Employment for each industry/segment was reviewed and major employers were identified and studied via the company web sites.
3. **Overall trends in a particular industry at a national/global level that may impact future growth.** General trends that may drive local industries are noted on page B-2.
4. **Local interest and business environment to support a given industry.** This is based on general study of the media, discussions with the local planners and formal feedback from the planners.
5. **Availability of resources required to support an industry:** Resources requirements are identified and evaluated for each target industry/segment beginning on page.

It should be noted that a **Location Quotient** was calculated and plotted for each of the three counties (see charts of page A-12) 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 the region been located within a single county. An LQ was not done at the town level because most are too small to have a 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 towns are too small for the data to be meaningful. In addition, since the vast majority (>75%) of residents leave the town to work each day, there is a need to study a larger area (as was done).

Target industries for the SNHPC region are identified and evaluated in this section and then applied to each city/town within the region in Section C.

## ■ 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.

## ■ POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES

### Description of Potential Target Industries

Target Industry/Sector	Description of Industry/Sector
<b>Back Offices, Shared Service and Customer Contact Centers</b>	<p>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.</p> <p>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.</p>
<b>Headquarters Operations</b>	<p>Includes small corporate and regional offices.</p> <p>Companies may select New Hampshire for low operating cost, low personal income tax or for life style preferences.</p> <p>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.</p>
<b>Manufacturing of Parts, Components and Subassemblies:</b> <ul style="list-style-type: none"> <li>• Electrical/Electronic</li> <li>• Metal</li> <li>• Plastic</li> <li>• Wood</li> <li>• Specialty Materials</li> </ul>	<p>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.</p> <p>There is frequently on-going product enhancement and new product development.</p> <p>Companies may be start-ups, spinoffs of local companies or relocated in from other states.</p> <p>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.</p>
<b>Manufacturing of Machinery and Equipment:</b> <ul style="list-style-type: none"> <li>• Electrical/Electronic Instruments</li> <li>• Specialized Tools</li> <li>• Medical Devices</li> </ul>	<p>Products are typically uniquely designed with high technical content utilized for production, testing/monitoring, measuring, or medical applications.</p> <p>There is frequently on-going product enhancement and new product development.</p> <p>Operations can range from 5-10 employees in industrial flex space up to 100+ employees in an industrial park.</p>
<b>Professional, Technical and Scientific Services:</b> <ul style="list-style-type: none"> <li>• Engineering/Architecture</li> <li>• Design/Graphics</li> <li>• Software</li> <li>• R&amp;D/Testing Services</li> <li>• Business consulting</li> </ul>	<p>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.</p> <p>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.</p> <p>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.</p>
<b>Regional Retail</b>	<p>As the region grows, there is potential to expand regional big box/mall retail in Hooksett and in Bedford/Londonderry area.</p>
<b>Regional Distribution</b>	<p>As the region grows, there is potential to expand regional distribution in Raymond and Londonderry (near the airport).</p>
<b>Regional Health Care</b>	<p>Continued expansion of the major hospital facilities as well as installation of local clinics and walk-up services in more remote areas.</p>
<b>Tourism-Related</b>	<p>There is an opportunity for destination tourism packages in the more remote areas with more Bed &amp; 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.</p>
<b>Agriculture-Related</b>	<p>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.</p>

## ■ POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES

### Rationale for Selecting Specific Target Industries

<b>Target Industry:</b>	<b>Back Office, Shared Services and Customer Contact Operations (Multiple Industries)</b>
<b>Description:</b>	This includes financial services (banking, investments and insurance) along with any major company with similar operations that needs lower cost alternatives.
<b>Criteria for Evaluation</b>	<b>Discussion</b>
<b>Historic Presence of Industry</b>	The ramp-up of this industry segment began in 1995 when Fidelity Investment acquired the former DEC campus in Merrimack.
<b>Current Employment Levels and Major Employers</b>	Total financial services employment in the three-county area is nearly 20,000. Major back office employers in or near the SNHPC region include: <ul style="list-style-type: none"> <li>• Fidelity Investments (2,500-4,999) in Merrimack</li> <li>• Liberty Mutual Insurance (100-249) in Bedford</li> <li>• CIGNA Health Care (100-249) in Hooksett</li> <li>• United Healthcare (100-249) in Hooksett</li> <li>• UniCare (100-249) in Londonderry</li> </ul>
<b>Industry Trends/Outlook</b>	The financial services industry as a whole is still recovering from the recent financial meltdown and will be offsetting short-term hiring with technology investments. However, communities with good cost fundamentals will be candidates for further growth as companies shed jobs in higher cost areas.
<b>Local Interest and Business Environment to Support Industry</b>	Strong local interest within region to expend existing employers and attract additional back office operations.
<b>Availability of Resources</b> (Detailed Analysis in Next Section)	Shovel ready sites and available buildings are limited. There is a significant supply of college grads in business and IT within the region. When the economic expands rapidly, the supply of business/IT talent gets tight.
<b>Other Comments</b>	A listing of major financial services companies in New England is provided below.

#### LISTING OF MAJOR FINANCIAL SERVICES COMPANIES IN NEW ENGLAND

Company	HQ Location	Current Presence in NH	Comments
Fidelity Investments	Boston, MA	Merrimack	
MassMutual	Springfield, MA		
Liberty Mutual	Boston, MA	Bedford, Dover, Portsmouth	
State Street Corporation	Boston, MA		
John Hancock	Boston/Toronto		Owned by Manulife Financial in Canada.
OneBeacon	Canton, MA		
Sun Life Financial	Wellesley Hills, MA		Owned by Sun Life Assurance in Canada.
Putnam Investments	Boston, MA		
Bank of America	Charlotte, NC		Acquired FleetBoston and other regional banks.
The Hartford Fin. Serv. Group	Hartford, CT		
Aetna Incorporated	Hartford, CT		
St. Paul Travelers Companies	New York City		Strong presence in Connecticut.
CIGNA	Bloomfield, CT	Hooksett	

## ■ POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES

### Rationale for Selecting Specific Target Industries (cont'd)

<b>Target Industry:</b>	<b>Headquarters Operations</b>
<b>Description:</b>	Includes smaller/mid-size corporate, regional and other headquarters operations.
<b>Criteria for Evaluation</b>	<b>Discussion</b>
<b>Historic Presence of Industry</b>	The most prominent headquarters historically were the textile and shoe companies.
<b>Current Employment Levels and Major Employers</b>	The major current headquarters near the region include: <ul style="list-style-type: none"> <li>• Brookstone, Inc. (Merrimack)</li> <li>• PC Connection (Merrimack)</li> </ul>
<b>Industry Trends/Outlook</b>	Companies (both public and private) must deal with the challenges of placing their headquarters where it provides a strategic advantage while managing costs, being where it is attractive to top talent and meets the personal needs of the top executives.
<b>Local Interest and Business Environment to Support Industry</b>	The region would embrace a potential headquarters but few communities have placed it on their list of strategic targets.
<b>Availability of Resources</b> (Detailed Analysis in Next Section)	See discussion of specific resource needs of the industry in the next section of this report.

<b>Target Industry:</b>	<b>Manufacturing of Parts, Components and Subassemblies</b>
<b>Description:</b>	Includes production of high value electrical/electronic, metal, plastic, wood and specialty material parts and components as well as subassemblies and packages.
<b>Criteria for Evaluation</b>	<b>Discussion</b>
<b>Historic Presence of Industry</b>	Since the days of textiles, the region has been engaged in parts manufacturing. Initially it was primarily iron and steel machine parts but has expanded into other materials.
<b>Current Employment Levels and Major Employers</b>	There are a lot of current companies engaged in parts, components and subassembly manufacturing, including (see list of manufacturers in Appendix): <ul style="list-style-type: none"> <li>• GE Aircraft Engine (engine parts)</li> <li>• Alcumet (metal castings)</li> <li>• Strataflex (Printed circuit boards, flex circuitry and cable assemblies)</li> <li>• General Cable (electronic wire and cable), etc.</li> </ul>
<b>Industry Trends/Outlook</b>	The industry tracks the economy and can be volatile like other higher tech products. Each company must maintain a market "edge" to survive.
<b>Local Interest and Business Environment to Support Industry</b>	General interest in these types of businesses. Viewed as providing good jobs with low impact on the environment.
<b>Availability of Resources</b> (Detailed Analysis in Next Section)	There is a need to sustain a pool of skilled labor to support this segment. See discussion of specific resource needs of the industry in the next section of this report.

## ■ POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES

### Rationale for Selecting Specific Target Industries (cont'd)

<b>Target Industry:</b>	<b>Manufacturing of Machinery and Equipment</b>
<b>Description:</b>	Includes electrical/electronic instruments, specialized tools, medical devices, etc.
<b>Criteria for Evaluation</b>	<b>Discussion</b>
<b>Historic Presence of Industry</b>	Machine building has been a core industry in the region since the mid-19 <sup>th</sup> century.
<b>Current Employment Levels and Major Employers</b>	There are a number of machinery/equipment manufacturers in the region, including: <ul style="list-style-type: none"> <li>• High Speed Technologies (metalworking machinery)</li> <li>• Infinity Constructors (construction machinery)</li> <li>• Insight Technology (Night vision weapons and detection systems), etc.</li> </ul>
<b>Industry Trends/Outlook</b>	The industry tracks the economy and can be volatile like other higher tech products. Each company must maintain a market "edge" to survive.
<b>Local Interest and Business Environment to Support Industry</b>	The region embraces this segment due to the quality of companies and jobs.
<b>Availability of Resources</b> (Detailed Analysis in Next Section)	See discussion of specific resource needs of the industry in the next section of this report.

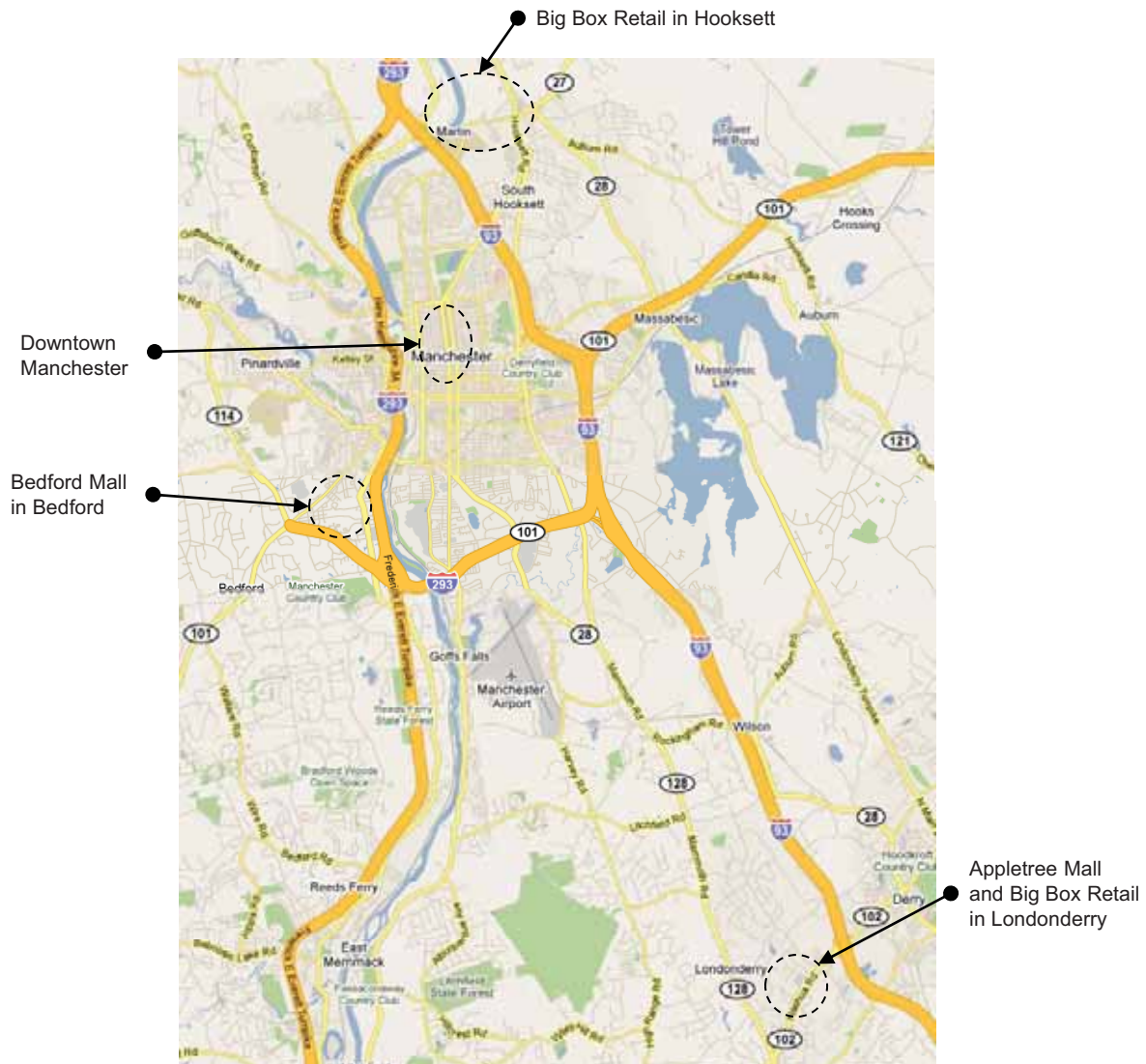
<b>Target Industry:</b>	<b>Professional, Technical and Scientific Services</b>
<b>Description:</b>	Includes diverse services such as engineering/architectural, design/graphics, software developer, R&D/testing services and business services.
<b>Criteria for Evaluation</b>	<b>Discussion</b>
<b>Historic Presence of Industry</b>	Technical services in the region began with the in-house design and construction of the Amoskeag manufacturing complex.
<b>Current Employment Levels and Major Employers</b>	There are nearly 23,000 employees plus micro businesses within the three-county area that are involved in this category. It is also the main utilization of "knowledge-based" jobs in the economy.
<b>Industry Trends/Outlook</b>	This is one of the fastest growing segments of the U.S. economy. Substantial small business activity within this segment. Technology allows individuals within this segment to live in more life-style based areas as long as broad band service is present.
<b>Local Interest and Business Environment to Support Industry</b>	General interest in these types of businesses. Viewed as providing good jobs with low impact on the environment.
<b>Availability of Resources</b> (Detailed Analysis in Next Section)	There is a need to sustain a pool of skilled talent to support this segment. See discussion of specific resource needs of the industry in the next section of this report.



■ POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES

Rationale for Selecting Specific Target Industries (cont'd)

<b>Target Industry:</b>	<b>Regional Retail</b>
<b>Description:</b>	Includes major malls and big box retail that services consumers coming from outside the region.
<b>Criteria for Evaluation</b>	<b>Discussion</b>
<b>Historic Presence of Industry</b>	Downtown Manchester was the original destination for regional retail.
<b>Current Employment Levels and Major Employers</b>	There are two major regional shopping areas in the region, one in Bedford and the other in Hooksett.
<b>Industry Trends/Outlook</b>	This segment will track the overall population growth in the region.
<b>Local Interest and Business Environment to Support Industry</b>	As developable land becomes scarce, the region will be cautious as to what land and where additional big box operations are placed.
<b>Availability of Resources</b> (Detailed Analysis in Next Section)	Requires large land tracts near limited access highway exits.



## ■ POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES

### Rationale for Selecting Specific Target Industries (cont'd)

<b>Target Industry:</b>	<b>Regional Distribution</b>
<b>Description:</b>	Large box distribution centers that service a significant geographic area.
<b>Criteria for Evaluation</b>	<b>Discussion</b>
<b>Historic Presence of Industry</b>	Most distribution for the area has traditionally come from states to the south.
<b>Current Employment Levels and Major Employers</b>	There are several distribution centers currently in the region: <ul style="list-style-type: none"> <li>• Activity near the airport</li> <li>• Wal-Mart distribution center in Raymond</li> </ul>
<b>Industry Trends/Outlook</b>	As land becomes a premium in higher density areas, there will be different methods of optimizing space and minimizing land consumption.
<b>Local Interest and Business Environment to Support Industry</b>	The region will be wary of investing too much land into warehousing operations.
<b>Availability of Resources</b> (Detailed Analysis in Next Section)	See discussion of specific resource needs of the industry in the next section of this report.

<b>Target Industry:</b>	<b>Regional Health Care</b>
<b>Description:</b>	Includes the major hospitals and health networks, local clinics/doctor's offices and all support services.
<b>Criteria for Evaluation</b>	<b>Discussion</b>
<b>Historic Presence of Industry</b>	Major health care came to the region in the late 20 <sup>th</sup> century sponsored by the large textile companies and the Catholic Church.
<b>Current Employment Levels and Major Employers</b>	There are about 50,000 workers within the health care industry in the three-county area. Manchester is host to the majority of health care jobs within the SNHPC Region.
<b>Industry Trends/Outlook</b>	The segment will continue to grow with the overall population growth and diversify as the large Baby Boomer population ages. Government policies on health care may dramatically alter the delivery of health services locally and nationally.
<b>Local Interest and Business Environment to Support Industry</b>	Continued general interest in health care services at affordable cost.
<b>Availability of Resources</b> (Detailed Analysis in Next Section)	There is a need to sustain a pool of skilled talent to support this segment. See discussion of specific resource needs of the industry in the next section of this report.

**POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES**

**Rationale for Selecting Specific Target Industries (cont'd)**

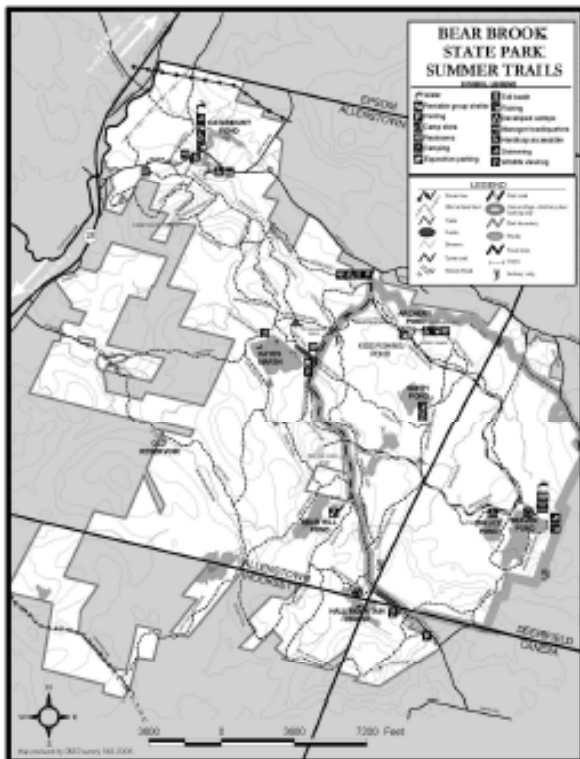
<b>Target Industry:</b>	<b>Tourism-Related</b>
<b>Description:</b>	Outdoor focused destination tourism integrating Bed & Breakfast and small restaurant operations with access to trails for biking, hiking, birding/nature study, and cross-country skiing. Also leverage lakes and rivers for canoeing/kayaking and fishing.  Also an opportunity to link craft shops, museums and historical destinations with B&B's and small restaurants.
<b>Availability of Resources</b>	Leverage state parks and conservation areas throughout the region.



**Garnet Hill Lodge**  
North River, NY

The lodge was built in 1936 after the old garnet mine closed down. The operation offers seasonal activities:

- Mountain biking, hiking, birding and nature study in spring through fall.
- Water sports on local lake.
- Cross-country skiing and snowshoeing in winter.



Extensive trail system in Bear Brook State Park.



There are successful B&B's throughout New Hampshire.



Damian's on the River in New Boston.

## ■ POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES

### Rationale for Selecting Specific Target Industries (cont'd)

<b>Target Industry:</b>	<b>Agriculture-Related</b>
<b>Description:</b>	Provide destination options for visiting farm, consider: baked goods; ice cream and milk products direct; regional agricultural products such as maple syrup and cheeses; small sandwich shop; corn maze; petting "zoo"; hay rides and others. See examples on next two pages.
<b>Availability of Resources</b>	Expand facilities at existing farms.

#### FARM PROFILE IN THE THREE COUNTY AREA



Description	Hillsborough	Merrimack	Rockingham
<b>Size of Farm</b>			
50 to 179 acres	182	185	151
180 to 499 acres	66	66	38
500 to 999 acres	9	20	4
1,00+ acres	2	4	1
<b>Revenue From Farm</b>			
\$25,000 to \$49,999	34	37	43
\$50,000 to \$99,999	25	14	22
\$100,000+	33	50	44
<b>Product Types (# of Farms)</b>			
Livestock and Poultry	136	150	125
Forage Crops	172	221	205
Orchards	51	41	39

■ POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES

Rationale for Selecting Specific Target Industries (cont'd)



**Wrights Dairy Farm & Bakery**  
North Smithfield, RI

Retail Store on the Farm Property

The 100+ year old farm milks 130 cows and has a retail store on-site for both their dairy products and well-known bakery products. They offer milking tours in the afternoon and sell Hermit cookies over the internet. This is a very popular destination in northern Rhode Island.

**Milky Way Farms**  
Chester Springs, PA

This 18<sup>th</sup> 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

## ■ POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES

### Rationale for Selecting Specific Target Industries (cont'd)



#### **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



#### **Salisbury Farm**

Johnston, RI

This farm is famous for its annual corn maze – purported to be the oldest in New England. The farm also offers the following:

- Pick your own strawberries in season
- Farm stand with sweet corn, raspberries, pumpkins and decorations
- Offer free hayrides
- Host educational tours, birthday parties and corporate outings

## ■ POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES

### Resource Analysis to Support Target Industries

Target Industry:	<b>Back Office, Shared Services and Customer Contact Operations (Multiple Industries)</b>	
Description:	This includes financial services (banking, investments and insurance) along with any major company with similar operations that need slower cost alternatives.	
Resource	Requirements	Assessment/Comments
Transportation Access	<ul style="list-style-type: none"> <li>• &lt;30 minute travel to regional airport.</li> <li>• Large operations: close proximity to interstate.</li> <li>• Small operations: farther from interstate.</li> </ul>	<ul style="list-style-type: none"> <li>• Regional air access is very good.</li> <li>• Need to determine available buildings and sites within close proximity of interstates and other limited access highways.</li> </ul>
Facilities (Sites & Buildings)	<ul style="list-style-type: none"> <li>• Prefer existing facilities in favorable locations.</li> <li>• Some companies will opt to build on Shovel Ready sites.</li> </ul>	<ul style="list-style-type: none"> <li>• Need to develop inventory of office space and consider spec building if inventory is very limited.</li> <li>• Make inventory of Shovel Ready building sites throughout the region.</li> </ul>
Utilities	Power and telecom are critical with access to redundancy. More critical if they have a data center on site.	Utilities are adequate for developed areas. Rural areas may have challenges. Power costs are very high for data centers.
Labor Skills	<p>Will vary by operation but may include the following college grads /experienced skills:</p> <ul style="list-style-type: none"> <li>• Computer software/information technology</li> <li>• Accounting/finance</li> <li>• Human resources</li> <li>• Marketing and sales support</li> <li>• Paralegal</li> <li>• Employee benefits specialists</li> <li>• Insurance and investments specialists.</li> </ul>	<ul style="list-style-type: none"> <li>• Annual college graduation within target areas is favorable to demand.</li> <li>• There can be an issue for sourcing experienced talent when the economy tightens.</li> </ul>
Business Support Services	Shipping services, catering for special events, printing, etc.	A variety of services are available in the region.
Financial/Incentives	Some tax abatements expected primarily for larger operations.	Not a strong point for NH communities.
Quality of Life Attributes	Cost of housing, taxes, school quality, ability to get MBA/advanced degrees, cultural and recreation options and specialized health care services.	Quality of life is quite favorable.

## ■ POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES

### Resource Analysis to Support Target Industries (cont'd)

Target Industry:	Headquarters Operations	
Description:	Includes smaller/mid-size corporate, regional and other headquarters operations.	
Resource	Requirements	Assessment/Comments
Transportation Access	<ul style="list-style-type: none"> <li>• &lt;30 minute travel to regional airport.</li> <li>• Large operations: close proximity to interstate.</li> <li>• Small operations: farther from interstate.</li> </ul>	<ul style="list-style-type: none"> <li>• Regional air access is very good.</li> <li>• Need to determine available buildings and sites within close proximity of interstates and other limited access highways.</li> </ul>
Facilities (Sites & Buildings)	<ul style="list-style-type: none"> <li>• Smaller operations prefer multi-tenant building in a high-end location</li> <li>• Larger companies will opt to build on Shovel Ready sites.</li> </ul>	<ul style="list-style-type: none"> <li>• Need to develop inventory of office space and consider spec building if inventory is very limited.</li> <li>• Make inventory of Shovel Ready building sites throughout the region.</li> </ul>
Utilities	Power and telecom are critical with access to redundancy. More critical if they have a data center on site.	Utilities are adequate for developed areas. Power costs are very high for data centers.
Labor Skills	Will vary by operation but may include by lower level and senior staff in functional areas such as legal, finance, engineering, sales, IT, HR, etc.	Reasonable supply for lower level talent. Most senior talent will need to be relocated to the area.
Business Support Services	Shipping services, catering for special events, printing, business consulting, marketing, advertising, etc.	A variety of services are available in the region but services such as advertising and high end consulting will need to access Boston and NYC.
Financial/Incentives	Some tax abatements expected primarily for larger operations.	Not a strong point for NH communities.
Quality of Life Attributes	Cost of housing, taxes, school quality, ability to get MBA/advanced degrees, cultural and recreation options and specialized health care services. There will also be a need for spousal employment.	Quality of life is quite favorable. There will be a perceived /real challenge for certain types of spousal employment.



## ■ POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES

### Resource Analysis to Support Target Industries (cont'd)

<b>Target Industry: Manufacturing of Parts, Components and Subassemblies</b>		
<b>Description:</b>	Includes production of high value electrical/electronic, metal, plastic, wood and specialty material parts and components as well as subassemblies and packages.	
<b>Resource</b>	<b>Requirements</b>	<b>Assessment/Comments</b>
Transportation Access	<ul style="list-style-type: none"> <li>• Access to regional airport for shipping and periodic business travel.</li> <li>• Reasonable proximity to interstate. Larger operations seek to be closer than smaller operations.</li> <li>• Larger plastics molding operations need rail access.</li> </ul>	<ul style="list-style-type: none"> <li>• Regional air access is very good.</li> <li>• Need to determine available buildings and sites within close proximity of interstates and other limited access highways.</li> </ul>
Facilities (Sites & Buildings)	<ul style="list-style-type: none"> <li>• Most companies will refer existing facilities (flex space) in industrial parks or on appropriate stand-alone site.</li> <li>• Larger companies may opt to build on Shovel ready site.</li> </ul>	<ul style="list-style-type: none"> <li>• Need to develop inventory of office space and consider spec building if inventory is very limited.</li> <li>• Make inventory of Shovel Ready building sites throughout the region.</li> </ul>
Utilities	Power and telecom are critical with access to redundancy. Some operations may need gas.	Utilities are adequate for developed areas. Rural areas may have challenges. Power costs are very high for large users.
Labor Skills	<p>Operations typically require technical staff at different levels:</p> <ul style="list-style-type: none"> <li>• Engineering</li> <li>• Skilled labor (machinists)</li> <li>• Semi-skilled that require some OJT</li> <li>• Unskilled support staff</li> </ul>	<p>Engineering staff recruiting can be very competitive (only two schools in the area: UNH-Durham and UMass-Lowell) or recruit up from Boston.</p> <p>Skilled labor is aging and there are few sources for replacements.</p>
Business Support Services	Shipping services, tech support, etc.	A variety of services are available in the region.
Financial/Incentives	Some tax abatements expected primarily for larger operations.	Not a strong point for NH communities.
Quality of Life Attributes	Cost of housing, taxes, school quality, ability to get MBA/advanced degrees, cultural and recreation options and specialized health care services.	Quality of life is quite favorable.

## ■ POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES

### Resource Analysis to Support Target Industries (cont'd)

<b>Target Industry:</b>		<b>Manufacturing of Machinery and Equipment</b>
<b>Description:</b>		Includes electrical/electronic instruments, specialized tools, medical devices, etc.
<b>Resource</b>	<b>Requirements</b>	<b>Assessment/Comments</b>
Transportation Access	<ul style="list-style-type: none"> <li>• Access to regional airport for shipping and periodic business travel.</li> <li>• Reasonable proximity to interstate. Larger operations seek to be closer than smaller operations.</li> </ul>	<ul style="list-style-type: none"> <li>• Regional air access is very good.</li> <li>• Need to determine available buildings and sites within close proximity of interstates and other limited access highways.</li> </ul>
Facilities (Sites & Buildings)	<ul style="list-style-type: none"> <li>• Most companies will refer existing facilities (flex space) in industrial parks or on appropriate stand-alone site.</li> <li>• Larger companies may opt to build on Shovel ready site.</li> </ul>	<ul style="list-style-type: none"> <li>• Need to develop inventory of office space and consider spec building if inventory is very limited.</li> <li>• Make inventory of Shovel Ready building sites throughout the region.</li> </ul>
Utilities	Power and telecom are critical with access to redundancy. Some operations may need gas.	Utilities are adequate for developed areas. Rural areas may have challenges. Power costs are very high for large users.
Labor Skills	<p>Operations typically require technical staff at different levels:</p> <ul style="list-style-type: none"> <li>• Engineering</li> <li>• Skilled labor (machinists)</li> <li>• Semi-skilled that require some OJT</li> <li>• Unskilled support staff</li> </ul>	<p>Engineering staff recruiting can be very competitive (only two schools in the area: UNH-Durham and UMass-Lowell) or recruit up from Boston.</p> <p>Skilled labor is aging and there are few sources for replacements.</p>
Business Support Services	Shipping services, tech support, etc.	A variety of services are available in the region.
Financial/Incentives	Some tax abatements expected primarily for larger operations.	Not a strong point for NH communities.
Quality of Life Attributes	Cost of housing, taxes, school quality, ability to get MBA/advanced degrees, cultural and recreation options and specialized health care services.	Quality of life is quite favorable.

## ■ POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES

### Resource Analysis to Support Target Industries (cont'd)

<b>Target Industry:</b>		<b>Professional, Technical and Scientific Services</b>
<b>Description:</b>	Includes diverse services such as engineering/architectural, design/graphics, software developer, R&D/testing services and business services.	
<b>Resource</b>	<b>Requirements</b>	<b>Assessment/Comments</b>
Transportation Access	<ul style="list-style-type: none"> <li>• &lt;30 minute travel to regional airport.</li> <li>• Large operations: close proximity to interstate.</li> <li>• Small operations: farther from interstate.</li> </ul>	<ul style="list-style-type: none"> <li>• Regional air access is very good.</li> <li>• Need to determine available buildings and sites within close proximity of interstates and other limited access highways.</li> </ul>
Facilities (Sites & Buildings)	<ul style="list-style-type: none"> <li>• Prefer existing facilities in favorable locations.</li> <li>• Some companies will opt to build on Shovel Ready sites.</li> </ul>	<ul style="list-style-type: none"> <li>• Need to develop inventory of office space and consider spec building if inventory is very limited.</li> <li>• Make inventory of Shovel Ready building sites throughout the region.</li> </ul>
Utilities	Power and telecom are critical with access to redundancy.	Utilities are adequate for developed areas. Rural areas may have challenges.
Labor Skills	Will vary by operation and include a variety of technical, scientific and business skills.	<ul style="list-style-type: none"> <li>• Depending on the level of specialization, there may be a need to go beyond UNH-Durham and UMass- Lowell for talent. .</li> <li>• There can be an issue for sourcing experienced talent when the economy tightens.</li> </ul>
Business Support Services	Shipping services, catering for special events, printing, etc.	A variety of services are available in the region.
Financial/Incentives	Some tax abatements may be expected primarily for larger operations.	Not a strong point for NH communities.
Quality of Life Attributes	Cost of housing, taxes, school quality, ability to get MBA/advanced degrees, cultural and recreation options and specialized health care services.	Quality of life is quite favorable.

## ■ POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES

### Resource Analysis to Support Target Industries (cont'd)

<b>Target Industry: Regional Retail</b>		
<b>Description:</b>	Includes major malls and big box retail that services consumers coming from outside the region.	
<b>Resource</b>	<b>Requirements</b>	<b>Assessment/Comments</b>
Transportation Access	• Close proximity to interstate.	• Currently have ideal locations.
Facilities (Sites & Buildings)	• Access to large land sites for future growth.	• Need to develop inventory sites that are appropriate for growth.
Utilities	Power and telecom are critical with access to redundancy and backup power sources.	Utilities are adequate for developed areas.
Labor Skills	Primarily retail service personnel.	Supply tightens as education levels rise.

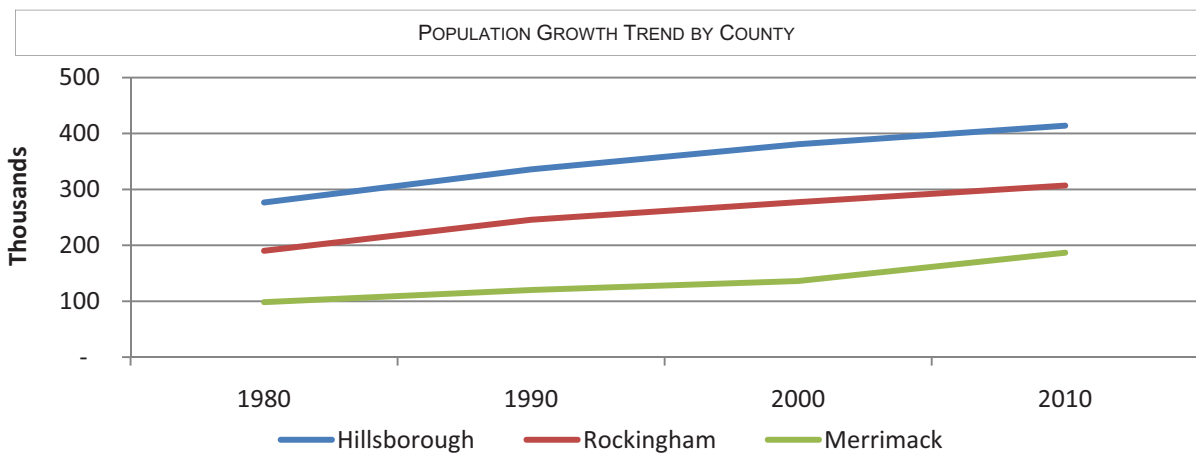
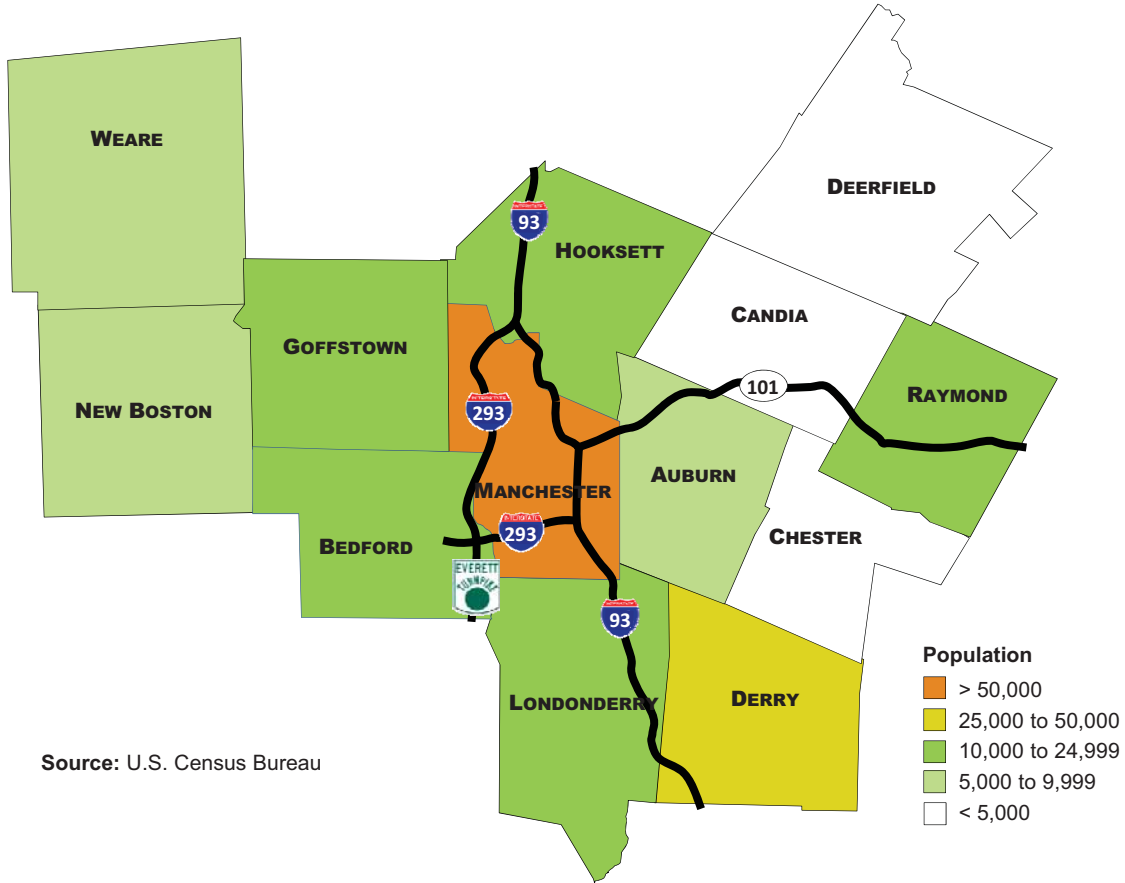
<b>Target Industry: Regional Distribution</b>		
<b>Description:</b>	Large box distribution centers that service a significant geographic area.	
<b>Resource</b>	<b>Requirements</b>	<b>Assessment/Comments</b>
Transportation Access	• Close proximity to interstate.	• Additional sites must be identified with interstate access.
Facilities (Sites & Buildings)	• Access to large land sites for future growth.	• Need to develop inventory sites that are appropriate for growth.
Utilities	Power and telecom are critical with access to redundancy and backup power sources.	Utilities are adequate for developed areas.
Labor Skills	Skilled and non-skilled labor.	Supply is currently adequate.

<b>Target Industry: Regional Health</b>		
<b>Description:</b>	Includes the major hospitals and health networks, local clinics/doctor's offices and all support services.	
<b>Resource</b>	<b>Requirements</b>	<b>Assessment/Comments</b>
Transportation Access	• Close proximity to interstate. • Smaller clinics will be located in more remote areas.	• Existing major hospitals are adequately positioned in the region.
Facilities (Sites & Buildings)	• Expansion in place for existing major facilities. • Smaller sites available for future growth.	• Need to develop inventory sites that are appropriate for growth.
Utilities	General access to utilities. Backup power for smaller facilities is a plus.	Utilities are adequate for developed areas.
Labor Skills	Medical staff: doctors, nurses, technicians, administrative skills.	Supply is currently adequate except for high level specialists and the ongoing challenge of recruiting doctors.

■ POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES

Population Concentration and Growth

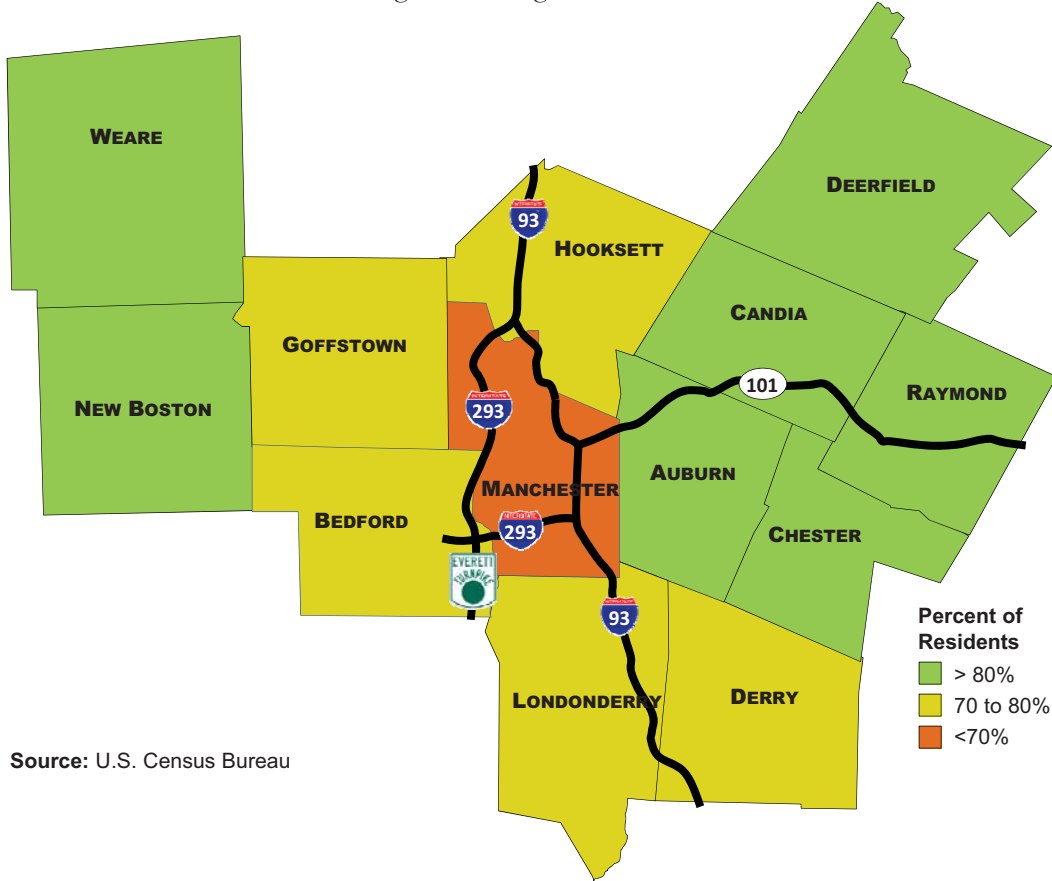
The concentration of population continues to build along the I-93 and Everett Turnpike corridors, particularly in the southern towns nearest to Massachusetts.



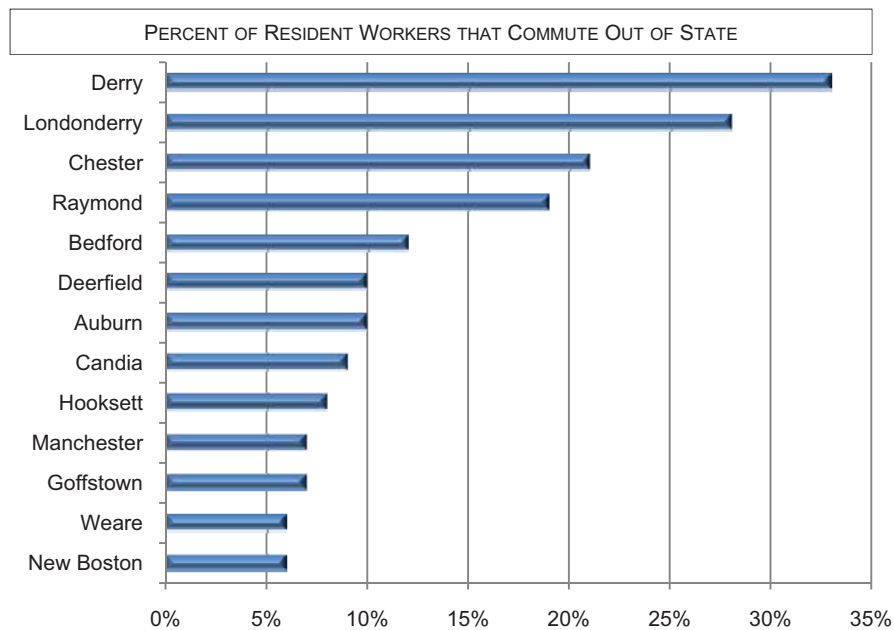
**POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES**

**Population Concentration and Growth**

In the rural communities, over 80% of the working residents leave their towns to work in adjacent communities or down in Massachusetts. Major employers such as Fidelity Investments in Merrimack and BAE Systems in multiple locations attract labor from throughout the region.



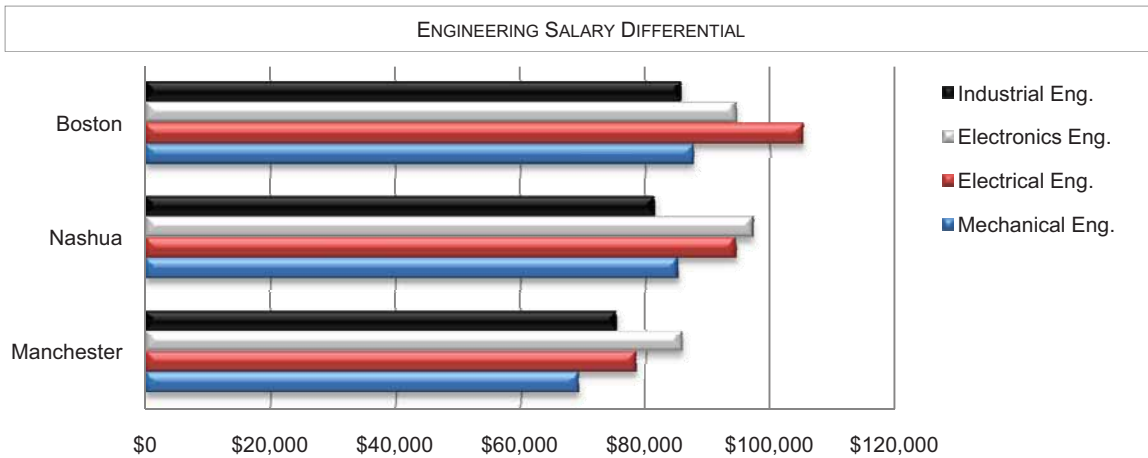
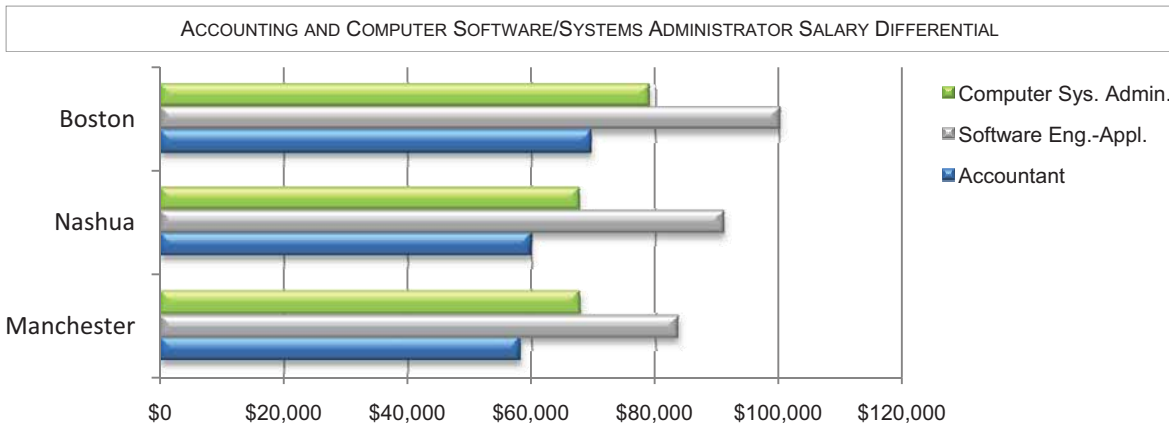
Source: U.S. Census Bureau



■ POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES

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

## ■ POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES

### 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

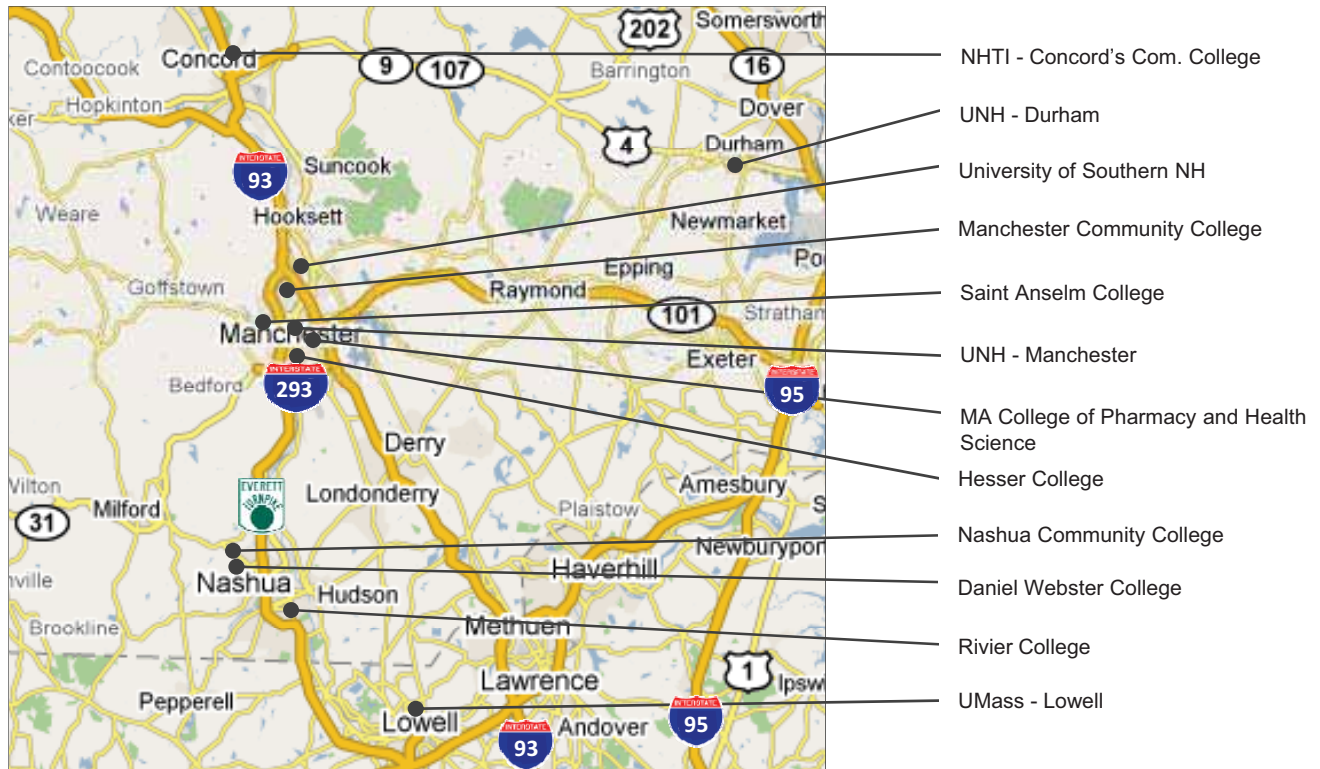
- U.S. Census Bureau and Claritas (demographic data)
- U.S. Department of Labor (union activities and cost of labor)
- U.S. Department of Energy (electric power rates)
- Co-Star and Grubb & Ellis databases (real estate data)



**POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES**

**Education Resources**

Regional colleges and universities with greater than 1,000 students were identified by location and profiled below by their respective level of program offering – from certificate on up to a Doctorate degree. Additional details on the number of students graduating by specific program are provided in Appendix B-1.



