

Comprehensive Economic Development Strategy

2016 Annual Update

Adopted June 2017



Strafford Regional Planning Commission
150 Wakefield Street, Suite 12
Rochester, NH 03820
PH: 603-994-3500 FX: 603-994-3500
www.strafford.org

Preparation of this report has been financed through the US Economic Development Administration.



The preparation of this document was funded in part through grant ED16PHI3030088 from the Economic Development Administration, U.S. Department of Commerce. This grant was established through the Short Term Planning Assistance Program under Section 203 of the Public Works and Economic Development Act of 1965, as amended (42 U.S.C. § 3143). The contents of this report do not necessarily reflect the official view or policies of the Economic Development Administration.

TABLE OF CONTENTS

Introduction	1
Strafford CEDS Vision and Goals	2
Performance-Based Planning	4
Economic Growth	5
Introduction	5
Goal	5
Household Income	6
Unemployment & Underemployment	11
Employment Clusters	12
Regional Collaboration	15
Introduction	15
Goal	15
Commuting Data	16
Regional Context	17
Infrastructure	19
Introduction	19
Goal	19
Alternative Fuel Stations	20
Red-Listed Bridges	21
Public Transit	22
Resources and Environment	25
Introduction	25
Goal	25
Rooms and Meal Tax	26
Hazard Mitigation Planning	27
Vehicle Emissions	28

Workforce and Entrepreneurial Development	29
Introduction	29
Goal	29
Population Age	30
Educational Attainment	32
Workforce Training Programs	32
Quality of Place	33
Introduction	33
Goal	33
Population Trends	34
Wealth Generation	35
Housing	36
Economic Resilience	37
Introduction	37
Priority Project List	39
Introduction	39
Current Projects	40
New Projects	48
Completed Projects	55
Action Plan and Evaluation	59
Introduction	59
Structure of the CEDS Action Plan	60
Implementing the CEDS Goals	61
Project Development Process	61
Evaluation	65
Appendices	66
Appendix A : CEDS Logic Model and SWOT Analysis	
Appendix B : Charts and Data	

Acknowledgments

Strafford Regional Planning Commission would like to thank our partners from the public, private, non-profit, and higher education sectors for their support and involvement throughout the project solicitation and CEDS update processes. We are grateful for your time and expertise, and we value your contributions. We would also like to thank the US Economic Development Administration for their financial support, and Alan Brigham and the EDA Philadelphia Regional Office for his advice and technical guidance. The following people contributed to this report:

SRPC Staff

Cynthia Copeland, AICP	Executive Director
James Burdin, AICP	Regional Economic Development Planner
Shayna Sylvia	Communications and Outreach Specialist
Colin Lentz	Regional Transportation Planner
Rachel Dewey	Data Analyst
Rachael Mack	GIS Planner
Ken Mayo	Editor
Cynthia Plascencia	Transportation Writer

Strafford EDD Strategy Committee

Dan Barufaldi	Dover
Charlie French	UNH Cooperative Extension
Marcia Gasses	Barrington
Mary Ellen Humphrey	Durham
Bob Jaffin	Rochester
Fred Kaen	Lee
John Law	Farmington
Julian Long	Rochester
Ute Luxem	Profile Bank
Dennis McCann	SEDC
Karen Pollard	Rochester
Denise Roy-Palmer	WEDCO
Shanna B. Saunders	Somersworth
John Scruton	Barrington
Deanna Strand	Dover Adult Learning
David Watters	NH Senate

Additional Thanks

Alan Brigham	Economic Development Administration
Joanne Cassulo	Central New Hampshire Regional Planning Commission
Ken Gallagher	NH Office of Energy and Planning
Mark Laliberte	NH Department of Resources and Economic Development
Fay Rubin	NH GRANIT
Christina Wall, M.Ed	WorkReady NH

Strafford EDD Board of Directors

Barrington

Vacant (2)

Durham

Wesley Merritt

Wayne Burton

Vacant (1)

Madbury

Thomas Crosby

Mark Avery

New Durham

Terry Chabot

Vacant (1)