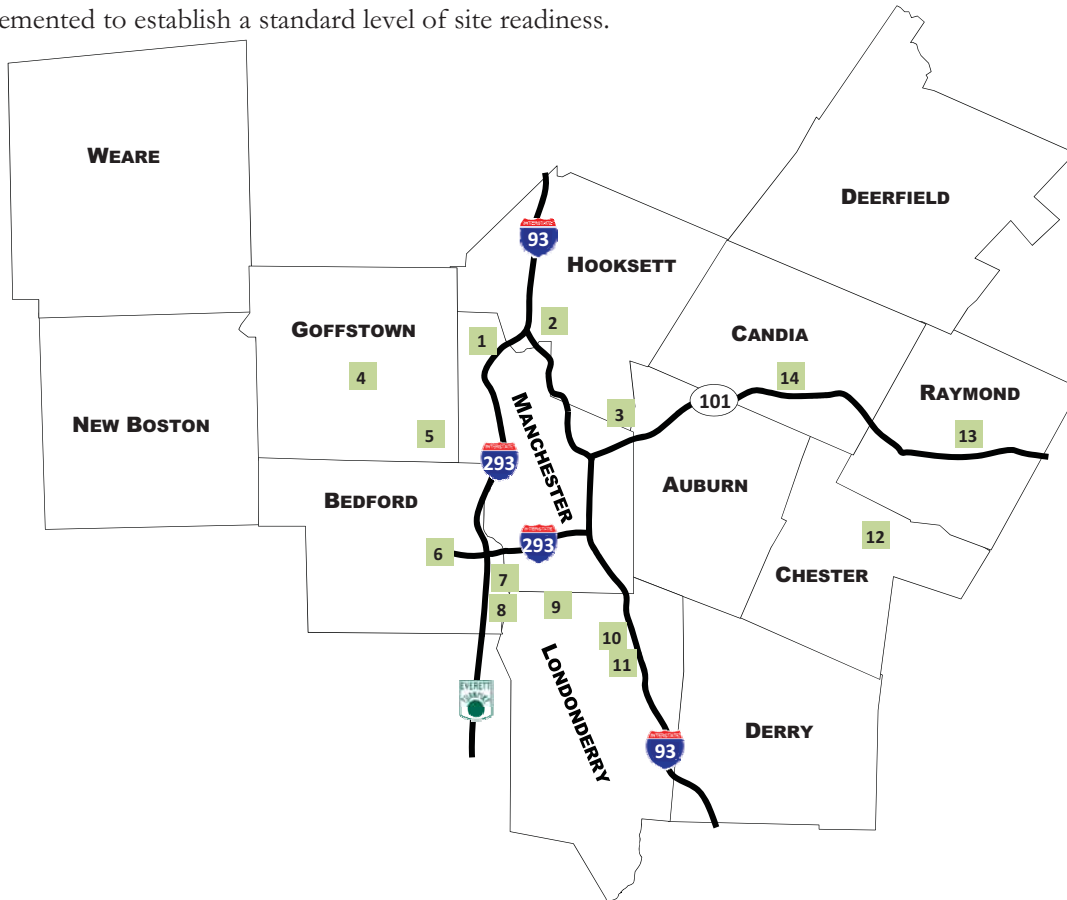
MAJOR COLLEGE/UNIVERSITY ENROLLMENT AND OFFERING OF SELECTED PROGRAMS							
No.	College/University	Enrollment	Business	IT/Computer	Engineering	Nursing/Health-Related	Bio/Chem/BioMed
1	UNH-Durham	14,900	C,A,B,M,D	B,M,D	C,A,B,M,D	C,B,M	B,M,D
2	NHTI-Concord's Com. College	3,650	C,A	C,A	C,A	C,A	
3	UNH-Manchester	1,060	B	B	B	B	
4	Southern NH University	7,000	C,A,B,M,D	C,A,B,M		C,A	
5	Saint Anselm College	1,900	B	B		B	B
6	Hesser College	3,800	A,B	A		A	
8	Manchester Com. College	2,450	C,A	C,A		C,A	
9	Nashua Community College	1,925	C,A	C,A	A	C,A	
10	Daniel Webster College	1,000	A,B,M	B	A,B		
11	Rivier College	3,000	A,B,M	A,B,M		A,B,M	
12	UMass - Lowell	12,500	A,B,M	A,B,M,D	A,B,M,D	B,M,D	B,M,D

Degrees Offered: C = Certificate; A = Associate; B = Bachelor; M = Master; D = Doctor

■ POTENTIAL TARGET INDUSTRIES AND REQUIRED RESOURCES

Major Land Parcels Available (25+ Acres)

There are a significant number of development sites located throughout the region that are at different levels of readiness and cost. An inventory of all sites above 5 acres should be made and a *certified sites* program implemented to establish a standard level of site readiness.



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

## ■ APPENDIX B-1

### Graduates From Area Universities by Program for the 2007/2008 Academic Year



Program	UNH - Durham				UNH - Manchester		Southern NH University				St. Anselm Univ.		Hesser College	
	A	B	M	D	A	B	A	B	M	D	A	B	A	B
Biological/Biomedical		153	12	9	1							26		
Business	55	366	156		4	28	98	717	505	4		107	176	102
Accounting			18				15	81	31			17	39	28
Bus. Admin/Mgmt.		327					78	445	398			69	132	74
International Business								15	24	4		9		
Finance									28			8		
Marketing							3	40	17					
Hospitality Mgmt.		39						94	4					
Operations Mgmt.									3					
Computer/IT						8	13	20	49			6	33	
Engineering		158	44	3		16 T						2		
Chemical		15	4											
Civil		54	9											
Computer		10												
Electrical/Electronics		13	16											
Environmental		11												
Materials			3											
Mechanical		55	9	1										
Polymer/Plastics														
Health-Related		221	124			11			31			64	131	
Nursing		78	33			11						64		
Medical/Clinical Assistant													111	
Clinical Lab Science		9												
Communication Disorders		45	20											
PT/OT		58	55											13
Culinary Arts							31							

A = Associates; B = Bachelor; M = Master; D = Doctorate/PhD

Source: National Center for Educational Statistics

## ■ APPENDIX B-1

### Graduates From Area Universities by Program for the 2007/2008 Academic Year

Program	Daniel Webster College			Rivier College			UMass - Lowell			
	A	B	M	A	B	M	A	B	M	D
<b>Biological/Biomedical</b>					5			41	37	2
<b>Business</b>	2	40	40	1	34	54	5	279	42	
Accounting										
Bus. Admin/Mgmt.	2	11	40		34	53		279	42	
International Business										
Finance										
Marketing		5								
Operations Mgmt.										
<b>Computer/IT</b>		14		1	6	10	10	122	27	2
<b>Engineering</b>	1	7						167	118	9
Chemical								12	10	1
Civil								32	14	
Computer								13	17	
Electrical/Electronics								40	32	
Materials										
Mechanical								48	8	1
Aerospace/Aeronautical		7								
Polymer/Plastics								22	34	5
<b>Health-Related</b>				106	64	8		136	41	31
Nursing				106	64	8		69	17	2
PT/OT									8	29

One of the strongest engineering programs in the region.

A = Associates; B = Bachelor; M = Master; D = Doctorate/PhD

Source: National Center for Educational Statistics

■ APPENDIX B-1

Graduates From Area Universities by Program for the 2007/2008 Academic Year

	NHTI - Concord	Manchester Community College	Nashua Community College
	A	A	A
<b>Biological/Biomedical</b>			
<b>Business</b>	73	38	51
Accounting	19	21	12
Bus. Admin/Mgmt.	42	12	25
International Business			
Finance			
Marketing		4	13
Hospitality Mgmt.	6		
Operations Mgmt.			
<b>Computer/IT</b>	29	11	14
<b>Engineering/Mfg.</b>	65		18
CADD/CAM Drafting			
Chemical			
Civil			
Computer	11		4
Electrical/Electronics	6		3
Electromechanical			3
Mechanical	16		
Machinist			1
Mfg. Technology	13		
Polymer/Plastics			
<b>Health-Related</b>	165	54	
Medical Radiation Tech	3		
Nursing	70	40	
PT/OT			

Nashua is the only college with a machinist program and only one graduate.

A = Associates; B = Bachelor; M = Master; D = Doctorate/PhD

Source: National Center for Educational Statistics

■ APPENDIX B-2

Listing of Manufacturing Firms Within the SNHPC Region With >25 Employees (Page 1 of 4)

Location	Company	Business Description	Year Estab.	Employment
Bedford	Coca-Cola Bottling Co.	Beverage mfg.	1978	45
Bedford	Enviro-Tote	Canvas tote bags	1990	38
Bedford	Ferrotec USA	Adv. materials/components/assemblies	1968	100
Bedford	Graham Packaging	Innovative packaging (beverage containers)	1974	100-249
Bedford	Metronics	High precision measuring tools	1983	30
Bedford	Segway	Innovative transportation products	1999	100-249
Bedford	Technical Research & Mfg.	Microwave components	1970	45
Bedford	Z-Flex	Venting products	1978	35
Candia	High Speed Technologies	Metalworking machinery	1979	25
Chester	Genesis Woodcraft	Wooden house wares	1977	25
Derry	Allen Datagraph	Recording instruments, vinyl cutters/plotters	1980	45
Derry	BE Peterson	Metal fabrication	N/A	100-249
Derry	Biosan Labs	Vitamins, minerals and food supplements	1972	100
Derry	Business Cards Express	Thermographic printer	1985	40
Derry	Derry Publishing	Newspaper publisher	1880	35
Derry	Fireye (Div of United Tech)	Flame safeguard and protection systems	1992	150
Derry	Hawk Quality Products	Machine shop	1977	40
Derry	Martel Electronics	Process control instruments and display panel meters	1983	30
Derry	Merrimack Valley Wood Products	Doors and windows	1949	100
Derry	NEL-Tech Labs	Digital voice systems	1984	26
Derry	Precision Tool & Die	Machine shop, plastic injection molds	1982	45
Derry	Strataflex	Printed circuit boards, flex circuitry, cable assemblies	1993	100
Derry	Vermillion	Graphic design, pre-printing and printing	1976	60
Goffstown	Accurate Brazing Corp	Brazing and heat treating services	1989	45
Goffstown	NH Stamping Company	Metal stamping	1991	27
Goffstown	Northeastern Sheet Metal	Sheet metal fabricators	1975	80
Goffstown	Plastic Techniques	Utility field items and aerial truck equipment	1969	25
Goffstown	NH Steel Fabricators	Steel fabrication	1981	50
Hooksett	Cummings Printing	Printing	1914	105
Hooksett	GE Aircraft Engine	Metal fabrication of aircraft engine parts	1966	650
Hooksett	Manchester Sand/Gravel/Cement	Cement and asphalt aggregates	1933	30
Hooksett	Pike Industries	Asphalt, aggregate crushing operations	1872	120
Hooksett	Poultry Products Northeast	Poultry, meat and cheese processing	1967	250
Hooksett	Sullivan Tire	Tire retreads	1955	30
Hooksett	RG Tombs Door Co	Overhead and hollow metal doors	1978	25

■ APPENDIX B-2

Listing of Manufacturing Firms Within the SNHPC Region With >25 Employees (Page 2 of 4)

Location	Company	Business Description	Year Estab.	Employment
Londonderry	Alcumet	Precision investment casting	1975	95
Londonderry	Blue Seal Feeds	Animal feeds	1868	550
Londonderry	Coca-Cola Bottling Co.	Beverage mfg.	1978	200
Londonderry	Continental Paving	Asphalt, aggregate crushing, sand	1980	200
Londonderry	CTS Electronics	Electronic component manufacturing	N/A	100-249
Londonderry	Donovan Equipment Co.	Truck body repair, metal fabrication, dump truck bodies	1953	58
Londonderry	Felton Brush	Industrial brushes and nylon brush weather stripping	1852	78
Londonderry	Fiberkraft	Paper converter (envelopes, folders and paper)	1971	35
Londonderry	Anthony Galluzzo Company	Architectural millwork, casework and moldings	1972	31
Londonderry	Granite State Plastics	Injection molding and printing assemblies	1969	32
Londonderry	Harvey Building Products	Vinyl, wood and aluminum windows and doors	1961	350
Londonderry	Insight Technology	Night vision/electro-optical weapons systems	1990	250-499
Londonderry	Kluber Lubrication NA (German)	Speciality oils and greases	1983	40
Londonderry	Laurier Inc.	Hybrid die and semiconductor sorting equipment	1970	40
Londonderry	Linear and Metric Co.	CNC milling and turning	1975	25
Londonderry	Metal Works, Inc.	Precision sheet metal fabrication	1985	68
Londonderry	Micro Metrics	Microwave semi-conductors	1986	54
Londonderry	NH Precision Metal Fabricators	Sheet metal fabricators, sub assembly, powder coating	1983	75
Londonderry	Northern Electronics	Automation systems and equipment	1988	30
Londonderry	Nu-Cast	Aluminum casting and machining	1985	120
Londonderry	Omni Services	Hydraulic hose assembly, adapters and fittings	1978	70
Londonderry	Stonyfield Farms	Yogurt, ice cream	1983	310
Londonderry	Uni-Cast	Non-ferrous investment castings	1968	140
Londonderry	Vibro-Meter (English Co.)	Aircraft instruments, monitor/sense equip., fire detect.	1922	250
Londonderry	Wire Belt Co. of America	Conveyor belt, wire mesh belts, conveyors	1947	100
Londonderry	Workplace Systems	Steel workplace and vocational/lab furniture	1947	45
Manchester	ACL Industries	Metal and aluminum ladders and stair treads	2000	25
Manchester	API of NH	Heating equipment and supplies	1979	75
Manchester	Admix	Mixing and agitation	1989	30
Manchester	Aggregate Industries	Concrete products	1948	25
Manchester	Budd Foods	Baked chicken pies	1955	125
Manchester	CADEC	On-board vehicle computers	1976	50
Manchester	Celestica	Electronics for computer and communications	1939	60
Manchester	Coca-Cola Bottling Co.	Beverage manufacturing	~1975	50
Manchester	Control Technologies	Air conditioning/heating mfg. and installations	1990	70

■ APPENDIX B-2

Listing of Manufacturing Firms Within the SNHPC Region With >25 Employees (Page 3 of 4)

Location	Company	Business Description	Year Estab.	Employment
Manchester	Counter Pro	Counter tops	1988	30
Manchester	Cushcraft Corp.	Aluminum antennas	1955	90
Manchester	EPE Corporation	Manufacturers of printed circuit boards	1968	100
Manchester	Electropac	Printed circuit boards	1976	104
Manchester	Empire Sheet Metal	Sheet metal work	1972	25
Manchester	FCI - Bundy Products (French)	Electric connectors	1924	175
Manchester	Freed's Bakery	Baked goods	1921	125
Manchester	Vibracoustics (Freudenberg-NOK)	Automotive vibration control products	~1990	N/A
Manchester	GTI Spindle Technology	Acoustic control systems	1997	50
Manchester	General Cable	Electronic wire and cable	1973	200
Manchester	Gentex Corporation	Communication microphones	1975	150
Manchester	Granite State Mfg.	Electro-mechanical assemblies, machinery, automation	1938	100
Manchester	H&O Dental Lab	Dental labs	1945	135
Manchester	Hitachi Cable Manch. (Japanese)	Optical fiber cables	1986	170
Manchester	IEMS	Printed circuit boards	2005	25
Manchester	Intelitek	CNC training/prototype lathes and milling systems	1982	47
Manchester	Jewell Instruments	Panel meters, control meters, sensors for avionics	1969	150
Manchester	KRL Bantry Components	Power resistors and temperature sensors	1985	75
Manchester	Kalwall Corporation	Wall panels and solar applications	1955	400
Manchester	Keller Products	Wooden drum shells, plastic profile extrusions, etc.	1942	70
Manchester	Ladescos	Custom coil winding	1973	50
Manchester	Manchester/Blake's Creamery	Ice cream	1900	100
Manchester	Miraco	Connections for printed circuits	1987	25
Manchester	New England Brace Co.	Orthotic and prosthetic devices	1947	28
Manchester	NH Plastics	Plastic sheet extrusion/co-extrusion, color conc.	1971	100
Manchester	Northstar Direct	Commercial printing	2004	25
Manchester	Nycoa-Nylon Corp. (French)	Nylon resins	1962	64
Manchester	Osram-Sylvania (German)	HID Lamps	1959	500
Manchester	PGM of New England	Machine shop	2000	57
Manchester	Pepsi Bottling Company	Beverage mfg.	N/A	130
Manchester	RCD Components	Resistors, molded induction coils, capacitors	1973	110
Manchester	RR Donnelley	Printed forms and labels	1982	130
Manchester	Rockwell Int'l/Allen-Bradley	Photo electric cont., proximity/limit switches, software	N/A	250
Manchester	Sanmina-SCI Corporation	Assembly, test and packaging of printed circuit boards	1995	250
Manchester	Schleuniger (Swiss)	Coax cable, semi-rigid cable, fiber optic cable	1988	55



■ APPENDIX B-2

Listing of Manufacturing Firms Within the SNHPC Region With >25 Employees (Page 4 of 4)

Location	Company	Business Description	Year Estab.	Employment
Manchester	SP Sercel Associates	Robots for assembly line and commercial/industrial	1994	50
Manchester	Skylight Roofing	Sheet metal work, rubber roofing and copper work	1986	30
Manchester	Structures Unlimited	Skylights	1968	60
Manchester	Summit Packaging Systems	Aerosol valves (custom molding)	1976	350
Manchester	Suntron	Contract printed circuit board assembly	1989	80
Manchester	Swanson's Die Company	Die makers	1949	25
Manchester	Sylvester Sheet Metal	Sheet metal fabrication	1971	25
Manchester	Symmetry Medical Poly-Vac	Injection molded products for the operating room	1982	160
Manchester	Teletrol Systems	Automated temp and building controls, software	1987	45
Manchester	Temco Tool Company	Precision 5-axis machining	1963	40
Manchester	Textiles Coated	Coated PTFE glass fabrics, silicone coated, PTFE lam.	1985	100
Manchester	AW Therrien	Sheet metal for roofing	1937	35
Manchester	VHG	Industrial chemicals	1987	45
Manchester	Velcro USA (Danish)	Velcro brand fasteners	1957	500
Raymond	Aggregate Industries	Quarry and concrete	1988	40
Raymond	Gemini Valve	Ball valves	1974	50
Raymond	Infinity Constructors	Construction machinery	1996	30
Weare	Northland Tool and Electronics	Spindle repair, printed circuit board repair, ind. mach.	1984	50

SECTION

C

Southern New Hampshire Regional Planning Commission

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TARGET INDUSTRY ANALYSIS  
BY CITY/TOWN

## ■ TARGET INDUSTRY ANALYSIS BY CITY/TOWN

### GENERAL DISCUSSION

In Section B, ten (10) industry categories/sectors were identified as potential target industries to support the region's economy. In this section, the target industries are applied to each city/town within the SNHPC region (see page C-2). It should be pointed out that due to local conditions (remoteness from a limited access highway and workforce concentration) a given industry may not be suitable for every city/town or they may need to be scaled down in size.

There are two (2) pages for each city/town with the first page providing basic statistics, land use map and aerial photos of strategic locations. The second page provides an overview of the local situation along with the current presence of employers within each industry category and the potential target industries for the town/city for economic growth.

### Comments on Each Industry Category/Sector

- **Back Office/Shared Services/Customer Contact Centers:** These types of operations typically seek low cost locations (vs. higher cost headquarters locations), often prefer existing facilities to minimize start-up costs and have the ability to negotiate price for purchase or lease. Larger (>100 employees) operations are typically located near limited access highways in more populated areas to assure access to labor. There may be circumstances (smaller operations with local owners) when the facility is located remotely away from the limited access highway.
- **Headquarters Operations:** Headquarters will most likely reside along the Everett Turnpike and near the Manchester Airport in well designed office parks with access to restaurant, shopping and hotel amenities.
- **Manufacturing:** The size of the operation will dictate how far from a limited access highway it would choose to reside. Some companies prefer certified land ready for development while others seek out existing buildings – particularly flex buildings that are easily adapted and expandable.
- **Professional, Scientific and Technical Services:** Some operations will be home/farm based in more remote areas (that have internet access) while others will seek multi-tenant office space to accessible areas.
- **Regional Retail, Health Care and Warehousing:** Each segment requires a different location strategy and will grow in proportion to the area population and its demographic profile.
- **Tourism-Related:** There is an opportunity for the different outdoor, museum, cultural/arts and shopping options to be packaged with hospitality and an expanded Bed & Breakfast network to make this area a stronger destination location.
- **Agriculture-Related:** Farms throughout the U.S. have developed destination options that include the addition of a bakery, sandwich shop, ice cream parlor, multi-product farm stand, petting zoo, activity center, horse training center, etc. to increase sales and profits. They have also offered certain items over the internet to maintain interaction with their customer base.

## ■ TARGET INDUSTRY ANALYSIS BY CITY/TOWN

### Application of Target Industries to Individual Communities

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	■		■	■	■	■	■	■			■	■	■

(1) Rural community without limited access highway. Smaller scale operations would be more appropriate in these towns.

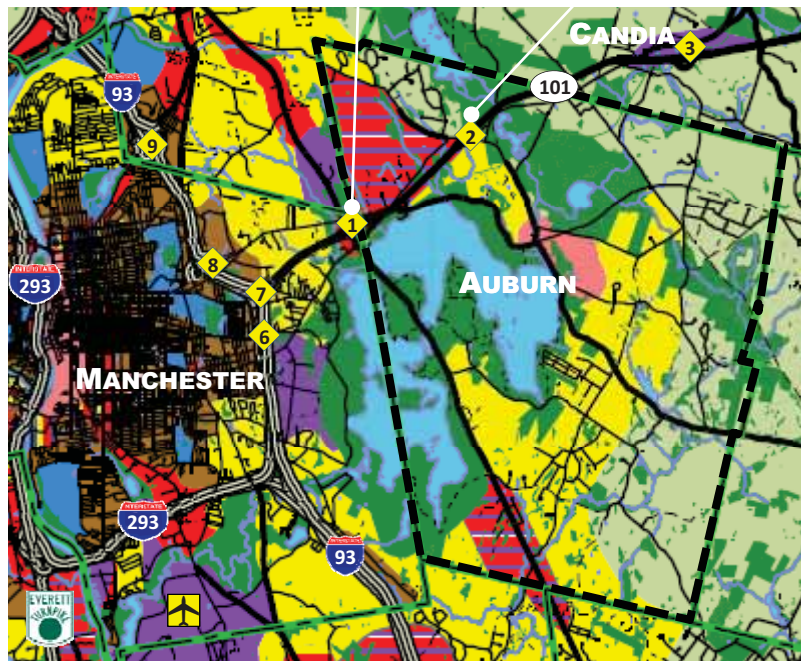
The identification of a target industry for a specific community does not guarantee success. The community must assure that the right resources are in place and the location is properly marketed.

■ TARGET INDUSTRY ANALYSIS BY CITY/TOWN

TOWN OF AUBURN

General Statistics

Population (2008 est.): 5,085	% Adult Population With 4-Yr.+ Degree: 27% (U.S. average: 27%)
Median Age: 36.8 (U.S. average: 35.3)	% Population Over 65: 6.1% (U.S. average: 12.4%)
Population Density: 200 residents/sq. mi.	Per Capita Income (2000 Census): \$28,405 (U.S. average: \$21,587)
% Residents Commute to Other Community: 87%	Direct Access to Interstate/Limited Access Highway: Yes (2 exits)



- 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 AUBURN (CONT'D)**

**Overall Observations and Comments on Target Industries**

The town is located due east on the City of Manchester with direct access to Route 101 via Exits 1&2 and in close proximity to I-93. There is substantial lakes/conservation areas within the town and two (2) mixed use commercial/industrial areas. The majority of working residents leave the town for jobs and the adult population has a four-year+ level of education (27%) that is at the national average.

The town does not have a substantial business presence but there are opportunities to develop sites between Exits 1 & 2 of Route 101 that could be utilized for manufacturing, smaller back office operations as well as offices for professional, technical and scientific services. Planning for the area should include some retail and restaurant presence to support the employees as well as local residents.

CURRENT EMPLOYERS BY ECONOMIC LEVEL AND INDUSTRY WITH NOTATION OF POTENTIAL TARGET INDUSTRIES		
Economic Sector	Auburn	Existing Employers
<b>Level 1 - Primary Industries</b>		
Agriculture/Forestry	■	Family farms on eastern portion of town.
State/Federal Government	■	Post office
Manufacturing		
Colleges/University/Training		
Back Office/Shared Services		
Prof./Tech/Scien. Services	■	Sunrise Labs (product development), Woodward & Curran, Alliance Technology
Regional Healthcare		
Regional Retail		
Regional Distribution		
Tourism-Related		
Headquarters		
<b>Level 2 – Business Support Services</b>	Construction services (blasting, electrical, drywall, blacktop sealers, HVAC, plumbing, etc.), security services, energy services	
<b>Level 3 - Consumer Services</b>	Restaurants, healthcare services and local government.	

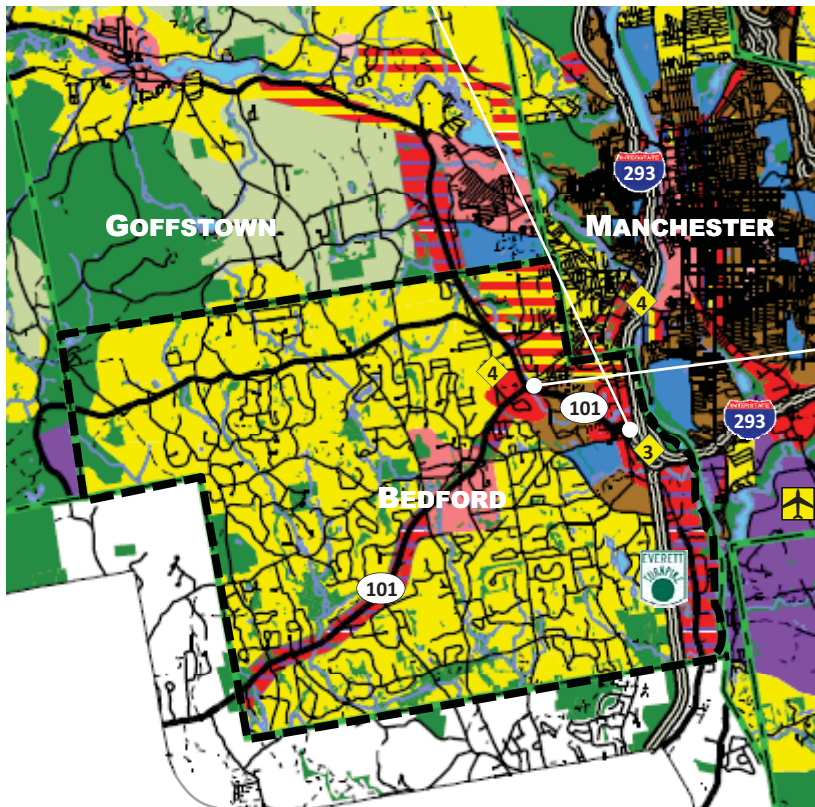
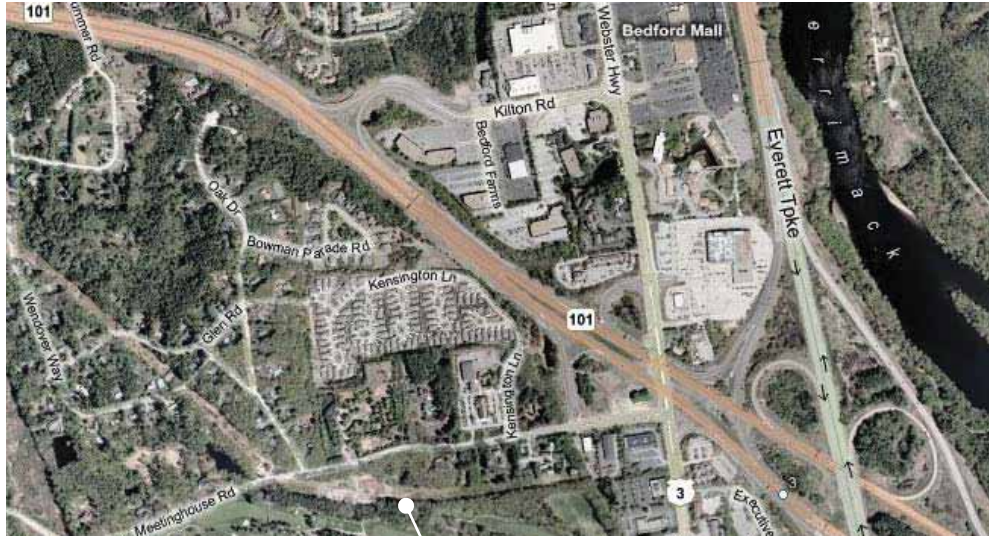
■ Existing Industry      ■ Potential Opportunities

■ TARGET INDUSTRY ANALYSIS BY CITY/TOWN

**TOWN OF BEDFORD**

General Statistics

Population (2008 est.): 20,800	% Adult Population With 4-Yr.+ Degree: 49.3% (U.S. average: 27%)
Median Age: 39.2 (U.S. average: 35.3)	% Population Over 65: 11.5% (U.S. average: 12.4%)
Population Density: 636 residents/sq. mi.	Per Capita Income (2000 Census): \$37,730 (U.S. average: \$21,587)
% Residents Commute to Other Community: 74%	Direct Access to Interstate/Limited Access Highway: Exit 3, Everett Tpk



- 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 BEDFORD (CONT'D)**

**Overall Observations and Comments on Target Industries**

The town is located southeast of the City of Manchester along the Route 3/Everett Turnpike corridor with access to Route 101 and I-293. It has the highest per capita income of the region and a very high percentage of the adult population has four-year+ college degrees (49.3%). Nearly three quarters of the working population commutes out of the town for work. The town is host to the Bedford Mall, a regional retail center. Much of the land within the town has been developed for medium density residential. There are some parcels available for future business development but most are relatively small in size.

Opportunities for future economic growth will be mostly small footprint buildings for headquarters, back office operations and for professional, technical and scientific services. There may be some areas appropriate for manufacturing of parts, components, equipment or medical devices.

Ferrotec makes seals for multiple applications



Bedford is home to the Segway Personal Transporter



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

Economic Sector	Bedford	Existing Employers
<b>Level 1 - Primary Industries</b>		
Agriculture/Forestry		
State/Federal Government	■	Post Office
Manufacturing	■	Segway, Graham Packaging, Ferrotec, etc.
Colleges/University/Training		
Back Office/Shared Services	■	Liberty Mutual Insurance
Prof./Tech/Scien. Services	■	Normandeau Associates
Regional Healthcare	■	Nursing homes and assisted living
Regional Retail	■	Wal-Mart, Target, Macy's, Lowe's, Super Stop & Shop, etc.
Regional Distribution		
Tourism-Related		
Headquarters		
<b>Level 2 – Business Support Services</b>		Hospitality industry, construction services,
<b>Level 3 - Consumer Services</b>		Local retail, education services and local government.

■ Existing Industry      ■ Potential Opportunities



■ 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
<b>Level 1 - Primary Industries</b>		
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		
<b>Level 2 – Business Support Services</b>	Severino Trucking, American Oil Burner Services, Sunbelt Rentals, communications, farm equipment retailers, Candia Trailers, Blastech (construction), Hydro Grass, cleaning services	
<b>Level 3 - Consumer Services</b>	Education services and local government.	

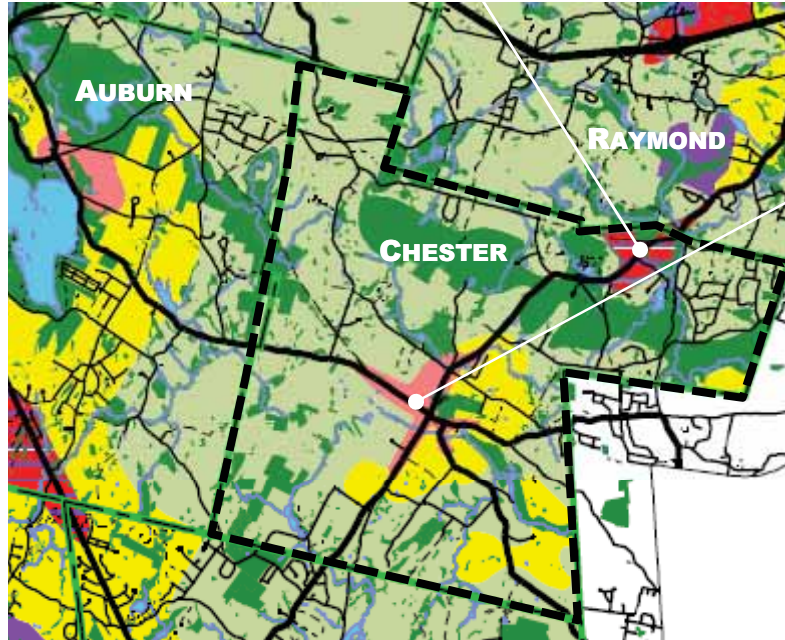
■ Existing Industry      ■ Potential Opportunities

■ TARGET INDUSTRY ANALYSIS BY CITY/TOWN

**TOWN OF CHESTER**

General Statistics

Population (2008 est.): 4,620	% Adult Population With 4-Yr.+ Degree: 31.1% (U.S. average: 27%)
Median Age: 35.7 (U.S. average: 35.3)	% Population Over 65: 6.1% (U.S. average: 12.4%)
Population Density: 178 residents/sq. mi.	Per Capita Income (2000 Census): \$23,842 (U.S. average: \$21,587)
% Residents Commute to Other Community: 84%	Direct Access to Interstate/Limited Access Highway: No (I-93 is 7 mi.)



- 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 CHESTER (CONT'D)**

**Overall Observations and Comments on Target Industries**

The town is in a rural setting with low population density, located seven miles east of I-93. Adult population has a high (31%) four-year+ education attainment level and 84% of working population leaves the town to work – over 20% travel to Massachusetts each day. The town has a variety of family farms, some manufacturing as well as technical services companies.

Due to its location away from limited access highway, the town should continue to attract small manufacturers, small professional/technical services firms and additional agricultural and tourism destinations. A significant portion of technical services and other consulting businesses may work from a home office.

Stone Machine makes complex metal parts.



Senator Bell Horse Farm.

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

Economic Sector	Chester	Existing Employers
<b>Level 1 - Primary Industries</b>		
Agriculture/Forestry	■	Family farms, Senator Bell Farm, Jackson Farm
State/Federal Government	■	Post office
Manufacturing	■	Genesis Woodcraft, Stone Machine Company, Carp Industries
Colleges/University/Training	■	Chester College of New England
Back Office/Shared Services		
Prof./Tech/Scien. Services	■	SWS Consulting, Crawford Software Consulting, Dann Norris Batting Architects
Regional Healthcare		
Regional Retail		
Regional Distribution		
Tourism-Related		
Headquarters		
<b>Level 2 – Business Support Services</b>		JR Pepper Electric, realtors, mailing services, water and fire damage services
<b>Level 3 - Consumer Services</b>		Local retail and restaurants and local government.

■ Existing Industry      ■ Potential Opportunities

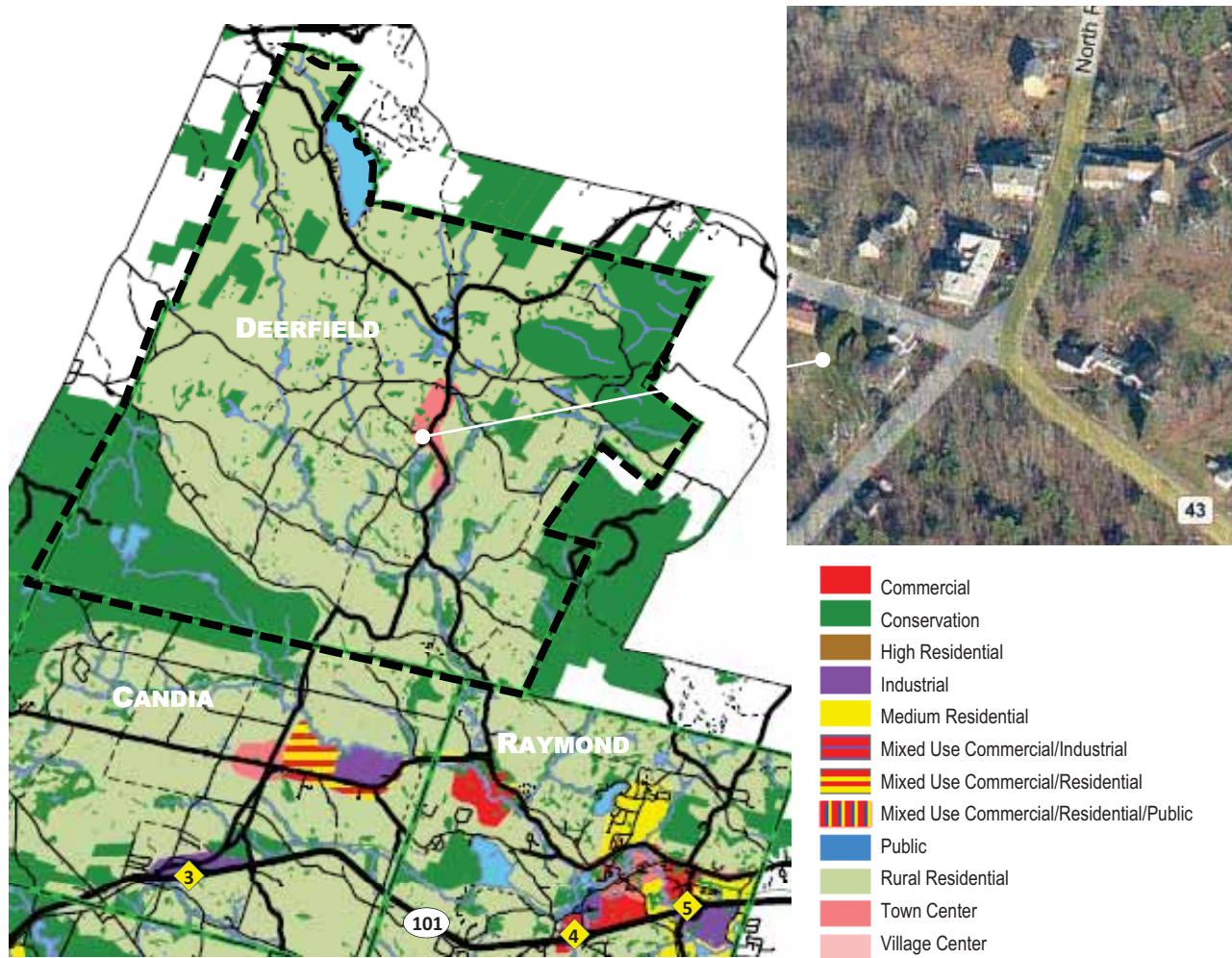
**Note:** Due to remoteness from limited access highway, manufacturing operations may be smaller in size (many may be home based).

■ TARGET INDUSTRY ANALYSIS BY CITY/TOWN

**TOWN OF DEERFIELD**

General Statistics

Population (2008 est.): 4,366	% Adult Population With 4-Yr.+ Degree: 31.7% (U.S. average: 27%)
Median Age: 36.2 (U.S. average: 35.3)	% Population Over 65: 6.9% (U.S. average: 12.4%)
Population Density: 85.6 residents/sq. mi.	Per Capita Income (2000 Census): \$24,160 (U.S. average: \$21,587)
% Residents Commute to Other Community: 84%	Direct Access to Interstate/Limited Access Highway: No



■ TARGET INDUSTRY ANALYSIS BY CITY/TOWN

**TOWN OF DEERFIELD (CONT'D)**

**Overall Observations and Comments on Target Industries**

The town is a low density, rural city/town with some agriculture (livestock, dairy and nursery) and primarily inhabited with adults having above average education levels that commute out of the town for work. Having no direct access to an interstate or limited access highway has some limitations for attracting larger businesses that need interstate access. This will be less of an issue for smaller businesses (<25 employees) that will locate based on the needs and desires of the owner. The town also has a significant portion of its land designated as conservation area, with the major land tracts being state parks.

Most likely candidates for economic growth are agriculture-related and tourist-related destinations and some small manufacturing operations – possibly in a home/farm-based situation.

Van Berkum Wholesale Nursery



CURRENT EMPLOYERS BY ECONOMIC LEVEL AND INDUSTRY WITH NOTATION OF POTENTIAL TARGET INDUSTRIES		
Economic Sector	Deerfield	Existing Employers
<b>Level 1 - Primary Industries</b>		
Agriculture/Forestry	■	Family farms, Van Berkum Wholesale Nursery, Deerfield Fair
State/Federal Government		Post office and state park personnel
Manufacturing		
Colleges/University/Training		
Back Office/Shared Services		
Prof./Tech/Scien. Services		
Regional Healthcare		Inn at Deerfield (retirement center)
Regional Retail		Country Berries (home/garden goods)
Regional Distribution		
Tourism-Related		
Headquarters		
<b>Level 2 – Business Support Services</b>	J&D Power Company (industrial equipment), East Coast Signals (traffic control installation) and multiple construction companies.	
<b>Level 3 - Consumer Services</b>	Convenience store, family restaurant and a few other retail and service employers. Residents must leave the town for most shopping requirements. Local government.	

■ Existing Industry      ■ Potential Opportunities

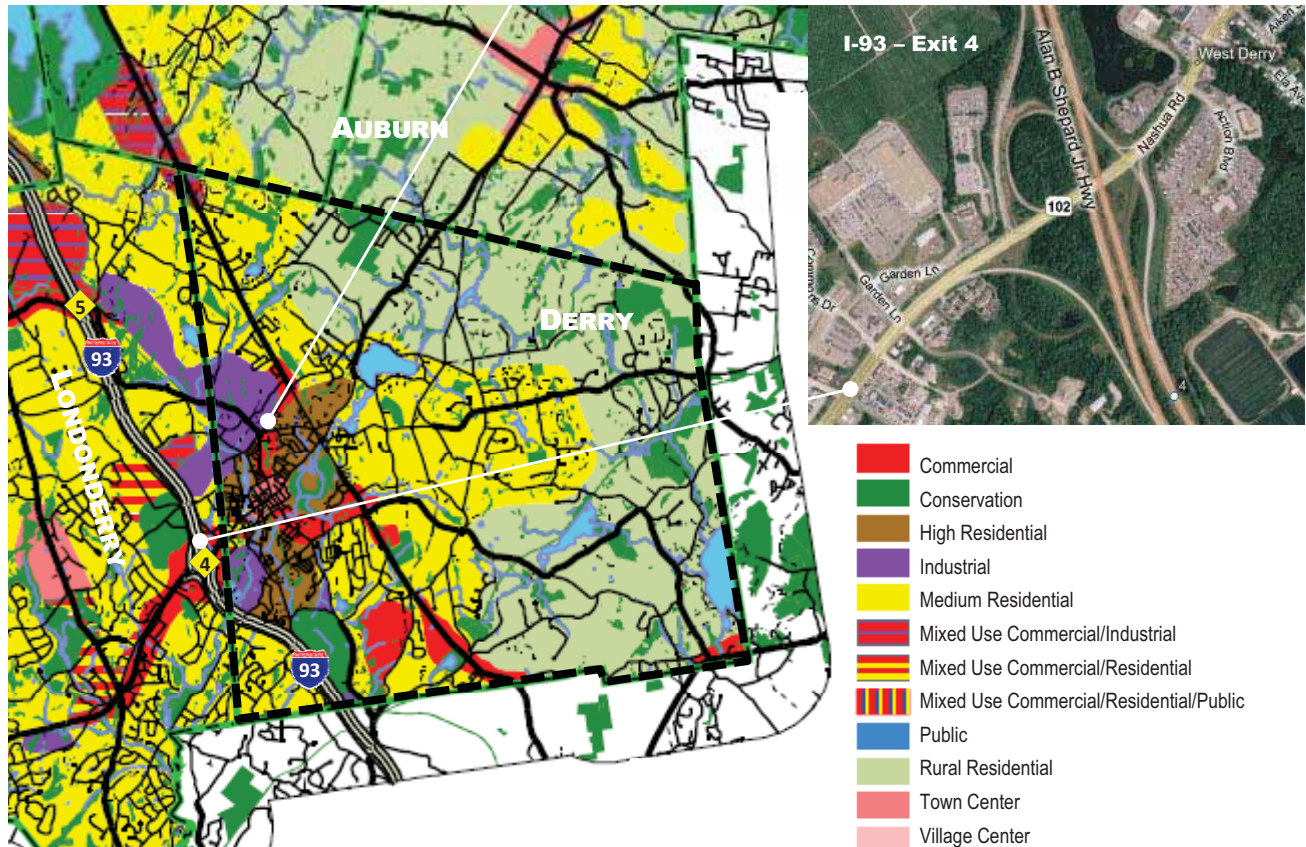
**Note:** Due to remoteness from limited access highway, manufacturing and prof/technical services operations may be smaller in size.

■ TARGET INDUSTRY ANALYSIS BY CITY/TOWN

**TOWN OF DERRY**

General Statistics

Population (2008 est.): 34,070	% Adult Population With 4-Yr.+ Degree: 26.3% (U.S. average: 27%)
Median Age: 33.6% (U.S. average: 35.3%)	% Population Over 65: 6.2% (U.S. average: 12.4%)
Population Density: 966 residents/sq. mi.	Per Capita Income (2000 Census): \$22,315 (U.S. average: \$21,587)
% Residents Commute to Other Community: 80%	Direct Access to Interstate/Limited Access Highway: Near I-93, Exit 4



■ TARGET INDUSTRY ANALYSIS BY CITY/TOWN

**TOWN OF DERRY (CONT'D)**

**Overall Observations and Comments on Target Industries**

The town is located just east of Londonderry and southeast of the City of Manchester. Population of over 34,000 makes it the second largest jurisdiction in the SNHPC region behind the City of Manchester. There is access to both exits 4 & 5 off I-93 and the town has zoned industrial lands on the western section near I-93. There town has both medium and high density residential as well as rural areas. Education attainment for adults is at 26.3% (slightly below national average) and 80% of residents leave the town to work.

Future economic growth can be derived from additional high value manufacturing operations, possibly a back office/shared services operation if the right location is set aside, and some enhanced family farms with destination attractions (small restaurant, direct sale of dairy products, ice cream, etc.)



Vermillion Printers



Fireye Burner Controls

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

Economic Sector	Derry	Existing Employers
<b>Level 1 - Primary Industries</b>		
Agriculture/Forestry	■	Family farms
State/Federal Government	■	Post office
Manufacturing	■	Fireye, BE Peterson, Cedar Point Communications
Colleges/University/Training	■	Pinkerton Academy
Back Office/Shared Services		
Prof./Tech/Scien. Services		
Regional Healthcare	■	Several clinics, nursing homes and assisted living centers
Regional Retail		
Regional Distribution		
Tourism-Related		
Headquarters		
<b>Level 2 – Business Support Services</b>	Communications companies,	
<b>Level 3 - Consumer Services</b>	Local retail (Wal-Mart, Hannaford, Shaw's Supermarket. etc.), education services, healthcare and local government.	

■ Existing Industry      ■ Potential Opportunities

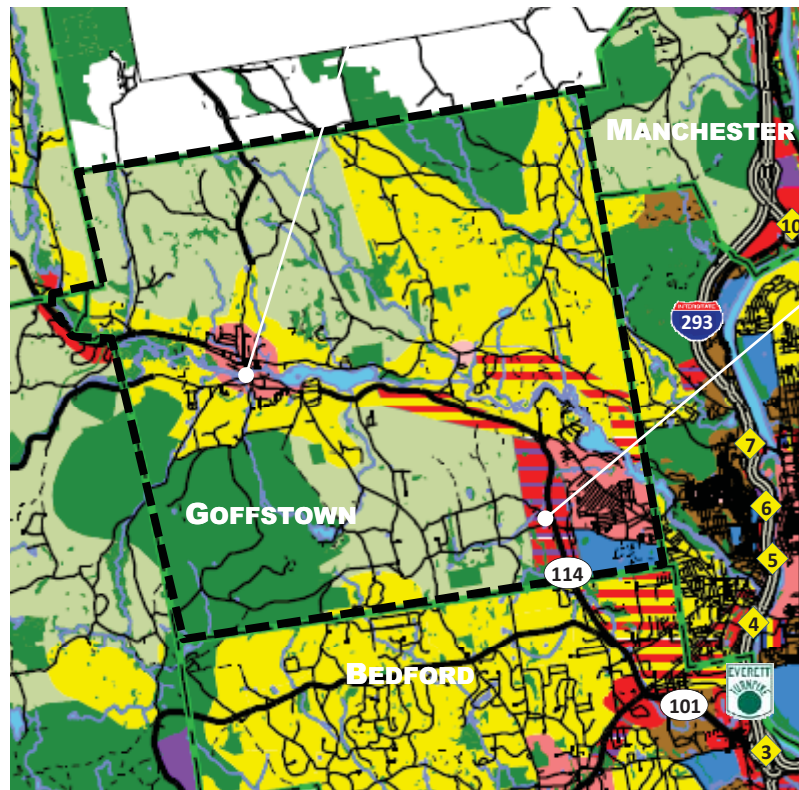


■ TARGET INDUSTRY ANALYSIS BY CITY/TOWN

**TOWN OF GOFFSTOWN**

General Statistics

<b>Population (2008 est.):</b> 17,600	<b>% Adult Population With 4-Yr.+ Degree:</b> 25.2% (U.S. average: 27%)
<b>Median Age:</b> 35.4 (U.S. average: 35.3)	<b>% Population Over 65:</b> 6.9% (U.S. average: 12.4%)
<b>Population Density:</b> 476.8 residents/sq. mi.	<b>Per Capita Income (2000 Census):</b> \$21,907 (U.S. average: \$21,587)
<b>% Residents Commute to Other Community:</b> 78%	<b>Direct Access to Interstate/Limited Access Highway:</b> 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 GOFFSTOWN (CONT'D)**

**Overall Observations and Comments on Target Industries**

The Town of Goffstown is located just west of the City of Manchester, and also has an industrial heritage derived for textile and other mill activities along the Piscataquog River. Nearly 80% of the town’s working residents leave the town for work in adjacent communities. Although portions of the town have already been developed, there are available parcels in its central area, at its southeast corner, and its eastern edge that are zoned for industrial and commercial uses. The town has direct access to a limited access highway and is within a few miles of exit 3 of the Everett Turnpike via Route’s 101 and 114.

The town has some manufacturing presence along with nursing homes and a state prison for women. For the future, there is an opportunity to attract additional small to medium size manufacturing if facilities are available. There is also potential for small back office operations (<50 employees initially) if a facility is available as well as expand destination options for tourism and agriculture.



New Hampshire Stamping Company

CURRENT EMPLOYERS BY ECONOMIC LEVEL AND INDUSTRY WITH NOTATION OF POTENTIAL TARGET INDUSTRIES		
Economic Sector	Goffstown	Existing Employers
<b>Level 1 - Primary Industries</b>		
Agriculture/Forestry	■	Family farms, Lemay and Sons
State/Federal Government	■	Women’s Prison, US Post Office, NH Liquor Store
Manufacturing	■	Northeast Metal Fabrication, Accurate Brazing Co., NH Stamping Co., etc.
Colleges/University/Training		St. Anselm College
Back Office/Shared Services		
Prof./Tech/Scien. Services	■	Retlif Testing Labs and McClellan Automation
Regional Healthcare	■	Hillsborough County Nursing Home, Catholic Medical Center Regional Clinic and Upreach Therapeutic Riding Center
Regional Retail	■	Uncanoonuc Mountain Perennials, Pro Landscape, Shaw’s Supermarket, Hannafords Market
Regional Distribution		
Tourism-Related	■	Stonebridge Country Club, Goffstown Rail Trail, Uncanoonuc Mountain trails
Headquarters		Goffstown Truck Center
<b>Level 2 – Business Support Services</b>		Trucking services, cleaning services, accounting, architectural and engineering, banking, computer services, and construction contractors
<b>Level 3 - Consumer Services</b>		Education/day care services, real estate, restaurants, local retail, landscaping, communications, personal services, and local government.

■ Existing Industry      ■ Potential Opportunities

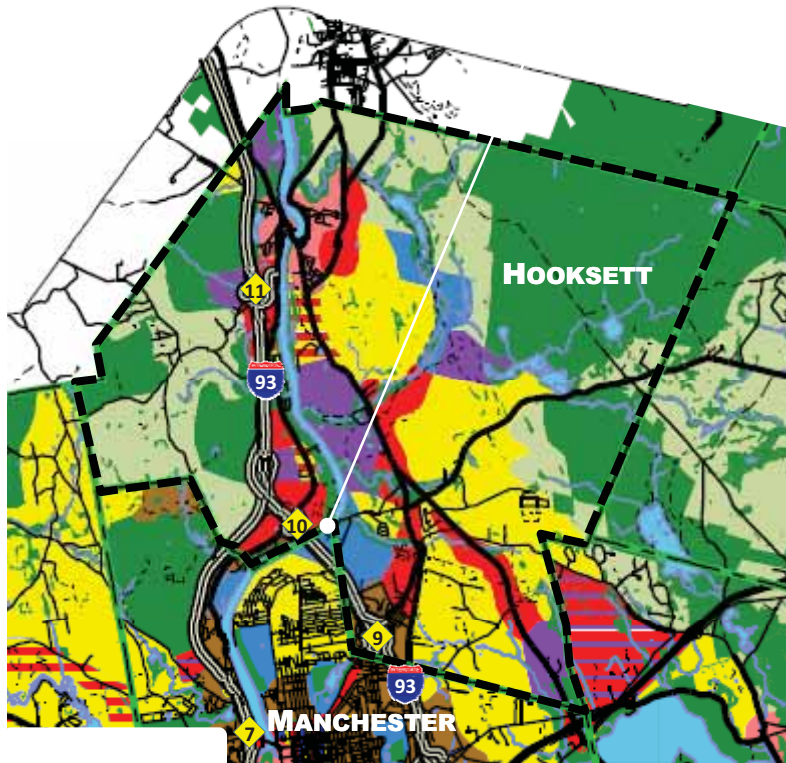
**Note:** Due to available property sizes, back office, manufacturing and professional/technical services operations may be smaller in size (some may be home based).

■ TARGET INDUSTRY ANALYSIS BY CITY/TOWN

**TOWN OF HOOKSETT**

General Statistics

Population (2008 est.): 13,480	% Adult Population With 4-Yr.+ Degree: 29.4% (U.S. average: 27%)
Median Age: 35.3 (U.S. average: 35.3)	% Population Over 65: 9.1% (U.S. average: 12.4%)
Population Density: 365 residents/sq. mi.	Per Capita Income (2000 Census): \$24,629 (U.S. average: \$21,587)
% Residents Commute to Other Community: 79%	Direct Access to Interstate/Limited Access Highway: I-93/Route 101



- 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 HOOKSETT (CONT'D)**

**Overall Observations and Comments on Target Industries**

The town is located due north of the City of Manchester where I-93 and I-293 converge. Access to the town is through three exits (9-11) onto I-93. It is also in close proximity to exit 1 on Route 101. Hooksett has a diverse economic based comprised of manufacturing, back office operations, education and regional retail. It also has direct access to Bear Brook State Park on the east side of the town. While labor for local employers can be drawn from a broad area it all directions, nearly 80% of the working residents leave town for work.

Target industries for future growth include manufacturing of components and equipment, back office operations, offices for professional and technical consultants, additional regional retail and distribution operations as well as leverage access to Bear Brook State Park as tourist destination.



GE Aircraft Engine makes component parts in Hooksett



Huttig Building Products in Hooksett Constructed by ProCon, a local design and construction firm.

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

Economic Sector	Hooksett	Existing Employers
<b>Level 1 - Primary Industries</b>		
Agriculture/Forestry		
State/Federal Government		
Manufacturing	■	GE Aircraft Engine, Pike Industries,
Colleges/University/Training	■	Southern New Hampshire University
Back Office/Shared Services	■	United Healthcare, Cigna Healthcare
Prof./Tech/Scien. Services	■	ProCon (arch/eng serv),
Regional Healthcare		
Regional Retail	■	K-Mart, Wal-Mart, Kohl's, Home Depot, Shaw's Supermarket, Target, BJ's, etc.
Regional Distribution	■	Great State Beverages, Huttig Building Products
Tourism-Related		
Headquarters		
<b>Level 2 – Business Support Services</b>	Hooksett Crushed Stone, Cummings Printing	
<b>Level 3 - Consumer Services</b>	Local healthcare, restaurants, retail and local government.	

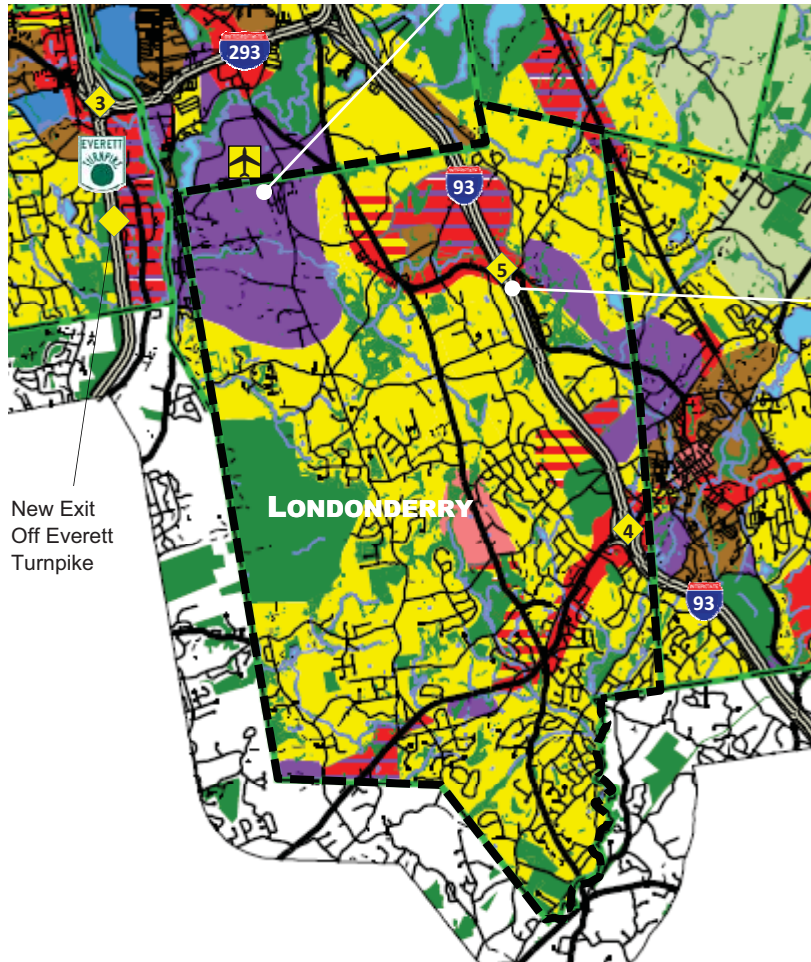
■ Existing Industry      ■ Potential Opportunities

■ TARGET INDUSTRY ANALYSIS BY CITY/TOWN

**TOWN OF LONDONDERRY**

General Statistics

<b>Population (2008 est.):</b> 24,570	<b>% Adult Population With 4-Yr.+ Degree:</b> 35.9% (U.S. average: 27%)
<b>Median Age:</b> 35.0 (U.S. average: 35.3)	<b>% Population Over 65:</b> 6.9% (U.S. average: 12.4%)
<b>Population Density:</b> 586 residents/sq. mi.	<b>Per Capita Income (2000 Census):</b> \$26,491 (U.S. average: \$21,587)
<b>% Residents Commute to Other Community:</b> 78%	<b>Direct Access to Interstate/Limited Access Highway:</b> I-93/Everett Tpk



New Exit  
Off Everett  
Turnpike



- 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 LONDONDERRY (CONT'D)**

**Overall Observations and Comments on Target Industries**

The Town of Londonderry is located just south of the City of Manchester and has access to I-93 via two exits on the east side and will have direct access to the Everett Turnpike to the west once the new exit is completed in 2010. Population ranks third in the region behind the City of Manchester and the Town of Derry at nearly 25,000 and will continue to grow in the future. The adult education attainment level for four-year+ college is high (~36%) and nearly 80% of the working residents leave the town to work.

Due to its strategic location and available land, Londonderry will play a critical role in the growth of the region over the next ten years. With the completion of the new Everett Turnpike exit, businesses have both east and west access to I-93 and the Everett Turnpike respectively. The area around the airport is well positioned as both an office and industrial park. It will be critical in the layout of the area and its amenities in determining the image and types of companies that will have an interest in the area.

Key economic growth opportunities for the town back offices and some headquarters (depending on the quality of the office park), component and equipment manufacturing, and multi-tenant offices for professional and technical consulting businesses. There may also be some regional retail at I-93, exits 4&5 and distribution operations placed near the airport.



Night Vision Detection Systems From Insight Technologies



CTS Electronics Components

CURRENT EMPLOYERS BY ECONOMIC LEVEL AND INDUSTRY WITH NOTATION OF POTENTIAL TARGET INDUSTRIES		
Economic Sector	Londonderry	Existing Employers
<b>Level 1 - Primary Industries</b>		
Agriculture/Forestry		
State/Federal Government		Army and Air Force Reserve Centers
Manufacturing	■	Harvey Industries, Insight Technologies, Vibro-Meter, CTS Electronics, Wire Belt of America, Concrete Systems, Uni-Cast (foundry) and Stonyfield Farms
Colleges/University/Training		
Back Office/Shared Services		
Prof./Tech/Scien. Services		
Regional Healthcare	■	Dana-Farber Cancer Center, Elliot Medical facility
Regional Retail	■	Home Depot, Shaws' & Hannaford Super Markets, Market Basket, Cracker Barrel
Regional Distribution	■	Herrington Catalog (national),
Tourism-Related	■	Restaurants off interstate
Headquarters	■	Insight Technologies and Stonyfield Farms
<b>Level 2 – Business Support Services</b>		Construction contractors, shipping/trucking, fire protection systems, inventory services, paving contractors, freight services
<b>Level 3 - Consumer Services</b>		Health club, retail (Home Depot, Sears, Shaw's Supermarket, etc.) and local government.

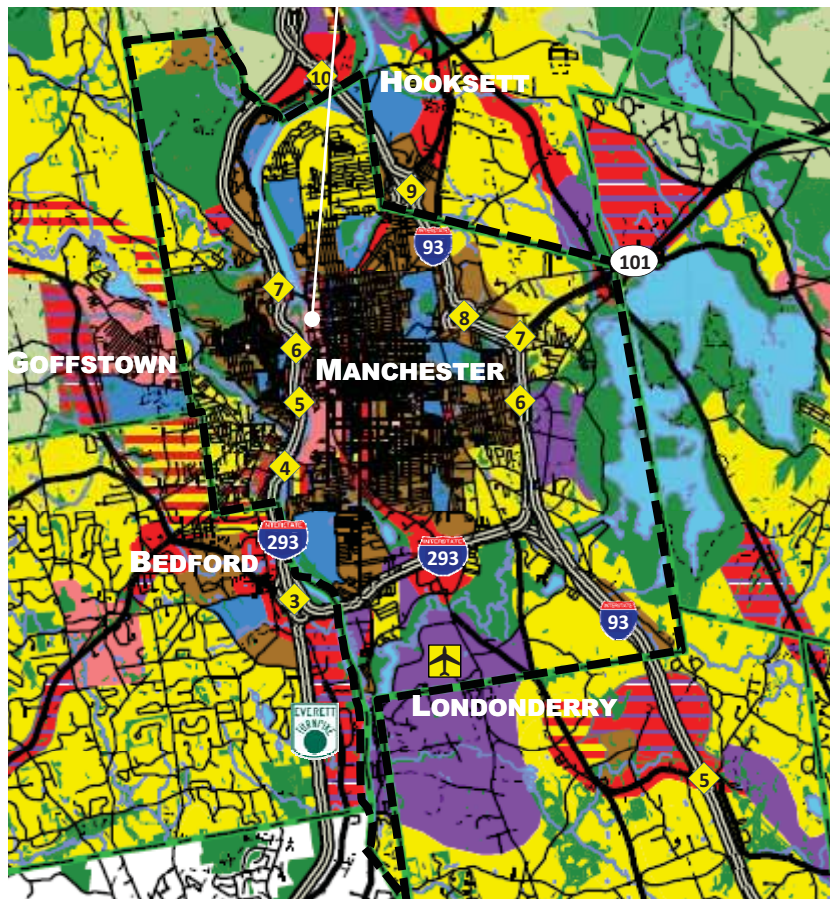
■ Existing Industry      ■ Potential Opportunities

■ 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



- 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

**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 19<sup>th</sup> 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
<b>Level 1 - Primary Industries</b>		
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
<b>Level 2 – Business Support Services</b>	Construction services, media, utilities, transportation services (air/trucking/rail)	
<b>Level 3 - Consumer Services</b>	Full complement of consumer services and local government.	

■ Existing Industry

■ Potential Opportunities

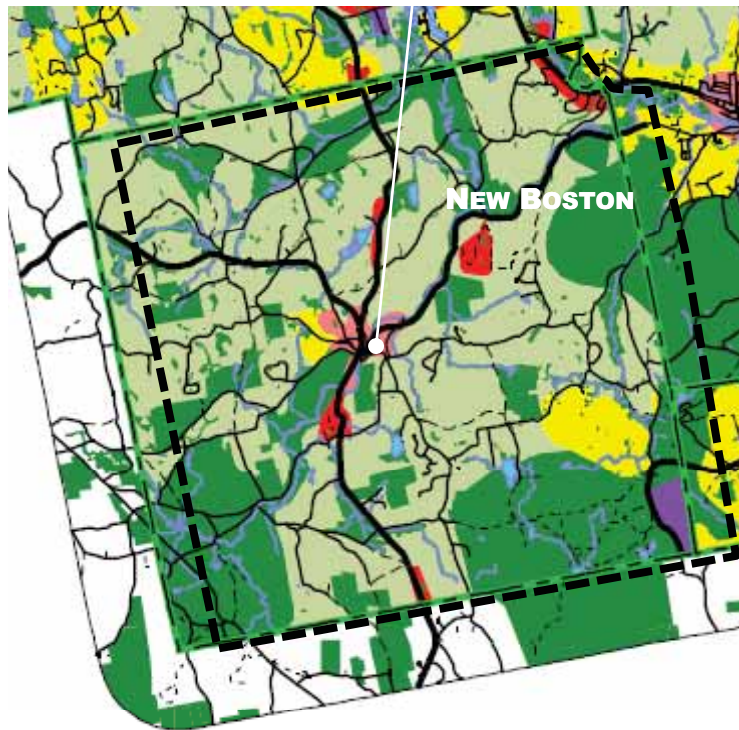


■ TARGET INDUSTRY ANALYSIS BY CITY/TOWN

**TOWN OF NEW BOSTON**

General Statistics

<b>Population (2008 est.):</b> 5,130	<b>% Adult Population With 4-Yr.+ Degree:</b> 36% (U.S. average: 27%)
<b>Median Age:</b> 36.2 (U.S. average: 35.3)	<b>% Population Over 65:</b> 5.0% (U.S. average: 12.4%)
<b>Population Density:</b> 118.2 residents/sq. mi.	<b>Per Capita Income (2000 Census):</b> \$26,488 (U.S. average: \$21,587)
<b>% Residents Commute to Other Community:</b> 84%	<b>Direct Access to Interstate/Limited Access Highway:</b> No



- 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 NEW BOSTON (CONT'D)**

**Overall Observations and Comments on Target Industries**

New Boston is a rural area with a traditional small town center. The residents have one of the highest education attainment levels with more than 35% of the adult population having a four-year and above college degree. Although over 80% of the working residents leave the town for work, there are some small manufacturing and professional services firms present. For example, Retcomp is an electronics assembly company that produces sophisticated assemblies for different instrument applications out of a remodeled barn in the town.

The future economic opportunities for New Boston may be derived from a combination of small businesses (many home-based) focused on parts/components/assemblies manufacturing, professional and technical consulting services as well as tourism/agricultural-based destination activities.



Damian's Restaurant makes a great destination as part of an area tourism package.



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

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

Economic Sector	New Boston	Existing Employers
<b>Level 1 - Primary Industries</b>		
Agriculture/Forestry	■	Family farms
State/Federal Government		Post office and small Air Force office
Manufacturing	■	Retcomp (electronic assemblies)
Colleges/University/Training		
Back Office/Shared Services		
Prof./Tech/Scien. Services	■	Sandford Surveying - Engineering
Regional Healthcare	■	Rose Meadow Farm (assisted living)
Regional Retail		
Regional Distribution		
Tourism-Related	■	Damian's on the River (destination restaurant)
Headquarters		
<b>Level 2 – Business Support Services</b>	Construction companies, other services	
<b>Level 3 - Consumer Services</b>	Local restaurants and retail, day care /private school, real estate brokers, medical services and local government.	

■ Existing Industry      ■ Potential Opportunities

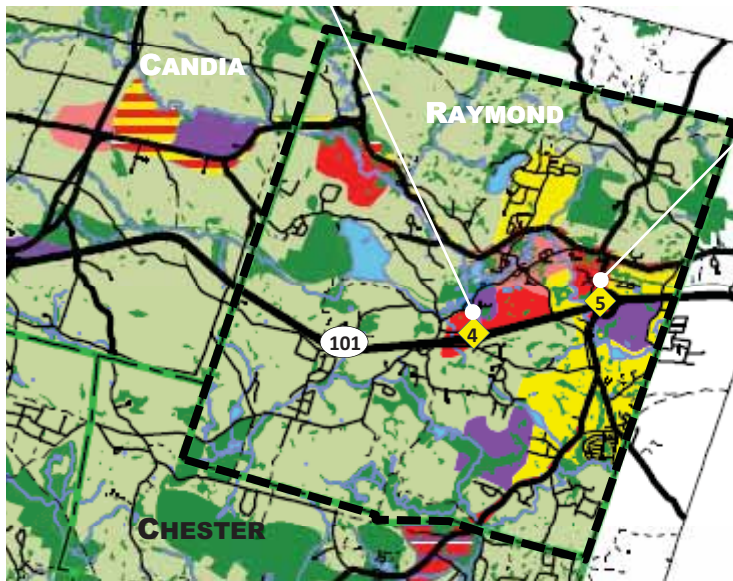
**Note:** Due to remoteness from limited access highway, manufacturing and prof/technical services operations may be smaller in size (many may be home based).

■ TARGET INDUSTRY ANALYSIS BY CITY/TOWN

TOWN OF RAYMOND

General Statistics

Population (2008 est.): 10,825	% Adult Population With 4-Yr.+ Degree: 13.0% (U.S. average: 27%)
Median Age: 34.4 (U.S. average: 35.3)	% Population Over 65: 6.9% (U.S. average: 12.4%)
Population Density: 374.5 residents/sq. mi.	Per Capita Income (2000 Census): \$18,430 (U.S. average: \$21,587)
% Residents Commute to Other Community: 82%	Direct Access to Interstate/Limited Access Highway: 2 exists off 101



- 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 RAYMOND (CONT'D)**

**Overall Observations and Comments on Target Industries**

The Town of Raymond is relatively rural and located along the Route 101 corridor with two exits within the town limits. The local economy has both distribution (Wal-Mart distribution center) and several manufacturing employers that leverage the local workforce that has primarily a high school diploma education attainment and low four-year+ college attainment. Over 80% of the working residents leave the community for work.

The target industries that would support economic growth in the town while leveraging is location and resources include component/assembly manufacturing and warehousing as well as build up destination tourism and agriculture.



CURRENT EMPLOYERS BY ECONOMIC LEVEL AND INDUSTRY WITH NOTATION OF POTENTIAL TARGET INDUSTRIES		
Economic Sector	Raymond	Existing Employers
<b>Level 1 - Primary Industries</b>		
Agriculture/Forestry	■	Family farms, garden centers
State/Federal Government	■	Post office
Manufacturing	■	Gemini Valve, Jackson Lumber and Millwork, Aggregate Industries (construction materials), Northeast Aerospace (specialty parts)
Colleges/University/Training		
Back Office/Shared Services		
Prof./Tech/Scien. Services		
Regional Healthcare		
Regional Retail		
Regional Distribution	■	Wal-Mart distribution center, Hudson/RPM
Tourism-Related	■	Camp On-Way
Headquarters		
<b>Level 2 – Business Support Services</b>	JCR Construction Company, Infinity Constructors, IC Reed and Sons	
<b>Level 3 - Consumer Services</b>	Apria Lifeplus, Lamprey Health Care, Hannaford Supermarket, MacDonalds, Dunkin' Donuts, Wal-Mart and local government.	

■ Existing Industry      ■ Potential Opportunities

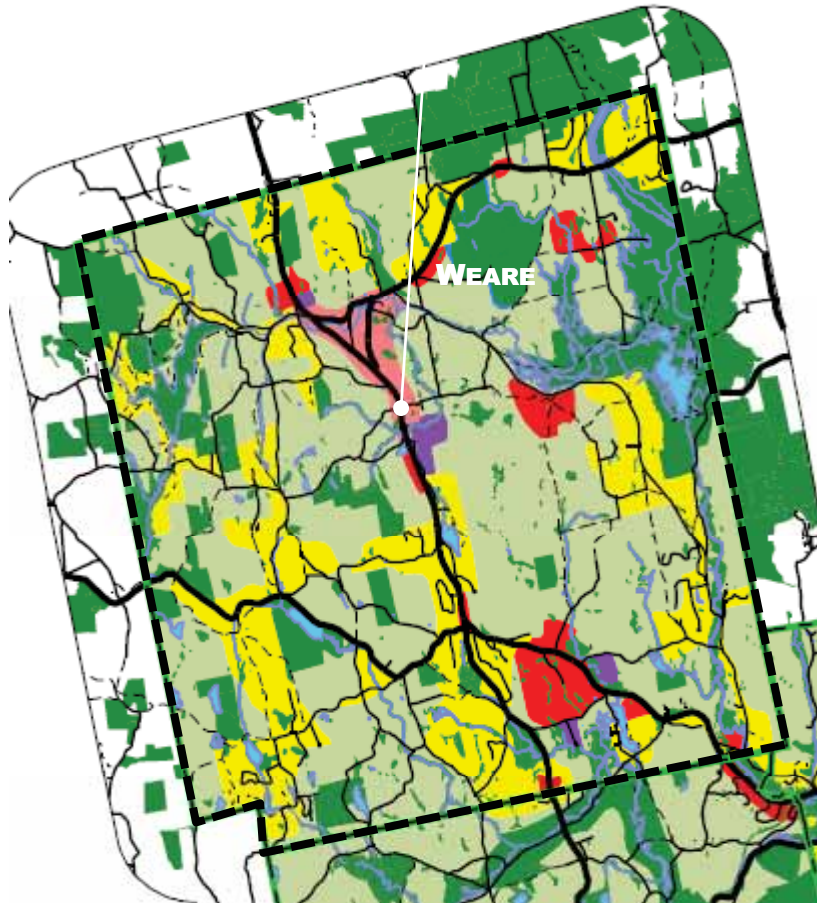
**Note:** Due to remoteness of town prof/technical services operations may be smaller in size and many may be home based.

■ TARGET INDUSTRY ANALYSIS BY CITY/TOWN

TOWN OF WEAIRE

General Statistics

Population (2008 est.): 8,990	% Adult Population With 4-Yr.+ Degree: 25.1% (U.S. average: 27%)
Median Age: 34.1 (U.S. average: 35.3)	% Population Over 65: 4.7% (U.S. average: 12.4%)
Population Density: 151.5 residents/sq. mi.	Per Capita Income (2000 Census): \$22,217 (U.S. average: \$21,587)
% Residents Commute to Other Community: 85%	Direct Access to Interstate/Limited Access Highway: No



- 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 WEARE (CONT'D)**

**Overall Observations and Comments on Target Industries**

The town is in a rural setting with no direct access to a limited access highway/interstate. Population density is low and 85% of the working residents leave the community for work. There are very limited Level 1 employers in the community other than agriculture and Northland Tool & Electronics. Potential target industries for the community include small manufacturing (assuming facilities/zoned land is available) and agricultural-related destination activities (retail milk/ice cream products, small restaurant or bakery, expanded farm stand with other products, etc. There is also an opportunity for professional/technical services have home-based or small office-based services.



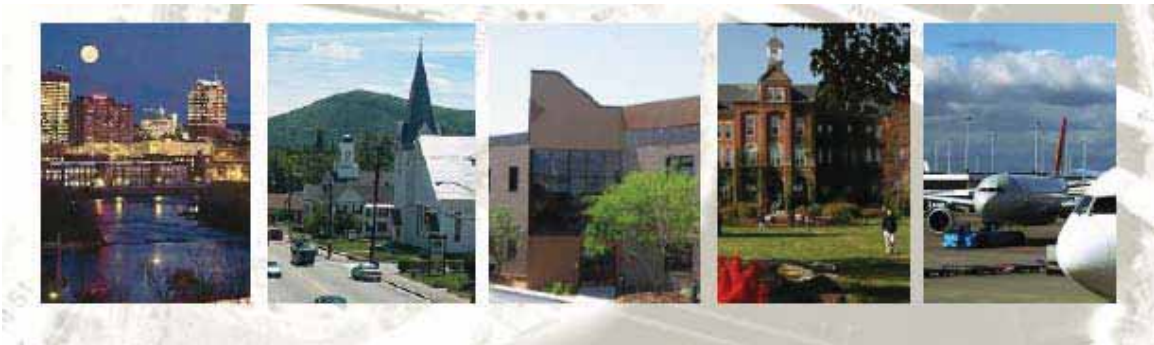
Machine tool spindle rebuild and repair by Northland Tool and Electronics

CURRENT EMPLOYERS BY ECONOMIC LEVEL AND INDUSTRY WITH NOTATION OF POTENTIAL TARGET INDUSTRIES		
Economic Sector	Weare	Existing Employers
<b>Level 1 - Primary Industries</b>		
Agriculture/Forestry	■	Family farms
State/Federal Government		
Manufacturing	■	Northland Tool & Electronics (tool rebuild/repair),
Colleges/University/Training		
Back Office/Shared Services		
Prof./Tech/Scien. Services		
Regional Healthcare		
Regional Retail		
Regional Distribution		
Tourism-Related		
Headquarters		
<b>Level 2 – Business Support Services</b>	Construction services, industrial supply, telecom services, truck center, emergency power sales	
<b>Level 3 - Consumer Services</b>	Self storage, education services, some retail/restaurant, RV/camper sales, home party services, and local government.	

■ Existing Industry      ■ Potential Opportunities

**Note:** Due to remoteness from limited access highway, manufacturing and prof/technical services operations may be smaller in size.

**Section G: Business Incubation Model Recommendations**



# Community Introduction to Business Incubation : Model Recommendations

*Prepared for:* Southern New Hampshire Regional Planning  
Commission

*Prepared by:*

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## **Section 1.0**

### **Preface**

This report is to be considered a “Phase I Study”. A Phase I Study, in this instance, is designed to introduce community members to the concept of business incubation and provide preliminary recommendations to communities regarding business incubation. This is not to be considered to take the place of either a Phase II: Feasibility Study and/or a Phase III: Business Plan for Incubation.

Given this, it was not within the parameters of this study to identify an incubator location nor determine associated costs of such a program. Such recommendations would be part of a (Phase II) feasibility study.

The recommendations made herein were subject to the constraints of both the intent of the study as well as the limitations of data collected. Further study is recommended, particularly with regard to “incentives” strategies and funding options. In addition, further study is recommended regarding further refinement of targeted industries (particularly in the “creative business” sector) for incubation/acceleration.

## Executive Summary

This study was conducted to:

1. Provide an introduction to the incubation industry to communities within the Southern New Hampshire Planning Commission region, *and*
2. Provide initial suggestions/model recommendations to communities in the region regarding incubation.

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.

Regarding the first issue identified above it must be noted that it was not a contractual item of this study to either research nor secure funding for such (incubation) programs. Relatively low cost models have been suggested in this study given the lack of funding for traditional “bricks & mortar” type incubation programs.

The lower cost, relatively speaking, approach suggested here 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 was the only category indicated in the “Target Industry Analysis” report prepared for the region that was recommended for all of the towns in the region (Rhoades, J., 2010) . Focus on this category provides a starting point for the region to focus on a particular niche area in which to concentrate efforts.

This category has been further refined in this study as the “Creative Business” category. This particular sector was selected due to the high-growth businesses within this category (e.g., digital media, gaming, graphic arts, et al). In addition, this category is appealing to our young professionals and college graduates and may well assist in efforts to retain these individuals in our region.

Several recommendations based on best practice models have been made to the towns in the region regarding incentives to encourage these types of high-growth businesses to locate in their communities. Given the lack of funding, these incentives are generally low-cost/no-cost approaches and have been described as “Phase 1” incentives. Longer term, Phase 2, incentives are also recommended (see Section 3.0).

The second issue identified, above, “lack of an *applied*, versus theoretical, regional approach to economic development” is certainly not an issue confined to this particular region. However, when it exists, it can be a major barrier to moving efforts forward for the recommended economic development programs on a regional basis. Efforts toward a regional approach to economic development appear to be moving forward with the formation of particular groups, i.e., Metro-Center NH, branded as being regional in nature. However, it should also be noted that, through observational research, some groups do not exhibit a regional approach in practice. During the course of this research it was observed that, even in so-called regional groups, individuals still exhibit an individual town bias, which while understandable, may inhibit a regional approach. While this is recognized as a possibly sensitive issue, particularly to the leadership in these groups, it is noteworthy since it may not be productive for the region as a whole.

## Recommendations

- ◆ Particularly in these economic times, towns should avoid the bricks and mortar type incubator model due to high fixed and variable cost components. In fact, no or limited funding exists to support this model.
- ◆ The region already has the longest existing (in NH) bricks and mortar mixed-use type incubator located in the region: the Amoskeag Business Incubator (ABI) in Manchester, NH. Taking a regional approach, it is suggested that if a particular town desires the bricks and mortar model they should utilize the existing incubator, ABI, to their advantage. They have a 12 year history of assisting businesses and this helps to avoid unnecessary, and expensive, replication in the region. If anything, support what already exists in the region versus large expenditures attempting to duplicate the model. Support/expand ABI if necessary to accommodate needs.
- ◆ First, a creative business accelerator (CBA) will be developed by the Center for Entrepreneurship and Social Innovation (CESI) at Southern New Hampshire University (SNHU) in the first quarter of 2011 with a projected 10-15 businesses. Municipalities within the region can participate in this model by developing and implementing incentives as recommended in Section 3.0 of this study. The CBA is a much lower-cost (yet effective) model than the bricks and mortar model. High growth, creative/knowledge businesses are the type of businesses that would also assist in the goal of increasing retention of college graduates in the region/state.
- ◆ A regional approach will be taken in establishing the CBA. This requires a coalition (CBA Advisory Board) of various higher-education institutions, the regional business community, local town representatives, Metro-Center NH, SNHPC, as well as training/service providers for the CBA. The coalition of various higher educational institutions is critical to the success in that each has particular strengths and areas of expertise to assist in the efforts in the development of creative/knowledge businesses in the region. The CESI Director will establish the CBA Advisory Board.
- ◆ Establish a *significant* funding mechanism for regional economic development. The Metro-Center NH group and/or SNHPC might be a logical body to pursue/receive such funding. Towns within the region do not appear to be likely funding sources. The reason for this is twofold: (1) a lack of funding at the town level for economic development, and (2) a pervasive non- regional approach to economic development, i.e., a town wanting direct benefit to themselves versus the region as a whole.
- ◆ Further research and regional discussions regarding incentives is recommended.
- ◆ Continue working at a regional, not individual town, level. These efforts avoid unnecessary duplication of services and expenditures. Branding of the region is important and branding as a “Creative Business Region” would bring in high-paying jobs and

economic growth that is “clean” and environmentally-friendly as well as attractive to the young professionals.

- ◆ This CBA strategy not only is a typical “inward”, grassroots, incubation/acceleration approach to economic development but is also an “attraction” type strategy to bring these (creative/knowledge) businesses into the region through incentives and proper branding at the regional level. Individual towns must recognize that support of the CBA concept strengthens the region as a whole and be less concerned regarding whether businesses developed/accelerated by the CBA will be relocated to their specific town. Growth within the region benefits all towns within the region.

## Introduction to the Incubation Industry

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. (National Business Incubator Association [NBIA], 2004). Business incubation can be regarded as truly a “grassroots” approach to economic development. 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. The concept here is to assist in the creation of innovative businesses within our communities that are owned and operated by the citizens that live in our communities.

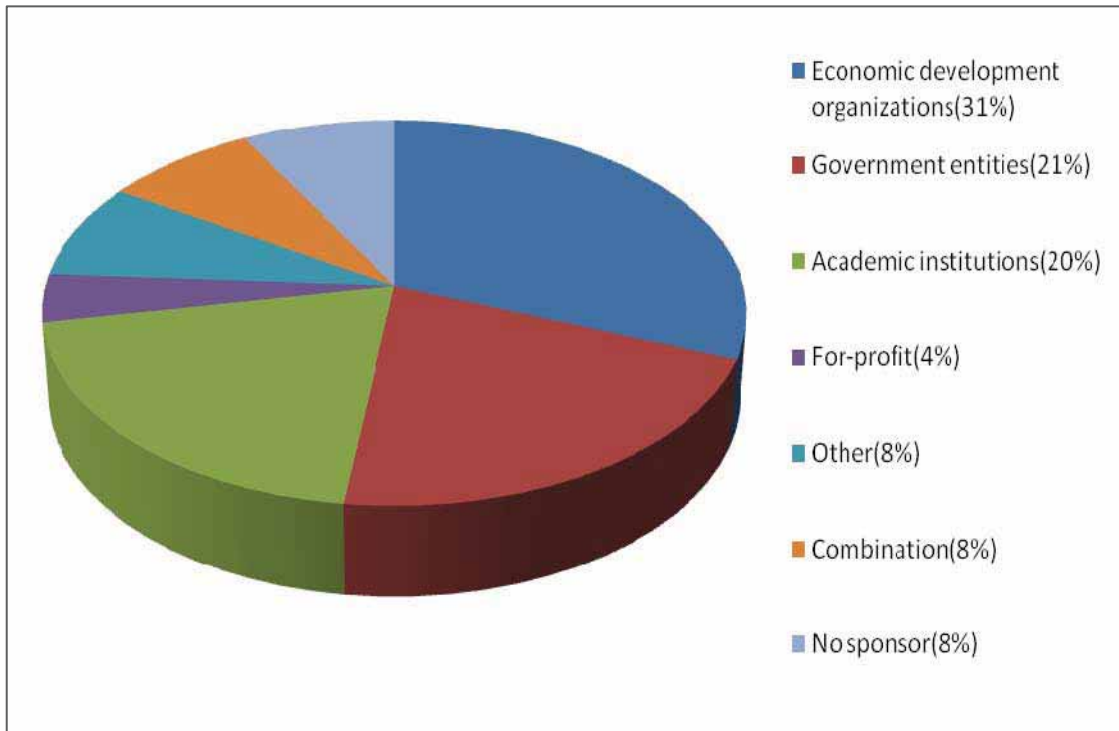
The concept of business incubation is not new. The first business incubator in the United States was founded in 1959 in Batavia, New York. Today, it is estimated that there are more than 7,000 business incubators worldwide. There are approximately 1,400 business incubators in North America including 1,115 in the U.S., 191 in Mexico, and 120 in Canada. (Knopp, 2007).

Business incubation is not simply about locating new venture entrepreneurial startup firms in cheap office space where they are able to share administrative expenses. The heart of a business incubation program is the support and advising services available to client companies. (Adkins, 2004). The various types of business incubators in existence are discussed later in this report. However, regardless of the specific type of business incubator, it is the safety net of such support services for new ventures that distinguishes them from simply being locations with (relatively) cheap office rent with shared administrative services.

Business incubation programs differ from other types of business assistance programs. For example, unlike business incubators, business assistance programs offered through the U.S. Small Business Administration’s (SBA) Small Business Development Centers (SBDCs) are not necessarily targeted at start-up and early stage (generally 1-3 years in operation) companies. The SBA program is designed to assist any firm, regardless of their stage of development, as long as they meet the criteria for being a small business as established by the SBA.

Over half (approximately 52%) of the business incubators in North America are sponsored by economic development organizations and governmental entities. Universities and colleges sponsor approximately 20% of business incubators with the remainder finding sponsorship from other various types of entities. Only about 4% of these incubators are sponsored by for-profit organizations (NBIA, 2006). See graphic, next page.

## Types of Incubator Sponsors



*Source: NBIA (2006) State of the Business Incubation Industry*



*MaRS Business Incubator, Ontario, Canada*

*Image Courtesy MaRS Discovery Center*



## Why Business Incubation? Key Findings

*Some key findings from this research include:*

The U.S. Department of Commerce Economic Development Administration (EDA) reported in 2008 that investments in business incubators created up to 46 times as many jobs as any other infrastructure project. What's more, those jobs cost at least three and a half times less per job than those created by other projects (EDA, 2008).

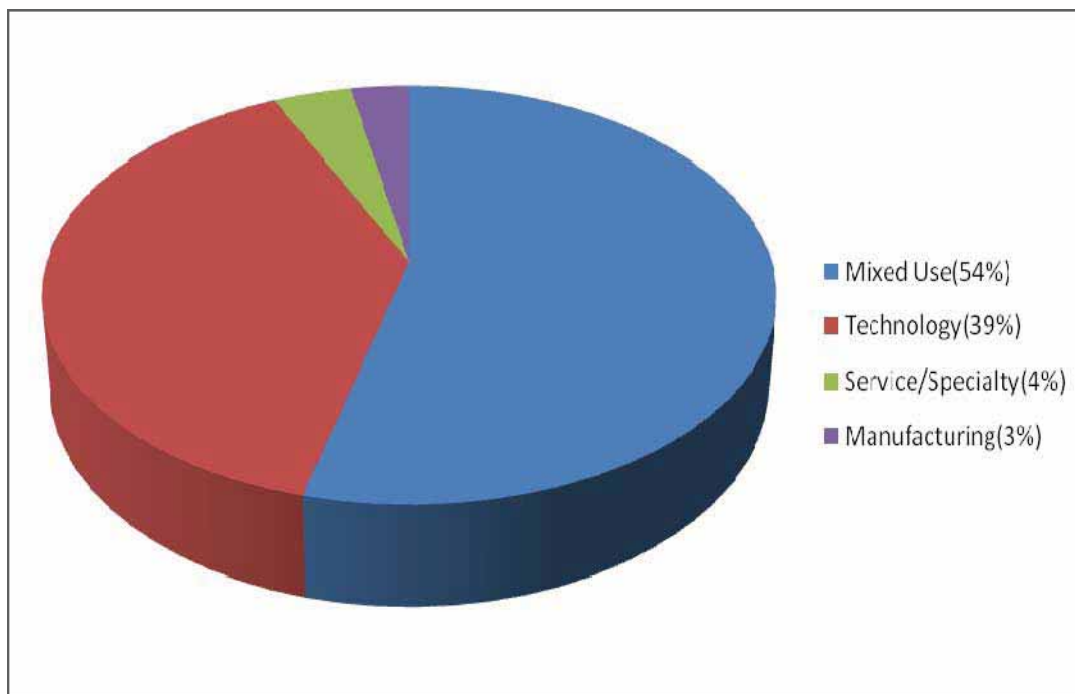
An EDA funded study indicates: for every public dollar invested in them, business incubators and their graduates returned about \$30 in local tax revenues (EDA, 2008).

Eighty-four percent of incubator graduates remain in their communities, continuing to grow to provide returns on public investment (NBIA, 2006).

Business incubators reduce the risk of small business failures. 87 percent of all firms that have graduated from incubators are still in business (NBIA, 2006).

In 2005 alone, North American incubators helped more than 27,000 start-up companies that provided full-time employment for more than 100,000 workers and generated annual revenues of more than \$17 billion (NBIA, 2006).

### Types of Business Incubators



*Source: NBIA (2006), State of the Business Incubation Industry*

## A. The Mixed-Use Business Indicator

*The following passage discusses the various types of business incubation programs as indicated in the preceding graphic. It is important to note that most of these program types may exist in either a “bricks and mortar (form)” or “virtual/hybrid environment”, as will be discussed later in this report.*

As the graphic on page 10 indicates, approximately 54% of business incubators are of the ‘mixed-use’ variety.

A mixed-use type business incubator does not focus on any particular type of business or industry. While most of these operations accept businesses of many different types they, generally, do not accept all types of businesses due to the constraints of space, suitability of the incubator facility, or the mission of incubator operation.

Sectors represented in a mixed-use incubator may include service, technology, and light manufacturing. Generally, these types of facilities are the largest type of incubators with offices of varying sizes and may even include warehousing space and high ceiling manufacturing space with attached offices.

An example here in New Hampshire of a mixed-use incubator is the Amoskeag Business Incubator (ABI) located on Commercial Street in downtown Manchester. ABI, the oldest business incubator in New Hampshire, was founded in 1997 as a joint venture between Southern New Hampshire University (SNHU) (then New Hampshire College) and the City of Manchester, New Hampshire. It was a part of the Center for Entrepreneurship & Social Innovation (CESI) until it was spun off from SNHU in 2007. It now operates as a separate 501(C)(3) organization.

*A typical mixed-use business (bricks and mortar) incubator program has the following general characteristics:*

Facility and clients:

40,610 square feet  
16 resident clients

Goals:

Creating jobs  
Fostering entrepreneurial climate

Services:

Marketing assistance  
Networking  
Access to loan funds  
Business training programs

*Source: NBIA (2006), State of the Incubation Industry*

## B. Technology Incubation Program

Approximately 39% of all business incubation programs (bricks and mortar) are technology incubation programs.

These types of programs tend to be costly to both establish and operate in that they may include facilities such as laboratories and scientific equipment. In addition, since many if not most of the clients residing in such an incubator tend to be researchers with little or no entrepreneurial experience, clients tend to reside longer in this type of incubator. In addition, the length of time of residency is generally longer due to the nature of the work and products resulting from that work (e.g. pharmaceuticals). An example of this type of incubator in New Hampshire is Tech Village in Conway, New Hampshire.

*The key characteristics of a technology business incubation program are:*

### Facility and clients:

36,631 square feet  
14 resident clients

### Goals:

Technology commercialization  
Economic diversification  
Identifying corporate spin-out businesses

### Services:

Specialized equipment or facilities  
Management team identification  
Access to angel or venture capital

*Source: NBIA (2006), State of the Incubation Industry*



*Animetrics Inc., a developer of facial recognition software, recently opened this new facility in Tech Village, a Conway, N.H.-based business incubator.*

## C. Specialty Business Incubation Program

Approximately 4% of business incubation programs are specialty business incubation programs (brick and mortar).

These programs may include shared space for arts based programs or other such type programs. Specialty incubators tend to have, on average, approximately the same number of clients as mixed-use incubators. However, the amount of full-time jobs produced (at non-technology based specialty incubators) tend to be about one-third that of mixed-use incubators.

The incubator program in New Hampshire that comes closest to this type of incubator operation would be the Hannah Grimes Center in Keene, New Hampshire. However, although Hannah Grimes tends to cater to clients that make locally produced items (promoted and sold through their Hannah Grimes Marketplace), they also have clients in other service sectors represented, such as an architect and a provider of computer network support services.

*Key characteristics of specialty business incubation programs include:*

### Facility and clients:

13,146 square feet  
15 resident clients

### Goals:

- Accelerating growth in a particular industry
- Business Retention
- Fostering minority/women entrepreneurship

### Services:

- Shared facilities and/or services
- Networking
- Logistics/distribution help

*Source: NBIA (2006), State of the Incubation Industry*

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**RIGHT:** *The Hannah Grimes Marketplace in Downtown Keene, N.H., an initiative of the Hannah Grimes Center, focuses exclusively on the sale of locally made and grown goods.*



## D. Summary: Bricks & Mortar

Type of Incubator	Square feet	Clients	Goals	Services
<b>Mixed-use</b>	40,610	16	<ul style="list-style-type: none"> <li>* Job Creation</li> <li>* Fostering entrepreneurial climate</li> </ul>	<ul style="list-style-type: none"> <li>* Marketing assistance</li> <li>* Networking</li> <li>* Access to loan funds, business training programs</li> </ul>
<b>Technology</b>	36,631	14	<ul style="list-style-type: none"> <li>* Technology commercialization</li> <li>* Economic diversification</li> <li>* Identifying corporate spin-out businesses</li> </ul>	<ul style="list-style-type: none"> <li>* Specialized equipment</li> <li>* Management team identification</li> <li>* Access to angel or venture capital</li> </ul>
<b>Specialty</b>	13,146	15	<ul style="list-style-type: none"> <li>* Accelerating growth in a particular industry</li> <li>* Business retention</li> <li>* Fostering minority/women entrepreneurship</li> </ul>	<ul style="list-style-type: none"> <li>* Shared facilities and/or services</li> <li>* Networking</li> <li>* Logistics/distribution help</li> </ul>

Source: SNHU/CESI-summary of NBIA, 2006 data



Image courtesy David Wulff

## **Section 2.0**

### **Best Practices - Successful Business Incubation:**

Prior to the discussion of a proposed model and suggested incentives developed for the region here in New Hampshire are two specific examples relating to business incubation. The examples are of traditional, physical (Bricks and Mortar) incubator type operations.

#### **Bricks and Mortar Best Practices: Case 1:**

##### ***Ben Franklin Technology Partners, Pennsylvania***

Ben Franklin Technology Partners is one of the pioneers in the incubation of technology/knowledge economy type firms. Founded in 1983, they operate 4 regional headquarters and 10 satellite offices strategically located throughout Pennsylvania. They also operate 14 traditional incubator sites. The industry sector focus is rather wide-ranging, as follows:

- Advanced Manufacturing
- Alternative and Clean Energy
- Biotechnology
- Communications/Wireless Technology
- Environmental Technology
- Green Technologies
- Healthcare Technology
- Information Technology
- Interactive Media
- Material Sciences
- Medical Devices
- Microelectronics
- Optoelectronics
- Pharmaceutical
- Plastics
- Powdered Metals
- Robotics



*Pittsburgh, Penn.-based Sustainable Systems is developing new-age wind energy turbines, thanks in part to a grant from Ben Franklin Technology Partners.*

*Source: Ben Franklin Technology Partners, (2010); see also: Florida Gulf Coast University (2009)*

Pennsylvania is a leader in this type of incubation program. It should be noted that this type of program needs considerable funding at the state level particularly. While the payback is noteworthy indeed, it is not for the faint of heart in terms of funding required as can be seen in the information below.

### Typical Bricks and Mortar Model

#### **Yearly Operating Expenses:**

*Range: \$7,000-\$5.4 million*

*Composition: 38% for building costs; 36% for total payroll/benefits; 19% for program expenses; 7% for "Other" (see graphic)*

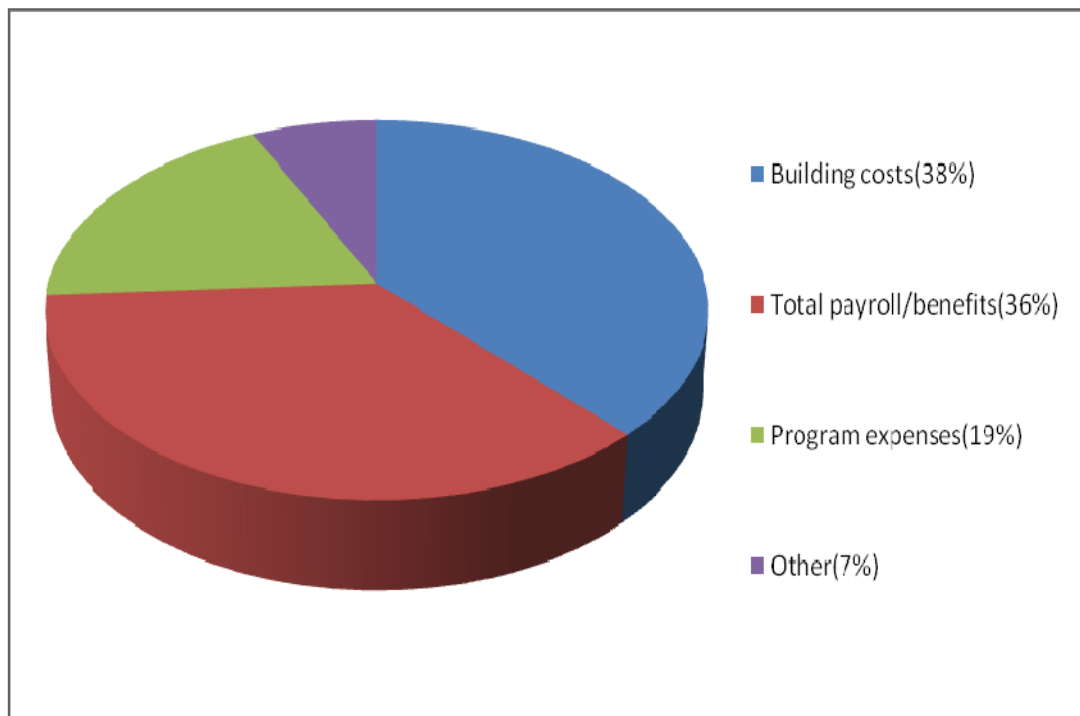
#### **Location Differentials:**

*Suburban Area Incubators: **Average:** \$848,500; **Median:** \$425,000*

*Urban Area Incubators: **Average:** \$587,044; **Median:** \$400,000*

*Rural Area Incubators: **Average:** \$269,847; **Median:** \$175,000*

### Yearly Operating Expenses: Typical Bricks & Mortar Model



*Source: NBIA (2006) State of the Business Incubation Industry*

## Bricks and Mortar Best Practices: Case 2:

### *University of Central Florida—Technology Incubator, Orlando, Florida*

The University of Central Florida (UCF) program is a traditional incubator program consisting of 7 incubators that physically house firms. Their focus is on “emerging technology companies in several industries including Biomedical, Digital Media, Education and Training Technology, IT Products & Services, Optics, and Simulation/Modeling”. The incubator began operations in 1992 and has expanded operations to several sites throughout the central Florida area (Florida Gulf Coast University, 2009).

The UCF incubator has the following offerings:

- Mentoring
- Access to experienced entrepreneurs through Entrepreneurs in Residence program
- Operational and Strategic Advice
- Networking events
- Marketing assistance
- Educational programs
- Shared space, including meeting rooms, support services and office space
- Access to university faculty and labs
- Links to partner membership organizations

Resident tenants pay rental fees that are just below market rates while virtual clients pay \$250 and are entitled to all of the services offered by the incubator. Nearly half the operating costs are paid through client rentals while the remainder is subsidized through the university, the City of Orlando, FL, Orange County, FL, and various economic development agencies. (Florida Gulf Coast University, 2009; See also: University of Central Florida, 2010).