Nottingham

Dirk Grotenhuis

Gary Anderson

Somersworth

Brian Tapscott

Mark Fearis

Scott Orzechowski

Brookfield

Edward Comeau

Dianne Smith

Farmington

John Law

Martin Laferte

Middleton

Jon Hotchkiss

Janet Hotchkiss

Newmarket

Peter Nelson

Lisa Henderson

Rochester

Sandra Keans

Kenn Ortmann

Robert Jaffin

Rick Healey

Strafford

Vacant (2)

Strafford County

George Maglaras

Dover

Elena Piekut

Marcia Gasses

Anthony McManus

Samuel Reid

Lee

Scott Kemp

Fred Kaen

Milton

Vacant (2)

Northwood

Scott Martin

Victoria Parmele

Rollinsford

Judith Nelson

Suzanne Huard

Wakefield

Steve Brown

Vacant (1)



Introduction

Downtown Dover, NH Source: SRPC

Strafford Regional Planning Commission (SRPC) is one of nine regional planning commissions in New Hampshire. SRPC provides technical planning assistance to its municipalities, which are the communities of Strafford County plus Brookfield and Wakefield in Carroll County and Newmarket, Northwood, and Nottingham in Rockingham County. SRPC also provides regional transportation planning and technical assistance services to these communities through its designation as the Strafford Metropolitan Planning Organization (Strafford MPO). SRPC was also designated as the administrators of the newly-formed Strafford Economic Development District (Strafford EDD) by the Economic Development Administration (EDA) of the US Department of Commerce in 2015. The Strafford EDD comprises the municipalities of Strafford County plus Brookfield and Wakefield; Newmarket, Northwood, and Nottingham are served by the Rockingham EDD.

Due to the variety of data sources used in this plan, data cannot always be analyzed for the exact region of the Strafford EDD. When data for the Strafford EDD is not available, the “SRPC region” or “Strafford MPO” refers to the jurisdictions of SRPC and the Strafford MPO as shown in Figure 1. In cases where data is available by county, Strafford County is used as an approximation of Strafford EDD, but data is also provided for Carroll and Rockingham Counties where possible.

Strafford EDD is committed to being a leader in economic development planning by providing sound metrics and data analysis and providing opportunities for meaningful collaboration throughout the region. In addition to promoting and providing technical assistance to economic development projects in our municipalities, Strafford EDD is responsible for maintaining and implementing a regional Comprehensive Economic Development Strategy (CEDS).

The CEDS was originally adopted in 2011 as an analysis of the region's unique advantages and disadvantages and a vision for the future of the region's economy. The 2011–2016 CEDS outlines a regional strategy for future economic development and prosperity based on the vision and goals developed by the CEDS Strategy Committee¹. This document is the final annual update of the original CEDS. It provides an updated analysis of the region's economy, updates to the priority project list, and an evaluation of our progress in implementing the CEDS and the operation of the Strafford EDD.

The Strafford EDD is supported by a variety of funding sources. EDA funding supported the creation of the CEDS in 2011 and continues to be instrumental to the technical support that we provide. This funding is matched at the local level by our public, private, non-profit, and higher education partners through generous donations of their time and technical expertise.

The Strafford EDD Strategy Committee met twice during the development of this update. On February 14, 2017, the committee met to discuss a preliminary content outline for the document and a timeline for research and community outreach. The committee reconvened on April 18, 2017, to review the content sections and the priority project list. The Strafford EDD Board of Directors approved the content of this strategy at its June 22, 2017, meeting following a 30-day public comment and review period.

Strafford CEDS Vision and Goals

This document is driven by the vision developed by the Strategy Committee in 2011. According to that vision, it is the responsibility of the Strafford EDD to:

Engage in collaborative networks to sustain and grow the region's economic vitality and median income through business development, job creation, enhancement of the tax base, educational excellence, and cultural and civic diversity, all within a historic place rich in recreational opportunity and natural beauty.