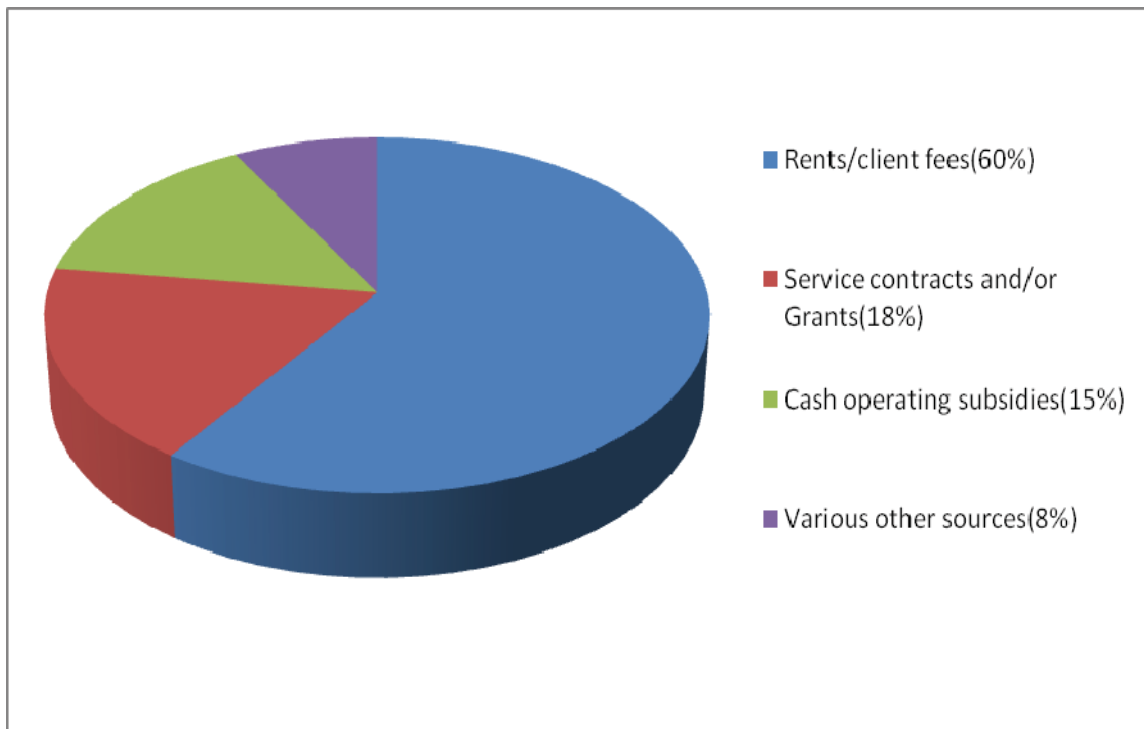
This has been a highly successful physical incubator operation. It is not a low-cost proposition either in terms of initial startup or ongoing operations. This model, physical incubation, is a heavily subsidized model and is difficult to operate on a self-sufficient basis without significant subsidies. See page 18.

***RIGHT:*** *The University of Central Florida Business Incubator Program operates out of several locations, including this one in Orlando, Fla.*





## Yearly Revenue Composition: Typical Bricks & Mortar Model



Source: NBIA (2006), *State of the Business Incubation Industry*

### **Yearly Revenue:**

*Range:* \$14,000-\$5.5 million

*Composition:* 60% from rents/client fees; 18% from service contracts and/or Grants; 15% from cash operating subsidies; 8% from various other sources

### **Location differentials:**

*Suburban Area Incubators:* **Average:** \$854,642; **Median:** \$468,658

*Urban Area Incubators:* **Average:** \$675,416; **Median:** \$379,500

*Rural Area Incubators:* **Average:** \$264,661; **Median:** \$170,000

Source: NBIA (2006), *State of the Incubation Industry*.

## “Bricks & Mortar” Incubator Model : Quick Facts

### Bricks & Mortar: Two Most Common Incubator Types

Characteristic	Mixed-Use	Technology
<i>Square Footage</i>	40,610	36,631
<b><i>Yearly Revenue</i></b>		
<i>Average</i>	\$320,000	\$1,000,000
<i>Median</i>	\$243,000	\$524,000
<b><i>Yearly Operating Expenses</i></b>		
<i>Average</i>	\$327,624	\$873,962
<i>Median</i>	\$270,000	\$487,000
<i>Average full-time equivalent employees</i>	1.8	1.8
<i>Average number of clients</i>	16	14
<b><i>Incubation number of months</i></b>		
<i>Average</i>	32	34
<i>Median</i>	36	36

Source: SNHU/CESI-summary of NBIA, 2006 data



*The Youngstown (Ohio) Business Incubator has helped jumpstart that city's struggling economy by attracting a series of technology companies to the region like GreenEnergy TV and software provider TurningPoint.*

## An Introduction to Business Acceleration Models

The evolution from traditional bricks & mortar incubation to the business accelerator concept has occurred due to the high-cost of the bricks & mortar model, the lack of funding for physical incubator models, and the advent of technology to service client needs. In addition, the accelerator model concentrates on what is the essence of business incubation: the support services available to clients (New Economy Strategies, 2008).

The strictly virtual type of business accelerator leverages the technology available today via the Internet to provide support services to clients (100% virtual incubators are somewhat rare). Many of the businesses that are started today, particularly in the knowledge economy sector, are also of a virtual nature with no bricks and mortar location (other than an in-home location) so this seems like a natural fit for these types of businesses. However, it must also be noted that many business startups prefer having a physical presence as well as having a face-to-face relationship with the support services provider.

To overcome the limitations of a purely virtual model, which, as mentioned, is rare, a “hybrid” approach may be taken. This approach combines both virtual business acceleration with face-to-face interaction with clients when providing some, or all, of the support services. For instance, clients may have their businesses residing on their own Web site and participate in both group and individual discussion/ counseling/mentoring/training/networking sessions with other clients and service providers. In essence, they become part of a larger business network and community.

In this hybrid model virtual one-to-one private sessions may also be available to clients. However, in a hybrid model there would be the opportunity to also have face-to-face mentoring/ counseling and training sessions both on a group and individual basis. This may be the solution for those that do not necessarily want, or even need, physical bricks and mortar space. It may be a more comfortable environment for some that either fear or simply do not like the feeling of isolation they may experience in a purely virtual model. Many colleges and universities are also successfully using this approach in the offering of courses.

## **Section 3.0**

### **Recommendations for SNHPC Municipalities: Proposed Model & Incentive Suggestions**

Most towns in the region identified a wide variety of industry sectors that they would desire to develop. In such a situation, it would be the mixed-use type of physical incubator that generally would be suggested.

However, the type of industries (mostly) preferred by the towns also fall into the “creative business” category (as explained below). These are also the type of businesses recommended in the Target Industry Analysis prepared for the Southern New Hampshire Planning Commission (Rhodes, J., 2010). In that study the only category recommended for all 13 towns in our region was “Professional, Technical, and Scientific Services”. Creative businesses fall into this category. This being the case, it would be appropriate to recommend a model different, i.e., non-bricks and mortar, from those discussed at the beginning of this report. The type of model recommended at this juncture is a “hybrid-virtual” model, as described below.

#### **A. The Recommended Model:**

##### *The (Hybrid-Virtual) Creative Business Accelerator (CBA)*

This is a type of model known as a Creative Business Accelerator (CBA). Generally, this conjures up thoughts of an “arts” type incubator. However, the term “creative business” has a much broader meaning than that. The discussion below begins with a definition of and examples of creative businesses.

##### **Creative Businesses Defined**

*“In this new economy based on innovation and globalization, progressive leaders recognize that creativity now drives global competitiveness. Globally, creative industries are estimated to account for more than 7% of the World’s GDP and **the annual growth of the creative industries is twice that of the service industries and four times that of the manufacturing industries.** Thus, those communities that can develop and sustain an environment in which its creative talent can thrive will be able to most effectively drive economic development success - both because of job growth in specific creative industries and because communities with a dynamic, creative soul attract high impact employers and talented, skilled employees” (Angelou Economics, 2008).*

Firms in creative industries, include, but are not limited to, architecture, communications, design and merchandising, digital media, engineering, fashion design, music, video, film and film, education/training, business consulting, production, graphic arts, information

technology, interior and industrial design, marketing/advertising, multimedia design, photography, planning, product design, gaming and software development, the culinary arts, as well as firms in the environmental/life sciences. Please note that this is not intended to be an exhaustive nor suggested list but merely serves as examples of the numerous types of high growth businesses in this sector. The CBA as established for the Southern New Hampshire Region will, however, have more of a niche focus as will be detailed later in this report.

While many of these businesses may be small as they begin operations, the impact of such businesses on New Hampshire should not be overlooked. These microenterprises (firms with 1-5 employees, including the owner) comprise 87% of the businesses in New Hampshire and number approximately 124,000 firms that employ over 160,000 individuals. This represents nearly 20% of all private (non-farm) employment in New Hampshire (U.S. Census, 2000).

The types of businesses qualifying as creative businesses are the type of businesses that appeal to the younger generation. Assisting in the creation of “new economy/knowledge businesses” would assist in retaining college graduates. The increased retention of college graduates was a goal established in the SWOT report that was prepared for the Southern New Hampshire Planning Commission. In addition, the businesses in this category are clean, environmentally friendly type businesses.

It should be noted that the recommended Creative Business Accelerator does not duplicate the services of the so-called “affiliate” program at the regional bricks and mortar incubator (ABI). The affiliate program at ABI is similar in nature but the focus of that program is on the “mixed-use” type incubator businesses. ***The CBA will focus on creative/knowledge high-growth businesses only.***

The model itself is very much a “hub and spoke” type model. The CBA sits as the hub and the towns are out on the spokes in this model. The CBA services businesses from a centralized location. This model is very cost effective in that it can serve as an ongoing feasibility study for the region. Demand for services and the number/types of businesses can be determined under this model in a cost effective manner when compared to the \$20,000-\$40,000 for an initial feasibility study and then another \$10,000-\$20,000 for a business plan. This model is also considerably less expensive than the physical type incubator both in terms of development as well in ongoing operations.

Specifically, the CBA is currently being established at Southern New Hampshire University by and as part of the Center for Entrepreneurship and Social Innovation (CESI). Oversight and management would be through the Director of CESI, with an advisory board comprised of individuals selected from/by the various towns, from area creative businesses, the Amoskeag Business Incubator, Metro-Center NH, SNHPC, and a select group of faculty members from the creative business categories at colleges and uni-

-versities within the region. This model has advantages to the college/university as well as to the towns. Such a model can provide a hands-on learning environment for students through active involvement and internships with CBA businesses. In addition, it deepens the level of community involvement with colleges/universities while assisting in the growth of the region. The CBA will service client businesses from both colleges/universities as well as from the general public within the region.

*Towns within the region have a significant role in promoting and advising the CBA: they can participate on the advisory board and in the development/implementation of local incentives to promote creative business growth.*

### **Services provided by the CBA:**

- ◆ Meeting space with regular hosted meetings; access to conference/training rooms
- ◆ Networking opportunities with fellow members, local service providers, and local businesses
- ◆ Business training workshops/courses
- ◆ Mentorship/advisory/consulting services
- ◆ Advertising for member firms and area businesses
- ◆ Newsletter featuring client firms and town information
- ◆ Liaison for towns/Metro-Center NH/Chamber of Commerce for site selection and community services for member businesses
- ◆ Access to college/university faculty and interns



*Metro Center–NH and the Greater Manchester Chamber of Commerce are two established organizations that should be capitalized upon.*



## Video Gaming Industry “Quick Facts”

- ◆ More than 2/3 (68%) of American households play video games
- ◆ 22.9%: the growth rate in 2008 for U.S. computer and video game software
- ◆ \$11.7 billion: sales level of U.S. computer and video games software
- ◆ Sales of U.S. computer and video games software has quadrupled since 1996
- ◆ 35 years old: Average age of video game players
- ◆ 12 years: Average length of time for having played video games
- ◆ 39 years old: Average age of most frequent video game purchaser
- ◆ > 17%: Growth rate of U.S. entertainment software industry in years 2003-04 and 2005-06 versus < 4% growth rate for U.S. economy as a whole
- ◆ The US entertainment software industry directly employs more than 24,000 people in 31 states.
- ◆ The total US employment, both direct and indirect, that depends on entertainment software now exceeds 80,000.
- ◆ 40%; of all game players are women.
- ◆ Women over the age of 18 represent a significantly higher level of the game-playing population (34%) versus boys age 17 or younger (18%).
- ◆ In 2006, average compensation per employee (wages, salaries and employer contributions for pensions, insurance and government social insurance) was \$92,368.
- ◆ Global videogame spending expected to be \$49 billion by 2011, up from \$32 billion in 2006.



*LEFT: Video games are not just for young people anymore.*

Sources: PricewaterhouseCoopers, (2007), *Global Entertainment and Media Outlook 2007-2011*; Also see: Siwek, Stephen, (2007), *Video Games in the 21st Century*

## Wage Data Example: Digital Media and Gaming

The table below lists common digital media (gaming) industry associated positions and the corresponding mean annual wage for the State of New Hampshire versus the nation.

Position Title (SOC Code)	New Hampshire Average Wage	National Average Wage	NH as Percent of National Wage	10-Yr. Projected Growth Rate
Multi-Media Artists & Animators (27-1014)	\$60,590	\$61,010	99.31%	31.2%
Fine Artists, Illustrators (27-1013)	N/A	\$48,110	-	11.3%
Producers & Directors (27-2012)	\$63,232	\$77,070	82.04%	9.0%
Media & Communication Workers (27-3099)	\$46,280	\$45,720	100.1%	11.3%
Film & Video Editors (27-4032)	\$36,150	\$61,180	59.09%	N/A
Media & Communication Equipment Workers (27-4099)	\$28,933	\$54,090	53.49%	N/A
Graphic Designers (27-1024)	\$42,494	\$46,750	90.9%	14.6%

Source: SNHU/CESI; NH Dept. of Economic Development (June, 2009 Wage Estimates)  
N/A = not available: non-tracked data



## CBA Target Customers

The target customers for CBA services are in the following categories:

- **Student “Start-Ups”:** Students from colleges/universities in New Hampshire will be encouraged to join the CBA as they create new knowledge economy business ventures. The CBA Director and Advisory Board will work with colleges and universities, particularly with those individuals at campuses involved in the knowledge economy disciplines (e.g.: IT departments/professors, graphic arts, etc.), to encourage student involvement with the CBA.
- **Emerging Regional Knowledge Economy Ventures:** The CBA Director and Advisory Board will pursue a strategy of promoting the services of the CBA to existing, “early stage” (1-3 years in business), knowledge economy ventures within the region.
- **Regional (Community/Non-Student) Start-Ups:** The CBA Director and Advisory Board will pursue a strategy of promoting the services of the CBA to community-based knowledge economy start-ups that wish to locate in the region.
- **Career Transition Individuals:** The CBA Director and Advisory Board will pursue a strategy of promoting the services of the CBA to individuals that, for various reasons, desire a career transition. Included in this group will be “retired” individuals seeking to create a knowledge economy venture.

### CBA Funding:

The Director of CESI will pursue grant funding to cover the first two years of CBA operations. Monthly fees for CBA clients as well as business sponsorships for the CBA will assist in offsetting ongoing operational costs. The CBA Advisory Board will be involved in these ongoing funding efforts.



*LEFT to RIGHT: Prominent buildings from Saint Anselm College, UNH-Manchester, and Southern New Hampshire University.*

## The Initial Niche Focus of the CBA

The CBA will have an initial niche focus on the establishment of video gaming studios and website design firms. Below is an example of some of the various college majors applicable to a video gaming studio appearing on a gaming jobs website (Gamasutra, 2010).

<b>MAJOR</b>	Southern N.H. Univ.	UNH Durham	UNH Manchester	Daniel Webster	Rivier	Saint Anselm	Hesser	NHTI Concord	Manchester C.C.	Nashua C.C.	NH Art Institute	Chester College
Gaming*	X			X				X				
Computer/ IT	X	X	X	X	X	X	X	X	X	X		
Acct./ Finance	X	X				X	X	X	X	X		
Business	X	X	X	X	X	X	X	X	X	X		
Graphic Design	X				X	X	X			X		X
Communications	X	X	X		X	X	X		X			X
Music/Audio	X	X				X						
Visual Arts	X					X			X		X	
Marketing	X	X		X	X		X			X		

Source: SNHU/CESI

\*While not in the Southern New Hampshire Planning Commission region, Great Bay Community College in Portsmouth, NH is in the approval stage for a gaming major.

As the above data indicates, the establishment of video gaming studios reaches across many majors and disciplines in terms of employment. The concentration on gaming studios allows for the leveraging of available resources (university programs and infrastructure) to build a particular niche in the region in the creative industry sector. An expansion to include other creative industry sectors will be dependent upon initial (2-3 years) results achieved with the CBA.

See “Quick Facts” for the video gaming industry on page 26.

## B. Incentive Recommendations

The following recommendations are set forth to encourage communities to begin the process of developing strategies to:

- Identify and brand the region as a “Creative Business Corridor/Region” within New Hampshire
- Promote job growth in the region
- Increase retention of college graduates and young professionals
- Increase expansion of existing creative businesses
- Increase recruitment of creative businesses to the region

While incentive programs should be developed and offered by local communities, it is imperative that incentives be instituted and supported also at the state level. It is recommended that further study be performed in this regard. Given funding level difficulties, it is recommended that incentives be developed that do not require direct cash outlays.

Incentives should be targeted at three different categories, namely:

- Location
- Industry
- Individual

### Specific Incentive Recommendations

It is recommended that an initial low-cost approach to establishing creative businesses within the region be pursued. While these incentives are listed in various phases it must be emphasized that one phase does not necessarily need to be completed before another phase is begun. In fact, it is recommended that Phase 2 (State Level) efforts begin simultaneously with Phase 1 (Local Level) efforts due to the lag time involved with Phase 2 type incentives.

#### Phase 1 Incentives: Local Level

- ◆ Towns should identify 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.
- ◆ Creative businesses (as defined by the region/local towns) locating in buildings requiring renovation be exempt from town fees for building permits, building inspection fees, and other such regulatory fees associated with the renovation.
- ◆ Incubated companies wishing to relocate or expand within the community may be eligible for reduced business license fees
- ◆ The region should have a “dedicated” centralized body to assist companies wishing to locate within the region, regardless of town of location. It is suggested that Metro-Center NH and/or the CBA (Director) fill this role.

## Phase 2 Incentives: State Level

- ◆ Industry specific tax credits for creative businesses. This strategy has been successful in other states, such as Florida and Texas, that, like New Hampshire, also 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.

## 1. Location Targeted Incentives Best Practice : Three Cases

### *Case 1: The Peekskill (NY) Downtown Artist District*

The Peekskill incentive specifically allows “live/work” spaces in a specified artist district. While this example is restricted to “artists”, much the same approach may be taken by communities in this region while expanding it to include other types of individuals/businesses that are deemed suitable for in-home occupations. The Peekskill approach was to specifically allow “live/work” properties within a particular district of the community. Landlords were offered grants, tax incentives, and loans for renovating 2<sup>nd</sup> floor commercial space for live/work areas. Included in this are façade improvements for exterior portions of the building (Borup, Tom, 2006).



*A Peekskill, N.Y. artist poses alongside a recent painting.*

### *Case 2: Maryland Arts and Entertainment District*

Maryland, in 2007, became the first state in the nation to create an Arts and Entertainment District statewide. Up to six districts can be designated Arts and Entertainment districts yearly by the Maryland Department of Business and Economic development. The designation allows artists within these districts to be eligible for tax relief. In addition, it allows for property tax exemptions, for up to ten years, on the value of renovations performed to provide artist live/work spaces. To date, Maryland has designated 15 communities as such districts (Angelou Economics, 2008).



*The Station Arts and Entertainment District in Baltimore is one of more than a dozen such districts in Maryland.*

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### *Case 3: Charleston Digital Corridor*



*The Charleston Digital Corridor utilizes an aggressive marketing campaign.*

The Charleston Digital Corridor (CDC) is a creative effort to attract, nurture, and promote the Charleston, SC knowledge economy. The focus is on technology companies in the areas of media, life sciences, telecommunications, medical device design and engineering. CDC is a hybrid-virtual incubator with meeting space available. CDC covers distinct districts in and around Charleston. It is a member-driven organization in terms of programming with strong regional business participation. The costs of CDC are primarily covered by the City of Charleston, with additional support provided through membership dues and corporate and individual sponsors. The focus of CDC is on client (member) counseling services, talent matching through its online “Talent Portal”, investor matching, and networking events (e.g.: Fridays at the Corridor).

CDC essentially acts as a regional clearinghouse for technology firms, both local and non-local, interested in locating in the area of the Corridor. Members pay dues on a sliding scale basis depending on the number of employees at the member company (Angelou Economics, 2008).

Services available to members are varied and wide-ranging (yet cost effective) including:

- Access to a community of experienced entrepreneurs and professionals
- Use of (2) conference facilities
- Access to the Digital Corridor Talent Portal
- Reduced rates on City licenses and fees
- Company profile on the Digital Corridor website
- Business Advisory Services - real estate/incentives etc.
- Assistance with news and press release drafting and distribution
- Ability to post news items and press releases
- Invitations to Annual "Corridor Bash" Event
- Preferred rates at select Charleston Hotels
- Participation in monthly "Fridays @ the Corridor" series

Incentives include:

- Companies locating in corridor buildings requiring renovation are exempt from city fees for building permits, building inspection fees, and such regulatory fees associated with the renovation.
- Companies may be eligible for reduced business license fees
- The City of Charleston has a "dedicated" project manager to assist companies wishing to locate within the corridor.

The CDC has grown from an initial 18 firms in 2001 to 71 today (Charleston Digital Corridor, 2010).



*Downtown Charleston, S.C.*

*Image courtesy BAR Photography*

## 2. Industry Targeted Incentives: Two Cases

### *Case 1: Louisiana: Industry Targeted Tax Credits*



*LEFT: A film crew shoots a scene in the French Quarter of New Orleans*

In 2002, the State of Louisiana began an ambitious effort to support growth in particular industries through the use of targeted tax credits. It began this effort with a focus on the film industry with the passage of the Louisiana Film Tax Credit.

This tax credit is actually comprised of multiple tax credits. For example, a 10% tax credit is allowed for hiring Louisiana labor, a 25% tax credit for production expenditures, and a 40% tax credit for infrastructure expenditures (such as sound stages).

The result of this rather aggressive tax credit policy is that the targeted industry (film) has become one of the principle economic drivers of the Louisiana economy. By 2007, \$400 million dollars of film production took place in Louisiana. Based on the success of the film industry tax credit, Louisiana has expanded the use of targeted tax credits to other industries such as music and sound recording. Music and sound recording companies are now eligible for a 25% tax credit for infrastructure and production expenditures. In addition, video gaming companies (digital media) are eligible for a 20% tax credit for expenditures in Louisiana (Angelou Economics, 2008).

### *Case 2: Ontario, Canada*

An interesting approach involving the use of targeted industry tax credits comes from the Province of Ontario, Canada. Ontario has been successful in using the targeted tax credit approach in the film industry as well as other creative industries like digital media, book publishing, and sound recording. Much like the Louisiana case, they provide generous tax credits for using Ontario labor as well as for other associated expenditures (Angelou Economics, 2008).

### 3. Individual Targeted Incentives: Two Cases

#### *Case 1: Philadelphia Creative Investment Fund*

Philadelphia, Penn. created this fund in 2007 in order to:

- Foster growth in the creative industries,
- Brand Philadelphia as an area known for “knowledge industries”, and
- Retain and recruit young professionals to the area.

The fund provides pre-seed and early-stage investments in the amount of \$25,000-\$150,000 for creative businesses in industries such as architecture, communications, design and merchandising, digital media, engineering, fashion design, music, video, film and film production, graphic arts, information technology, interior and industrial design, marketing, multimedia design, photography, planning, product design, and software development (Econsult corporation, 2008).



*Downtown Philadelphia*

*Image courtesy Michael Righi*



*Case 2: Paducah, Kentucky Artist Relocation Program*



*Artist in Lowertown, Paducah, Kentucky*

This program was started in what was a run-down central section of Paducah, Kentucky known as Lowertown. The once proud historic structures and homes there had fallen into decay since World War II. Drug dealers invaded the area as it continued its decline. In 1989 an artist/visionary moved to the area and proceeded to transform the area with plans for an artist community.

The large historical structures provided an opportunity for work/live spaces. This first step was taken in the form of zoning that would allow such use. Then incentives were provided to the artists themselves to move to the area and set up shop. The city and banking community partnered in a program to offer very generous financing to artists for moving to the area and purchasing homes as work/live spaces. Financing from the banks provided 100% financing up to three times the appraised value of the property. Below market interest rates were subsidized by the city for the purchase of these properties.

Today, the area known as Lowertown” in Paducah is a transformed artist community that adds significant economic value to the region (Borrupt, Tom, 2006).

## Next Steps

### For the CESI/CBA Director:

- ◆ Identify individuals at each college/university involved in business startups on campus within the creative industries sector. Initial contacts with video game industry/website design associated programs.
- ◆ Form a *regional* advisory group comprised of college/university representatives, representatives from the various towns, the Amoskeag Business Incubator , Metro-Center NH, SNHPC, the Women's Business Center, SCORE, Micro-Economic Development, and other groups as deemed appropriate. This advisory group will serve as an information clearinghouse for the towns as well as a vehicle to share best practices regarding campus/community startups in our region.

This advisory group will serve as a bridge from the college/university campuses and the ABI to the local communities. The advisory group will direct startups from the CBA to ABI or particular communities that have instituted incentives as recommended in this study.

- ◆ Seek grant funding for initial start-up period (2 years) of CBA
- ◆ Provide necessary facilities/operating structure/programming/service providers for CBA operations.
- ◆ Begin CBA operations in 1st quarter, 2011 on the Southern New Hampshire University campus in Manchester, NH under the direction of the Director of the SNHU Center for Entrepreneurship & Social Innovation.

### For the Towns:

- ◆ Identify one individual per town to serve on CBA Advisory Board.
- ◆ Identify incentive measures suitable for each town.
- ◆ Develop and institute incentives (Phase 1) as discussed in this report (or as otherwise determined by towns).
- ◆ Identify and work with State level officials regarding Phase 2 incentives

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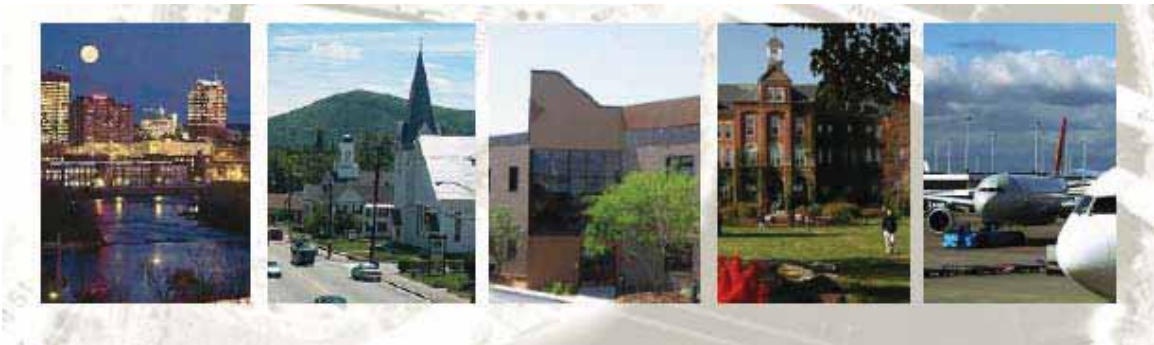
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## Section H: Certified Site Proposal





Studio One Photography

# Southern New Hampshire **CERTIFIED SITE PROGRAM**

## **Program Proposal and Summary**

Prepared By:

Southern New Hampshire Planning Commission  
Metro Center-NH Steering Committee

# Southern New Hampshire CERTIFIED SITE PROGRAM

## Summary of Key Program Elements

### Program

Administrator: Southern New Hampshire Planning Commission

### Key Participants:

Metro Center-NH (Manchester Chamber of Commerce)  
13 Municipalities located in the Southern New Hampshire Region  
Public Utilities operating in the Region  
State of New Hampshire Department of Resources and Economic  
Development (NH DRED)

### Estimated

Program Costs: \$15,000 Initial Program Development Cost  
\$ 1,500 Annual Program Administration/Implementation Cost

### Estimated

Program Revenues: \$ 1,500 Application fee per site

### Potential Sources of Funding:

Public Service of New Hampshire (PSNH)  
Granite State Electric  
NH Electric Cooperative, Inc. (Derry and Raymond)  
Unitil Energy Systems, Inc. (Londonderry)  
National Grid  
FairPoint Communications  
Granite State Telephone Inc.  
Metro Center Investment Model – Member Donations  
NH Business and Industry Association (BIA)  
New Hampshire Real Estate Investors Association (NHREIA)  
New Hampshire Commercial Investment Board of Realtors  
(NHCIBOR)

## Background

The recently completed *Target Industry Analysis*<sup>1</sup> report prepared by MS&B for the Southern New Hampshire Regional Economic Development Plan recommends that a **Certified Site Program** be established for the Southern New Hampshire Region.

<sup>1</sup> Target Industry Analysis, Final Report Prepared by Moran, Stahl & Boyer, Site Selection and Economic Development Consultants, January 2010, Executive Summary. Available at SNHPC website at: <http://www.snhpc.org/>

**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.

Originally, the certified sites/shovel ready concept was developed to help market brownfields sites that were once environmentally contaminated and subsequently assessed and remediated and made ready for redevelopment and/or reuse. The concept was then applied to open and vacant developable land zoned for specific industrial/office uses.

Within the past several years, Certified Site Programs have gained substantial momentum across the U.S. 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 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](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.

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It is important to note that while most of all the Certified Site Programs implemented in the U.S. are administered as a state-wide or state-run program, it will be the most cost effective to implement a Certified Site Program in New Hampshire 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 at this time 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 finding was confirmed at a meeting held on February 4, 2010 with Roy Duddy, Interim Director and staff with the NH Division of Economic Development. Currently, neither the NH DRED nor the Office of Energy and Planning have any funding or grant opportunities available to support the implementation of a Certified Site Program in the State of New Hampshire. Despite the lack of program support and funding, NH DRED is however in favor of the program and is willing to participate in the program by posting the Certified Sites approved through the Southern New Hampshire Certified Site Program on the state's International Trade Data Network (ITDN). In addition, information on certified sites will also be posted on the Metro Center-NH website with links set up to participating municipality's websites.

This program proposal and summary sets forth an outline and scope of work for implementing the **Southern New Hampshire Certified Site Program**. This 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 in the amount of \$13,000 will be required for initial program development. In addition, it is anticipated that to successfully administer and implement the program, roughly \$15,000 will be needed to support the first year of the program and \$10,000 for the second year. The need for funding each year of the program however is dependent upon the number of certified site applications submitted for review and approval.

This program proposal and summary will be presented to the Metro Center-NH Steering Committee and all the public utility companies and real estate organizations located within the region. All the utility companies and real estate organizations within the region will directly benefit from the future development of the certified sites. After the program is up and running for two years, it is anticipated that the program will be self-sustaining through the implementation of a program application fee in the 3<sup>rd</sup> year.

The Southern New Hampshire region includes the City of Manchester and the twelve municipalities surrounding the city, including the towns of Auburn, Bedford, Candia, Chester, Deerfield, Derry, Goffstown, Hooksett, Londonderry, New Boston, Raymond and Weare (as shown in the following map). This is the same region that forms the basis of Metro Center-NH partnership. More information about the Metro Center-NH Strategic Partnership under the Manchester Chamber of Commerce can be found at the following link: <http://www.manchester-chamber.org/resource-development/regional-development-committee.asp>



## Key Concepts/Elements of the Southern New Hampshire Certified Site Program

### Program Overview -- What Is A Certified Site?

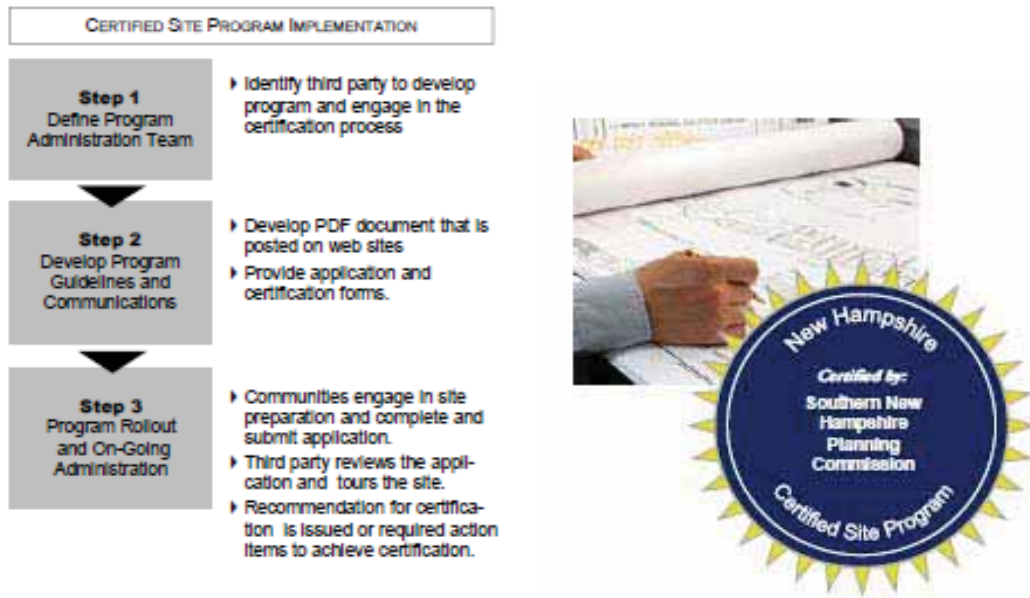
As currently envisioned a Certified Site under the **Southern New Hampshire Certified Site Program** would need to meet the following minimum standards and guidelines in order to achieve certification approval. Final agreement on the program standards and other similar guidelines will still need to occur among all program participants in order to achieve a high degree of participation and to set a Certified Site apart from other approved or potential development sites within a municipality and the region.

- The Certified Sites Program shall be open to all industrial, office and mixed-use sites in order to achieve the maximum program exposure as possible.
- Participation in the Certified Sites Program is optional and at the discretion of the municipal Planning Board.
- In order to participate in the program, the Planning Board must include at a minimum a site certification process within its site plan and subdivision regulations. This can be easily achieved by adopting the model site plan/subdivision amendment which is included as part of this proposal. Also, included with this proposal is a model zoning amendment that can be considered by the planning board if it desires to codify the site certification process as part of the municipality's zoning ordinance. In addition, an innovative planned development model zoning district (referred to as an Economic Opportunity District) is included with this proposal that can be adopted to offer additional program electives at the recommendation of the planning board.

- The property owner and municipality must agree to work together to complete and submit the necessary Site Certification application forms to the Southern New Hampshire Planning Commission for final site certification review and approval.
- The site is zoned industrial, office, mixed-use or some other similar zoning classification that allows for a range of permitted uses that reflect the target end use of the site as desired by the property owner and municipality.
- All Certified Sites must have site plan approval from the planning board. This also includes subdivision plan approval as may be necessary to ensure both zoning and site plan compliance.
- However, at the option of the planning board and upon establishment of an innovative planned development zoning district for tracts of land greater than 25 acres in size (see the Economic Opportunity District model ordinance recommended as part of this proposal), site plan approval will not be required for approved Certified Sites that are part of this or a similar zoning district and are in compliance with an overall comprehensive master development plan for this innovative zoning district.
- A Certified Site can be privately or publicly owned, or owned by an economic development organization, developer or other third party, and a sales price for the property or properties has been determined, including a boundary survey, title search, and Phase I Environmental Assessment.
- The required technical studies and surveys have been completed (e.g., soils analysis, wetlands, drainage, floodplain, environmental assessment (often including as needed historical/archeological survey)). Depending on the type of site, a traffic study has also typically been performed.
- All local, state and federal permits (typically wetland, alteration of terrain - grading, drainage, soil erosion and sedimentation, and comprehensive shoreland protection as may be necessary) required to engage in site development have been obtained (except building permit and/or site construction permits shall not be required to achieve Certified Site status).
- The provision of public utilities and roads to the site and/or building to be served shall either be in place or be designed and approved by the municipality and the utility for installation within the time period of the approval of the plan.
- While not required, at the option of the property owner and as approved by the municipality, all or portions of a non-level site can be excavated to make it “pad ready.”

#### The Certification Process – What are the General Program Steps?

There are three main steps in implementing the **Southern New Hampshire Certified Site Program**. These steps are identified in the following figure that has been prepared by MS&B for the Southern New Hampshire Planning Commission. The program begins with the Southern New Hampshire Planning Commission who shall be responsible for program administration; the processing and review of applications; engaging on-site reviews; making the determination that the site is ready to be certified; and preparing electronic PDF of all the essential site information.



**Step 1: Define Program and Administrative Team.** This step involves establishing two committees: a Program Steering Committee and a Technical Advisory Committee. The Program Steering Committee will be responsible for guiding the development of the program; overseeing the work of the Southern New Hampshire Planning Commission in administering the program; and offering recommendations for revisions and adjustments to the program as necessary to ensure its success.

The Technical Advisory Committee will be charged with determining the specific technical standards and guidelines for the certification of sites as well as providing feedback and recommendations on the review of applications. It is anticipated that several meetings will be held with both the Program Steering Committee and the Technical Advisory Committee to seek agreement on the overall program as well as the specific standards and guidelines for site certification.

**Step 2: Develop Program Guidelines and Communications.** This step involves developing the necessary Certified Site Application Form and other technical guidance and documentation – both electronically and in hard copy in order to communicate and market the program – both within and outside the region. This will also include branding and marketing the program and preparing a power point presentation to be delivered to all the municipalities, public utilities and real estate boards and associations within the region. The application form and all program guidance and communications will be prepared by the Southern New Hampshire Planning Commission working in connection with both the Program Steering Committee and the Technical Advisory Committee.

Because timing is critical in the site selection process, it will be important that for all certified sites, accurate and up to date information about the site be submitted as part of the application so that if the site is certified, it can be packaged and consolidated into an

electronic file (PDF) and posted on the NH DRED and Metro Center websites. Presenting accurate and essential information about the site could make the difference between landing a company's interest in the site or losing the site to another location.

A general list of the typical forms and other technical guidance that will be part of the **Southern New Hampshire Certified Site Program** are identified below:

- Certified Site Program Application Form and Checklist
- Program Guidance and Contact Information
- Frequently Asked Questions
- Example PDF documents of a Certified Site to be posted on internet sites
- Map of Certified Sites within Region
- Re-Certification Application – typically all sites must be re-certified every five years to keep the site information up to date.
- Modifications – it is envisioned that minor modifications such as a change of ownership or other site data can be updated during this five year period and will not require that a site be re-certified.

**Step 3: Program Rollout and Ongoing Administration.** This step consists of launching and implementing the program and engaging municipalities, developers and property owners within the region to consider site preparation and application submittal. Potential sites within many communities will be at various stages of site readiness and preparation for development. Therefore, it will be critical that municipalities and developers work together to identify appropriate sites within their communities that will meet the program certification guidelines.

In addition, it is recommended that municipal planning boards incorporate procedures within their site plan and subdivision regulations that can facilitate the processing and submittal of certified site applications (see example and model ordinance language included in this proposal). It is anticipated that the Site Certification Application can be completed by the property owner(s), real estate developers, municipalities, local economic and/or industrial development corporations, and other businesses and agencies engaged in economic and real estate development that have a stake in the development of the site. However, the property owner(s) and all others who have an interest in the site must agree and sign the application form and submit the necessary documentation.

Upon receipt of the application materials, the Southern New Hampshire Planning Commission (SNHPC) will begin a review of the application to ensure that it is complete and that all the required materials have been provided. SNHPC will make an initial determination whether the site is eligible for certification and the whether the application is complete. If additional and/or required documentation/information is needed and/or missing, the applicant will be notified and provided an opportunity to resubmit the application. Upon receipt of a complete application, SNHPC will schedule a tour of the site and offer a recommendation to the Program Steering Committee who will then review the application and render a decision.

If the site is approved for certification, the SNHPC will consolidate the site information into an electronic PDF file to be posted on the NH DES and Metro Center websites. This file will contain all the essential information about the site, including photos, maps, copies of local approval records and permits, permitted uses, and other key documentation which provides evidence of the shovel readiness of the site for development purposes.

#### Overall Program Mission - What are the Main Goals of the Program?

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 US Certified Sites.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. This would be accomplished by seeking statewide and legislative support for such a program through NH DRED, all the regional planning commissions located within the state, as well as all the public utilities, real estate and other similar organizations participating in the program.

It must be noted however that just having a certified site available within the region and the 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 U.S. which have been implementing and developing similar programs.

#### What is the Responsibility of the Site Owner/ Developer?

As with all development, the property owner whether they are a site developer, local government, economic development corporation, and/or another third party are ultimately responsible for promoting and obtaining necessary site approvals in order to market or develop the site. Under the **Southern New Hampshire Certified Site Program**, the same responsibilities, pre-development costs and investment risks would apply regardless of ownership or who partners in the development of the site. Some of the program requirements and specifications may include:

- Obtaining clear title and a survey of the site/properties
- Obtaining an appraisal and market value (sales price) of the site
- Obtaining necessary local, state and federal permits, and local site and zoning approvals, including site and subdivision plans as necessary
- Conducting studies as necessary, such as environmental, drainage, grading, soil erosion and sedimentation, water and wastewater and traffic
- Conducting necessary site clearing and grading work to make it "pad ready"

All of these steps and requirements are already a key part of the site development process. To help aid in these costs, the Southern New Hampshire Planning Commission's Brownfields Program may be able to provide assistance to property owners/developers in conducting necessary Phase I and II environmental assessments as well as Phase III remedial action plans, as necessary, for eligible brownfields properties.

#### How will this Program Directly Benefit the Site Owner/Developer?

Besides the obvious marketing benefits that can be derived from this program, the program will also directly enable the site owner/developer achieve a reduction in time, risk and up-front costs related to site development knowing that a Certified Site has been approved and is ready to be moved and positioned for building permit and construction. Another significant benefit are that Certified sites pre-approved by a municipal planning board and once certified by the Southern New Hampshire Planning Commission will be valid for five years from the date of official plan approval as opposed to the typical one year or two year plan approval period granted by most planning boards. This 5-year plan approval period would eliminate the need for the site owner/developer to seek time extensions from the planning board after a year or two from the date of official plan approval. This additional time for maintaining plan approval adds greater predictability and certainty in the land development process. Modifications to an approved plan requiring planning board approval such as for example a change in ownership, a change in the approved use of the site, and/or a change in site guarantees for the provision of necessary improvements would still be enforced as part of the planning board's regulations, as determined by the municipality.

In addition to the benefit of a five year plan approval, an innovative planned development model ordinance (a new Economic Opportunity District) is included as part of the Certified Sites program, wherein at the option and recommendation of the planning board, approved certified sites within the master planned development could proceed to building permit upon execution of a development agreement.

#### What are the Specific Roles of Each Program Participant?

There are a number of important program roles both technical and advisory that will be coordinated and implemented as part of the **Southern New Hampshire Certified Site Program**. The program participants and their roles are identified as follows:

**Southern New Hampshire Planning Commission:** As noted earlier, SNHPC's role in the certified site program shall be overall program development, management and administration, fiscal agent oversight, and program implementation, including facilitating both the technical review committee and program steering committee. The largest cost to the SNHPC in implementing the program will be compiling all the site data, photos, graphics and plans of each approved Certified Site into a marketable website PDF and updating this information as necessary over five years. The SNHPC shall also collaborate with Metro Center-NH on fund raising and overall program marketing needs to ensure that the program is sustainable year to year and self-supporting.

**Metro Center-NH:** The Manchester Chamber of Commerce role in the site certification program will consist of: initial program development; ongoing program oversight; program support through Metro's investor model member donations; working with SNHPC on fund raising and overall program marketing; serving on the program steering committee; and most importantly providing website support and hosting of Certified Sites.

**Planning Boards:** While this program can benefit each and every municipality within the region, it will be the option of the planning board to decide if and when to participate in the program. Planning boards that opt to participate will continue to review site development proposals, including granting necessary local approvals and permits for an eligible site to meet the program guidelines in becoming a certified site. Ultimately, the primary program requirement that the planning board shall be responsible for if it elects to participate shall be reviewing applications for and pre-approving certified sites before the property owner/developer can submit the certified site program application and supporting documentation to the SNHPC for final certification. Specific roles municipalities would provide to the program include: initial and ongoing program development; serving on the program advisory steering committee; assisting with potential ongoing program funding support; working with SNHPC on overall program marketing; as well as hosting Certified Sites on local economic development and municipal websites.

**Public Utilities:** Public utility companies stand to directly benefit from the Certified Site Program through the provision of necessary utilities as well ongoing service support as a



result of site development. It will be the option of every public utility in the region to decide if they would like to participate in the program. For utilities that elect to participate in the program they would assist with initial program development, (including developing necessary site certification guidelines and specifications); serving on the technical review committee; and assisting with program funding support. All participating utilities that provide funding to help develop and implement the program will be able to include their company logo and will be recognized as such on all program materials and web resources. All utilities would also at request of the planning board and the SNHPC need to agree to provide verification of necessary pre-development site approvals with respect to the provision and/or feasibility of providing necessary utilities and services to a prospective certified site.

**State of New Hampshire DRED:** Initially, NH DRED's role in the program will be primarily providing website support and hosting of Certified Sites and serving on the program steering committee. Eventually, it is hoped that cooperative efforts can be pursued to expand the program under the coordination of NH DRED or a similar state agency and/or all the regional planning commissions within the state as directed by the state legislature and governor.

### **Program Development Approach/Work Tasks/Cost Estimates**

#### **Initial Program Development:**

Step One: Obtain Metro Center- NH Steering Committee Acceptance of Program Proposal and Commitment to Proceed with Program Development

Cost Estimate: SNHPC - 15 Hours @ \$50/hr = \$750

Step Two: Develop Program Guide; Program Logo/Certification Seal; and Power Point Presentation for Promoting/Marketing Program

Cost Estimate: SNHPC - 75 Hours @ \$50/hr = \$3,750

Step Three: Contact Identified Key Program Participants (up to 24): Present Program Guide, Certification Forms and Power Point Presentation to Obtain Program Support and Participation Commitments

Cost Estimate: SNHPC – 48 Hours @\$50/hr = \$2,400

Step Four: Meet with Key Potential Program Funding Sources (11 sources – identified on page 1 of this proposal) – Present Program Guide and Power Point Presentation and Cost Estimates for Initial Program Start Up and ongoing Program Implementation

Cost Estimate: SNHPC – 22 Hours @\$50/hr = \$1,100

Step Five: Upon Funding Commitments: Establish Technical Review Committee and Program Advisory Committee and Develop Program Timeline and Program Implementation Materials to include:

- Program Instructions and Application Forms
- Site Certification Guidelines and Specifications
- Database Requirements for Certified Sites

Cost Estimate: SNHPC – 100 Hours @\$50/hr = 5,000

Step Six: Upon Funding Commitments: Distribute Program Instructions and Application Forms to Participants and Conduct Widespread Marketing of Program

Cost Estimate: SNHPC - 30 Hours @ \$50/hr = \$1,500  
Travel Costs – 13 Municipalities = \$500

Estimated SNHPC Total Initial Program Development Cost: **\$15,000**

#### **Key Funding Sources:**

- Metro Center Investors Model – Member Donations
- Public Utility Grants/Donations
- Real Estate Boards and Business Associations – Grants/Donations

#### **Annual Program Implementation/Administration:**

Work Task One: Review Applications with Technical Review Committee, Perform On-Site Review and Issue Site Certification

Cost Estimate: SNHPC – 10 Hours @ \$50/hr = \$500 per site

Work Task Two: Consolidate/Display Certified Site Information into electronic PDF Format and Distribute to Websites to Host/Market Sites

Cost Estimate: SNHPC – 10 Hours @\$50/hr = \$500 per site

Work Task Three: Facilitate Two Advisory Committee Meetings and End of Year Program Review and Assessment

Cost Estimate: SNHPC – 10 Hours @\$50/hr = \$500

Estimated SNHPC Annual Program Cost: **\$1,500 per site**

It is estimated that the **Southern New Hampshire Certified Site Program** could be supported through an **Application Fee of \$1,500 per site**. This fee would enable the program to continue on an ongoing and self – supporting basis.

**Estimated Program Development Timeline/Schedule:**

- Submit Proposal to Metro Center-NH Steering Committee for Endorsement  
- **April 28, 2010 Meeting**
- Submit Proposal to Key Funding Sources –  
- **May through June 2010**
- Upon Funding Commitments – Proceed with Program Development –  
- **June – August 2010**
- Roll Out Program to Municipalities and Public  
- **September 2010**

**Model Ordinances – Planning Board Site Certification Authority/Regulations and Procedures:**

All planning boards that desire to participate in the **Southern New Hampshire Certified Site Program** must adopt and incorporate the following Certified Site Program minimum site plan/subdivision regulations (see following Model Ordinance A) and/or the basic language and intent of these regulations (as confirmed by the SNHPC and as approved by municipal counsel) within their site plan and subdivision regulations.

These basic minimum regulations would enable the municipality to accept applications under the certified site program and to pre-approve planned industrial, office, and/or mixed-use sites for certification within specific identified zoning districts within the community. Under these regulations, all sites and buildings to be approved for site certification by the Southern New Hampshire Planning Commission must have in place local planning board site plan approval and as necessary subdivision plan and zoning approval from the municipality.

Planning boards that desire to codify the Certified Site Program as part of the municipality's zoning ordinance can also adopt the following Model Ordinance B.

In addition, planning boards can consider establishing an innovative planned development district within their community (see following Model Ordinance C – Economic Opportunity District) or amending an existing similar district the purpose of which would allow pre-approved certified sites to proceed to development (building permit) upon approval and execution of a development agreement.

Each of the following model ordinances and regulations can be adopted as innovative land use controls under RSA 674:21.

## **Model Ordinance A: Site Plan/Subdivision Regulations Certified Site Program**

**The following minimum regulations and procedures must be adopted as part of the planning board's site plan and subdivision regulations in order to participate in the Southern New Hampshire Certified Site Program.**

### **I. Purpose**

The purpose of the Certified Site Program is to provide an opportunity for property owners/site developers to obtain Certified Site approval of sites and/or buildings located within the Municipality of \_\_\_\_\_. All applications for site certification must be approved by the municipal planning board before submittal to the Southern New Hampshire Planning Commission for review and final certification. Once certified, required and essential information about the site and/or building may be posted on an active economic development website designed to enhance the visibility of the site to national and international site selectors, real estate organizations and professionals, as well as companies and businesses seeking sites and buildings to develop and/or relocate to within the Southern New Hampshire Region and the Municipality of \_\_\_\_\_.

### **II. Applicability**

Certified Site approval for sites and buildings shall only be considered within the following zoning districts: \_\_\_\_\_ within the Municipality of \_\_\_\_\_.

All sites and buildings seeking site certification must have in place site plan and zoning approval from the Municipality of \_\_\_\_\_, including subdivision plan approval as may be necessary to ensure both zoning and site plan compliance. In addition, all required technical studies and surveys shall be completed and all local, state and federal permits (as necessary) to engage site development (except building permits) shall be obtained as part of the planning board's approval. The provision of public utilities and roads to the site and/or building to be served shall either be in place or be designed and approved by the Municipality of \_\_\_\_\_ for installation with adequate documentation and site guarantees within the time period of the approval of the plan.

Upon receiving Certified Site approval from the Southern New Hampshire Planning Commission, site plan and subdivision approval granted by the planning board of the Municipality of \_\_\_\_\_ shall be valid for five years from the date of official planning board approval. However, all Certified Sites must be re-certified every five years from the date of official planning board approval in order to keep the site information up to date. Any modification to an approved plan of a Certified Site requiring planning board approval occurring within the five year approval period shall be submitted to the Southern New Hampshire Planning Commission and the Certified Site website posting shall be updated accordingly.

## **Model Ordinance B: Zoning Regulations Certified Site Program**

**The following model zoning ordinance regulations are offered if a municipality desires to codify the Certified Site Program as part of the municipality's official zoning ordinance. While adoption of this model zoning ordinance is not a mandatory requirement for participation in the Southern New Hampshire Certified Site Program, these zoning regulations or other similar language as may be developed by the planning board may be recommended by municipal counsel especially if the planning board elects to adopt the following model Economic Development Opportunity District or other similar planned development district or master plan zone within the municipality.**

### **I. Purpose**

The purpose of the Certified Site Program is to provide an opportunity for property owners/site developers to obtain Certified Site approval of sites and/or buildings located within the Municipality of \_\_\_\_\_. All applications for site certification must be accepted by the municipal planning board before submittal to the Southern New Hampshire Planning Commission for review and final certification. Once certified, required and essential information about the site and/or building may be posted on an active economic development website designed to enhance the visibility of the site to national and international site selectors, real estate organizations and professionals, as well as companies and businesses seeking sites and buildings to develop and/or relocate to within the Southern New Hampshire Region and the Municipality of \_\_\_\_\_.