This vision will be achieved through strategic efforts towards each of the following goals:

- **Economic Growth:** Support the attraction, retention, and expansion of business, as well as investments and employment in the region.
- **Regional Collaboration:** Provide opportunities for regional collaboration and leadership in economic development among businesses, communities, institutions, governments, and other parties.
- **Infrastructure:** Promote improved access to the critical regional infrastructures of transportation, utilities, water and wastewater, waste management, built environment, banking, and finance.
- **Resource and Environment:** Capitalize on both the built environment and natural resources through measures that protect, preserve, manage, and promote quality of life and an increasing diversity of resource usage.
- **Workforce and Entrepreneurial Development:** Support development of education and training initiatives relevant to businesses in the region. Provide quality education and training for residents and employees of all ages and abilities.
- **Quality of Place:** Improve the health and welfare of residents and workers in the areas of wealth generation, human health and well-being, educational attainment, recreation, social services, and the environment.

These themes were developed in the 2011 CEDS as part of the logic model and analysis of regional strengths, weaknesses, opportunities, and threats. Each theme represents an important aspect of economic development, but we also recognize that there may be significant overlap and intersection between themes. Both the logic model and SWOT analysis from 2011 are provided in this plan in Appendix A.

¹ The CEDS Strategy Committee was the predecessor of the Strafford EDD Strategy Committee prior to the formation of the Strafford EDD in 2015. For more information on the Strategy Committee's role and relation to SRPC, see the Action Plan and Evaluation chapter.