### **II. Authority**

This ordinance is adopted in accordance with RSA 674:16 and RSA 674:21.

### **III. Applicability**

Certified Site approval for sites and buildings shall only be considered within the following zoning districts: \_\_\_\_\_  
within the Municipality of \_\_\_\_\_.

All sites and buildings seeking site certification must have in place site plan and zoning approval from the Municipality of \_\_\_\_\_, including subdivision plan approval as may be necessary to ensure both zoning and site plan compliance. In addition, all required technical studies and surveys shall be completed and all local, state and federal permits (as necessary) to engage site development (except building permits) shall be obtained as part of the Certified Site application. The provision of public utilities and roads to the site and/or building to be served shall either be in place or be designed and

approved by the Municipality of \_\_\_\_\_ with adequate documentation and site guarantees for installation within the time period of the approval of the plan.

However, as provided for this Zoning Ordinance, a site and/or building may be pre-approved by the planning board as a Certified Site without site plan approval provided the planning board has approved the site and/or building as part of a comprehensive master development plan that has been approved and is in compliance with the municipality's following planned development ordinance: \_\_\_\_\_.\*

***\* (If the municipality does not have in place a planned development ordinance or other similar unified or overall master plan zone that can be amended to provide this option, the following innovative model Economic Development Opportunity District ordinance is offered for municipal consideration)***

Upon receiving Certified Site approval from the Southern New Hampshire Planning Commission, site plan and subdivision approval granted by the planning board of the Municipality of \_\_\_\_\_ shall be valid for five years from the date of official planning board approval. However, all Certified Sites must be re-certified every five years from the date of official planning board approval in order to keep the site information up to date. Any modification to an approved plan of a Certified Site requiring planning board approval occurring within the five year approval period shall be submitted to the Southern New Hampshire Planning Commission and the Certified Site website posting shall be updated accordingly.

## **Model Ordinance C: Innovative Planned Overlay Zone Economic Opportunity District (EOD)**

The following innovative model ordinance is offered for those planning boards that do not have in place a planned development zoning district or overlay district, planned unit development ordinance or other similar area-wide or unified planning zone. The intent of this model ordinance is to provide economic opportunities for planned industrial, office and mixed-use development on appropriate size tracts of land and at locations that have been approved by the planning board as part of a larger unified or comprehensive master development plan. The comprehensive master development plan as recommended in this model ordinance sets forth the permitted uses and development standards for the zone and as such the master plan would be established upon zoning approval. The model ordinance also provides an opportunity for approved Certified Sites that are in conformance with the approved comprehensive master development plan to proceed to building permit upon execution of an approved development agreement.

### **Economic Opportunity District (EOD)**

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#### **Sections:**

**Purpose**

**Authority**

**Establishment and Applicability**

**Definitions**

**Governing Regulations and Conflict**

**Process and Procedural Requirements**

**Comprehensive Master Development Plan – Standards and Submission Requirements**

**Required Findings – Review Criteria**

**Conditions of Approval**

**Expiration and Extensions; Modifications**

#### **I. Purpose**

The EOD district is a specialized and innovative overlay zone designed to promote economic growth and development by allowing for arrangements in land utilization not otherwise permitted by other zoning districts within the municipality. Specifically this overlay district provides an opportunity for appropriate large-scale planned industrial, office and/or mixed-use development on contiguous tracts of land greater than 25 acres in size. The district is also designed to provide for the development of individual sites and lots that are approved as part of and in compliance with an overall unified or comprehensive master development plan that is to be developed or owned either by a single owner or a combination of owners. Once approved for a particular tract of land and in conjunction with the establishment of the EOD, the comprehensive master development plan sets forth the permitted uses, the overall physical arrangement, layout

and association of uses on the land, including the intensity, dimensions and other development standards for the district.

The establishment of an EOD provides unique opportunities for economic development including greater flexibility in development by permitting project proposals, including the issuance of building permits for Certified Sites in conformance with the comprehensive master development plan and the execution of development agreements as opposed to specific site plans prepared on a lot by lot basis under conventional zoning. Through an EOD, the municipality can offer owners and developers the flexibility they need to implement planned large-scale developments, while at the same time ensuring the quality of new development, encouraging aesthetically attractive features, promoting quality site and architectural design, and mitigating for off site impacts and externalities related to traffic, noise, lighting, drainage, and other land use and environmental considerations.

## **II. Authority**

This ordinance is adopted in accordance with RSA 674:16 and RSA 674:21, specifically 674:21(e) Planned Unit Development and (i) Flexible and Discretionary Zoning.

## **III. Establishment and Applicability of District**

Each EOD shall be a free-standing zoning district in which the permitted land uses and intensities of land use shall be tailored to fit the physical features of the site as well as achieve compatibility with existing and planned adjacent uses through the review and approval of a comprehensive master development plan. An EOD shall only be established on contiguous tracts of land greater than 25 acres in size and shall be located entirely or partially within a designated Economic Revitalization Tax Credit zone approved by the New Hampshire Department of Resources and Economic Development under RSA 162-N. In establishing an EOD, the planning board shall consider the municipality's master plan and other long-range and comprehensive municipal plans, small area master plans or other specific plans as guidance in the land use development aspect of the EOD master planning process.

Approval of an EOD shall constitute an amendment to the municipality's Official Zoning Map wherein the EOD zone shall be shown to overlay the existing zoning districts for those parcels identified in the EOD application and within the comprehensive master development plan. The comprehensive master development plan shall be approved by the planning board in conjunction with the establishment and adoption of an EOD. Once approved, the comprehensive master development plan shall set forth all zoning, land use, density and development standards for the EOD and all development proposed within the EOD shall conform to the adopted comprehensive master development plan.

Before any building permit shall be issued for any development within an EOD, a development agreement shall be approved by the planning board and shall be processed pursuant to Chapter/Section \_\_\_\_\_ of this Zoning Ordinance (*Note: Example development agreements and regulations can be provided upon request*). Due to the complexity inherent in establishing and administering an EOD, prior to developing a



detailed EOD zoning request or submitting an application, a pre-application conference with the municipal Planning Department and a conceptual discussion of the proposal must be held with the planning board as well as the municipality's development review team or technical review committee.

#### **IV. Definitions**

##### **Comprehensive Master Development Plan:**

A comprehensive master development plan is an overall area-wide or specific plan that serves as the basis for the enactment of an Economic Opportunity District and that depicts the development standards and the proposed development of land within an EOD. The plan may be developed for one or more lots located on contiguous tracts of land at least 25 acres or greater in size. Where portions of the tract are separated by a road, road right-of-way, utility, waterway, or another like element, the land may be deemed contiguous unless the intervening feature is of such a nature that the planning board determines that the land can not function effectively as a unified and comprehensive development. The master development plan itself depicts the existing and proposed conditions of each lot, including: water features, drainage, landscaping and open spaces, walkways, means of ingress and egress, traffic circulation and streets, utility services, the footprints of all structures and buildings, signs and lighting, screening devices, and any other information as required by this zoning ordinance. While the comprehensive master development plan itself is not required to have an engineer's seal, an engineer's seal is required for all necessary engineering plans submitted and required to be included as part of the master development plan.

##### **Development Agreement:**

A development agreement is a legal instrument that is executed between a landowner (developer) and the municipality (governing body) for the purpose of allowing development to proceed and building permits to be issued for a development proposal or project that has been approved as part of an approved EOD comprehensive master development plan. The agreement provides the landowner (developer) and the municipality certainty in respect to the provision of sufficient security in provision and construction for necessary on-site and off-site improvements and public facilities as approved by the planning board and as deemed necessary by the development.

#### **V. Governing Regulations and Conflict:**

Except to the extent provided by the Comprehensive Master Development Plan and the EOD ordinance, all development within an EOD shall be governed by all the ordinances, rules, and regulations of the municipality in effect at the time of such development, including the standards of the EOD as adopted by the planning board. In the event of any conflict between the EOD ordinance and the comprehensive master development plan, and/or the ordinances, rules, and regulations of the municipality at the time of the

establishment of the EOD, the terms, provisions, and intent of the EOD Comprehensive Master Development Plan and the EOD ordinance shall control.

## **VI. Process and Procedural Requirements**

A zoning amendment to establish an EOD and an application for a Comprehensive Master Development Plan shall be processed simultaneously through the planning board. Both the zoning amendment and the comprehensive master development plan application shall be reviewed first by a municipal development review team and/or a technical review committee prior to formal submittal to the planning board. If the comprehensive master development plan is approved by the planning board the EOD zoning amendment shall be forwarded either to the governing body or to town meeting as a warrant article for final adoption as required by local statute. If the EOD zoning amendment is adopted, the approved Comprehensive Master Development Plan shall be incorporated and made a part of the EOD ordinance.

All EOD zoning amendments shall include the following basic information:

- a. EOD narrative statement and summary of intent, including locus map and identified properties;
- b. Comprehensive Master Development Plan and supporting documentation, including proposed development standards as provided for in Section VII. of this Ordinance, and
- c. Traffic impact analysis, and any other study and technical information as requested by the planning board.

Before any approved development can occur within an adopted EOD, a development agreement shall be prepared and submitted by the landowner (developer), reviewed and approved by the planning board, and formally executed by the governing body of the municipality. Development agreements may be approved by the planning board either in conjunction with or after the approval of the Comprehensive Master Development Plan at the determination of the planning board. Before any approved Certified Site located within the EOD can proceed to building permit approval, a development agreement must be in place and executed in accordance with these regulations and the approved comprehensive master development plan.

All applications and development agreements submitted for formal consideration by the planning board shall be considered at a duly advertised public hearing in accordance with the applicable Chapter/Section \_\_\_\_ of this ordinance. If the application and/or agreement are found to be complete, the planning board must take final action on the application and/or agreement within 65 days of a finding of completeness.

The planning department shall be responsible for maintaining a record of all approved EOD and associated comprehensive master development plans, development proposals, and development agreements.

All approved development proposals and executed development agreements must be consistent with the comprehensive master development plan of the EOD as approved by the planning board. While it is the master development plan, rather than the underlying zoning district(s) that regulate the development of properties within the EOD, there shall remain an underlying zoning designation for the tract at all times.

## **VII. Comprehensive Master Development Plan – Standards and Submission Requirements**

The comprehensive master development plan adopted as part of an EOD must be under unified ownership or consist of a collection of lots under separate ownership with a development agreement stipulating that all owners are subject to the requirements of the comprehensive master development plan approved by the planning board at the time of zoning adoption. However, the tract may be subsequently subdivided consistent with the terms and conditions of the approved comprehensive master development plan and the municipality's subdivision regulations. Multiple parties may own, manage, and/or develop various sites and lots within the comprehensive master development plan provided the master development plan remains an integrated plan.

A comprehensive master development plan may include land which has been previously developed under the requirements of the underlying zoning only when, as part of the master development plan, the previously developed portion of land is substantially redeveloped in a manner which is consistent with the spirit of the EOD ordinance and creates a unified concept and design for the entire tract of land.

The planning board shall have final determination during the review and approval of a comprehensive master development plan for an EOD, if certain sites and buildings and land use types shall be served by municipal water and/or sewer. While the landowner (developer) has significant flexibility in recommending the various land uses, density, setbacks, buffers, building heights, lot sizes, lot dimensions, parking requirements, and generally most of all the site design and development standards to be included in the comprehensive master development plan, the planning board has the final determination in setting these standards for the plan including the selection of the land uses to be allowed within the EOD. Commercial and residential land uses shall only be permitted in an EOD as part of a mixed-use development as shown on the comprehensive master development plan and as approved by the planning board.

In setting the development standards for approval of a comprehensive master development plan, the applicant and planning board shall consider the applicability of existing standards as provided for by other zoning districts for each proposed use, except the height of buildings and structures not intended for human occupancy (chimney, water tower, etc.) shall not exceed the maximum height as may be specified by the Federal Aviation Administration as part of their permitting process or by the limitations outlined by any existing or adjacent Airport Approach Height District within the municipality.

In comprehensive master development plans where residential uses are proposed, the overall residential density of the plan shall not exceed six (6) residential dwelling units (including single family homes) per gross acre of the master development plan tract. In determining appropriate density, as well as other applicable criteria and standards, the planning board shall consider the amount of buildable land contained within the EOD, the overall design of the proposed development as well as the compatibility of existing and proposed residential and non-residential uses located both within the EOD and directly adjacent to the EOD.

In addition, all roads and structures shall be setback a minimum of fifty (50) feet from all exterior EOD boundaries which abut existing residential uses except where transportation uses and connections are desired by the planning board. Landscaping and other screening devices shall be designed to provide a reasonable buffer between proposed development in an EOD and adjoining properties except where compatible uses adjoin each other.

All uses that are permitted in the underlying zoning district(s), either by right, special exception or conditional use permit (at such time as this ordinance may be established) shall be considered permitted uses in an EOD.

Any proposed covenant, restriction, and easement must be approved by the planning board. A provision must be built into the documents providing for municipal enforcement of the covenants, restrictions, and easements at the option of the municipality and at the landowner (developers) expense under appropriate circumstances. In a comprehensive master development plan where ownership is subject to restrictions, covenants and other agreements, those documents shall be recorded at the appropriate County Register of Deeds.

The applicant for approval of a comprehensive master development plan shall provide the following required submittal information and materials (in format and number as reasonably determined by the municipal planning department), plus any additional information as may be required by the municipal review team/technical review committee, and/or planning board:

- a. **Zoning Amendment.** Completed EOD zoning amendment;
- b. **Completed Application.** Completed application for a comprehensive master development plan;
- c. **Narrative Statements.** EOD narrative and summary of intent, including a statement of purpose for the EOD and how the plan meets the standards and requirements of this section;
- d. **Statement Regarding Compliance with Findings.** Written statement and illustrations to demonstrate how the project meets the required findings, and provides superior community design, environmental preservation, and/or public benefit amenities;
- e. **EOD Boundaries and Locus Map.** EOD project boundaries and property/parcel data -- a map showing the proposed project boundaries, the perimeter of the ownership, location and dimensions of any existing property

- f. **Proposed Land Use Plan.** Proposed land use plan and land use list -- A plan showing the general dimensions and locations of existing and proposed structures, buildings, streets, parking, yards, pathways, open spaces and other public or private facilities. The land use plan shall also indicate all of proposed land uses and land use activities to be conducted within the EOD, with approximate acreage, types of uses, density, related floor area or calculations of site area to be devoted to such uses, number of dwelling units if proposed and overall residential density for the tract, and any other development standards specific to the land uses;
- g. **Traffic Impact Study and Other Studies.** Traffic impact analysis, including preliminary estimates of trip generation, trip distribution, potential areas of off-site transportation improvements, and any other studies and technical information as requested by the municipal review team/technical review committee and planning board;
- h. **Topographic Information.** Existing and proposed land contours, elevations, soil types, wetlands, surface water, natural and cultural resources, ridges and knolls, rock outcrops, steep slopes and proposed land changes in the topography of the site, including the degree of land disturbance, the location of drainage channels or watercourses and the direction of drainage flow;
- i. **Engineering Plans.** Engineering plans with an engineer's seal showing site grading, and amount of cut and fill, including finished grades, and all existing and proposed drainage facilities and improvements, and existing street layouts, right-of-way, profiles and construction details, including any proposed easements and how they will be monitored and enforced, if applicable;
- j. **Utilities.** The location and capacity of all existing utilities, including public water and sewer located within the vicinity of the site, and all proposed utilities and public water and sewer extensions to be provided to the site;
- k. **Existing Conditions.** The location of any existing structures and trees on-site or in the adjoining right-of-way designated for retention or removal;
- l. **Landscape Plan.** The location of existing trees on-site or in the adjoining right-of-way designated for retention or removal and all proposed areas and sites to be landscaped with quantities and types of new landscape materials;
- m. **Open Space Plan.** A proposed open space plan including existing and proposed walkways, trails, sidewalks as appropriate, recreation area, parking, service and other public areas to be used in common on the property and a description of intended improvements to the open area of the property;
- n. **Development Standards.** A statement and documentation of all the development standards and guidelines for all existing and proposed development within the EOD;
- o. **Architectural Renderings.** Plan with colored graphics showing architectural concepts of existing and proposed building, including heights, design, and exterior building materials;

- p. ***Signage and Lighting Plan.*** Plan showing existing and proposed signage and lighting of all buildings and parking areas and streets within the EOD, including pedestrian areas with specific criteria for design, size and proposed sign/light types (wall, free standing, directional, etc.), materials, heights, colors, setbacks, projections and contextual issues shall be established. Any other sign design information as required by the municipality;
- q. ***Complete Abutters List/Application fees*** – *(Note: typical application fees might consist of: \$20 per gross acre of the tract, not to exceed \$5,000. Also legal notice and abutter notification fees shall be determined in the latest version of the municipality’s site plan and subdivision regulations);*
- r. ***Development Schedule/Phasing.*** A narrative and development schedule, indicating the sequence and timing of development and the priorities of any phased development;
- s. ***Covenants/Restrictions and Bylaws.*** Information on existing and proposed covenants/restrictions/easements and any proposed articles of incorporation and bylaws of any corporation and/or association to be formed;
- t. ***Development Agreement.*** See Section IV. of this section, including cost estimates and surety for installation of improvements and public facilities necessitated by proposed development and any other information that the planning board and municipal counsel may deem reasonably necessary.

### **VIII. Required Findings - Review Criteria**

The planning board may recommend that an EOD zoning request be adopted if all of the following findings are made:

1. The project meets all of the findings required for a zoning amendment pursuant to Chapter/Section \_\_\_\_\_ of the municipality’s zoning ordinance.
2. Development within the proposed EOD zone will be demonstratively superior to the development that could occur under the standards applicable to the underlying base district as indicated by the comprehensive master development plan submitted as part EOD zoning request.
3. The comprehensive master development plan submitted with the application conforms in all significant respects with the municipality’s master plan, and any applicable plan or policies adopted by the municipality.

A Comprehensive Master Development Plan shall only be approved by the planning board if all of the following findings are made:

1. The plan conforms in all significant respects with the municipality’s master plan, and any applicable plan or related policies adopted by the municipality which encourage this or similar development.
2. The plan conforms to all applicable standards within the municipality’s zoning ordinance unless waived or modified as part of the approval of the master

development plan and all applicable local, state and federal laws relating to public health and safety, building construction, and drainage (these standards may not be waived or modified).

3. Development within the EOD shall be (1) compatible with the surrounding area and land use; (2) protect the natural environment and (3) directly benefit and enhance the character of the community. In making this determination, the following factors shall be considered:
  - a. Appropriateness of the use(s) at the proposed location.
  - b. The compatibility and mix of uses within the development area.
  - c. Provision of infrastructure improvements.
  - d. Provision of open space.
  - e. Quality of design, and adequacy of light and air to the interior spaces of the buildings.
  - f. Overall contribution to the enhancement of the surrounding area and to the character and the environment of the community in the long term.
  - g. Creativity in design and use of land.

Review Criteria: The following general review criteria shall guide the planning board in determining appropriate land uses, densities, and other development standards for a comprehensive master development plan:

- a. Provisions of the municipality's zoning ordinance, site plan regulations, subdivision regulations, and other applicable local, state and federal law, where appropriate.
- b. Consistency with the municipality's master plan, and any related plans or studies.
- c. Conformance with the intent and objectives of this ordinance.
- d. Infrastructure capacity and the impact of the master development plan upon the delivery of public services and facilities and public safety.
- e. Prospective fiscal impact upon the municipality.
- f. Traffic impacts on surrounding streets and transportation systems.

In addition to the above general review criteria, every comprehensive master development plan should incorporate several of the following elements. The inclusion of any one of these elements as part of the master plan justifies departures from standards otherwise applicable under conventional zoning (introduction of new uses, more intensive land uses, higher density, novel design approaches, etc.).

- a. Inclusion of a harmonious mix of uses.
- b. Provisions for quality architectural design.
- c. Placement of structures on most suitable sites with consideration of topography, soils, vegetation, slope, etc.
- d. Preservation of open space.
- e. Preservation of natural vegetation and other important natural features.
- f. Preservation of important cultural resources such as stone walls and other archaeological sites.
- g. Development of active or passive recreational areas.
- h. Quality landscaping.
- i. Use of sidewalks, bikeways, and other multi-use paths.
- j. Use of traffic information, traffic calming, or transportation demand management measures.
- k. Significant screening of, or rear placement of, parking areas.
- l. Sustainable design and construction practices promoting energy conservation.
- m. Other public benefits such as provision of community center, farmer's market or day care center.
- n. Public access to community facilities in the EOD.

## **IX. Conditions of Approval**

In approving a comprehensive master development plan, the planning board may impose any conditions deemed necessary to:

- A. Ensure that the plan conforms in all significant respects with the municipality's master plan and with any other applicable plans or policies that the municipality has adopted;
- B. Achieve the general purposes of this Zoning Ordinance;
- C. Achieve the findings for the approval of a comprehensive master plan as provided for in Section VIII. above; or
- D. Mitigate any potentially significant impacts identified as a result of the review of the plan as conducted by the planning board.



## **X. Expiration and Extensions; Modifications**

All comprehensive master development plans shall be valid for a period of five years from the official date of planning board approval. All approved development proposals, approved Certified Sites, and approved development agreements for such projects shall be valid for a period of five years from the date of the executed agreement, or in accordance with the specific terms of the agreement.

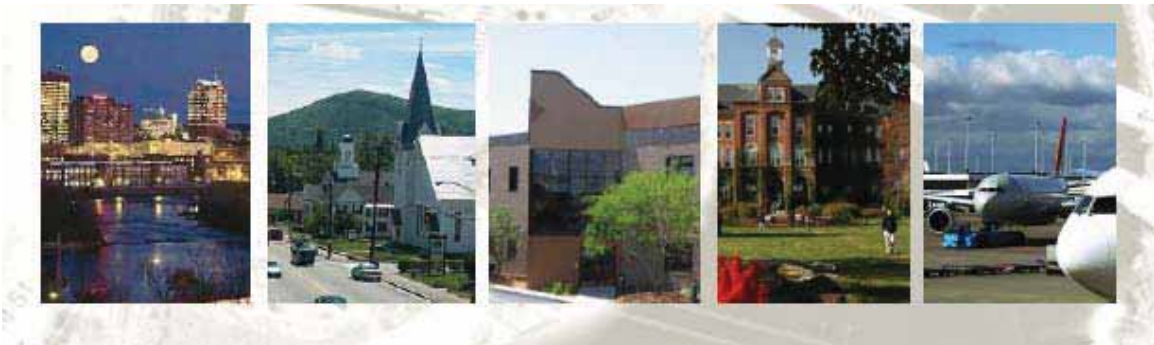
In the event that the applicant, landowner (developer) intends to develop the sites and lots within an EOD in phases, the planning board may approve a phasing plan for the planned development of the comprehensive master development plan. The phasing plan shall remain in effect for a specified period of time not to exceed a maximum of ten years as determined as part of the approval of the comprehensive master development plan.

However, in the event active and substantial development or building has not begun on a site or sites located within the comprehensive master development plan by the owner or the owner's successor-in-interest in accordance with the executed agreement after five years from the date of approval, or in accordance with other specific terms of the agreement, then the comprehensive master development plan shall be deemed to have expired and the underlying zoning shall then control development of the land. Landowners may apply to the planning board for extensions of this time period for good cause shown.

Property owners/developers of land located within an approved comprehensive master development plan may seek an exemption from all subsequent changes in subdivision regulations, site plan review regulations, impact fee ordinances, and zoning ordinances adopted by the municipality for a period of four years after the date of plan approval as provided for under RSA 674:39.

Landowners may also apply to amend all or a portion of an approved comprehensive master development plan following the same process requiring planning board approval of such plan. A landowner may also request to extinguish an EOD by notifying the planning board in writing that he/she does not intend to utilize the EOD.

## Section I: Workshop Agendas and Notes



## **Regional Economic Development Steering Committee**

### **Kick Off Meeting**

**August 28, 2009  
12:00 Noon to 1:00 P.M.**

**Southern New Hampshire Planning Commission  
438 Dubuque Street  
Manchester, NH 03102  
669-4664**

**Conference Room**

### **AGENDA**

- I. Welcome/Introductions – David Preece, Executive Director, SNHPC**
- II. Regional Economic Development Plan Scope of Work and Schedule – Jack Munn, Chief Planner, SNHPC (see attached)**
- III. Role of Steering Committee and Memorandum of Understanding or Resolutions – Jack Munn, Chief Planner, SNHPC**
- IV. Economic Assets Profiles – Brian Deguzis, Intern, SNHPC**
- V. Economic Development Survey – Jack Munn, Chief Planner, SNHPC**
- VI. Next Steps:**
  - Regional Economic Development Conditions Report**
  - Infrastructure Inventories**
  - Cluster/Market Analysis – RFP**
  - Next Meeting – Set Date and Time**

**Kindly RSVP by August 24<sup>th</sup> to Linda Moore at 669-4664 as lunch will be provided.**

**Regional Economic Development Steering Committee Meeting Notes**  
**Kick-Off Meeting: August 28, 2009 12:00 Noon -1:00 pm**

Members Attending

Jim Lagana, Auburn  
 Rich Sawyer, Bedford  
 Henry Bechard, Bedford  
 Paul Goldberg, Bedford  
 William Dermody, Bedford  
 Scott Komisarek, Candia  
 John Cole, Candia  
 R H Snow, Candia  
 Cynthia Robinson, Chester  
 Gary Stenhouse, Derry  
 Jack Dowd, Derry  
 Stephen Griffin, Goffstown  
 Dan Reidy, Goffstown  
 Matt Monahan, Bedford  
 David Boutin, Hooksett  
 Keith Moon, Hooksett  
 Don Moskowitz, Londonderry  
 Dan O'Neil, Manchester  
 Jay Minkarah, Manchester  
 Ray Clement, Manchester  
 Skip Ashooh, Manchester  
 Stuart Lewin, New Boston  
 Dani-Jean Stuart, Weare

Mark Brewer, Manchester Boston Regional Airport  
 Mike Skelton, Greater Manchester Chamber of Commerce/ Metro Center  
 Erica Menard, PSNH  
 David Preece, SNHPC  
 Jack Munn, SNHPC  
 Brian Deguzis, SNHPC

David Preece, Executive Director, SNHPC welcomed everyone and started the meeting by asking everyone to introduce themselves. He discussed the importance of this project and need for developing an Economic Development Plan for the Region.

Jack Munn, Chief Planner, SNHPC reviewed the meeting agenda and the agenda packet of materials distributed at the meeting which includes:

- Copy of SNHPC Memo to BOS Chairs and Mayor, Governing Boards
- Steering Committee Roster and List of Appointments and Members
- Regional Economic Development Plan Proposal and Scope of Work
- Proposed Work Schedule/Timeline

- Copy of Press Release
- Proclamation for BOS Signature
- Copy of RFP for Cluster/Market Analysis
- MS& B Proposal in response to RFP

Jack Munn next described the purpose of the Regional Economic Development Plan which is 1) to promote discussions of economic issues and needs of regional importance and 2) to help move the METRO Center-NH initiative from an advocacy role into a project-driven organization to promote regional economic growth and development. He also noted that one of the aims of the plan is to establish a cooperative framework for implementing region-wide economic development planning and to move the region into a strategic position to become one of the states's designated Economic Development Districts under the US Department of Commerce, Economic Development Administration.

Jack also pointed out that the regional economic development plan is not a federal sponsored or funded CEDS (Comprehensive Economic Development Strategy) process. He noted that the City of Manchester and the Rockingham Economic Development Corporation (REDC) currently prepares federally funded CEDS for Manchester and the Rockingham County towns located within the region. However, he mentioned that the towns located in Hillsborough and Merrimack counties within the region are not currently addressed by a CEDS process.

Laurel Bistany, Executive Director, REDC and Jay Minkarah, Economic Development Director, City of Manchester described the CEDS plan – primarily as a process for identifying and ranking projects – both public and private – which enables the US Dept. of Commerce in providing funding for communities for these various projects.

Jack Munn noted that the Regional Economic Development Plan was not going to be a CEDS plan per se, but that it would identify and prioritize public investments – infrastructure, transportation plans and projects, etc. of regional importance and that eventually this would be a goal to achieve for the region. Jay Minkarah suggested that the CEDS plan would be a good template for the Regional Economic Development Plan and Jack Munn agreed.

Jack Munn next reviewed the project scope of work and schedule. He indicated that SNHPC is anticipating the plan to be completed by next June/July 2010 and that the project would be divided into two phases: Phase One: Steering Committee/Visioning and Public Participation and Phase Two: Economic Development Planning Elements.

He next reviewed each of the work tasks, including the METRO Center-NH Proclamation which he noted had been approved by most of the municipalities, except New Boston, Weare and Deerfield. Mike Skelton from the Manchester Chamber passed around copies of the signed proclamations. Jack Munn pointed out that it was essential to have a signed proclamation in place from each community to show support for the planning process and the METRO economic development program. He suggested that

there were two critical questions regarding the plan which the Steering Committee will need to address as the plan is being developed:

- 1) Who should the Regional Economic Development Plan ultimately belong to – the region through the Planning Commission only and/or the Chamber and all the municipalities within the region; and,
- 2) Should local endorsement of the plan be obtained from each of the municipalities in the region?

David Preece, SNHPC and Mike Skelton from the Chamber agreed that the plan should be endorsed by both organizations. Rick Sawyer, Bedford suggested that this should be a goal of the Steering Committee but each municipality would want to review the plan first before endorsing it.

Jack Munn next introduced Brian Deguzis, SNHPC intern who then gave a brief presentation about the economic assets profiles that were recently created for each of the 13 municipalities in the SNHPC region. Brian indicated that the profiles were created to provide a quick reference sheet that could be posted on each municipality's webpage to convey basic economic information about each community. The profiles are an update of previous work completed by SNHPC in 2004 and serve as a means of comparison between towns within the SNHPC region.

Jack Munn requested that each municipality review the economic assets profiles for accuracy and to report back to Brian with any necessary edits. He also noted that as part of the development of the regional economic development plan, a SWOT (strength, weakness, opportunity and threats) planning process would be conducted during the Visioning workshops to be held in November and January. He indicated that space was left on the profiles to incorporate the results of the SWOT analysis for each municipality and that this information would be filled in after the workshops are held.

Jack next described the work the SNHPC staff would be providing to each municipality in designating Economic Development Revitalization Zones under RSA 162-N. He indicated that establishing these zones are important for local economic development as it is one of the only tax incentives available through the state to promote local economic growth. He also noted that the City of Manchester and Londonderry currently have EDRZ in place and that the SNHPC is currently assisting Hooksett and Goffstown in preparing the necessary applications to the NH DRED.

Jack also noted that the SNHPC would be conducting significant inventories of a broad range of public infrastructure systems necessary to support local and regional growth, including water and sewer, utilities, transportation, communications, etc. He indicated that some of this inventory work would be available to review at the Visioning workshop to be scheduled in November.

The next element of the Regional Economic Development Plan is the Cluster/Market Analysis. Jack Munn noted the RFP contained within the agenda packet and that 8

proposals had been submitted. He indicated that a selection committee of Steve Griffin, Jay Minkarah and two SNHPC staff members had selected the firm of Moran, Stahl & Boyer to conduct the study. A copy of the MS&B proposal is contained in the packet. He noted that this firm would be making two trips to Manchester area and would soon be interviewing various firms and professionals and that this analysis would be completed in time for the Visioning workshop to be held in November.

Lastly, Jack indicated as part of the development of the Regional Economic Development Plan, SNHPC staff would be preparing an summary of the economic stimulus funding and investments received by each municipality which would provide for an overall region-wide comparison. He also noted that SNHPC would be working with each community to evaluate the feasibility of establishing business incubators within their communities and that there was a successful example in place in the City of Manchester. Dr. Moon from Southern New Hampshire University described that a business incubator is a facility, such as an abandoned mill building or old manufacturing building which could be improved and through an owner or organization rent out space at below market rates to spur small business development. Jack noted that several towns such as Deerfield and Chester which are currently utilizing former school buildings for their town offices are in a way providing a business incubator within their communities by leasing out space for local and small business use.

In addition, Jack Munn indicated that SNHPC will also preparing a overall economic conditions report on the region in time for the Visioning workshop and would also be providing grant writing assistance to communities through the Regional Economic Development Plan as an ongoing service during the plan development process.

He indicated that the role of the Steering Committee would be to guide the overall development of the plan; offer suggestions and recommendations; review the materials prepared; prioritize and rank projects, and participate in the Visioning workshops to generate the overall goals, objectives, strategies and recommendations.

Representative and local councilor David Boutin from the Town of Hooksett commented that it would be challenge of the regional plan to address competitive economic goals and projects among each community. Jack Munn responded that this would be true but the main focus on the plan would be to identify those public projects and investments and not local commercial projects such as Home Depots/Targets, etc which are regionally significant and important. David Preece mentioned that some of these projects might include a new Exit 7 along I-293; the Airport Access/Pettingill Road in Londonderry and the work proceeding on the commuter rail.

Jack Munn also noted that the Planning Commission is currently conducting monthly surveys of topics of regional interest and that this would be a good opportunity to develop questions of local and regional interest. David Preece suggested that SNHPC could send out a copy of the current economic development survey to all the Committee members for their input of topic areas and additional questions.

Jack Munn indicated that the schedule calls for a minimum of five Steering Committee meetings and possibly a sixth meeting next May depending on the need for revisions to the plan. He asked the Committee to set the date for the next meeting. It was recommended that the next meeting be scheduled for September 29<sup>th</sup> at 8:00 am to accommodate more people to attend the meeting.

He noted that as part of the agenda for the September 29<sup>th</sup> meeting he would email a copy of the economic development survey to Committee members prior to the meeting and that the next meeting would focus on the survey; status update on the inventory work; update on the cluster/market analysis and economic assets profiles.

There being no further topics or discussion the meeting ended on time at 1:00 PM.

Prepared by Jack Munn and Brian Deguzis, SNHPC



## Regional Economic Development Steering Committee

### 2<sup>nd</sup> Meeting

September 29, 2009  
8:00 AM to 9:00 AM

Public Service New Hampshire Energy Park  
Conference Room

780 North Commercial Street  
Manchester, NH 03102

For directions visit: <http://www.psnh.com/AboutPSNH/EnergyPark/directions.asp>  
or call SNHPC at 669-4664

### AGENDA

- I. Welcome/Introductions – David Preece, Executive Director, SNHPC
- II. Review August 28, 2009 Meeting Minutes (see attached)
- III. Update - Cluster/Market Analysis Study – Jack Munn, Chief Planner, SNHPC  
(see Angelou Studies as background information available at:  
<http://www.yourmanchesternh.com/plans-and-projects/>  
- you will need to scroll down to the bottom of the page)
- IV. Update -Economic Development Survey – Jack Munn, SNHPC  
(see attached Draft Survey and other suggested topics)
- V. Update - Economic Assets Profiles – Brian Deguzis, Intern, SNHPC
- VI. Special Guest – USDA Rural Development Programs – Steve Epstein, USDA Rural Development
- VII. Next Steps:
  - Regional Economic Development Conditions Report
  - Infrastructure Inventories
  - Visioning Workshops – November and January
  - Next Meeting – Set Date and Time

**Regional Economic Development Steering Committee Meeting Notes  
September 29, 2009 8:00 AM – 9:00 AM, PSNH Energy Park**

Members Attending

Stoney Worster, Auburn  
Jim Lagana, Auburn  
Henry Bechard, Bedford  
William Dermody, Bedford  
Paul Goldberg, Bedford  
John Cole, Candia  
George Siroas, Derry  
Dan Reidy, Goffstown  
Tony Marts, Goffstown  
Matt Monahan, Goffstown  
David Boutin, Hooksett  
Keith Moon, Hooksett  
Carol Granfield, Hooksett  
Don Moskowitz, Londonderry  
Andre Garron, Londonderry  
Dan O'Neil, Manchester  
Jay Minkarah, Manchester  
Stuart Lewin, New Boston  
Elwood Stagakis, Weare

Mark Brewer, Manchester Boston Regional Airport  
Erica Menard, PSNH  
Rich Sawyer, Bedford  
Deb Paul, Londonderry  
Stephen Griffin, Goffstown  
Laurel Bistany, REDC  
Scott Johnson, USDA-RD  
Steve Epstein, USDA-RD  
David Preece, SNHPC  
Jack Munn, SNHPC  
Brian Deguzis, SNHPC

David Preece, Executive Director, SNHPC welcomed everyone and started the meeting by asking everyone to introduce themselves. David next reviewed the agenda for the meeting and noted that Steve Epstein's presentation concerning USDA funding opportunities would be moved up on the agenda.

David also asked for any corrections to the meeting notes from the August 28, 2009 Kick Off Meeting. Steve Griffin asked that his name be moved under staff attending and that Matt Monahan be identified with the Town of Goffstown. There being no additional changes the meeting notes were accepted.

Steve Epstein, USDA – Rural Development next provided a summary overview of funding opportunities, loans and grant programs offered through the Rural Development Office for homeowners, businesses, municipalities and non profit organizations. He distributed copies of a brochure containing flyers on each of the various programs.

He indicated that his office is located in Concord, NH and that it covers both the states of New Hampshire and Vermont. He pointed out that there are three basic programs – housing programs; rural business-cooperative programs; and community development programs.

The Rural Business and Cooperative Program include: Business and Industry Guaranteed Loans which are used to create jobs and stimulate rural economies by providing credit to lenders; Rural Business Enterprise Grants which are used to finance and facilitate development of small and emerging private business enterprises; and Rural Business Opportunity Grants which finance technical assistance for business planning in rural areas. He also noted that there are also a number of relending programs, development grants to assist agricultural producers, and renewable energy and energy efficiency grants to help agricultural producers and small businesses reduce energy consumption.

The Community Facility Program includes: loans to public bodies and non-profit organizations in rural areas with populations of less than 20,000 to provide essential community facilities; Water and Waste Disposal Loans and Grants for rural areas, cities and towns with populations less than 10,000; Solid Waste Management Grants – technical assistance and/or training for communities less than 10,000 population to reduce solid waste stream; and Electric Transmission, Medical and Rural Broadband Loans to promote deployment of electric and telecommunications services.

Steve Epstein also described two primary grant programs of interest for businesses and to promote economic development, including business incubators – the Rural Business Enterprise and Opportunity Grants which apply to all areas except cities of more than 50,000 in population and their contiguous and adjacent urbanized areas. He noted that these grants are available to most of the municipalities surrounding Manchester according to population size and household income. He indicated that there is a table included in the brochure which indicates the percentage of the community eligible for this funding.

Steve Johnson of the USDA –Rural Development staff reviewed all the housing programs, including direct and guaranteed loans for single-family homes, home repairs, rural rental housing, and housing preservation grants. He noted that most of the housing programs are geared toward land and building and infrastructure and site development.

Jack Munn, Chief Planner, SNHPC next reviewed the agenda packet of materials distributed at the meeting which includes:

- August 28, 2009 Kick Off Meeting Notes
- Steering Committee Roster and List of Appointments and Members

- Regional Economic Development Plan Work Schedule/Timeline
- Copy of MS&B's Overview of Target Industry/Market Analysis
- Copy of MS&B's General Comments and Review of Employer Lists
- Copy of MS&B's Four Questions for Local Communities (Planners)

Jack Munn next reviewed the overall project schedule and reported that the regional economic development plan is moving ahead and that the work elements consisting of the Cluster/Market Study; the Economic Assets Profiles; preparation of the regional economic conditions report, and basic infrastructure inventory would be converging towards the public workshops to be held in November 09 and January 2010.

He reported that the first public workshop is scheduled to be held on **November 16, 2009 from 3:00 to 5:00 PM here in the PSNH Auditorium at Energy Park.**

He noted that this workshop will be open to the public and all members of the Economic Development Plan Steering Committee as well as other municipal officials and representatives and that the purpose of the workshop would begin to discuss and identify the vision, goals, objectives and strategies of the plan as well as to begin the SWOT analysis. He noted that the SWOT analysis is a process which will involve participatory exercises and dialogue in identifying and evaluating the region's economic strengths, weaknesses, opportunities and threats to growth. Jack noted that the planning commission intends to retain a professional economic development expert knowledgeable of the region to lead the SWOT discussion and analysis pending approval by the Town of Raymond of their CTAP collaborative grant to be used for this process.

Jack also noted that pending this grant approval, the planning commission plans to engage the services of Dr. Moon and his expertise in business incubator development. Dr. Moon responded that these services would be rendered through the University of Southern New Hampshire's Center for Entrepreneurship and Social Innovation.

Jack Munn next reported that as a follow up from the Kick Off meeting that John Rhodes, Senior Principal with Moran, Stahl & Boyer, a national site selection and economic development consulting firm had been retained by the Planning Commission to undertake the Cluster/Market Analysis of the region. He also reported that John Rhodes has already jumped into the project and has held a very successful fist meeting with many of the area's economic development professionals and staff.

He pointed out that the purpose of this first meeting was to begin the Cluster Analysis which focuses on identifying the core or Level 1 – Primary Industries located within the region and ultimately understanding what part of the economy and what type of industries/companies will provide favorable jobs and tax base in the future. Jack displayed on a power point a list of the companies that the consultant has already generated and noted in one of the consultant's handouts that this analysis is more than cranking out numbers, but really is about understanding the dynamics of the region and the resources/business environment that stimulates some level of growth.

Jack Munn pointed out that the consultant is planning to conduct interviews of a number of companies and that he has generated a list of the following four questions which he is seeking a response from each municipal planning or economic development office:

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 the community.
2. What types of industries do you feel your community would like to grow/attract?
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.
4. Is there any organization within your community that formally talks to local employers about their needs on a routine basis (e.g. annually)?

Also, Jack noted that the consultant, John Rhodes is also looking for assistance in seeking access/contact information/invitations to interview Fidelity, Brookstone and PC Connection in Merrimack. The consultant is also currently working through the NH Workforce Opportunity Council in getting interview contacts at selected companies and he thanks for the Steering Committee in advance for their assistance and responding the four questions. Jack noted that MS&B is planning to complete their final report by the end of October in time for the November 16<sup>th</sup> Public Workshop and a presentation at the upcoming Metro Center-NH's annual meeting scheduled for December 10<sup>th</sup> from 3:00 to 5:00 PM at Saint Anselm College.

Jack Munn next reviewed by power point an Economic Development Survey to be distributed by email using Survey Monkey to the public and to all municipal officials and representatives. He reported that the planning commission intends to release this survey on October 6, 2009 with responses to close on December 7, 2009. He reviewed each of the 12 pages of the survey and asked for feedback/suggestions from the Steering Committee. A number of suggestions were offered including revisions including eliminating the term sprawl in favor of residential development; adding a question regarding the importance/role of the Manchester/Boston Regional Airport; and clarifying the response to the question regarding the role of the City of Manchester as the economic center and engine of the region.

Lastly, Jack Munn reported that since the August Kick Off Meeting the governing bodies of all 13 municipalities in the region have now signed the proclamation endorsing the regional economic development process and the Metro-Center NH concept. He also noted that the planning commission has received many comments and suggestions on the Economic Asset Profiles which were distributed at the Kick-Off Meeting, but the commission is still waiting to receive review comments from all the municipalities.

Both Jack Munn and David Preece thanked everyone for attending the meeting and that they appreciated their involvement. There being no further topics or discussion the meeting ended on time at 9:00 AM. Prepared by Jack Munn, SNHPC

**Regional Economic Development Plan  
Steering Committee Meeting/  
1<sup>st</sup> Public Visioning Workshop**

**November 16, 2009  
3:00 to 5:00 PM**

**Public Service New Hampshire Energy Park  
Auditorium**

**780 North Commercial Street  
Manchester, NH 03102**

**For directions visit: <http://www.psnh.com/AboutPSNH/EnergyPark/directions.asp>  
or call SNHPC at 669-4664**

**AGENDA**

- I. Welcome/Introductions – David Preece, Executive Director, SNHPC
- I. Review September 29, 2009 Meeting Minutes (see attached)
- II. Update/Status Regional Economic Development Plan – Jack Munn, Chief Planner, SNHPC
- III. Cluster/Market Analysis Study Report – Jack Munn, SNHPC
- IV. SWOT Brain Storming Exercise – Dennis Delay, Economist
- V. Group Discussion – Dennis Delay, Economist
- VI. Next Steps:
  - Regional Economic Development Conditions Report
  - Infrastructure Inventories
  - Visioning Workshop - January
  - Next Meeting – Set Date and Time

**Regional Economic Development Steering Committee  
Public Workshop Meeting Notes  
November 16, 2009 3:00 PM – 5:00 PM, PSNH Energy Park**

Members Attending

Stoney Worster, Auburn  
Jim Lagana, Auburn  
William Dermody, Bedford  
Paul Goldberg, Bedford  
Richard Snow, Candia  
John Cole, Candia  
Scott Kowisarek, Candia  
George Siroas, Derry  
Stu Arnett, Derry  
Gerald Coogan, Deerfield  
Dan Reidy, Goffstown  
Keith Moon, Hooksett  
Carol Granfield, Hooksett  
Don Moskowitz, Londonderry  
Andre Garron, Londonderry  
Dan O'Neil, Manchester  
Jay Minkarah, Manchester  
Stuart Lewin, New Boston  
Dani-Jean Stuart, Weare

Erica Menard, PSNH  
Rich Sawyer, Bedford  
Stephen Griffin, Goffstown  
Jo Ann Duffy, Hooksett  
Stephen Heavener, Capital Regional Development Corporation  
William Sirak, Metro Center NH  
Meena Gyawah, Manchester  
Chris Wellington, Manchester  
David Preece, SNHPC  
Jack Munn, SNHPC  
Brian Deguzis, SNHPC  
Linda Madoma, SNHPC  
Rachel Kelly, SNHPC  
Alex

David Preece, Executive Director, SNHPC welcomed everyone and started the meeting by asking everyone to introduce themselves. Jack Munn, SNHPC next reviewed the agenda for the meeting and requested Steering Committee members to submit comments on the September 29<sup>th</sup> meeting notes to him after the meeting. Jack then proceeded to provide an update on the progress/status of the Regional Economic Development Plan, again noting the purpose of the plan which is:

1. To set forth an economic development strategy for the region and identify both short and long range projects;
2. To expand role of the Greater Manchester Chamber of Commerce Metro Center-NH as an action-driven organization in promoting regional growth and development; and
3. To lay groundwork necessary for seeking funding and implementing a CEDS process for the region.

Jack Munn also outlined the direct benefits which municipalities would be receiving from the Regional Economic Development Plan, including:

- Cluster/Market Analysis – DRAFT report is now completed and available on SNHPC website and will be presented at the December 10<sup>th</sup> Metro Center – NH Leadership Forum at Saint Anselm College;
- Municipal Economic Assets Profiles – compilation of key municipal/economic data to be used on Metro Center NH website and as marketing tool for municipalities;
- Public Infrastructure Inventories – summary of all utility and public water and sewer service conditions/needs by community to be aggregated to regional level;
- SWOT Analysis – begin process today of identifying strengths/weaknesses and opportunities/threats for economic development at both regional and municipal level;
- Economic Revitalization Zone (RSA 79-E) – assistance to municipalities in identifying/preparing applications of eligible areas for designation by NH DRED;
- Business Incubator Analysis – assistance of SNHU Center for Entrepreneurship and Social Innovation in developing report and individual municipal recommendations;
- Grant Writing Assistance – assisting in USDA and EDC grant applications for example;
- Economic Stimulus Funding Project Summary – comparative summary of project funding by municipality within the region.

Jack Munn next reviewed the work currently in progress by SNHPC staff, including developing an Economic Conditions Report on the region; conducting the public infrastructure inventories; completing the Economic Assets Profiles for each community; and facilitating the region-wide economic development public opinion survey on the SNHPC website to be completed in January 2010.

He reported that the next work to be undertaken by SNHPC includes: the business incubator study; economic revitalization zones; and the economic stimulus funding summary.

As an opening into the SWOT Analysis, Jack Munn next provided a brief summary of the Cluster/Market Study DRAFT Report, noting that handouts of the Executive Summary as well as copies of the analysis prepared for each municipality are available at the workshop. He noted that a total of ten main industry types were evaluated by the



consultant and applied to each of the 13 municipalities within the region. He reported that the consultant had also ranked the Manchester MSA with other similar sized MSA along the East Coast utilizing typical site selection criteria identifying least and most favorable areas for economic development. Jack also described the consultant's municipal cluster/target analysis for each city/town in the region consisting of two pages (each town received a handout at the workshop). The first page provides basic statistics, land use map and aerial photos of strategic locations. The second page provides an overview of the local situation along with the current presence of employers within each industry category and the potential target industries for the town/city for economic growth.

Lastly, Jack noted that the consultant has suggested a number of recommendations for helping to promote development of the target industries, including establishing working groups for each target industry consisting of planners, economic development staff, brokers/developers, workforce investment boards, etc. to ensure that resources are available to expand and attract target industry. Jack also pointed out that the consultant's report states that the identification of a target industry for a specific community does not guarantee success...as the community must assure that the right resources are in place and the location is properly marketed.

At this time, he introduced Dennis Delay, economist with the NH Center for Public Policy who has been retained by the SNHPC to facilitate the SWOT participation process. Dennis reviewed the purpose, theory and implementation of the SWOT process utilizing slides and hand out materials. He indicated that the SWOT will take a look the region's current or internal economic performance (strengths and weaknesses) and factors in the external environment (opportunities and threats) that might affect the region's economic future. He provided some examples of how to look at internal and external factors as well as basic ground rules for conducting the SWOT analysis.

Dennis also provided some NH examples for the workshop participants to consider and passed out (a hand out – copy attached) of a SWOT Template which Steering Committee members and other municipal officials can take back to their community to complete. He asked all 13 municipalities to complete and return this template to the SNHPC by **December 18<sup>th</sup>**....which would provide enough turn around time to prepare for the 2<sup>nd</sup> public workshop to be held in January 2010.

Dennis also indicated that as part of the SWOT process today, workshop participants would be asked to prioritize key points under each of the four areas utilizing colored dots in terms of the following criteria:

- GREEN - Things that MUST be addressed now.
- BLUE - Things that can be handled now.
- YELLOW - Things that should be researched further.
- RED - Things that should be planned for the future.

During the next hour, workshop participants working together in smaller groups began to discuss and report out their key points which SNHPC staff recorded on four flip charts. After all the key points were reported out and recorded, workshop participants next placed colored dots next to the points utilizing the criteria and color code system described above.

All the key points applying to the region identified at the workshop are summarized in the attached Regional SWOT Analysis Template. All the results of the prioritization or ranking of the key points are described in the attached SWOT Priority Table Results.

Upon completion of this work, Dennis Delay reported that at the 2<sup>nd</sup> workshop scheduled for **January 25<sup>th</sup>** -- the next step would be to convert the results of the SWOT analysis into specific goals, objectives and strategies to be included in the Regional Economic Development Plan.

He reminded all municipalities to take the SWOT Template back to their community and to undertake the same exercise and to return the results to the SNHPC by **December 18<sup>th</sup>** if possible. He thanked everyone for their participation and a terrific effort.

There being no further topics or discussion the workshop ended on time at 5:00 PM.  
Prepared by Jack Munn, SNHPC

## **Regional Economic Development Steering Committee**

### **2<sup>nd</sup> Public Workshop**

**January 25, 2010**

**3:00 to 5:00 PM**

**Public Service New Hampshire Energy Park  
780 North Commercial Street  
Manchester, NH 03102**

**For directions visit: <http://www.psnh.com/AboutPSNH/EnergyPark/directions.asp>  
or call SNHPC at 669-4664**

### **Auditorium**

- I. Welcome/Introductions – David Preece, Executive Director, SNHPC**
- II. Review November 16, 2009 Meeting Minutes (see attached)**
- III. Update - Cluster/Market Analysis Study – Jack Munn, Chief Planner, SNHPC  
(see Target Industry Analysis Report – <http://www.snhpc.org>)**
- IV. Update –Results of Economic Development Survey – Jack Munn, SNHPC  
(see attached survey summary)**
- V. Continuation - Regional Municipal SWOT Analysis – Strategy and Goal Development – Dennis Delay, Economist**
- VI. Next Steps:**
  - **Economic Revitalization Zones**
  - **Infrastructure Inventories**
  - **Next Meeting – Set Date and Time**

**Regional Economic Development Steering Committee  
Public Workshop Meeting Notes  
January 25, 2010 3:00 PM – 5:00 PM, PSNH Energy Park**

Members Attending

Jim Lagana, Auburn  
William Dermody, Bedford  
Paul Goldberg, Bedford  
Rich Sawyer, Bedford  
Henry Bechard, Bedford  
Scott Kowisarek, Candia  
George Siroas, Derry  
Jack Dowd, Derry  
Gerald Coogan, Deerfield  
Dan Reidy, Goffstown  
Stephen Griffin, Goffstown  
Matt Monahan, Goffstown  
Keith Moon, Hooksett  
Don Moskowitz, Londonderry  
Scott Benson, Londonderry  
Steve Young, Londonderry  
Dan O'Neil, Manchester  
Jay Minkarah, Manchester  
Chris Wellington, Manchester  
~~Stuart Lewin, New Boston~~ ← Delete  
Dani-Jean Stuart, Weare

Mark Brewer, MHT Airport  
Erica Menard, PSNH  
Dennis Delay, Consultant  
David Preece, SNHPC  
Jack Munn, SNHPC  
Alex , SNHPC  
Derek Search, SNHPC  
Rachel Kelly, SNHPC

David Preece, Executive Director, SNHPC welcomed everyone and reviewed the meeting agenda. He explained that today's meeting is a continuation of the SWOT Analysis conducted at the last meeting on November 16, 2009 and that Jack Munn would begin the meeting with an update on the Target Industry Report and the Economic Development Survey results. David Preece also asked if there were any changes to the November 16<sup>th</sup> meeting notes. Being none, George Siroas moved and Steve Griffin seconded that the minutes be accepted.

Jack Munn, SNHPC next reviewed the status of the Regional Economic Development Plan noted that the Steering Committee was about half way through the schedule and that

work in preparing the Preliminary DRAFT of the plan would begin soon with public hearings to be scheduled in June and July for adoption. He reported that this workshop today would begin to take the SWOT results from the November meeting and begin to develop vision statements, goals, objectives and strategies for the plan. He also noted that the Municipal Economic Assets Profiles could now be completed as all the Municipal SWOTs are completed and turned in. He noted that SNHPC staff has also started work on the public infrastructure inventories including a new Broadband study.

Jack Munn next proceeded to report that the towns of Goffstown and Hooksett and the City of Manchester have submitted comments as requested to the Target Industry Analysis and that the consultant has addressed these comments and completed the Final Report which is available from the SNHPC website at: <http://www.snhpc.org>.

Jack next provided a brief update on the December 10<sup>th</sup> Metro Center-NH Leadership Forum where the consultant of the Target Industry Report provided an overall summary and recommendations for developing an economic development strategy for the region. He pointed out that the key points discussed identified that the Greater Manchester area needs to slim down the area's planning bureaucracy if the region wants to attract new business growth. Other weaknesses discussed identified a lack of readily available zoned buildings and permitted properties. In addition, the region has a lot of sites, broad price rates, but very low level of readiness and high energy prices.

Jack Munn next reviewed the results of the recently completed Economic Development Public Opinion Survey. He noted that public comments were received from citizens living in all the municipalities in the region, but the Town of Goffstown. The largest responses were received from the towns of Londonderry, Derry and Bedford.

In response to the questions in the survey regarding what are the region's key economic development issues of high concern: providing adequate education and seeking a balance in quality of life and improving/expanding the local tax base through non-residential development were identified as the top two. In response to the questions in the survey regarding issues of low concern; surprisingly affordable housing and providing affordable daycare received the lowest scores. Jack noted that these results are probably a reflection of the downturn in today's economy and the drop in real estate values.

In response to the questions in the survey regarding the Manchester-Boston Airport, it was clear that the airport should become the region's intermodal transportation hub and that ground transportation is needed including a direct airport highway link from I-93 and F.E. Everett Turnpike. The survey results also show that a majority of the respondents believe the City of Manchester continues to be the economic center and driver of the region and that the following industry types are viewed as the most favorable:

- Educational and Information/Computer
- Light Industrial/Arts & Culture/Recreation & Entertainment
- Health/Medical/Life Services
- Financial/Banking and Wholesale/Warehouse

The land use strategies receiving the highest level of support in the survey were mixed use development and compact/vibrant downtowns and village centers. Land use strategies with the lowest level of support were residential development and small scale development on rural corridors.

The results of the survey questions on economic development financing options indicate that Capital Improvement Programs and Impact Fees have the most support and Foreign Trade Zones and Capital Reserve Accounts have the least support.

Regarding the issue of the daily commute problem, the survey results were tied between recommendations to improve/extend public transportation services and to identify and build more park and ride facilities.

The results of the survey question whether your community has begun to work with local businesses and educational institutions to employ college graduates indicate an overwhelming negative response that this has never been done before. On the other hand, the survey responses indicate that most communities have now established a local economic development committee and have begun work on an economic development plan. This includes identifying types of desired businesses; building business databases and atlas of available properties, including establishing a local economic development website.

At this time, Jack Munn introduced Dennis Delay, economist with the NH Center for Public Policy who has been retained by the SNHPC to facilitate the SWOT participation process. Dennis reviewed the purpose, theory and implementation of the SWOT process utilizing slides and hand out materials. He also summarized the results of the November 16, 2009 SWOT which examined the region's current or internal economic performance (strengths and weaknesses) and factors in the external environment (opportunities and threats) that might affect the region's economic future.

Dennis Delay reported that the purpose of today's workshop would be to translate the strengths, weaknesses, opportunities and threats which were prioritized at the last meeting into strategies. He defined a strategy as a way to look at an organization's current performance (strengths and weaknesses) and factors in the external environment (opportunities and threats) that might affect the organizations' future. He presented a colored chart showing the Top Five identified SWOT Short Term rankings from the November 16<sup>th</sup> workshop as follows:

Strengths: Airport/University/Research Capabilities/Manageable Size of NH/Highway System and Location;

Weakness: Losing educated workers/Lack of Public Transit/Lack of Economic Development Funding/Tax Structure and Water and Wastewater Infrastructure;

Opportunity: Regional Perspective on Economic Development; Expansion of Passenger Rail/Freight Rail/Ahead in Economic Transition – region has been able to transition faster than other industrial parts of the nation/Connecting Young Workforce Opportunities/Accessible Government;

Threat: Retention Rate of College Grads and Young Workforce/Property Taxes/Lack of Tax Incentives/Lack of High Speed Communication Ability/Loss of Young, Educated Workforce

Dennis next described that the exercise today would be to look at these priorities by turning negatives into positives; by building upon successful examples and good practices to minimize threats; and by using opportunities to address weaknesses.

Dennis then showed and described a slide example of a SWOT Matrix of Strategies and divided the room into four discussion groups according to the following four SWOT areas:

- Strengths/Opportunities
- Weaknesses/Opportunities
- Strategies/Threats
- Weaknesses/Treats.

He provided some examples of possible strategies under each of the above four areas that the specific discussion groups could use as a guide when identifying their strategies. He also went over some basic ground rules for conducting the SWOT analysis and distributed a handout which provides a summary of some of the Municipal SWOT analysis results.

During the next hour, workshop participants in the small breakout groups began to discuss and report out their key strategies which SNHPC staff recorded on flip charts.

A spokesman from each group was selected and he/she reported out their strategies to the entire workshop participants. At the conclusion of this report out, Dennis Delay stated that he and SNHPC staff would be meeting to review the strategies soon to determine the next steps. Jack Munn reported that he believed this would result in Draft Vision Statement(s), goals, objectives and strategies for consideration of the Steering Committee. He indicated that he believed this could be reviewed by email, but that if another meeting is needed it could be scheduled in February.

Jack also summarized the next steps of the Regional Economic Development Plan which includes completing a list of the Top 5-10 Public Projects for the region and each municipality. He pointed out that a form is provided for this as part of the agenda materials and that the forms could be completed by Steering Committee members and/or a municipality's Economic Development Committee/Council. Jack asked that these forms be returned as soon as possible and no later than the next meeting which is scheduled for **March 29<sup>th</sup> from 3-5:00 PM at PSNH Energy Park.**

Agenda items for the March 29<sup>th</sup> meeting include: Economic Development Project Identification and Prioritization for the Region and each Municipality and a presentation by Dr. Keith Moon on the Incubator Program.

Jack also asked for all the municipalities to complete their responses to John Rhode's 4 basic economic questions as this information will help Dr. Moon in matching incubator programs with local needs and desires. Also, he asked that all completed Municipal SWOTs be submitted as soon as possible as well as the Metro Center-NH Informational Sheets requested for their website.

Lastly, Jack Munn reminded the Steering Committee and planners in attendance at the workshop, that the Planning Commission can provide over the next several months assistance in preparing application(s) to NH DRED for designation of properties land areas within a municipality that may be eligible for Economic Revitalization Zone (ERZ) Tax Credits under RSA 79-E. He mentioned that there are six municipalities in the region that could benefit from this assistance: the towns of Deerfield, Chester, Raymond, Candia, Weare and New Boston.

There being no further topics or discussion the workshop ended on time at 5:00 PM.  
Prepared by Jack Munn, SNHPC



## **Regional Economic Development Steering Committee**

### **Meeting**

**March 29, 2010  
3:00 to 5:00 PM**

**Public Service New Hampshire Energy Park  
780 North Commercial Street  
Manchester, NH 03102**

**For directions visit: <http://www.psnh.com/AboutPSNH/EnergyPark/directions.asp>  
or call SNHPC at 669-4664**

### **Auditorium**

- I. Welcome/Introductions – David Preece, Executive Director, SNHPC**
- II. Review January 25, 2009 Meeting Minutes (see attached)**
- III. SWOT Results/Final Report – Dennis Delay/Jack Munn, SNHPC  
(see attached)**
- IV. Update: Incubator Study Presentation – Dr. Keith Moon, SNHU**
- V. Discuss/Review Mission/Vision and Goals DRAFT – Jack Munn  
(see attached)**
- VI. Update: Top Project Review Process**
- VI. Next Steps:**
  - **Prioritize Top Public Projects for Region**
  - **Develop Objectives/Action Recommendations**
  - **Assistance: Economic Revitalization Zones**
  - **Presentation: Infrastructure Inventories/ARRA Funding**
  - **Next Meeting – April 26<sup>th</sup> PSNH**

**Regional Economic Development Steering Committee  
Public Workshop Meeting Notes  
March 29, 2010 3:00 PM – 5:00 PM, PSNH Energy Park**

Members Attending

Stoney Worster, Auburn  
Jim Lagana, Auburn  
William Dermody, Bedford  
Paul Goldberg, Bedford  
Dave Danielson, Bedford  
Rich Sawyer, Bedford  
George Siroas, Derry  
Gerald Coogan, Deerfield  
Dan Reidy, Goffstown  
Stephen Griffin, Goffstown  
Derek Horne, Goffstown  
Keith Moon, Hooksett  
Carol Granfield, Hooksett  
Steve Young, Londonderry  
Andre Garron, Londonderry  
Dan O’Neil, Manchester  
Ray Clement, Manchester  
Stuart Lewin, New Boston

Mark Brewer, MHT Airport  
Erica Menard, PSNH  
David Preece, SNHPC  
Jack Munn, SNHPC  
Jennifer Vance for Laurel Bistany, REDC  
Michele Petersen, Amoskeag Business Incubator (ABI)  
Julie Gustier, ABI  
Michele Shelton, GMCC  
William Sirak, GMCC

David Preece, Executive Director, SNHPC welcomed everyone and reviewed the meeting agenda. He explained that the purpose of today’s meeting is to summarize the results of the SWOT Analysis completed at the January 25<sup>th</sup> meeting and that Dr. Keith Moon, SMHU would be providing an update on his incubator study for the region. He also noted that Jack Munn, SNHPC would also be going over the proposed planning mission and vision statement and the proposed goals and actions of the plan. David Preece also asked if there were any changes to the January 25<sup>th</sup> meeting notes. Being none, George Siroas moved and Steve Griffin seconded that the minutes be accepted.

Jack Munn, SNHPC next reviewed the regional SWOT results by going over a number of slides in his power point presentation – these slides also included the overall project

schedule; the final Target Industry Report executive summary and recommendations for the region which is available on the SNHPC website: <http://www.snhpc.org>; the identified industry groups with the best fit for the region; and the results/outcomes from the Metro Center December 10<sup>th</sup> Leadership Forum.

Regarding the SWOT Analysis Final Report – there were two workshops – November 16<sup>th</sup> and January 25<sup>th</sup> wherein members of the Steering Committee participated in two brainstorming exercises. The first exercise was to identify and prioritize the strengths, weaknesses, opportunities and threats facing the region. The highest ranked strengths identified are the Manchester-Boston Regional Airport; the region’s university/research capabilities; the manageable size of government in New Hampshire; the region’s highway system and its location overall within the state.

The highest ranked weaknesses identified are losing educated workforce; lack of public transit; lack of economic development funding; the existing state and local tax structure and water and wastewater infrastructure. The highest ranked opportunities identified for the region consist of a regional perspective on economic development; expansion of passenger rail/freight; the region’s ability to transition faster than other parts of the country; connecting young workforce with opportunities and accessible government. The highest ranked threats center on the need to retain college graduates and young workforce; property taxes; lack of tax incentives; lack of high speed communications; and loss of educated young workforce.

In response to these priorities, the Steering Committee identified a number of strategies at the January 25<sup>th</sup> meeting for the Regional Economic Development Plan. These strategies are identified below:

- Build International Customs facilities at the airport to improve attractiveness to low cost carriers, and increase industrial development;
- Highway improvements like Exit 4, Exit 6/7, CTAP funding, and I-93 widening;
- Increase business to college communication in the region;
- Link airport to commuter rail;
- Create statewide broadband network;
- Promote young “lifestyles”, shopping, entertainment, attractions;
- Partner with high tech council to expand business and draw in younger workers;
- Improve public bus access to Manchester Airport;
- Have Londonderry North bus connect to other towns;
- Promote nightlife for younger workers;
- Amend tax structure to encourage sewer/water expansion;
- Forgiveness policy for student loans;
- Promote high density housing to improve affordability and maximize infrastructure;
- Apply the “First” program to biotech/biomed research;
- Examine resource of old copper in buildings.

Jack Munn noted that as time allows, the Committee would come back to these strategies to begin to set the stage for building the vision and goals of the plan.

Dr. Keith Moon, Southern New Hampshire University next presented his research and a power point presentation highlighting the results of his soon to be released Incubator Study for the region. He provided an overview and introduction to business incubators and as well as recommendations for the expansion of incubators within the region. He noted that the difference between typical economic development efforts aimed at building research/technology parks and a business incubator program is that incubators focus on select, viable start-up and early-stage companies (usually up to 3 years) and offers an array of targeted, specific business assistance services, such as support services and resources.

He noted that he is not here as a business incubator salesmen, but that from all credible accounts and research, business incubators generate significantly greater impacts in communities in which they are made than do other economic development projects. He cited a 2008 Grant Thornton study funded by the US Department of Commerce, EDA which found that investments in business incubators created up to 46 times as many jobs as any other infrastructure project. What's more, those jobs cost at least three and half times less per job than those created by other projects.

He also noted from a community standpoint that for every \$1 in public investment in incubators = \$30 in local tax revenue; resulting in an 84 percent retention rate of graduates; and 87 percent increased likelihood of business success – graduates stay in business.

Some of the basic services include: help with business basics; networking activities; marketing assistance; help with financial management; access to capital; links to colleges and universities; business training programs and mentoring and coaching. He also noted that some of the traits of successful incubator programs are integration into larger community; an effective team and professionalism.

The some of the various types of business incubators include: mixed-use incubation programs such as Amoskeag Business Incubator; technology programs and specialty programs. Dr. Moon cited additional research findings which found that in 2005 alone incubators in US helped more than 27,000 start-up companies; provided full-time employment for more than 100,000 workers and generated annual revenues of more than \$17 billion. He noted that a 2010 study released by Good Jobs First showed that growing companies locally resulted in net job growth 28 times larger than if a company was induced to move across state lines.

Dr. Moon presented a table showing all the towns within the region which had identified specific target industries as part of the Regional Economic Development Plan which industries were "creative industries" ideally suited for incubator support.

His recommendation for the region is to develop a “Hybrid-Virtual” Accelerator Incubator Program using a “Hub & Spoke” Model. He indicated that this approach would create companies tailored to young professionals as well as creative/knowledge firms; and help to leverage exiting resources. He suggested that the region could be branded as the “Creative Business Corridor” and that incentives could be developed at both the local and state level to help spur these start up companies. He stated that SNHU would act as the center or hub of the model and that specialized services would then be provided directly to the towns to support up to 5 businesses in each town in order to get the program started. He indicated that SNHU is in support of such a program provided that it pays for itself.

Dr. Moon indicated that he would like to submit a grant through the Kauffman Foundation seeking funding to pay for the program. He noted that in return for this funding the incubator companies would have to stay within the community.

William Sirak suggested at the meeting that this recommendation could be presented as a formal proposal to all the towns and that a list of action steps needs to be identified and included in the letter so that the towns can make a determination if they would like to participate or not. In response, Dr. Moon replied that all he needs to know is whether the towns are in favor or not in favor of the “Hybrid-Virtual Accelerator” concept for expanding “creative business” in the region or not. He indicated that if they are he would write the Kauffman grant and if not, he would proceed without the grant. In addition, he noted that he would like to see all the towns submit information on which types of businesses they would like to see for the future in their towns.

He also noted that he would need to know in the case of the Kauffman grant not being granted, if the region’s towns would be willing to pay \$1,000 per year, per business that would enter into the Accelerator program at SNHU. Also, Dr. Moon indicated that his final report would not be released to the public until receiving all the target business information from the towns.

Jack Munn commented that SNHPC would be working with Dr. Moon to obtain this information and to best communicate this information to the municipalities in the region. He passed out copies of Dr. Moon’s power point presentation and asked that the presentation be shared among the governing bodies of all the towns.

Jack Munn next reviewed the last part of the slides/power point presentation and asked for committee feedback and comments. He showed where he had written up the SWOT strategies as textual information under the following categories: **Transportation** (Airport/Highway/Transit); **Infrastructure** (water and wastewater and communications broadband), **Land Use** (geography/compact/smart growth); **Workforce** (retention of college graduates); **Education** (colleges/universities); **Overall Economic Development** (jobs creation/innovation and tax structure); and **Affordable Housing**. He indicated that these topic areas will reflect the goals and key actions of the plan.

Because of time limitations, he asked Committee members to review the goals and key actions contained with the power point presentation and to be prepared to discuss these at the next meeting scheduled for April 26, 2010.

Jack Munn next reviewed the overall core planning mission – purpose of the plan and asked for comments and feedback. The Committee was in support of the statements, but raised concern about whether the plan should be updated on a “continuous basis” and asked that this be deleted.

Jack Munn next reviewed a proposed Vision Statement/Economic Development Strategy for the region. The Committee was in general support of the statement, but raised concern about including within the strategy that it should be included in all plans developed by SNHPC for the region. In addition, it was recommended that statement number 2# regarding Metro Center should come before the statement regarding SNHPC and that SNHPC role for economic development planning should be in partnership with Metro Center and the region’s municipalities.

Jack Munn replied that he would make these revisions and send out a revised power point presentation with slides with the agenda for the April 26<sup>th</sup> meeting. He noted again that the focus of the April 26<sup>th</sup> meeting would be on the goals and key actions and he reminded all the municipalities to submit their list of Top Public Projects for the Region as well as their Metro Center-NH Information Handout Sheets.

There being no further topics or discussion, the workshop ended on time at 5:00 PM.  
Prepared by Jack Munn, SNHPC

## **Regional Economic Development Steering Committee**

### **Meeting**

**April 26, 2010  
3:00 to 5:00 PM**

**Public Service New Hampshire Energy Park  
780 North Commercial Street  
Manchester, NH 03102**

**For directions visit: <http://www.psnh.com/AboutPSNH/EnergyPark/directions.asp>  
or call SNHPC at 669-4664**

### **Auditorium**

- I. Welcome/Introductions – David Preece, Executive Director, SNHPC**
- II. Review March 29, 2010 Meeting Minutes (see attached)**
- III. Review Goals and Key Actions - Jack Munn, SNHPC  
(see attached REVISED March 29<sup>th</sup> Power Point Slides)**
- IV. Top Public Projects Review Process – Jack Munn, SNHPC**
- V. Updates:**
  - **Incubator Study Presentation**
  - **Infrastructure Inventories/ARRA Funding**
- VI. Next Steps:**
  - **Next Meeting – May 24<sup>th</sup> PSNH**

**Regional Economic Development Steering Committee  
Public Workshop Meeting Notes  
April 26, 2010 3:00 PM – 5:00 PM, PSNH Energy Park**

Members Attending

Stoney Worster, Auburn  
Jim Lagana, Auburn  
Dave Danielson, Bedford  
Rich Sawyer, Bedford  
George Siroas, Derry  
Matt Monahan, Goffstown  
Tony Marts, Goffstown  
Keith Moon, Hooksett  
Don Moskowitz, Londonderry  
Jay Minkarah, Manchester  
Shane Carter, Deerfield

Mark Brewer, MHT Airport  
Erica Menard, PSNH  
David Preece, SNHPC  
Jack Munn, SNHPC  
Tim White, SNHPC  
Stephen Heavener, CRDC

David Preece, Executive Director, SNHPC welcomed everyone and reviewed the meeting agenda. He explained that the purpose of today's meeting is to review the proposed goals and key actions which resulted from the SWOT Analysis completed at the January 25<sup>th</sup> meeting and to review the process for the next meeting which will focus on the top public projects for the region. David Preece also asked if there were any changes to the March 29<sup>th</sup> meeting notes. Being none, the minutes were accepted.

Jack Munn, SNHPC next reviewed the proposed goals and key actions resulting from the regional SWOT strategies by going over a number of slides in his power point presentation – these slides also included an overview of the core planning mission/purpose of the plan and the recommended vision/economic development strategy for the region.

He showed where he had written up the SWOT strategies as textual information under the following seven categories: **Transportation** (Airport/Highway/Transit); **Infrastructure** (water and wastewater and communications broadband), **Land Use** (geography/compact/smart growth); **Workforce** (retention of college graduates); **Education** (colleges/universities); **Overall Economic Development** (jobs creation/innovation and tax structure); and **Affordable Housing**.



He indicated that a total of 14 core goals and key actions had been identified by the Steering Committee resulting from the SWOT strategies and that the purpose of the meeting today would be to go through these goals and key actions.

Jack Munn next asked the participants to break into the following four groups – transportation; infrastructure/energy; education/workforce; land use and economic development. He asked participants at each group to focus on the proposed goals and key actions with the intent of seeking agreement and making edits and revisions where needed. He indicated that SNHPC staff would lead the small group discussions:

Steering Committee participants among each of the four groups proceeded to review the goals and actions and offer suggestions and revisions where needed. This information was then recorded by SNHPC staff.

After an hour of discussion, Jack Munn next reviewed the final step in development of the Regional Economic Development Plan which includes a review of the Top 5-10 Public Project Lists submitted by each municipality. He reminded all the municipalities to submit their list of Top Public Projects for the Region as well as their Metro Center-NH Information Handout Sheets if they had not already done so. He indicated that the Top Public Projects would be reviewed at the next meeting scheduled for May 24, 2010 from 3-5:00 PM here at the PSNH Energy Park.

He indicated that the review of the Top Public Projects would be similar to the prioritization of projects in a CEDS plan. The first step will be to determine if the proposed project addresses one or several of the goals of the plan. The second step will consist of identifying the projects as either short term, medium term or long term. The final step will then be ranking the projects according to weighted criteria considering the impact of the project(s) on improving jobs and the region's overall economy.

There being no further topics or discussion, the workshop ended on time at 5:00 PM.  
Prepared by Jack Munn, SNHPC

## **Regional Economic Development Steering Committee**

### **Meeting**

**May 24, 2010  
3:00 to 5:00 PM**

**Public Service New Hampshire Energy Park  
780 North Commercial Street  
Manchester, NH 03102**

**For directions visit: <http://www.psnh.com/AboutPSNH/EnergyPark/directions.asp>  
or call SNHPC at 669-4664**

### **Auditorium**

- I. Welcome/Introductions – David Preece, Executive Director, SNHPC**
- II. Review April 26, 2010 Meeting Minutes (see attached)**
- III. Present Final Goals and Key Actions - Jack Munn, SNHPC  
(see attached)**
- IV. Review and Prioritize the Top Public Projects for the Region – Jack Munn, SNHPC**
- V. Updates:**
  - Final Incubator Study Report**
  - Update: Infrastructure Inventory/ARRA Funding Data for Region**
- VI. Next Steps:**
  - Schedule/Review of Final Plan DRAFT**

**Regional Economic Development Steering Committee  
Public Workshop Meeting Notes  
May 24, 2010 3:00 PM – 5:00 PM, PSNH Energy Park**

Members Attending

Jim Lagana, Auburn  
Henry Bechard, Bedford  
Derek Horne, Goffstown  
Dan Reidy, Goffstown  
Don Moskowitz, Londonderry  
Jay Minkarah, Manchester  
Stu Lewin, New Boston  
Richard Snow, Candia  
Bill Sirak, Hooksett

Mark Brewer, MHT Airport  
Erica Menard, PSNH and Deerfield  
Mike Skelton, Manchester Chamber of Commerce  
David Preece, SNHPC  
Jack Munn, SNHPC  
Jillian Harris, SNHPC  
Matthew Caron, SNHPC  
Alex Kammler, SNHPC Intern

David Preece, Executive Director, SNHPC welcomed everyone and reviewed the meeting agenda. He explained that the purpose of today's meeting is to present the final goals and key actions resulting from the April 26<sup>th</sup> meeting and to review and rank the top public projects for the region as well as provide an update on the Incubator Study; the Infrastructure Inventory and the ARRA Funding Data for the region. David Preece also asked if there were any changes to the April 26<sup>th</sup> meeting notes. Being none, the minutes were accepted.

Jack Munn, SNHPC thanked the Steering Committee members and other participants for their participation and that this meeting would likely be the last meeting necessary for the Regional Economic Development Plan. He next reviewed the hand out of the final goals and key actions which resulted from the April 26<sup>th</sup> small group discussions, comments and recommendations of the Steering Committee members and meeting participants. He noted that there are ten Core Coals related to the following categories: Transportation; Infrastructure; Land Use; Labor Force/Workforce Development; Education; Energy, Economic Development Planning and Job Creation; Entrepreneurship; Real Estate Development – Site Readiness; and Funding Resources for Economic Development and that these would be posted on the SNHPC website and included in the plan. He also briefly reviewed a few of the Key Actions noting that they reflect the strategies resulting from the SWOT analysis and have also been included in the List of the Top Public Projects to be reviewed and scored today.

He asked the Steering Committee if they had any additional final comments or suggestions regarding the Core Goals and Key Actions. Dan Reidy suggested that the word “County” be added between municipal and state in the fourth bullet under the Key Actions for Economic Development Planning and Job Creation. There being no further changes or suggestions, the goals and actions were accepted.

Jack Munn next reviewed the work to be accomplished for the balance of the meeting. He indicated that participants would break into small groups to be facilitated by SNHPC staff for the purpose of reviewing the hand out and List of Top Public Projects and to score the projects according to the following criteria:

- 0 – Will have little or no importance in jobs or improving the region’s economy;
- 1 – Is important in creating jobs and improving the region’s economy;
- 2 – Is absolutely important in creating jobs and improving the region’s economy.

He noted that each participant will offer a score on each of the projects which are listed as having some significance or impact to the region in terms of the above criteria. The SNHPC facilitator will then tally the scores of all the participants to achieve a total group score. Then after the meeting a final total score will be added up and all the projects will be ranked accordingly.

Jack Munn next reviewed the List of Public Projects asking for any input or feedback on the projects from local officials. He pointed out that there were several projects on list which were deemed not to have an impact or significance to the region. He asked the meeting participants if they agreed with this assessment.

The only project which the committee believed may have some regional impact was the Londonderry North Fire Station. There were differing opinions about the fire station’s regional significance, but it was agreed that because of the mutual aid with City of Manchester and the location of this facility south of the airport that it had impact beyond the town’s borders and should be scored.

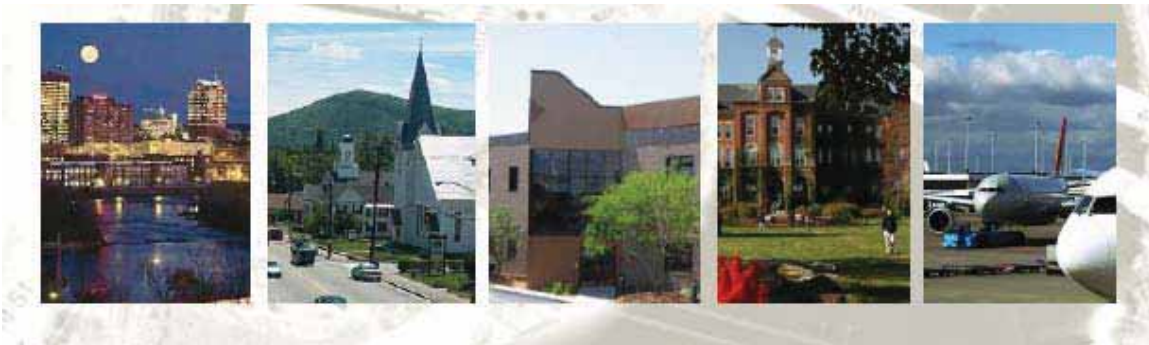
After an hour of review and discussion, the overall total results of each small group review and scoring is shown on the attached Ranking of Top Public Projects Submitted by Municipalities in the Region and the Ranking of Top Projects Identified Through Regional Economic Development Plan Core Goals/Key Actions/SWOT Analysis.

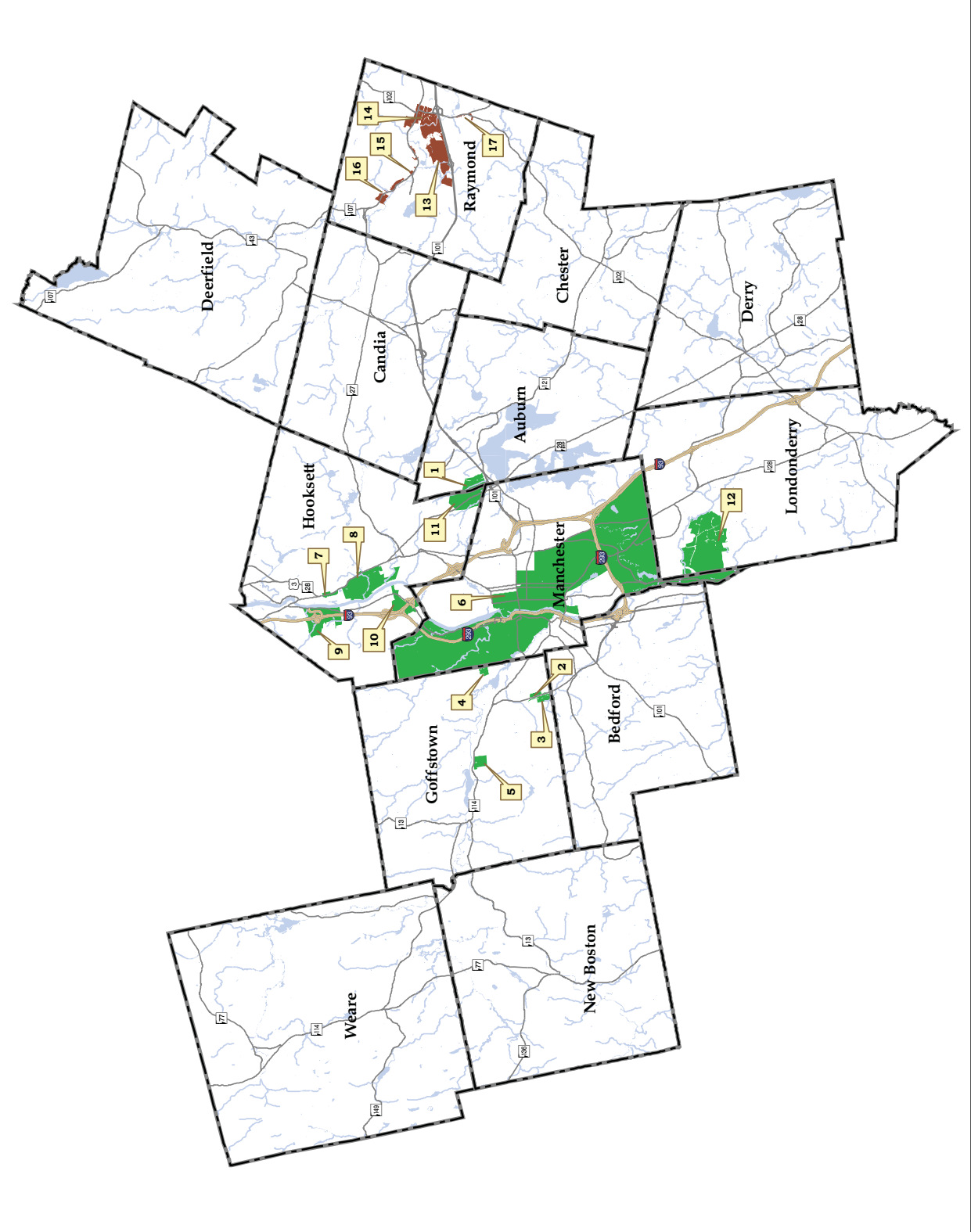
Jack Munn pointed out that the scoring results are only advisory and not an official list of projects for the region. He indicated that while the results would be included in the Regional Economic Development Plan, this would be the process that projects would be reviewed and officially recommended for the region under the US Department of Commerce, Economic Development Administration’s Comprehensive Economic Development Strategy (CEDS) process.

Jack Munn thanked everyone for their time and effort on the plan and that he would be drafting the plan next month and that the DRAFT would be forthcoming to committee members and town officials to review and comment before being scheduled for the SNHPC Planning Commission review and approval. He also noted that the Final Report for the Incubator Study was nearing completion and would also be released soon, along with the ARRA Funding Data for the Region and the Infrastructure Inventory which would be included in the Regional Economic Development Plan.

There being no further topics or discussion, the workshop ended on time at 5:00 PM.  
Prepared by Jack Munn, SNHPC

## Section J: Economic Revitalization State Tax Credit Zones





**Map #**  
**Regional Comprehensive Plan**  
**Economic Revitalization Zones**

**Economic Revitalization Zone**  
**Proposed Zone**  
**Town line**  
**Streams**  
**Rivers/ Lakes**  
**Roads**  
**Interstate Roads**  
**State Roads**

Name	Zone
Wellington Business Park- Auburn	1
Benchmark - Goffstown	2
Genite Slopes - Goffstown	3
Pond View - Goffstown	4
Tatro Drive - Goffstown	5
Manchester	6
Former Restaurant - Hooksett	7
The Valley - Hooksett	8
EXH11 - Hooksett	9
EXH10 - Hooksett	10
Londonderry Tpk - Hooksett	11
Airport Access Rd and Pettengill Rd - Londonderry	12
Exit 4 - Raymond	13
Exit 5 - Raymond	14
Old Southside Rd (South) - Raymond	15
Old Southside Rd (North) - Raymond	16
Chester Rd - Raymond	17

**Data Sources:**  
 NH State Digital Data (1/24/00)  
 NH State Department of Transportation  
 Town of Auburn  
 Town of Goffstown  
 Town of Hooksett  
 Town of Londonderry  
 City of Manchester

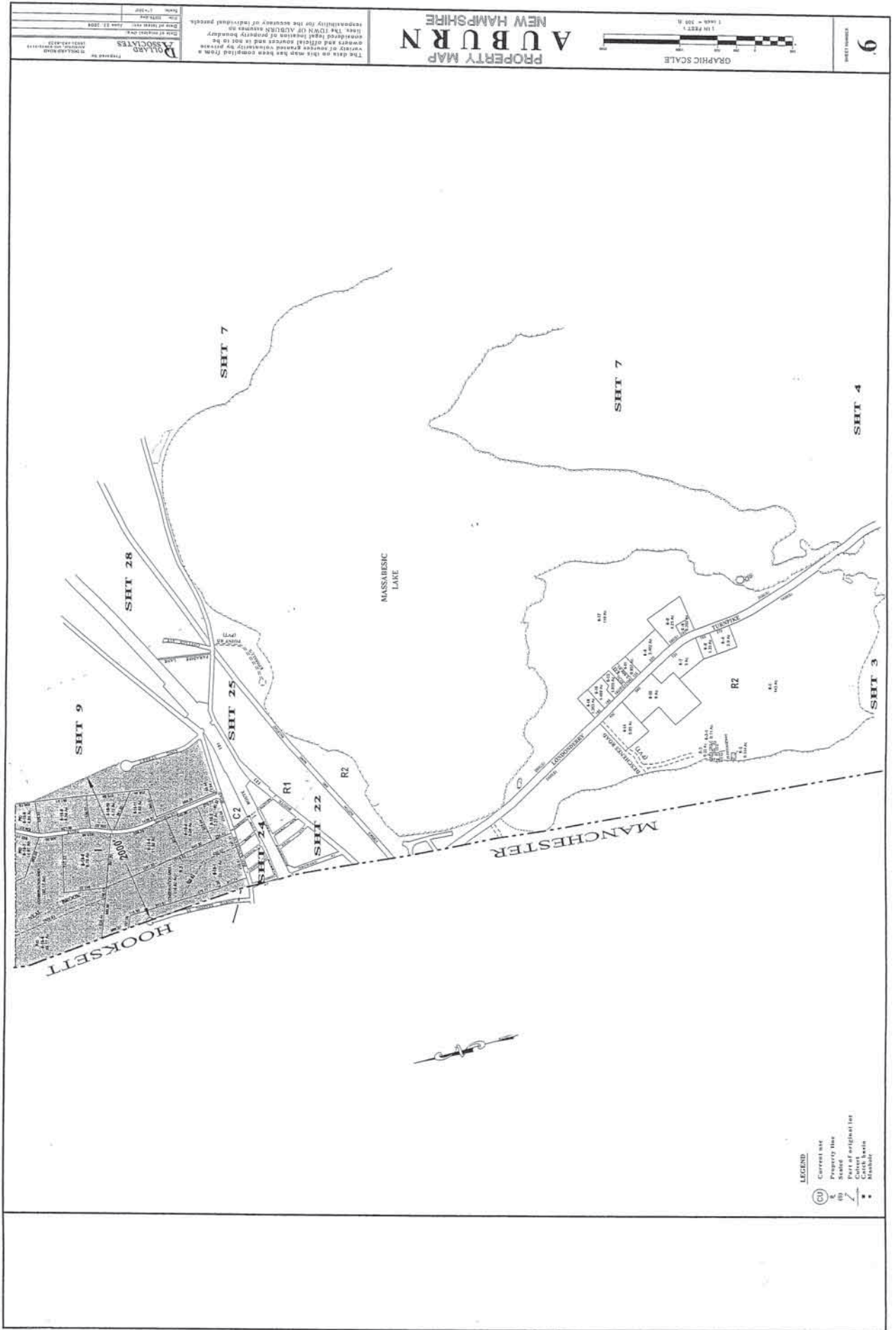
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 Contact: SNHPC, gis@snhpc.org or (603) 668-4664

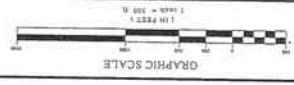
0 1.25 2.5 5 Miles

Location Map



The data on this map has been compiled from a  
 variety of sources granted authority by private  
 owners and official sources and is not to be  
 taken as a warranty of accuracy. The user assumes  
 responsibility for the accuracy of individual parcels.  
 DALLAS ASSOCIATES  
 Date of issue: 10/11/2004  
 Form: 10/11/2004

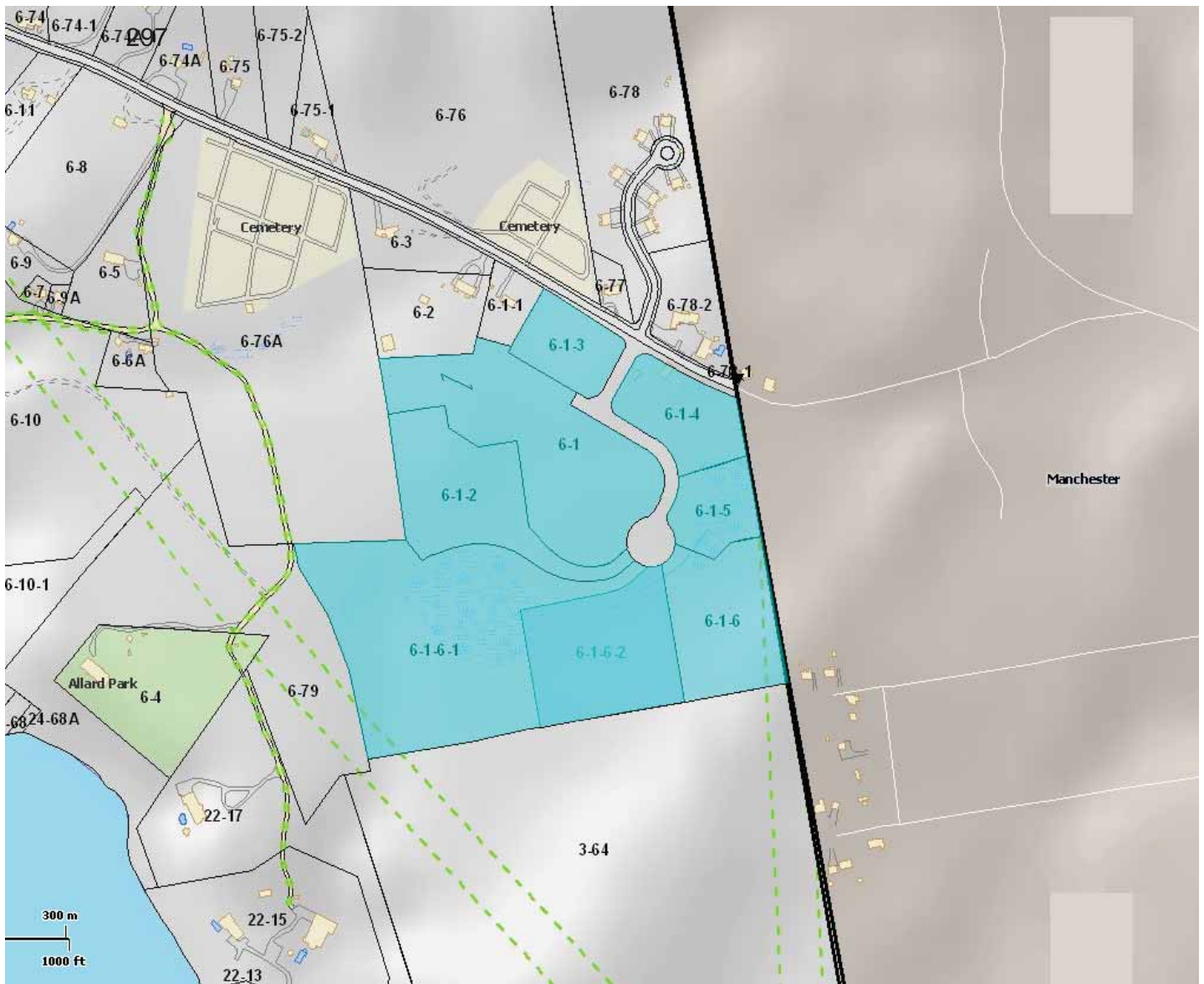
**PROPERTY MAP**  
**AUBURN**  
**NEW HAMPSHIRE**



SHEET NUMBER  
**6**

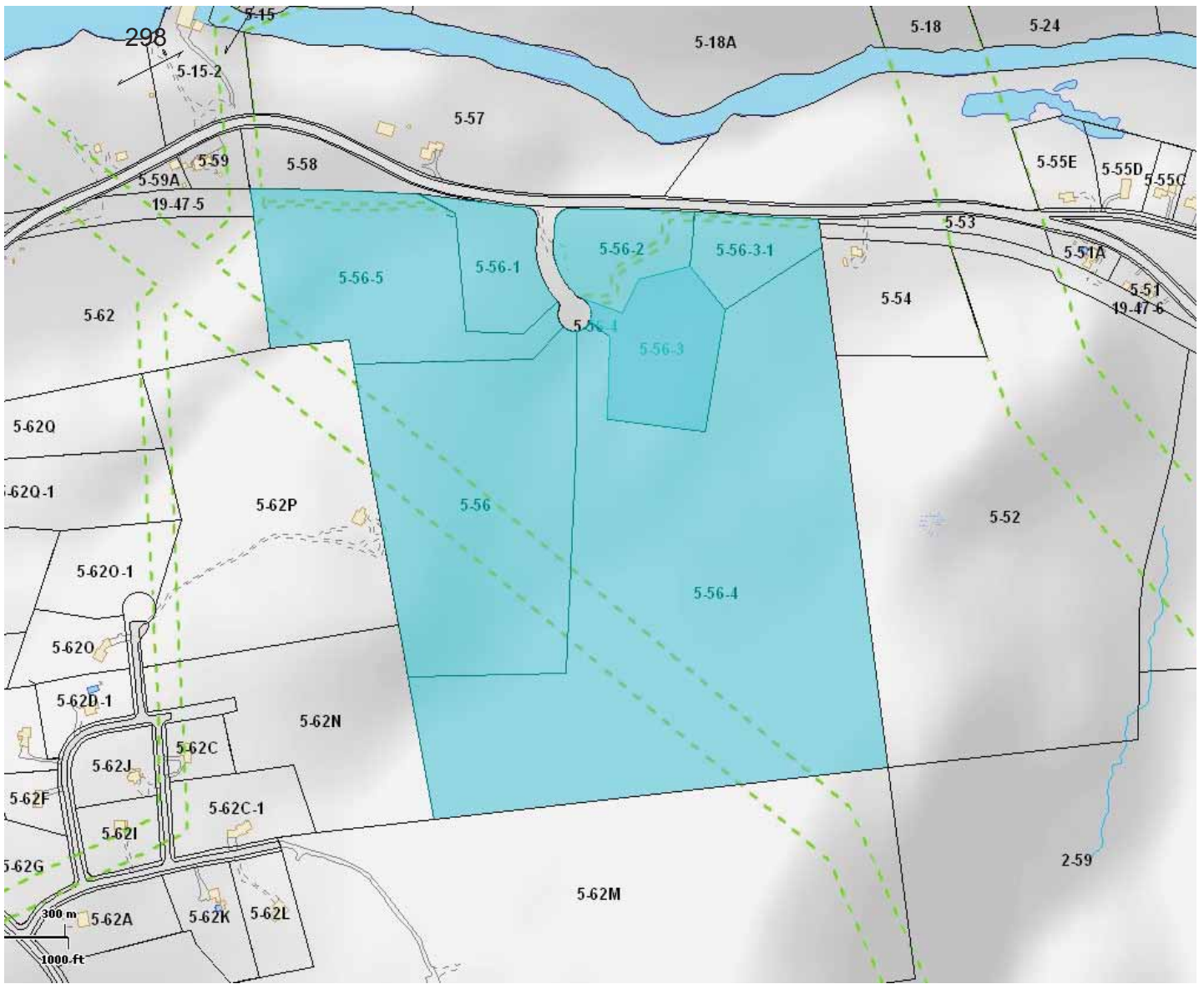
- LEGEND**
- (CU) Current use
  - Property line
  - Setback
  - Part of original lot
  - Creek head
  - Marsh





# Pond View Economic Revitalization Zone





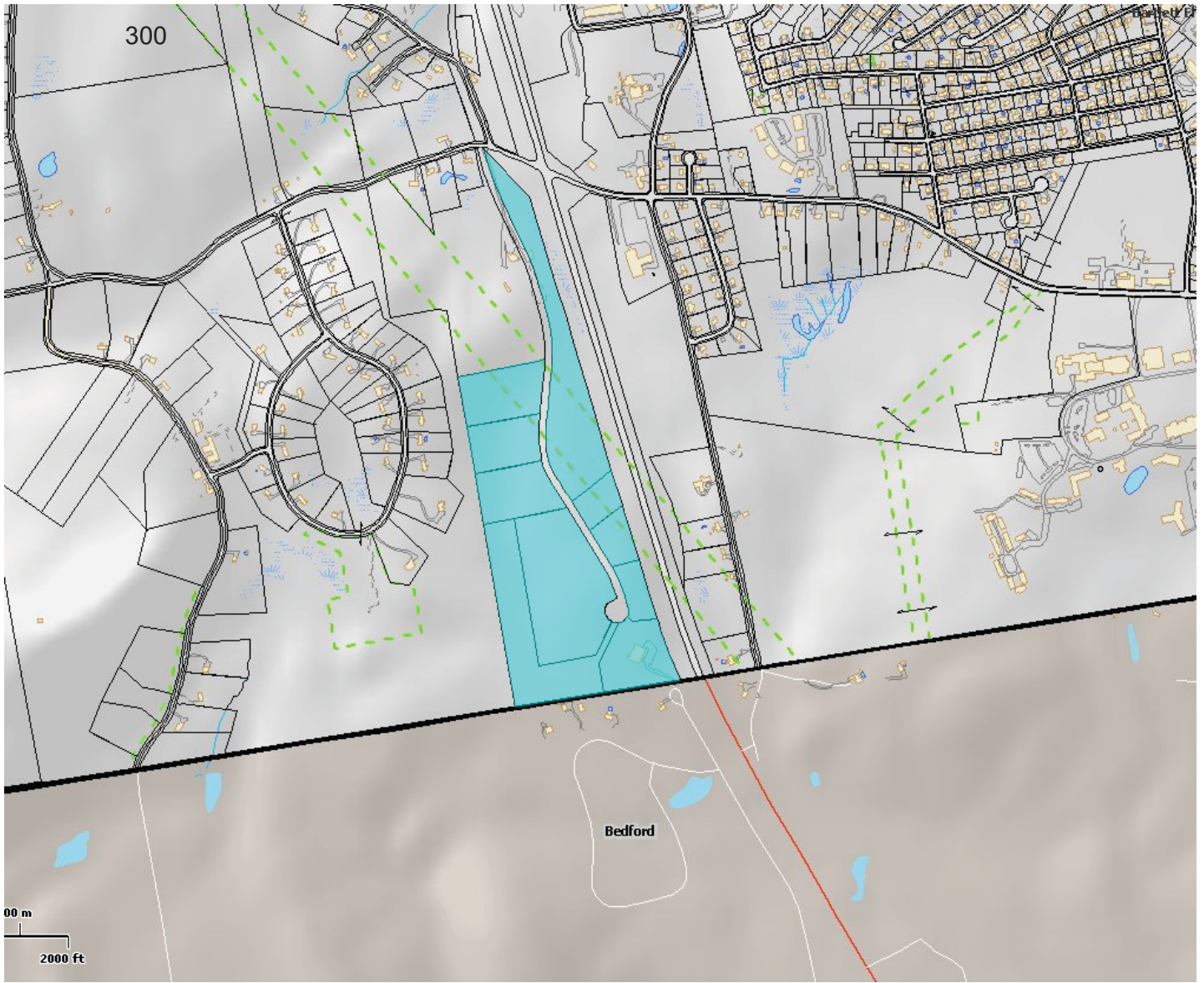
**Tatro Drive**  
Economic Revitalization Zone





**Benchmark**  
Economic Revitalization Zone

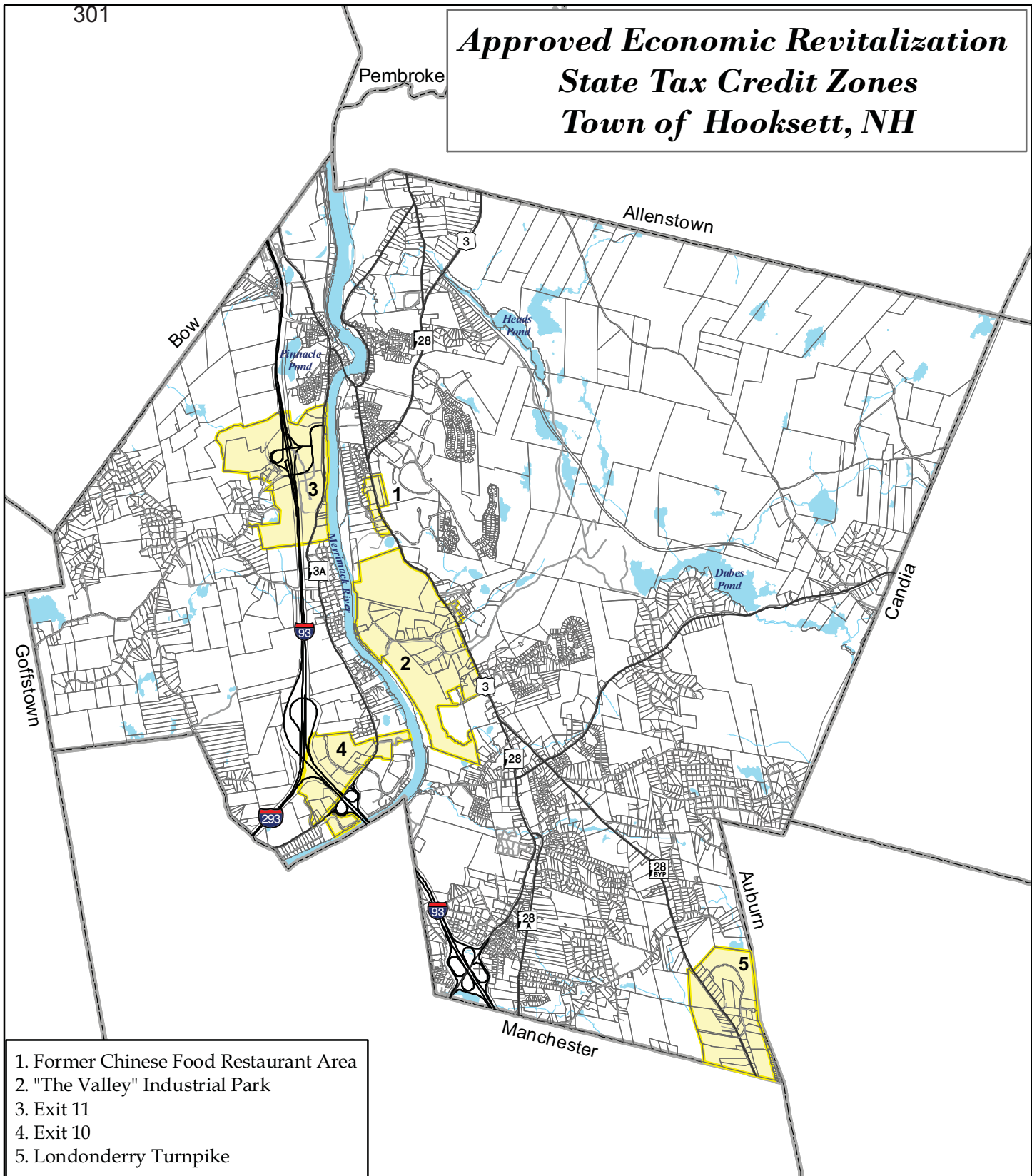




**Gentle Slopes Industrial Park**  
Economic Revitalization Zone



# Approved Economic Revitalization State Tax Credit Zones Town of Hooksett, NH



- 1. Former Chinese Food Restaurant Area
- 2. "The Valley" Industrial Park
- 3. Exit 11
- 4. Exit 10
- 5. Londonderry Turnpike

Data Sources:  
 Granit Digital Data (1:24,000)  
 NH Department of Transportation  
 SNHPC  
 Town of Hooksett

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Map produced by SNHPC May 2009.

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### Legend

Tax Credit Zones

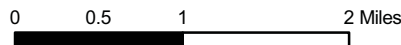
### Roads

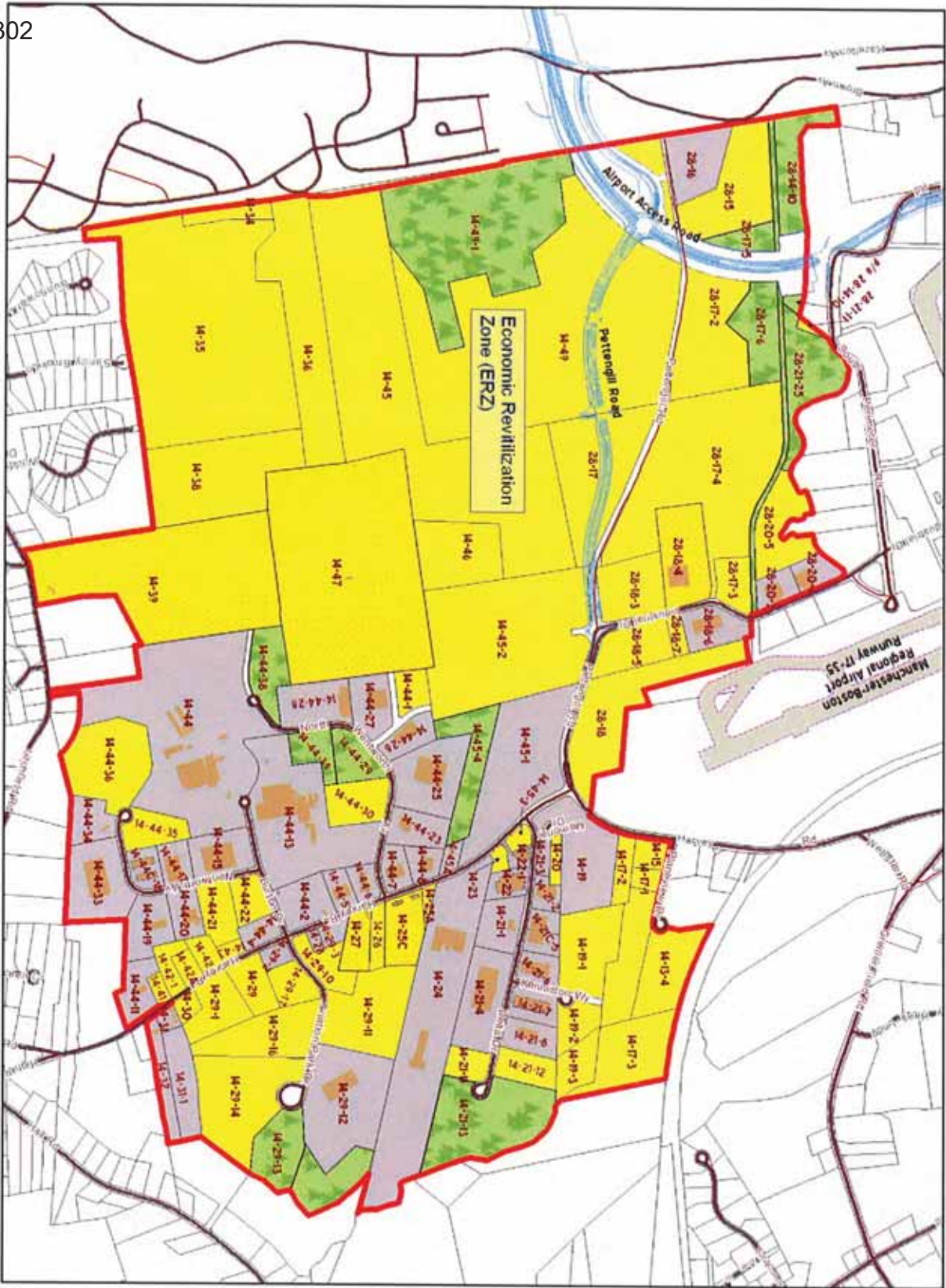
Interstate Highways

State Roads

Local Roads

Private Roads



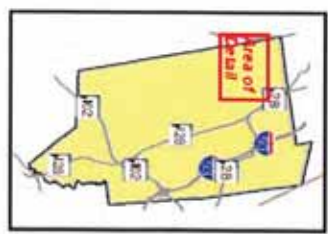


Town of Londonderry  
New Hampshire

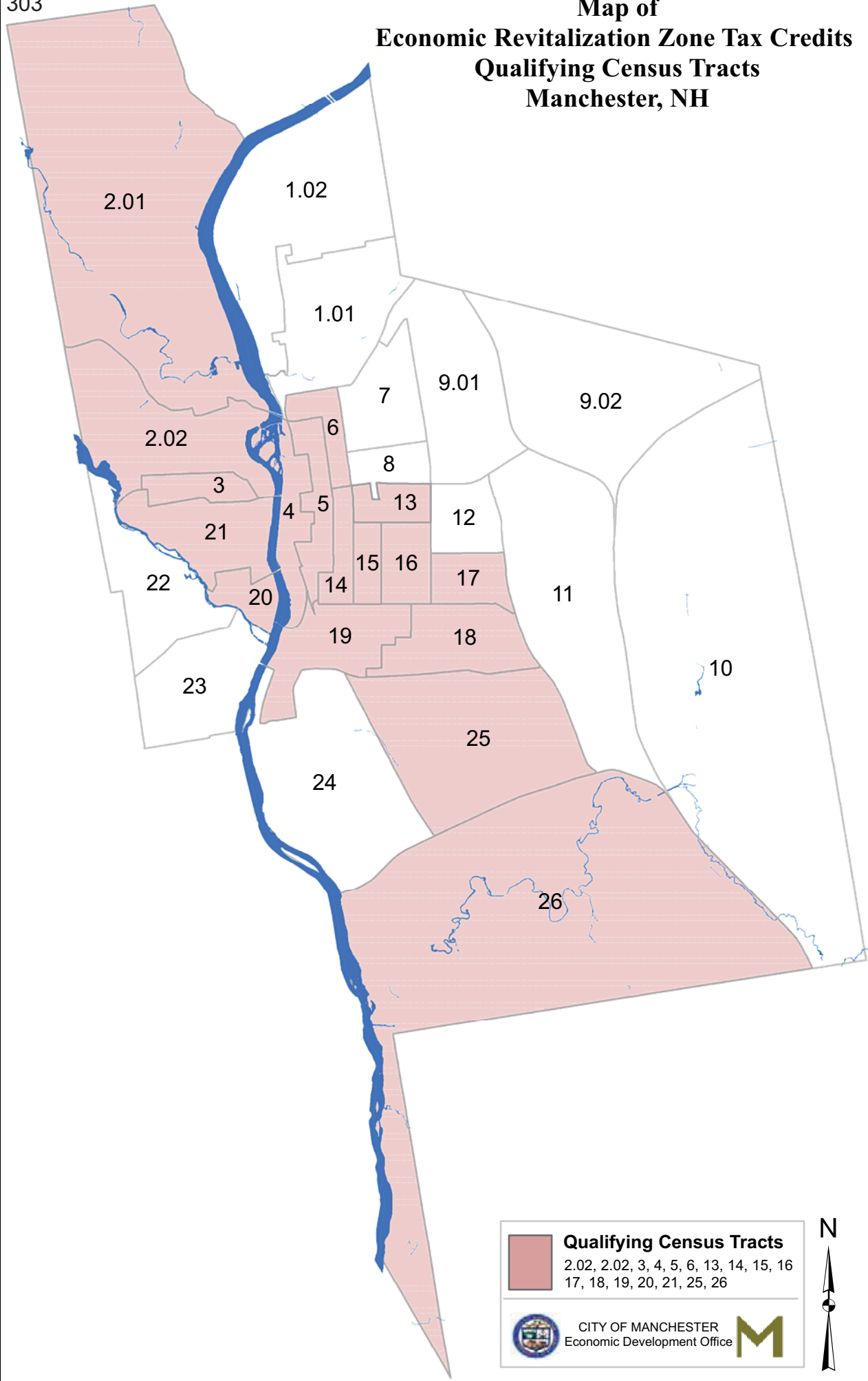
**Economic Revitalization Zone (ERZ)**

Adopted by NH DRED July 1, 2009

- ERZ Boundary
- Included Parcels, by use:
  - Vacant Parcels
  - Undervalued Parcels
  - Developed Parcels
  - Permanent Conservation Land
  - Existing Buildings
  - Proposed Limited Access Roadway



# Map of Economic Revitalization Zone Tax Credits Qualifying Census Tracts Manchester, NH



**Qualifying Census Tracts**  
2.02, 2.02, 3, 4, 5, 6, 13, 14, 15, 16  
17, 18, 19, 20, 21, 25, 26

 CITY OF MANCHESTER  
Economic Development Office 

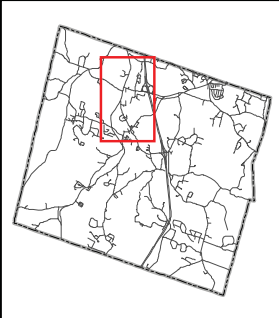
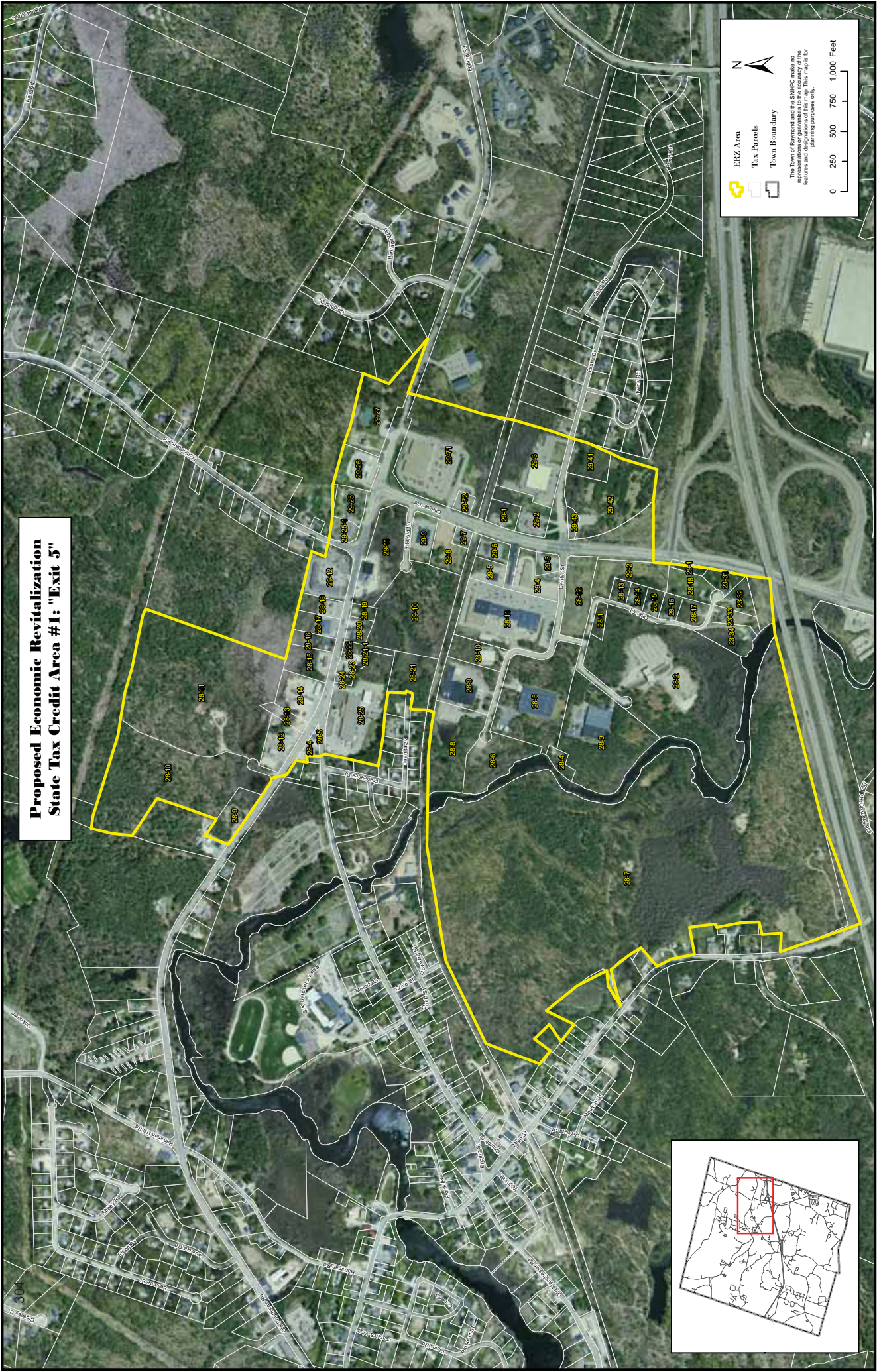


**Proposed Economic Revitalization  
State Tax Credit Area #1: "Exit 5"**

**ERZ Area**  
**Tax Parcels**  
**Town Boundary**

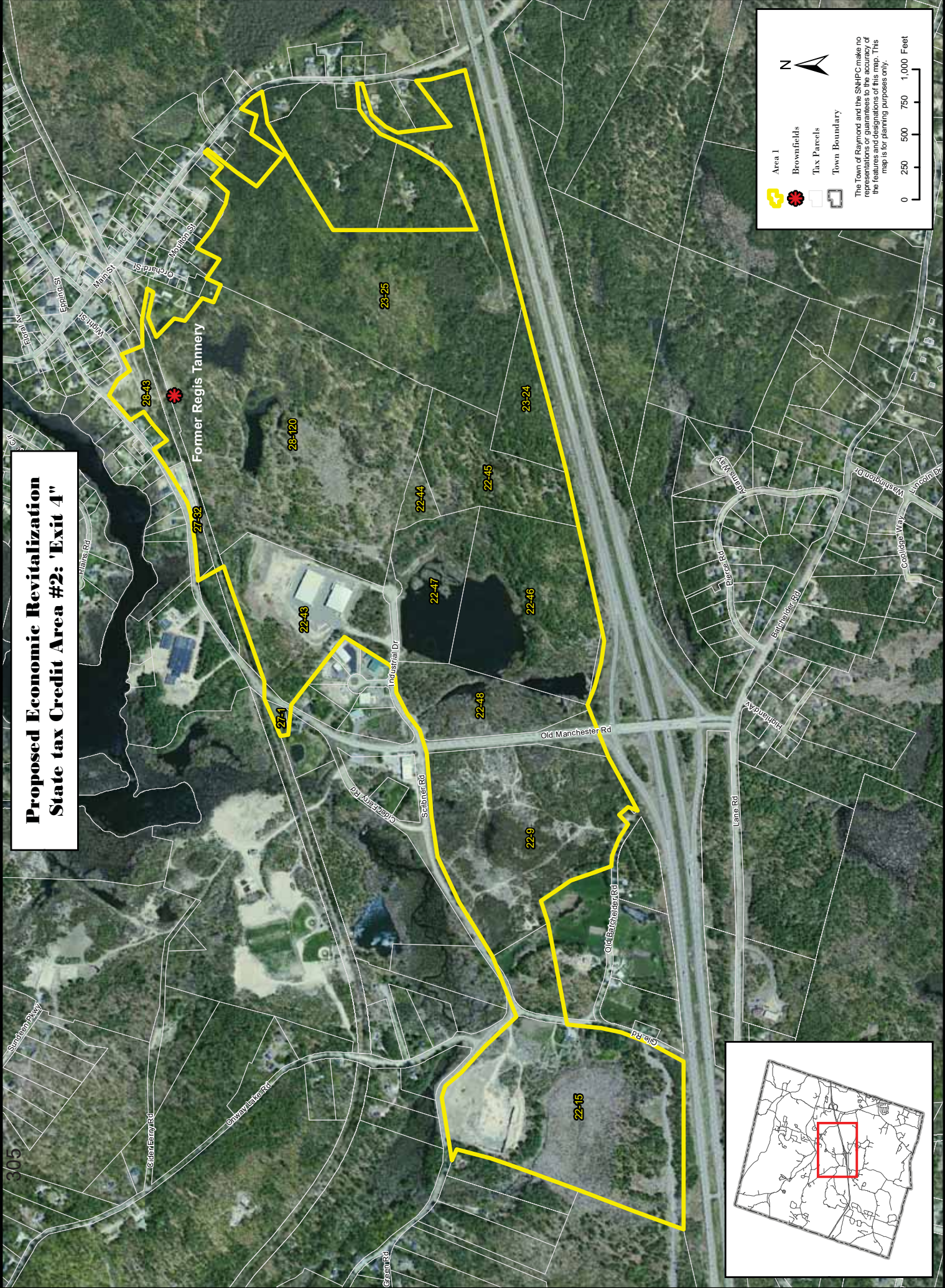
The Town of Raymond and the SHMPC make no  
 warranty, representation, or guarantee as to the  
 accuracy or completeness of the information  
 features and designations of this map. This map is for  
 planning purposes only.

0 250 500 750 1,000 Feet





# Proposed Economic Revitalization State tax Credit Area #2: 'Exit 4'



Former Regis Tannery

**Area 1**

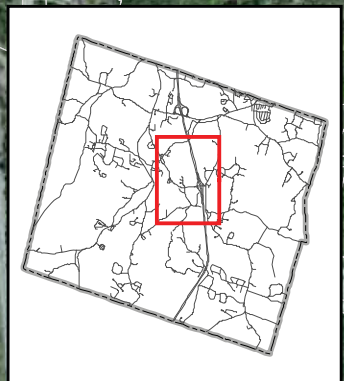
**Brownfields**

**Tax Parcels**

**Town Boundary**

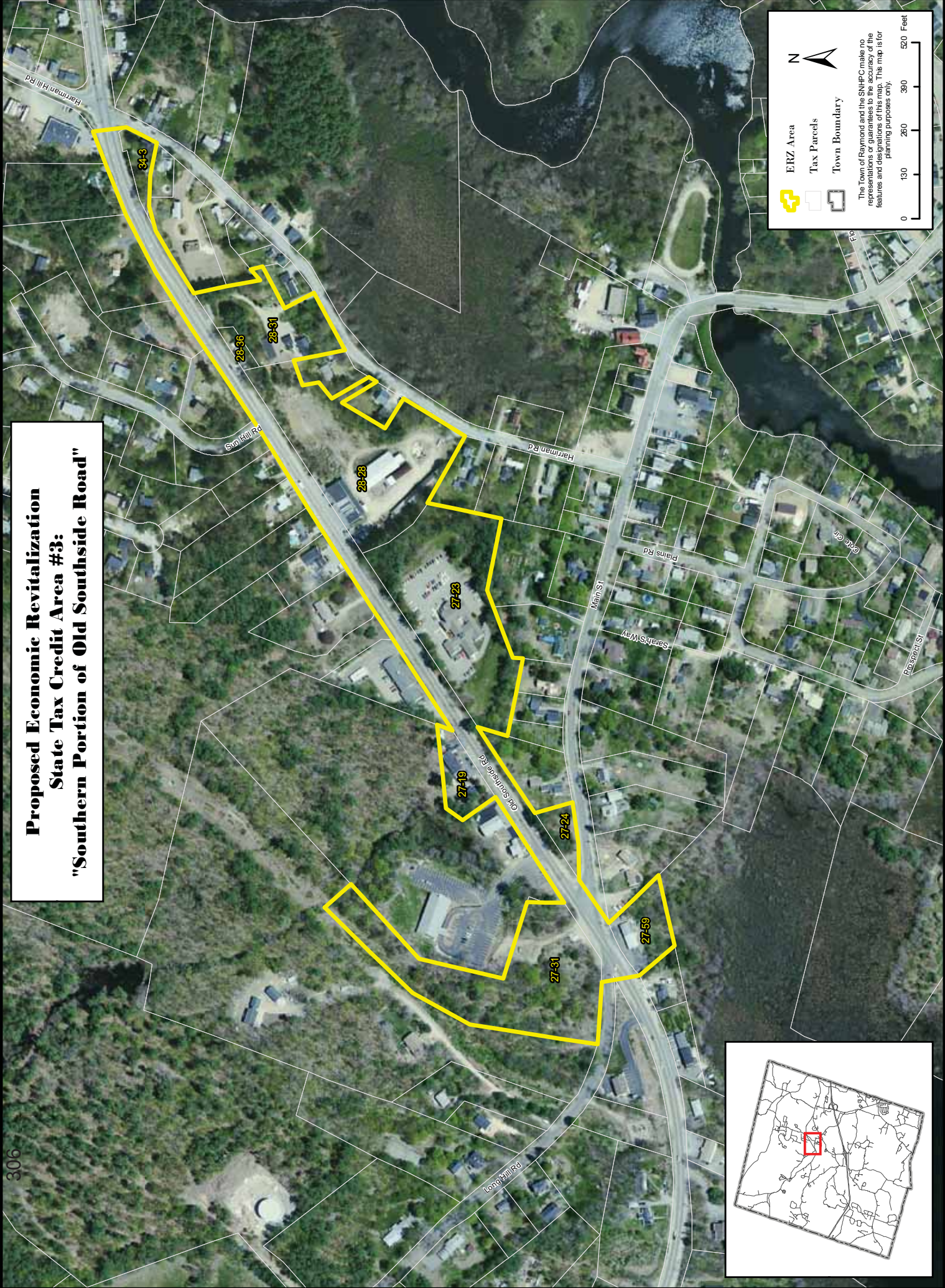
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0 250 500 750 1,000 Feet



**Proposed Economic Revitalization  
State Tax Credit Area #3:  
"Southern Portion of Old Southside Road"**

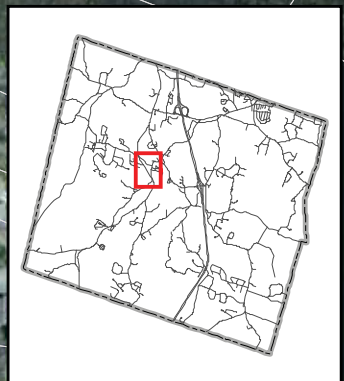
306



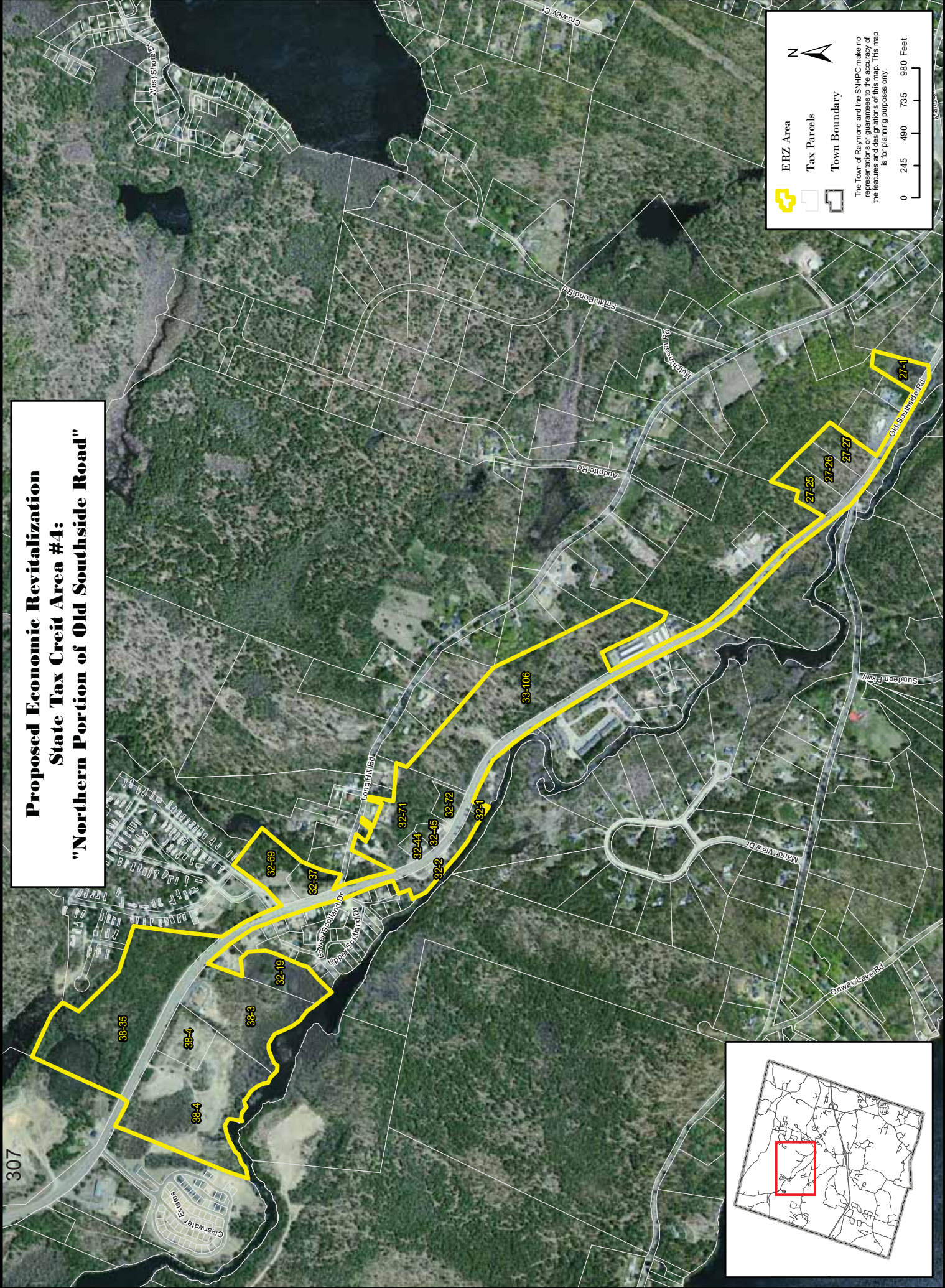
**ERZ Area**  
**Tax Parcels**  
**Town Boundary**

The Town of Raymond and the SNUFC make no representation as to the accuracy of the features and designations of this map. This map is for planning purposes only.

0 130 260 390 520 Feet



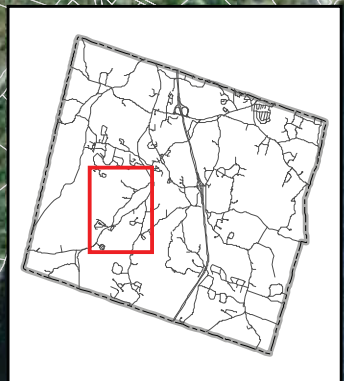
**Proposed Economic Revitalization  
State Tax Credit Area #4:  
"Northern Portion of Old Southside Road"**



**ERZ Area**  
**Tax Parcels**  
**Town Boundary**

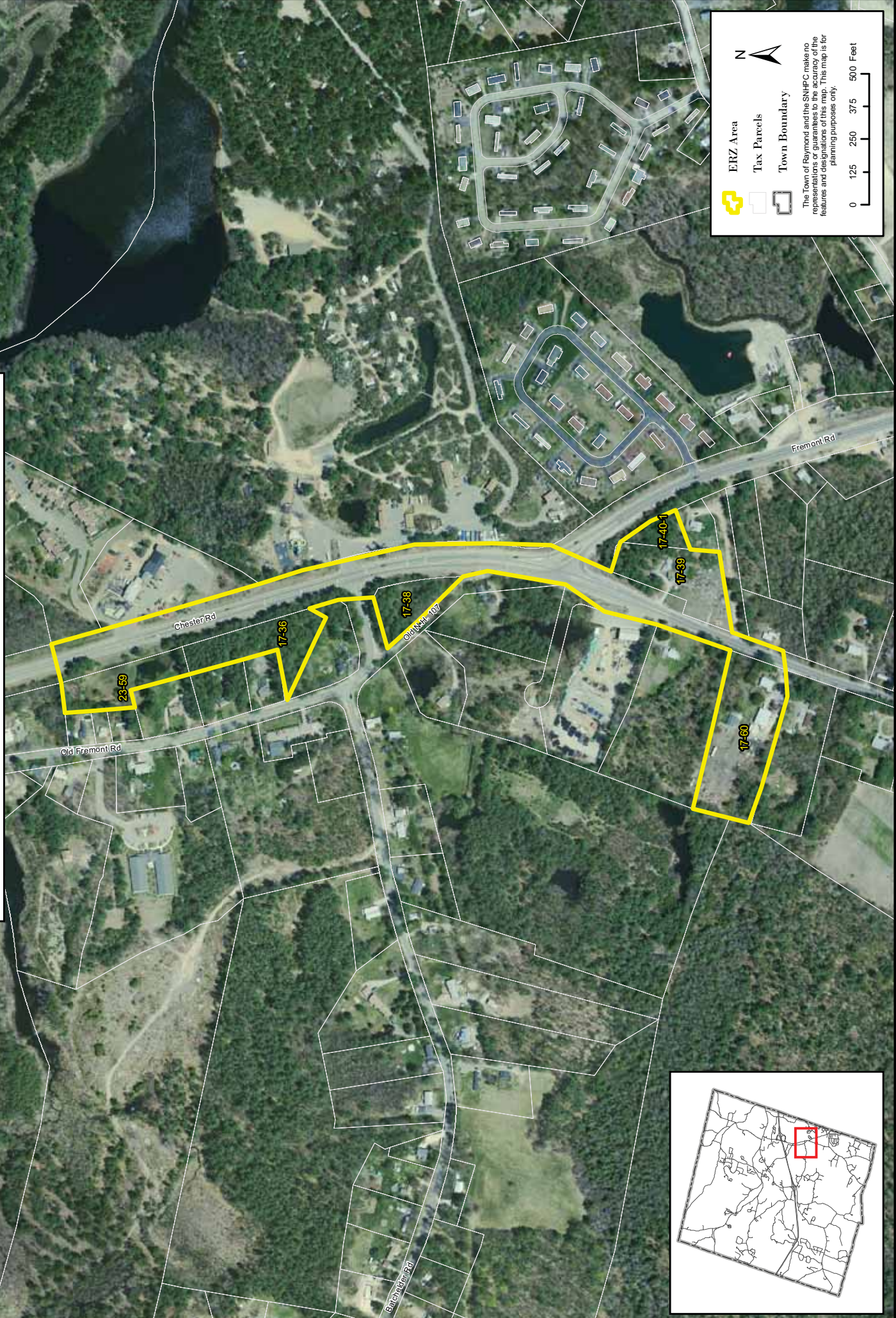
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0 245 490 735 980 Feet



# Proposed Economic Revitalization State Tax Credit Area #5: "Chester Road"

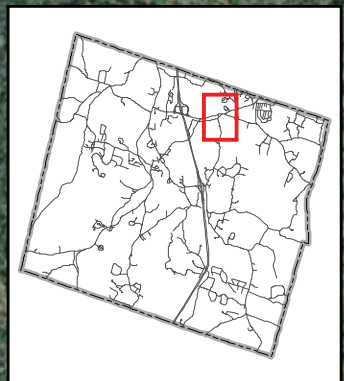
308



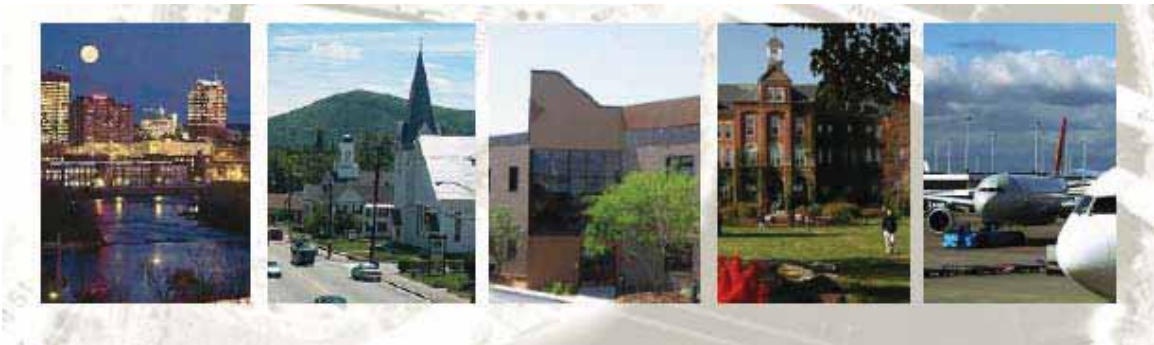
**ERZ Area**  
**Tax Parcels**  
**Town Boundary**

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0 125 250 375 500 Feet



## Section K: Regional Utility Maps



**Map #**  
**Regional Economic  
 Development Plan**  
**Wireless Communication  
 Towers**

**Wireless Communication Towers**

Towers:

Town line:

Streams:

Rivers/ Lakes:

**Roads**

Interstate Roads:

State Roads:

Local Roads:

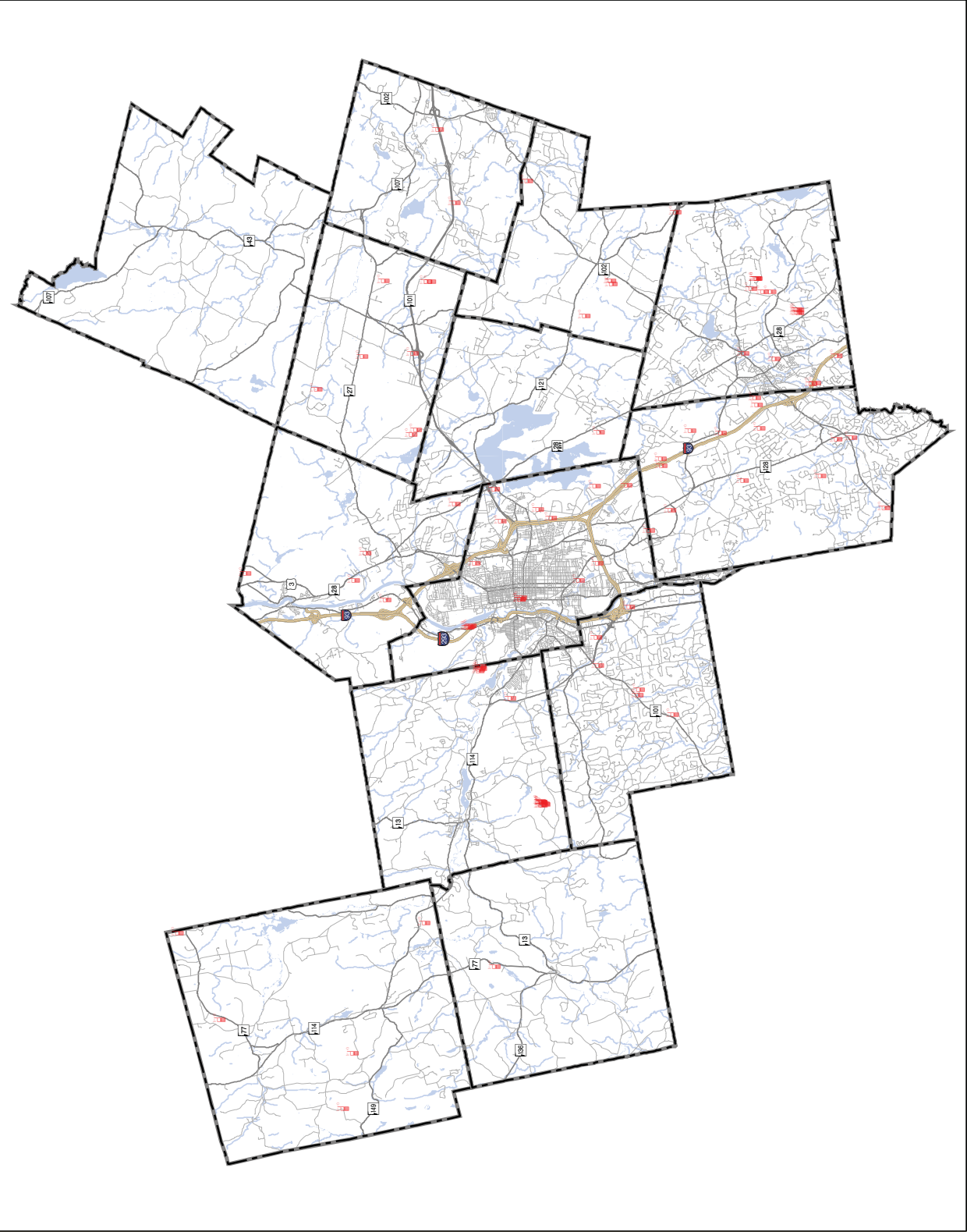
**Data Sources:**  
 Grant Digital Data (1/24/00)  
 NH Department of Transportation  
 SNHPC

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Map Produced by GIS Services SNHPC June 2010.  
 Contact: SNHPC, gis@snhpc.org or (603) 669-4664

**Location Map**

0 1 2 4 Miles



**Map #**  
**Regional Economic  
 Development Plan**  
 MS4 Areas

**MS4 Areas\***

**Town line**

**Streams**

**Rivers / Lakes**

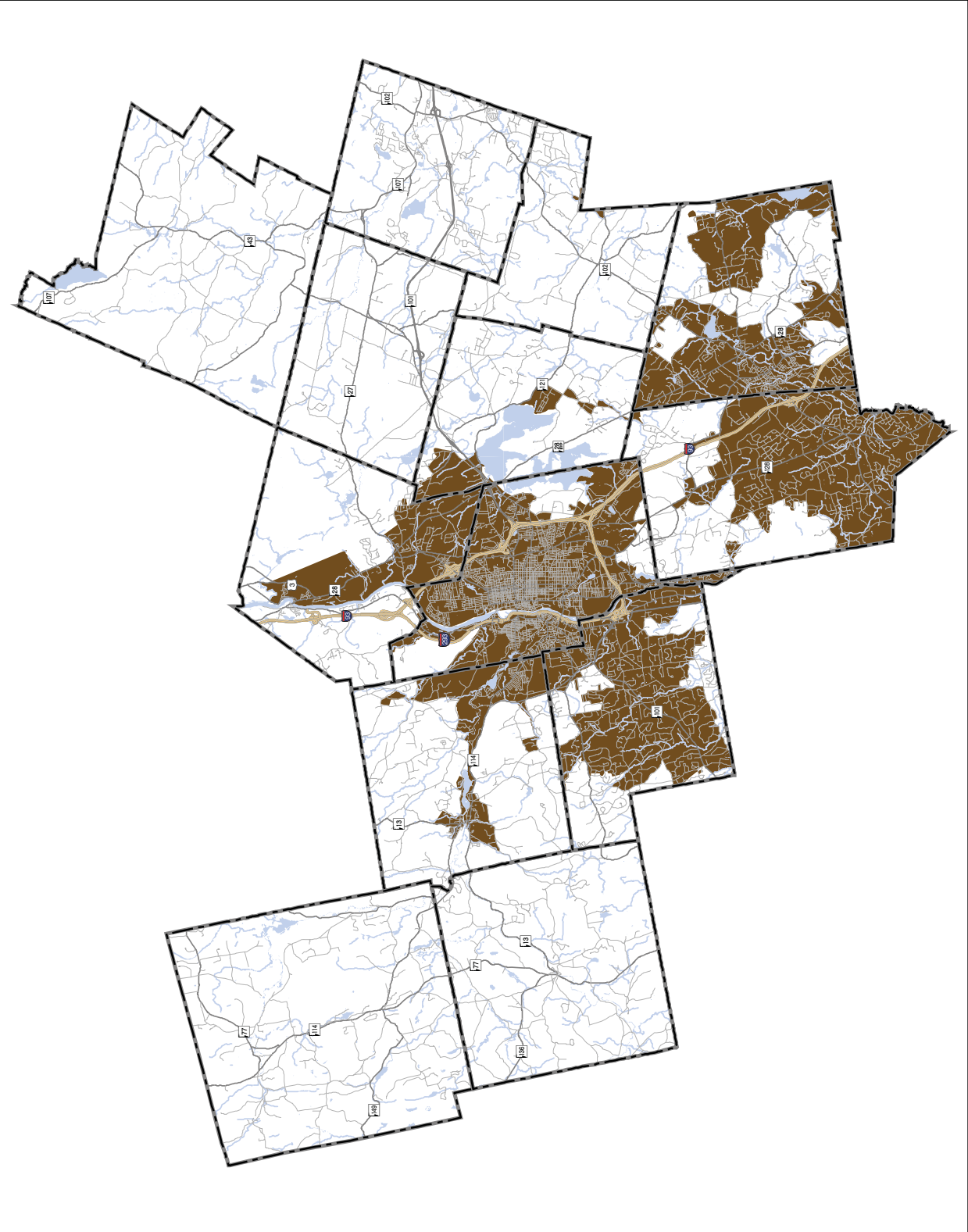
**Roads**

**Interstate Roads**

**State Roads**

**Local Roads**

\*The regulated area is based on Census 2000 Urbanized Areas



**Data Sources:**  
 Gann Digital Data (1:24,000)  
 NH Department of Transportation  
 US EPA - New England

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 Contact: SNHPC, gis@snhpc.org or (603) 668-4604

**Location Map**

0 1 2 4 Miles

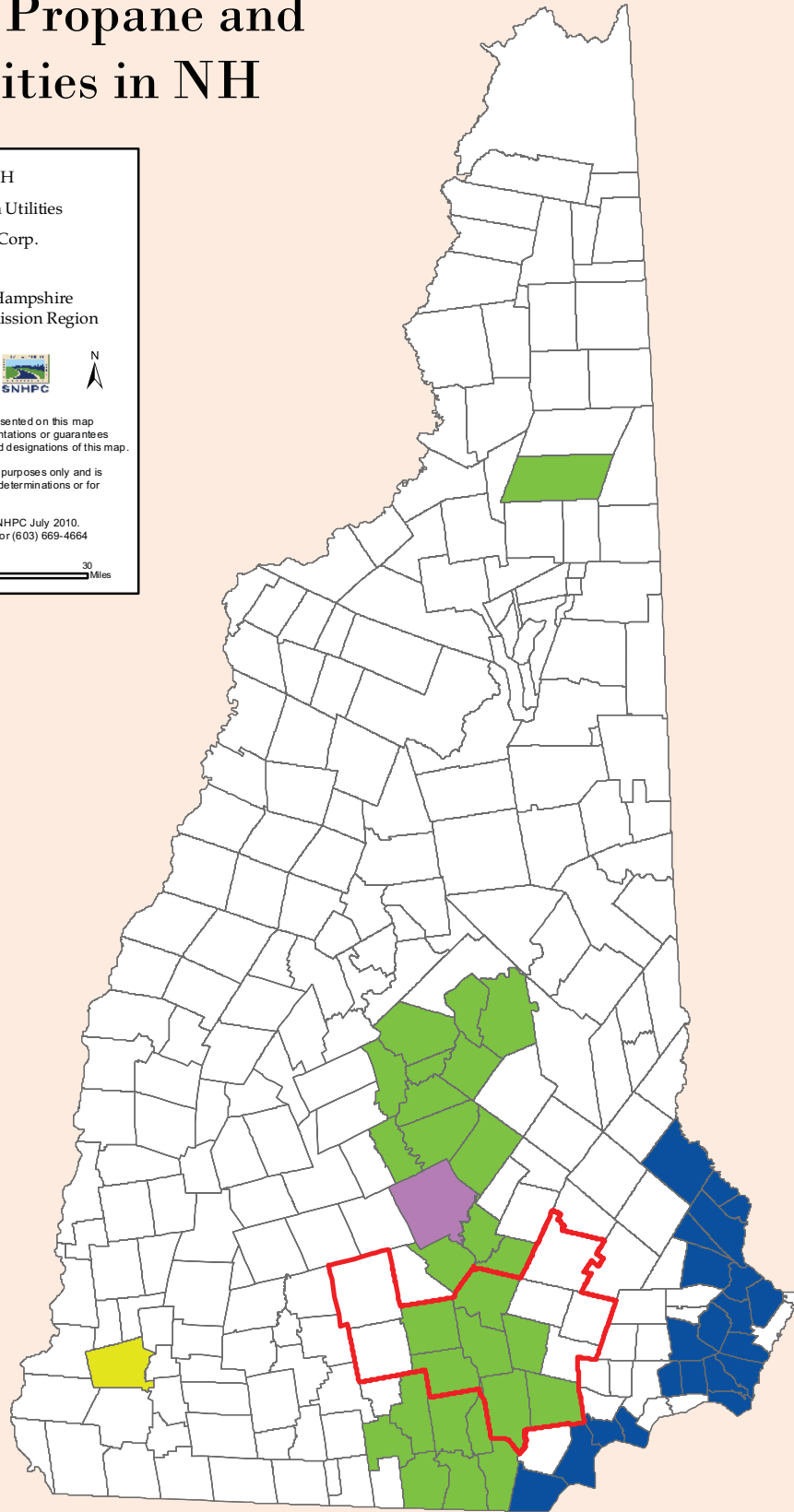
# Natural Gas, Propane and Steam Utilities in NH

**Data Sources:**  
 Granit Digital Data (1:24,000)  
 State of New Hampshire  
 SNHPC

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Map Produced by GIS Service SNHPC July 2010.  
 Contact: SNHPC, [gis@snhpc.org](mailto:gis@snhpc.org) or (603) 669-4664








Unitil/Northern Utilities (Natural Gas)				National Grid NH (Natural Gas) <small>* Southern New Hampshire Planning Commission Towns</small>					NH Gas Corp. (Propane)	Concord Steam Corp. (Steam)
Atkinson	Greenland	Newington	Salem	Allenstown	Boscawen	Gilford	Litchfield	Nashua	Keene	Concord
Dover	Hampton	North Hampton	Seabrook	Amherst	Bow	<b>Goffstown*</b>	<b>Londonderry*</b>	Northfield		
Durham	Hampton Beach	Plaistow	Somersworth	Auburn*	Canterbury	Hollis	Loudon	Pembroke		
East Kingston	Hampton Falls	Portsmouth	Stratham	Bedford*	Concord	<b>Hooksett*</b>	<b>Manchester*</b>	Sanbornton		
Exeter	Kensington	Rochester		Belmont	<b>Derry*</b>	Hudson	Merrimack	Tilton		
Gonic	Madbury	Rollinsford		Berlin	Franklin	Laconia	Milford			






**Map #**  
**Regional Economic**  
**Development Plan**  
**Sewer Service**

**Sewer Service Areas**

-  Sewer Service Areas
-  Sewer Lines
-  Town line
-  Streams
-  Rivers / Lakes

**Roads**




-  Interstates
-  State Roads
-  Local Roads

**Data Sources:**  
 GIS Data (1/24/00)  
 NH Department of Transportation  
 Town of Auburn  
 Town of Bedford  
 City of Manchester  
 Town of Raymond  
 Town of Chester  
 Town of Deerfield  
 Town of Hooksett  
 Town of Dover  
 Town of Hooksett

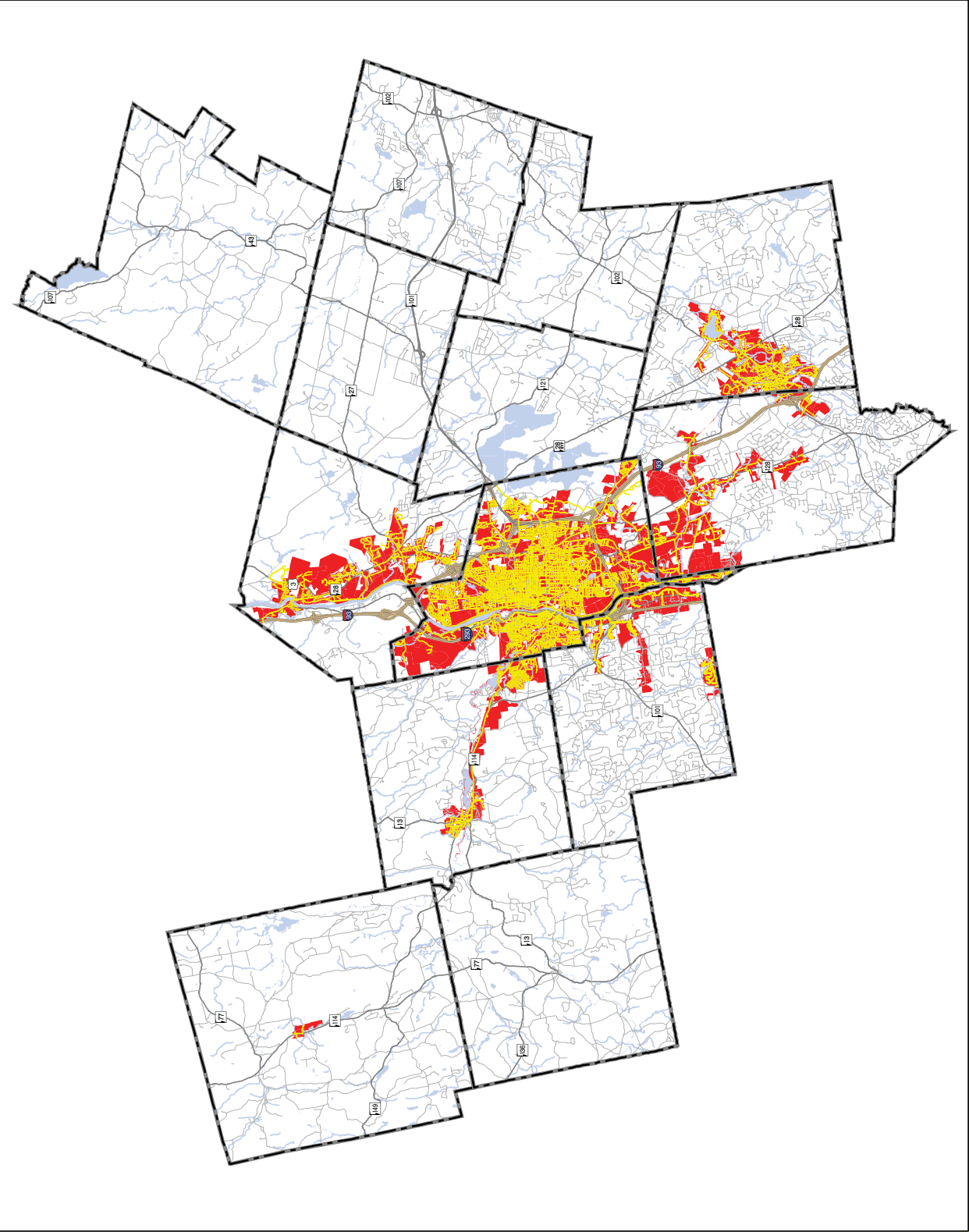
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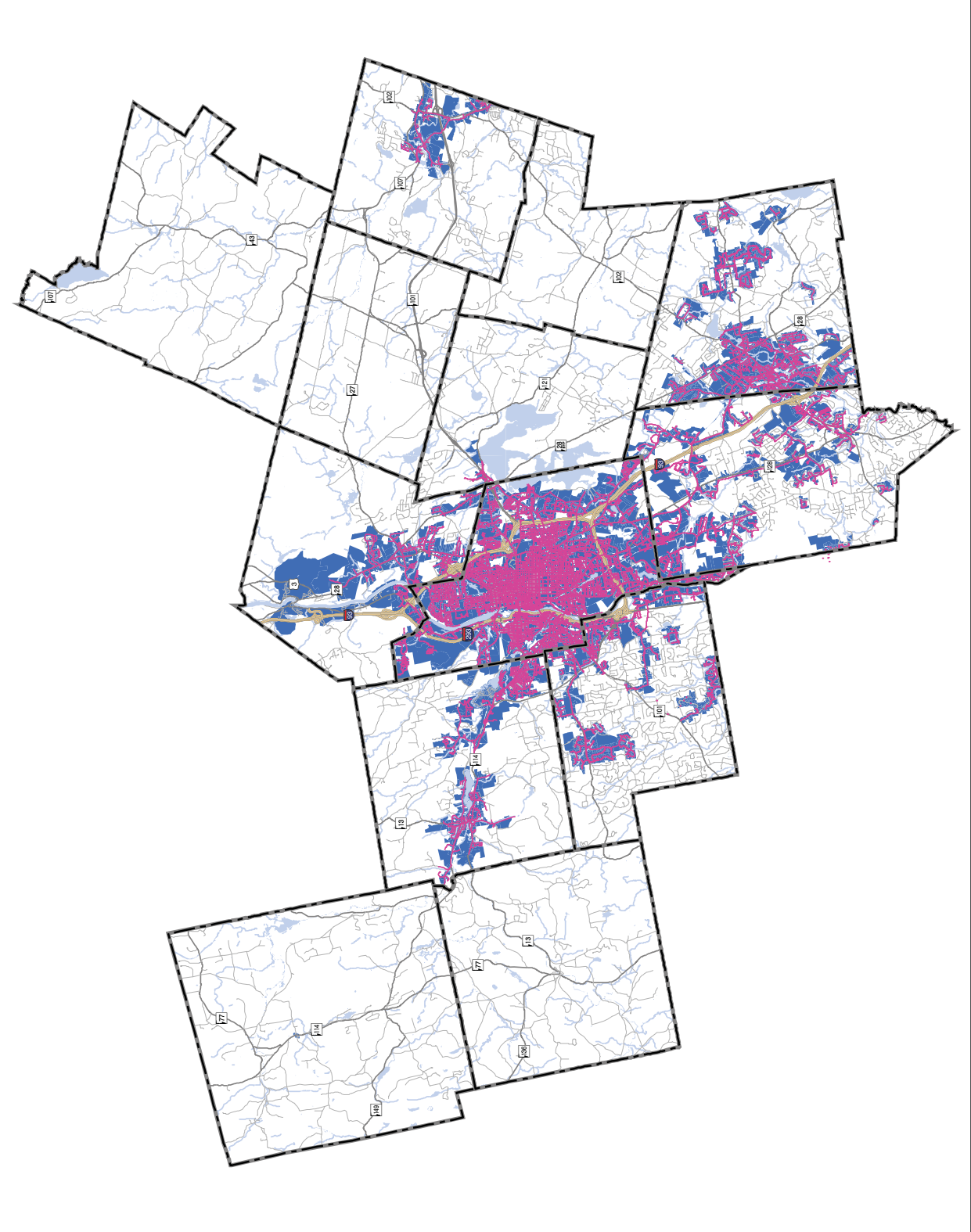
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Map Prepared by GIS Service, SNHPC, June 2010  
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0 1.5 3 6 Miles





**Map #**  
**Regional Economic Development Plan**  
**Water Service**

**Water Service Areas**

- Water Service Areas
- Water Lines
- Town line
- Streams
- Rivers/ Lakes

**Roads**

- Interstate Roads
- State Roads
- Local Roads

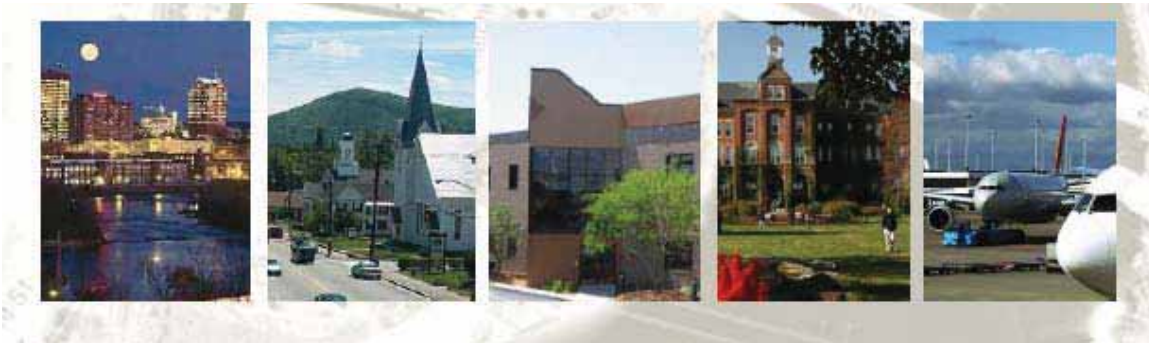
**Data Sources:**  
 GIS Data (1/24/00)  
 NH Department of Transportation  
 Town of Auburn  
 Town of Bedford  
 City of Manchester  
 Town of Merrimack  
 Town of Raymond  
 Town of Chester  
 Town of Deerfield  
 Town of Dover  
 Town of Hooksett  
 Manchester Water Works  
 Portsmouth Water Works  
 Portsmouth Water Works

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**Section L: American Recovery and Reinvestment Act (ARRA)  
Funding Information**



## **Introduction –**

This report, which is a summary of funding awards from the **American Recovery and Reinvestment Act** (commonly referred to by its' acronym ARRA), presents economic stimulus awards in the Southern New Hampshire Planning Commission region. By obtaining the most up to date information for our municipalities and presenting the data in an organized fashion, it may be possible to identify the important trends in the allocation of this money handed down from the federal government.

This is a part of the Regional Economic Development Plan and will ultimately be available to representatives of our thirteen municipalities as well as members of the Regional Economic Development Plan Steering Committee and MetroCenter – NH.

## **Methodology –**

### **Data:**

Data for this report was obtained from the New Hampshire Office of Economic Stimulus, a branch of the Governor's Office created in January of 2009 to monitor funds of the economic stimulus package and ensure that NH and its' residents receive the maximum amount of benefits from the program.

The website of this office contains many useful pieces of information regarding economic stimulus funding including links to relevant departments within NH state and federal government as well as a plethora of ARRA fact sheets and program descriptions. The dataset used for this report is the most recent available, with information received by the NH Office of Economic Stimulus as of December 1, 2009. There is a similar dataset from August 19, 2009 which is included in this report for comparison purposes but not used because the other it more up-to-date and is more comprehensive in terms of overall content. Both are available for viewing and download at: <http://www.nh.gov/recovery/map/funding.htm#top>.

The data can be viewed as a statewide map that allows the user to “pan” around and view the desired municipality or it is available as individual PDF's for each municipality. The data for each of the SNHPC communities was downloaded, printed, and included in this report.

### **Funding Categories:**

The funding awards are spilt up into nine different categories, commonly referred to as “funding categories” in this report, but the term “program areas” can also be used interchangeably. The different categories are:

- Business and Community
- Education
- Employment
- Energy and Environment
- Health and Nutrition
- Housing, Buildings, and Facilities
- Public Safety, Crime Victims, and Justice

- Technology
- Transportation

All but one of these categories, “Technology”, are represented within the SNHPC region. Although, there are differences between specific categories and municipalities regarding the amount of funding, programs areas included, and types of projects.

**Figures:**

The following two pie charts display the percentage of the total award (\$) by funding category on one and municipality on the other. These help to graphically display the distribution of funds across the SNHPC region.

**Conclusion –**

Through the collection, organization, and presentation of this important data, it may be possible for municipal leaders and decision-makers to identify trends in the distribution of federal stimulus money in the Southern New Hampshire Planning Commission region. It is important for this process to be monitored, and while the New Hampshire Office of Economic Stimulus is no doubt doing its best to make sure that NH and its municipalities are maximizing benefit from these federal dollars, local officials should aware of what their community is entitled to.

**Summary of American Recovery and Reinvestment Act (ARRA) Funding Awards - Southern New Hampshire Planning Commission Region**

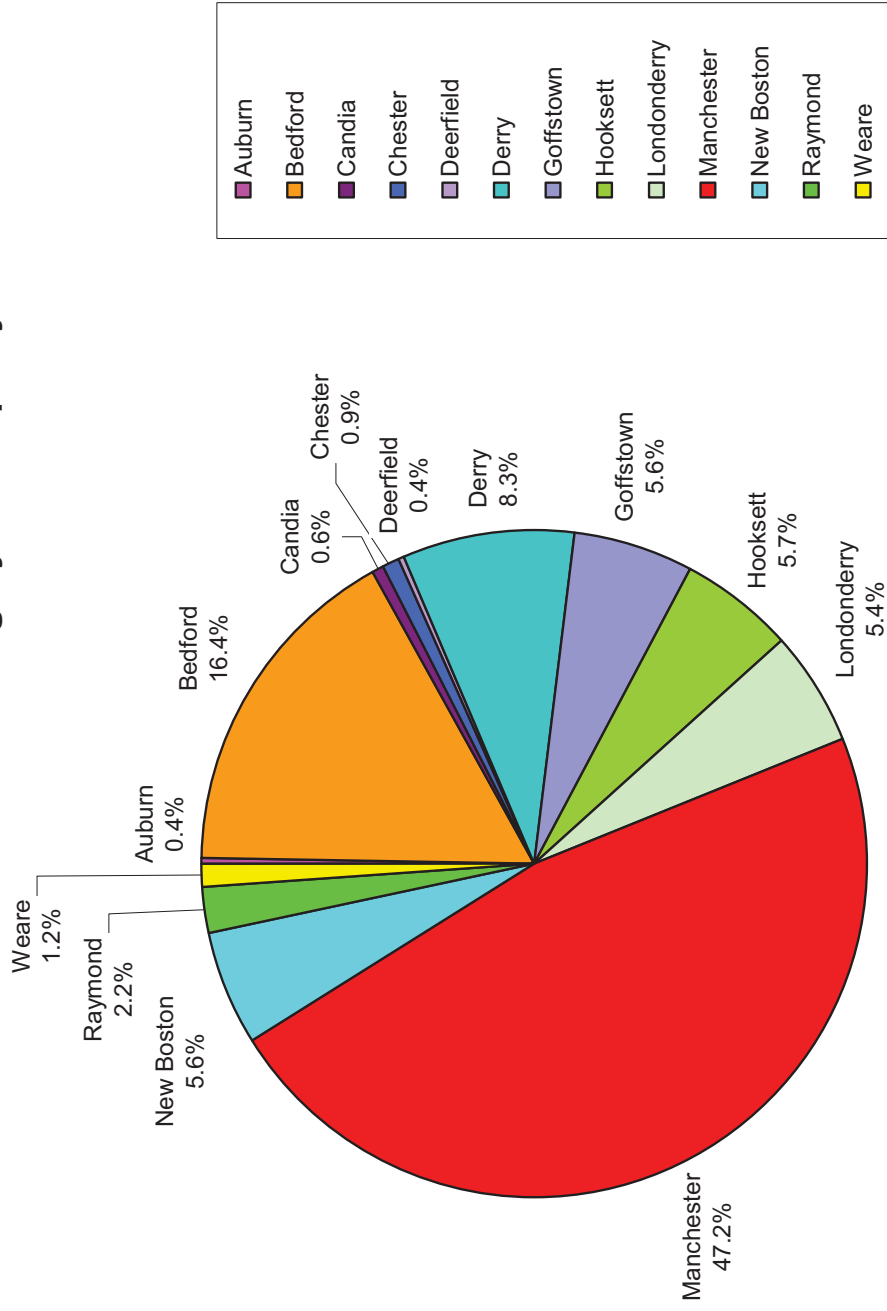
<b>ARRA Funding Categories</b>										
<b>Municipality</b>	<b>Business/Community</b>	<b>Education</b>	<b>Employment</b>	<b>Energy/Environment</b>	<b>Health/Nutrition</b>	<b>Housing/Facilities</b>	<b>Safety</b>	<b>Transportation</b>	<b>Total Award</b>	<b>Percentage</b>
Auburn	\$10,536	\$159,039	\$151,223	\$35,490	\$949	\$0	\$0	\$0	\$357,237	0.40%
Bedford	\$43,307	\$1,380,332	\$548,629	\$169,215	\$14,018	\$76,320	\$0	\$12,559,339	\$14,791,160	16.40%
Candia	\$9,780	\$135,825	\$119,739	\$32,944	\$1,458	\$0	\$0	\$234,704	\$534,450	0.60%
Chester	\$9,860	\$596,207	\$132,149	\$42,150	\$1,107	\$0	\$0	\$0	\$781,473	0.90%
Deerfield	\$10,378	\$159,942	\$127,493	\$34,958	\$2,078	\$0	\$0	\$59,042	\$393,891	0.40%
Derry	\$100,562	\$5,450,896	\$1,142,269	\$407,807	\$33,080	\$0	\$0	\$312,351	\$7,446,985	8.30%
Goffstown	\$55,516	\$2,157,266	\$977,829	\$1,816,918	\$23,321	\$0	\$48,677	\$0	\$5,079,527	5.60%
Hooksett	\$38,869	\$1,360,570	\$394,251	\$3,320,218	\$24,973	\$0	\$0	\$0	\$5,138,881	5.70%
Londonderry	\$52,410	\$3,236,604	\$751,025	\$298,109	\$29,809	\$0	\$0	\$510,000	\$4,877,957	5.40%
Manchester	\$738,998	\$18,487,274	\$5,192,991	\$6,933,716	\$1,324,981	\$6,655,496	\$2,256,000	\$861,815	\$42,451,271	47.20%
New Boston	\$13,564	\$163,671	\$142,893	\$3,622,201	\$2,539	\$932,394	\$0	\$149,117	\$5,026,379	5.60%
Raymond	\$32,047	\$1,410,872	\$388,855	\$126,950	\$9,074	\$0	\$0	\$33,529	\$2,001,327	2.20%
Wearse	\$26,179	\$497,533	\$263,926	\$113,268	\$6,824	\$0	\$0	\$186,175	\$1,093,905	1.20%
<b>Totals</b>	\$1,142,026	\$35,196,031	\$10,333,272	\$16,953,944	\$1,474,211	\$7,664,210	\$2,304,677	\$14,906,072	\$89,974,443	100%
<b>Percentage</b>	1.27%	39.12%	11.48%	18.84%	1.64%	8.52%	2.56%	16.57%	100%	

Source: New Hampshire Office of Economic Stimulus

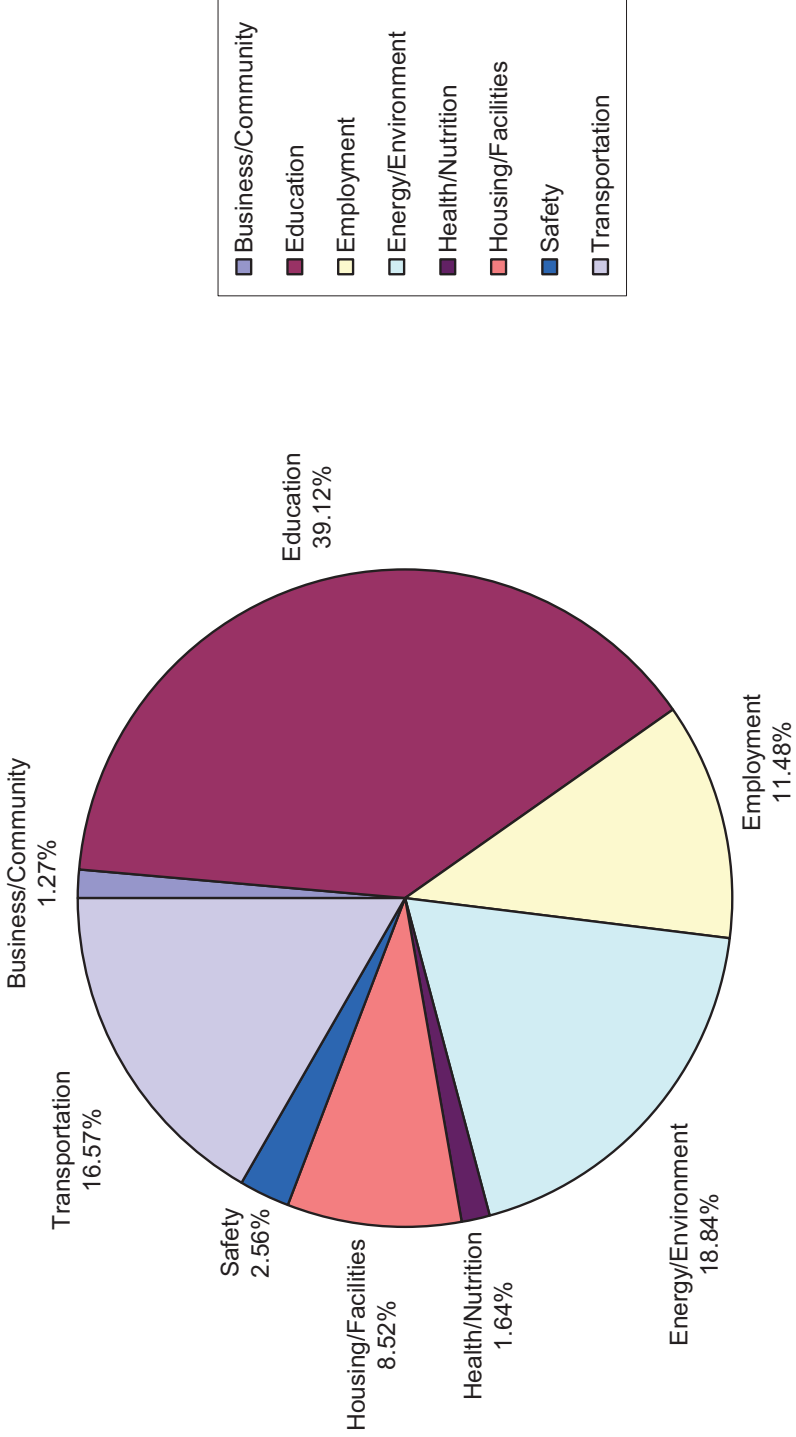
Date: Information received by the NH Office of Economic Stimulus as of 12/1/09

\*Note: There is a "Technology" funding category but since no funds were allocated to the SNHPC region, the field was not included (other municipalities in NH did receive funding from this category)

### Funding By Municipality



# Funding By Category





# The American Recovery and Reinvestment Act of 2009

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## Infrastructure Summit 2010



**New Hampshire Office of Economic Stimulus – October 2010**  
**Christopher D. Clement, Sr.**



STATE OF NEW HAMPSHIRE  
**American Recovery  
and Reinvestment Act**



## Executive Summary

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- ◆ Governor's Office of Economic Stimulus (OES) – Mission and Charter
- ◆ OES TAP Team
- ◆ ARRA Nationwide Impact
- ◆ ARRA Local Impact
  - ARRA New Hampshire Award Summary
- ◆ The *Numbers* – New Hampshire
- ◆ Section 1512 Reporting
- ◆ Training and Oversight
- ◆ New OES Web Site
- ◆ Faces of Economic Recovery



## **New Hampshire Office of Economic Stimulus - OES**

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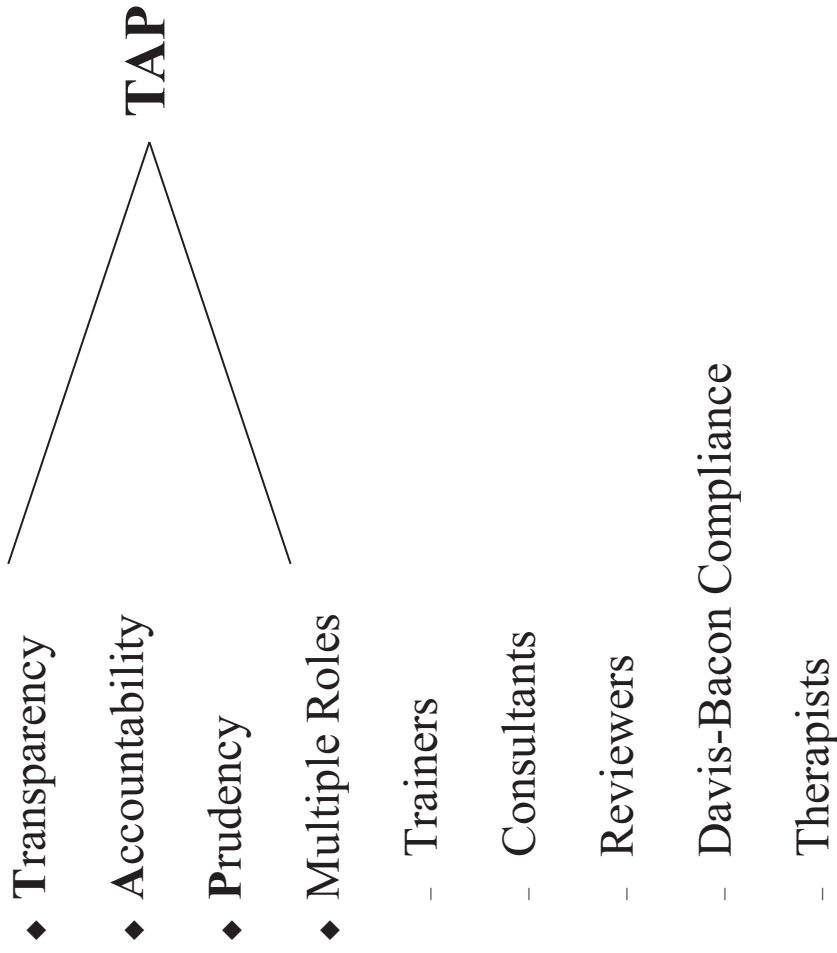
- ◆ Executive Order **2009-1**
- ◆ An order Establishing The Governor's Office of Economic Stimulus
  - To assist the Governor and direct state agencies on the management and expenditure of appropriations made under the Act
  - To coordinate with state agencies to ensure all ARRA conditions and procedural requirements are followed
  - To support the State's effort to obtain and administer federal grants, issue RFP's, contracts, awards, ....

◆ *To provide assistance and guidance to ensure successful ARRA implementation*



## OES TAP Team

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# *ARRA Award Summary*



## Congressional Budget Office – Directors Blog

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- ◆ Congressional Budget Office (CBO) Estimates of ARRA’s Impact on Employment and Economic Output – Q2 2010
  - Raised the level of real (inflation-adjusted) gross domestic product (GDP) by between 1.7 percent and 4.5 percent,
  - Lowered the unemployment rate by between 0.7 percentage points and 1.8 percentage points,
  - Increased the number of full-time-equivalent (FTE) jobs by 2.0 million to 4.8 million compared with what those amounts would have been otherwise
  - The effects of ARRA on output and employment are expected to gradually diminish during the second half of 2010 and beyond
  - Now estimates that the **total impact** over the **2009–2019 period** will amount to **\$814 billion**
  - CBO Objective, nonpartisan, and timely analyses to aid in economic and budgetary decisions on federal budget

## Overview of Funding

The American Recovery and Reinvestment Act of 2009 distributes the \$787 billion as follows:



**89%** of funds, excluding tax benefits, have been made available.

- ◆ Over 179,000 reports for both prime and sub recipients of federal stimulus contracts, grants or loans nationwide
- ◆ (352) have failed to report on how funds were spent (as of 6/30/10 report)
- ◆ (32) are 2x “non compliant” offenders & (8) are 3x “non compliant” offenders
- ◆ NH State Administered Awards are 100% compliant

## Quarterly Section 1512 Progress Report

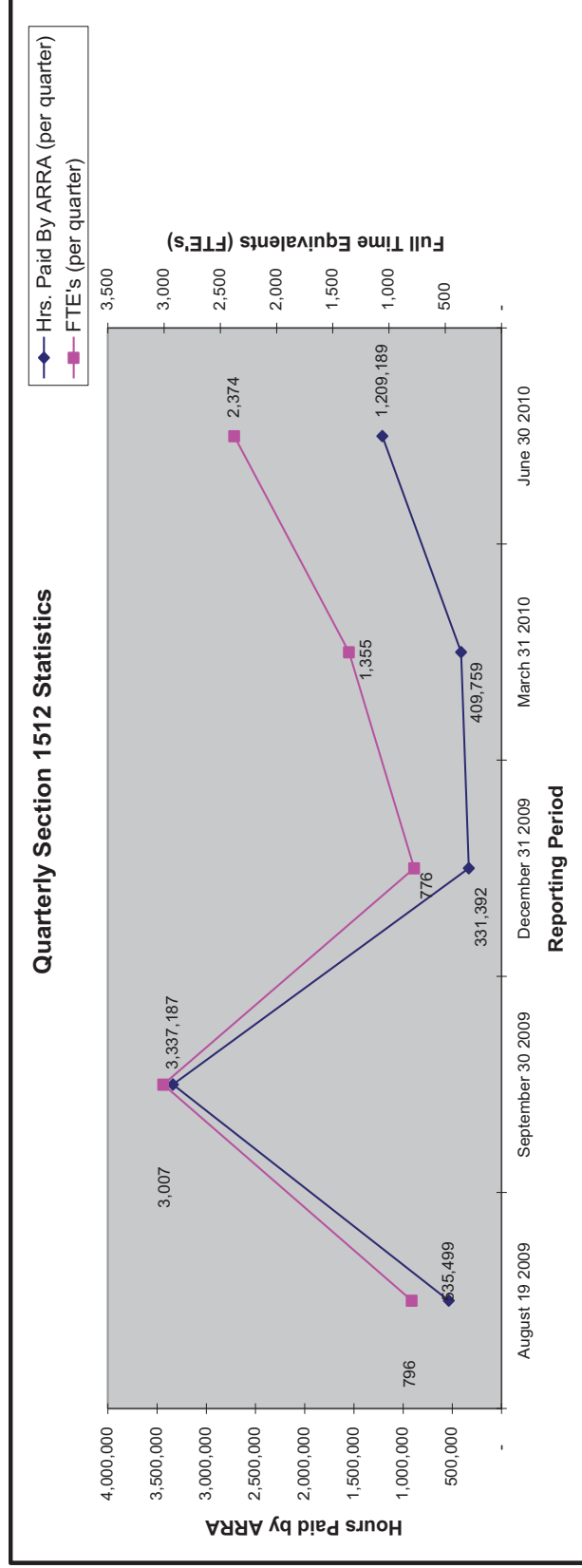
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- ◆ OES issued ARRA progress report August 11<sup>th</sup>, 2010 – next report due Nov 10<sup>th</sup>
- ◆ From 3/31/10 through 6/30/10 it is estimated that 1,209,189 work hours were paid for with ARRA funds managed by state agencies
  - FTEs: Quarterly hours worked divided by one full-time position working for full quarter (40 hour work week \* 13 weeks = 520 hours)
  - **2,374 quarterly FTEs and 8,308 FTE's in total since February 2009**
- ◆ Since ARRA's inception, as of 6/30/10, **5,292,189** work hours were paid for with ARRA funds managed by state agencies
- ◆ As of 6/30/10, **\$ 612,990,266** of ARRA-funded Section 1512 state administered grants were approved by G&C
- ◆ Additional **\$40,988,015** Education Jobs Fund Program
- ◆ Total including Ed Jobs Funding = **\$ 653,978,281**



# Quarterly Section 1512 Progress Report (as reported)

NH Office of Economic Stimulus Quarterly Statistics June 2010	Section 1512(a) Quarterly Report					Total	% Change Prior Quarter	Change Prior Quarter
	#1	#2	#3	#4	#5			
FTE's (per quarter)	796	3,007	776	1,355	2,374	8,308	75.2%	1,019
Hrs. Paid By ARRA (per quarter)	535,499	3,337,187	331,392	409,759	1,209,189	5,823,026	195.1%	799,430



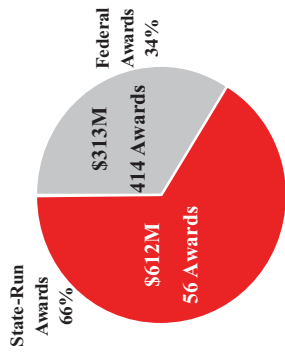
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# *ARRA Award Summary*



# ARRA NH Award Summary

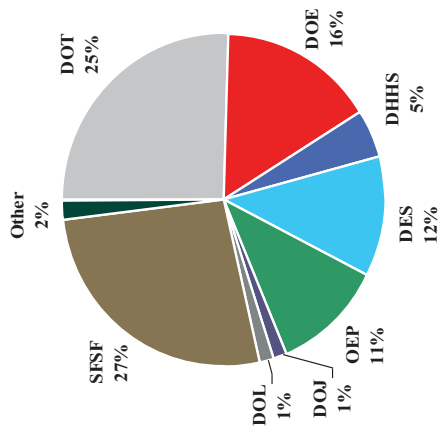
## State-Administered vs. Federal Awards



### Award Amount Program / Project Name

Average Federal Award	\$564,761
Average State-Run Award	\$6,596,127
Largest Federal Award	\$8,269,787
Largest State-Run Award	\$129,440,556
Smallest Federal Award	\$1,125
Smallest State-Run Award	\$60,301

## State-Administered Awards



## ARRA Funds Awarded to New Hampshire

	# of Awards	Total Amt. of Awards	FTE/Jobs Quarter
Federal Awards	414	\$313,340,331	361
State-Administered Awards	56	\$612,990,266	2374
<b>Total</b>	<b>470</b>	<b>\$926,330,597</b>	<b>2735</b>

## State-Administered Awards

	# of Awards	Total Amount of Awards
State Fiscal Stabilization Fund	3	\$200,787,230
NH Department of Transportation	5	\$139,638,529
NH Department of Education	10	\$86,316,983
NH Department of Environmental Services	7	\$64,502,894
NH Office of Energy and Planning	6	\$70,221,823
NH Department of Health and Human Services	12	\$25,157,697
NH Department of Justice	4	\$7,959,697
NH Department of Labor	4	\$8,031,786
NH Department of the Adjutant General	1	\$5,081,000
Community Development Finance Authority	1	\$2,462,647
NH Department of Employment Security	1	\$1,617,171
NH Public Utilities Commission	1	\$783,538
NH Department of Cultural Resources	1	\$293,100
NH Department of Administrative Services	1	\$136,171

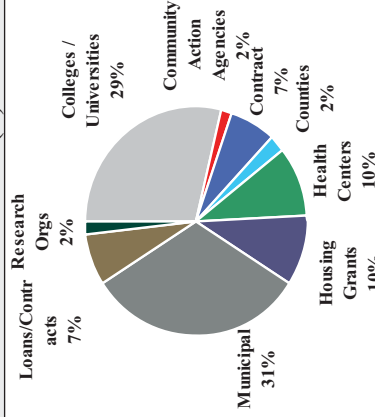
1. Source: OMB and NH Office of Economic Stimulus. As of 06/30/2010.



# ARRA NH Award Summary

Federal Awards: Examples			
<b>Recipient Name</b>	<b>Municipality</b>	<b>College / University</b>	<b>Contractor</b>
Water and Waste System Loans and Grants	Farmington	Dartmouth College	MCC / Catamount, LLC
<b>Program Name</b>		Trans-NIH Recovery Act Research Support	Land Port of Entry - Pittsburg
<b>Award Amount</b>	\$5,882,000	\$3,000,000	\$7,419,000

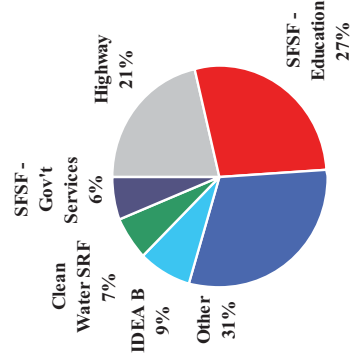
## Federal Awards (\$)



## Federal Awards

	# of Awards	Total	FTE/Jobs
Municipal	74	\$99,976,858	34
Colleges / Universities	180	\$89,585,306	173
Health Centers	31	\$30,970,701	18
Housing Grants	25	\$30,564,757	39
Loans/Contracts	1	\$23,162,615	48
Contractor	57	\$21,016,088	23
Counties	19	\$7,284,726	4
Research Orgs	10	\$5,587,104	10
Community Action Agencies	15	\$5,192,177	11
<b>Total</b>	<b>413</b>	<b>\$313,340,331</b>	<b>361</b>

## Five Largest State ARRA Awards (\$)



## Five Largest State ARRA Awards

Name	Award Amount	FTE/Jobs Cumulative
Highway Infrastructure Investment	\$129,440,556	712
SFSF - Education	\$164,243,954	3571
IDEA Part B	\$47,461,265	725
Clean Water State Revolving Fund	\$39,163,900	330
SFSF - Government Services	\$36,543,276	1462
<b>Other Awards</b>	<b>\$185,317,447</b>	<b>1503</b>
<b>Total</b>	<b>\$612,990,266</b>	<b>8,308</b>

1. Source: OMB and NH Office of Economic Stimulus. As of 06/30/2010.



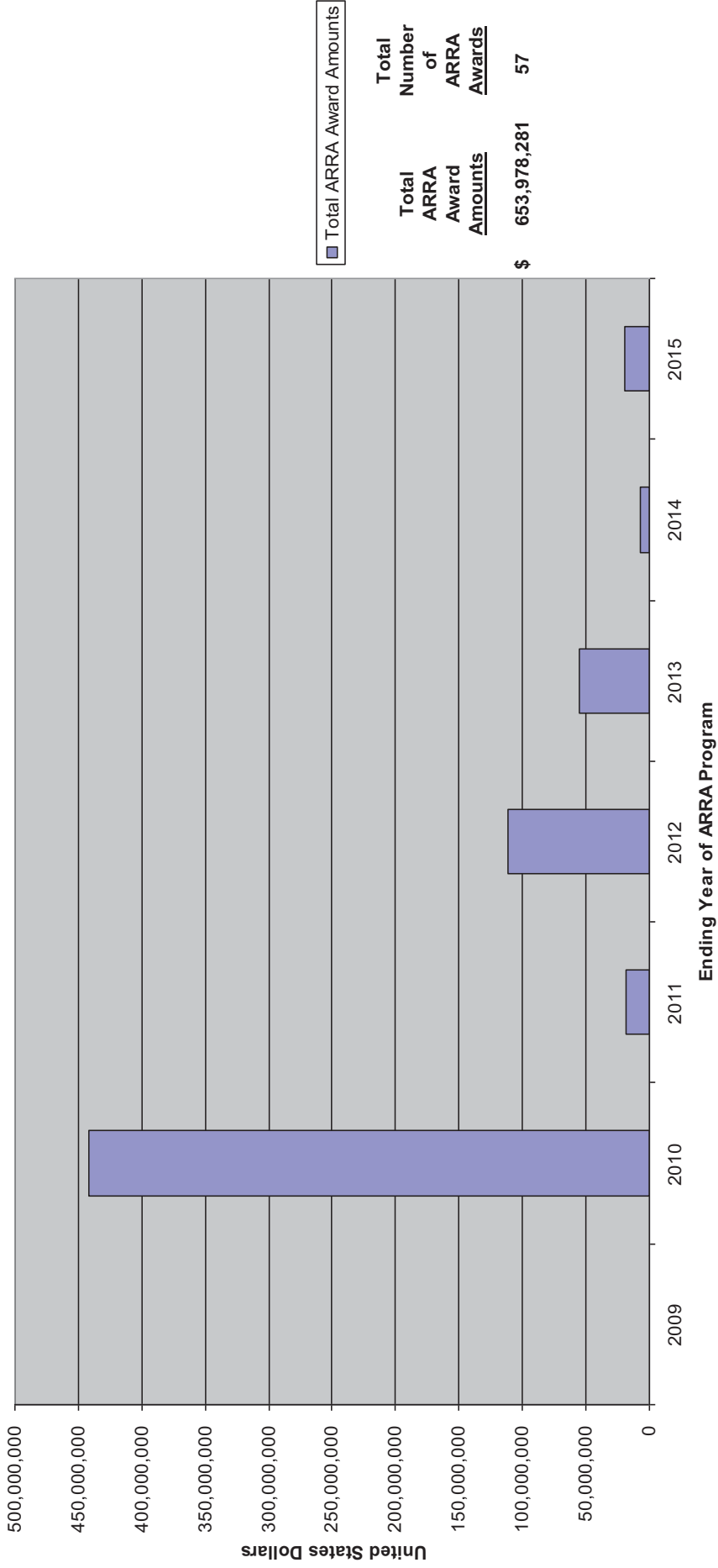
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# *The Numbers*

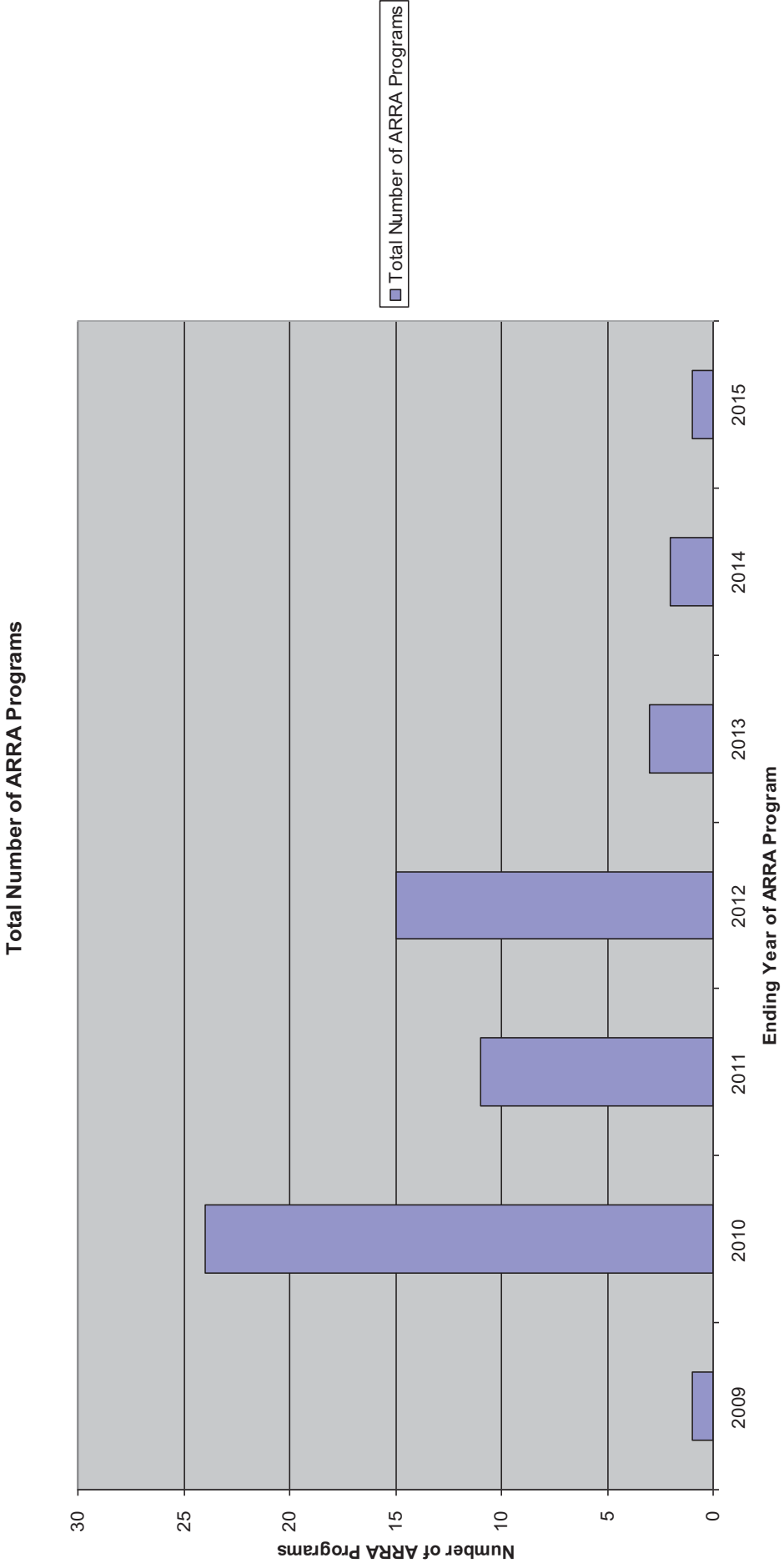


# ARRA View – Award Amount vs. Schedule

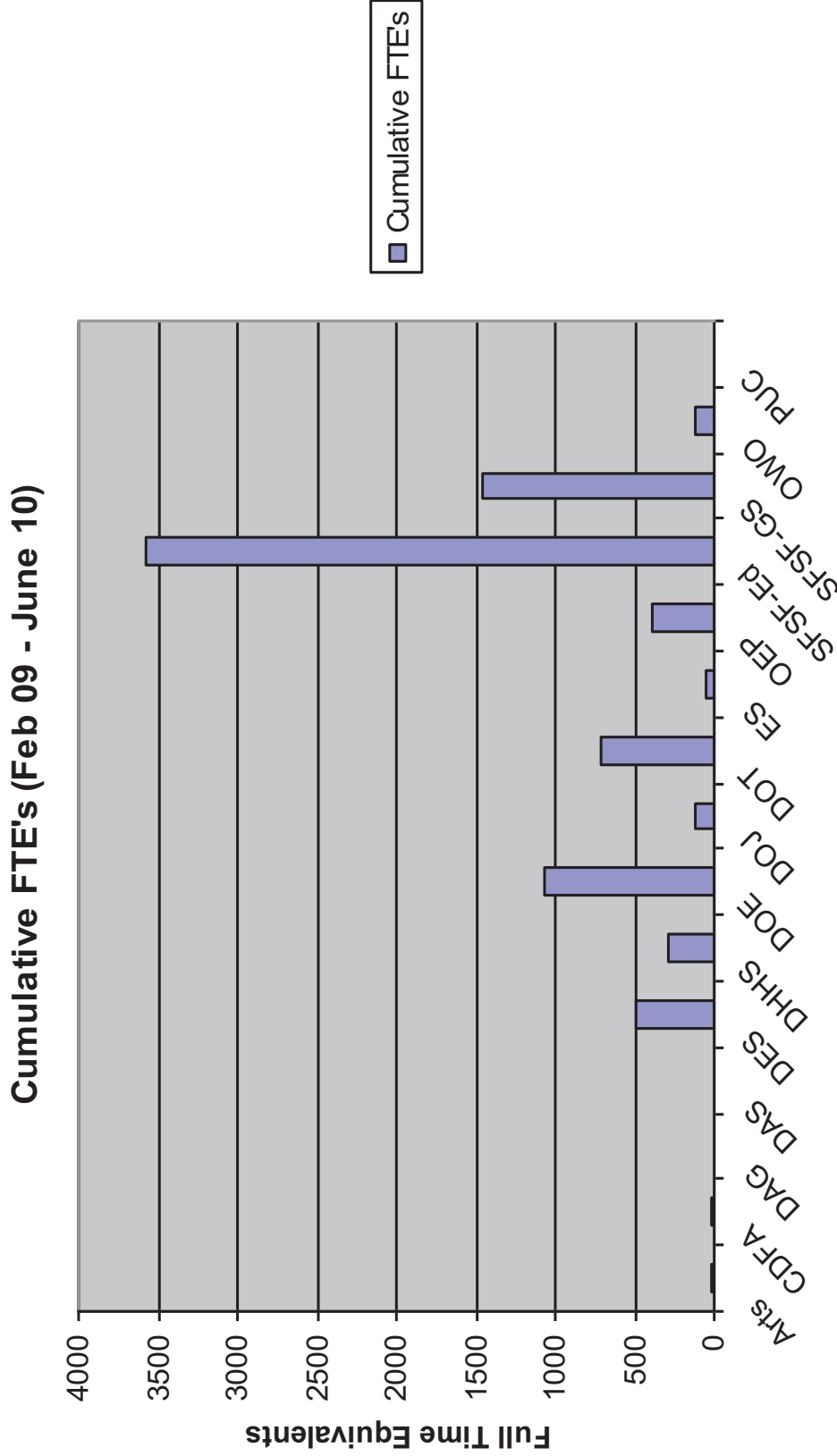
Total ARRA Award Amounts



# ARRA View – Programs vs. Schedule



# ARRA View – FTE’s vs. Program Agency



New Hampshire Department or Agency







STATE OF NEW HAMPSHIRE  
**American Recovery  
 and Reinvestment Act**



# Size of Program

- Total Size - \$789 billion nationwide Transportation, USDOT

FHWA	Highways & Bridges	\$27,500,000,000
FAA	Airport Improvement Grants	\$1,300,000,000
FRA	Intercity Rail & Amtrack	\$9,300,000,000
FTA	Transit	\$6,900,000,000
Any Mode	Competitive Grants	\$1,500,000,000

**Total = \$ 46,500,000,000**

- New Hampshire
  - Highway and Bridge - \$129.5 M
  - Transit – \$13.5 M
  - Rail – Submitted Tiger II Planning Grant
  - Aeronautics – \$5 M
- Typical Highway and Bridge Program - \$140 M/yr.

## Agency Training, Oversight and Compliance

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**Steps beyond standard practice to ensure success**

## Three Step Approach

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- ◆ ARRA Program Questionnaire – **Step 1**
  - Does your accounting system separate ARRA and non-ARRA costs, funding sources, and payroll?
  - Does the administrator have prior experience in this type of Federal program?
  - Have you verified that the sub-grantees and contractors have not been debarred from Federal contracting?
  - How much funding did the program receive in previous year?
- ◆ ARRA High Level Review Work Plan - **Step 2**
  - Designed to be completed in one day – all Section 1512 programs
  - Reviews documentation for ARRA-funded State of New Hampshire positions
  - Looks at the separation of ARRA and non-ARRA funding sources
  - Reviews use of Single review Report information by the Program Manager

# Pareto Analysis - Step 3

Pareto Analysis Bubble Chart	Pareto Commentary
<p>85% of ARRA Funds</p>	<ul style="list-style-type: none"> <li>◆ Review awards based on the following attributes                             <ul style="list-style-type: none"> <li>- Relative award size (\$)</li> <li>- Oversight Score (based on)                                     <ul style="list-style-type: none"> <li>• Program Questionnaire</li> <li>• Section 1512 Reporting</li> <li>• Funding increase from previous fiscal year</li> <li>• Perceived Office of Inspector General focus</li> </ul> </li> </ul> </li> <li>◆ OES TAP team will focus on Level 3 &amp; 4                             <ul style="list-style-type: none"> <li>- Focus on Level 3 &amp; 4 awards</li> <li>- Levels 3 &amp; 4 account for 85% of NH ARRA award \$</li> </ul> </li> <li>◆ Full review to be performed on Level 4 and Level 3 programs</li> </ul>
<p>Depending on review scope, OES will conduct full reviews of ~10 – 20 ARRA programs / awards</p>	



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# *Transparency - New OES Web Site*





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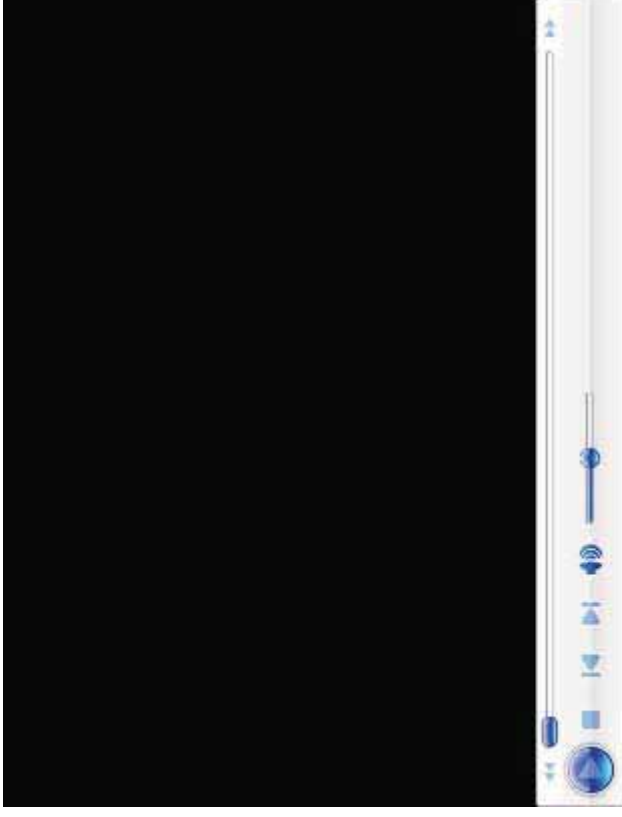
# *Faces of Economic Recovery*



## Faces of Economic Recovery

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- ◆ Sean Langois – Continental Paving employee
  - ◆ June Latti – Concord homeowner for Weatherization Program
- Community Action Program Belknap-Merrimack Counties, Inc.





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