Figure 1: SRPC, Strafford MPO, and Strafford EDD Boundaries

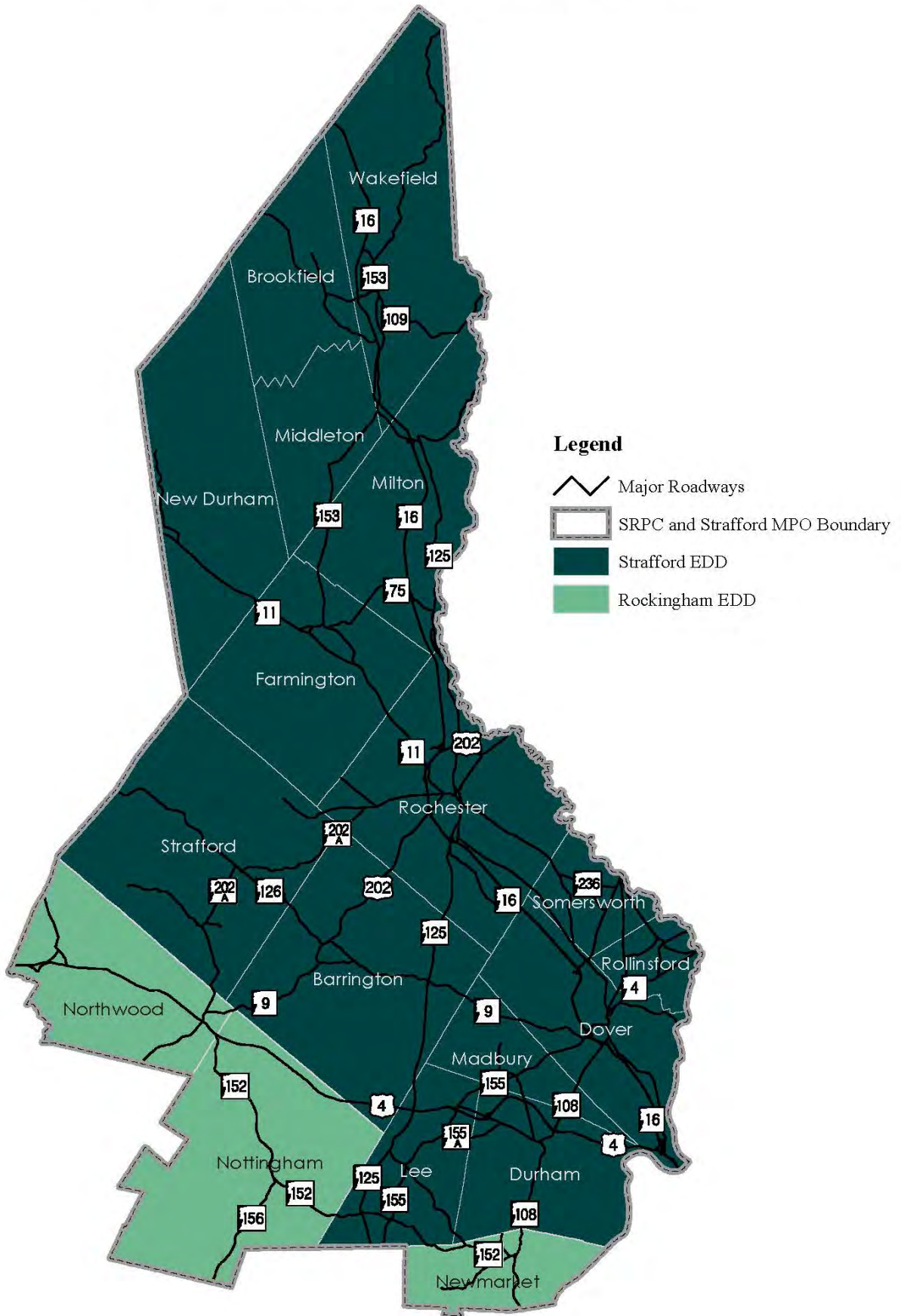


Figure 1: SRPC, Strafford MPO, and Strafford EDD Boundaries Source: SRPC

Performance-Based Planning

To better understand the underlying forces that affect our local and regional economies, and to align Strafford EDD's planning practices with the performance-based planning practices of SRPC's other core functions, we made a particular effort to integrate performance-based planning approaches into this update.

We modeled our approach on the Partnering for Performance NH Project, which was tasked with establishing a common framework for performance-based planning in transportation in the state². SRPC staff has identified performance measures and indicators that will inform the planning and project development processes of both the Strafford EDD and the Strafford MPO. For the purposes of this plan, we define each type of metric as follows:

- **Indicators:** Measurements of existing or historical conditions that can be used to identify economic trends and inform future actions in the Strafford EDD. Indicators are used in each subject area to provide data-driven analysis of the region's economy. While Strafford EDD or other organizations may set goals for "improving" indicators, and can enact policies to influence progress towards those goals, the organization generally lacks direct control over the indicator. For example, Strafford EDD may set a goal of increasing median household incomes by attracting high-paying jobs. Strafford EDD could encourage progress towards this goal by attempting to recruit new businesses to the area or by giving local businesses incentives to expand. However, the businesses themselves are ultimately responsible for creating or relocating the desired jobs.
- **Performance Measures:** Quantifiable measurements of the Strafford EDD's progress towards a goal. Performance measures are used in the Action Plan and Evaluation section to measure progress towards the implementation of the Action Plan in 2016 and towards completing projects from the Priority Project List over the life of the CEDS from 2011. While in some cases these measures can be impacted by external influences, ultimately the responsible organization has the ability to ensure that action items or projects are completed. For example, a municipality may need external funding to complete a project, but they have the ability to submit applications for funding or set aside local funds until they have raised sufficient funds to begin work.

In both cases, development of a set of informative indicators and performance measures is a time-consuming and ongoing process. Changes in technology, government regulation, and information sharing practices may make new sources of data available in the future. Similarly, changes to data collection methodologies may make existing indicators impractical in the future. Staff members look forward to building a set of reliable and informative measures to support our future regional and community planning and economic development efforts.

² <http://strafford.org/transportation/perfmeasures.php>



Economic Growth

Groundbreaking at the Ridge in Rochester Source: SRPC

Introduction

Periodic review of the CEDS and further consideration of the principles upon which it is based make it desirable to differentiate, in both this document and our daily practice, between the concepts of economic development and economic growth. Economic growth is simply increased economic production and outputs. We define economic development, based on the work of Feldman et al., as the expansion of capacities that contribute to the economic health of a region by creating the conditions necessary for long-term economic growth and resiliency to prevent, withstand, and counteract periods of economic disruption³. In recognition of this distinction, we have renamed this section to acknowledge its focus on the indicators and data indicative of economic growth as one component of economic development; however, its goal remains unchanged:



Goal

Strafford EDD will support the attraction, retention, and expansion of business, as well as investments and employment, in the region.

³ U.S. Department of Commerce, U.S. Economic Development Administration, The Logic of Economic Development: A Definition and Model for Development, by Maryann Feldman, Theodora Hadjimichael, Tom Kemeny, and Lauren Lanahan. (Chapel Hill, NC, 2014) <https://www.eda.gov/files/tools/research-reports/investment-definition-model.pdf>

Household Income

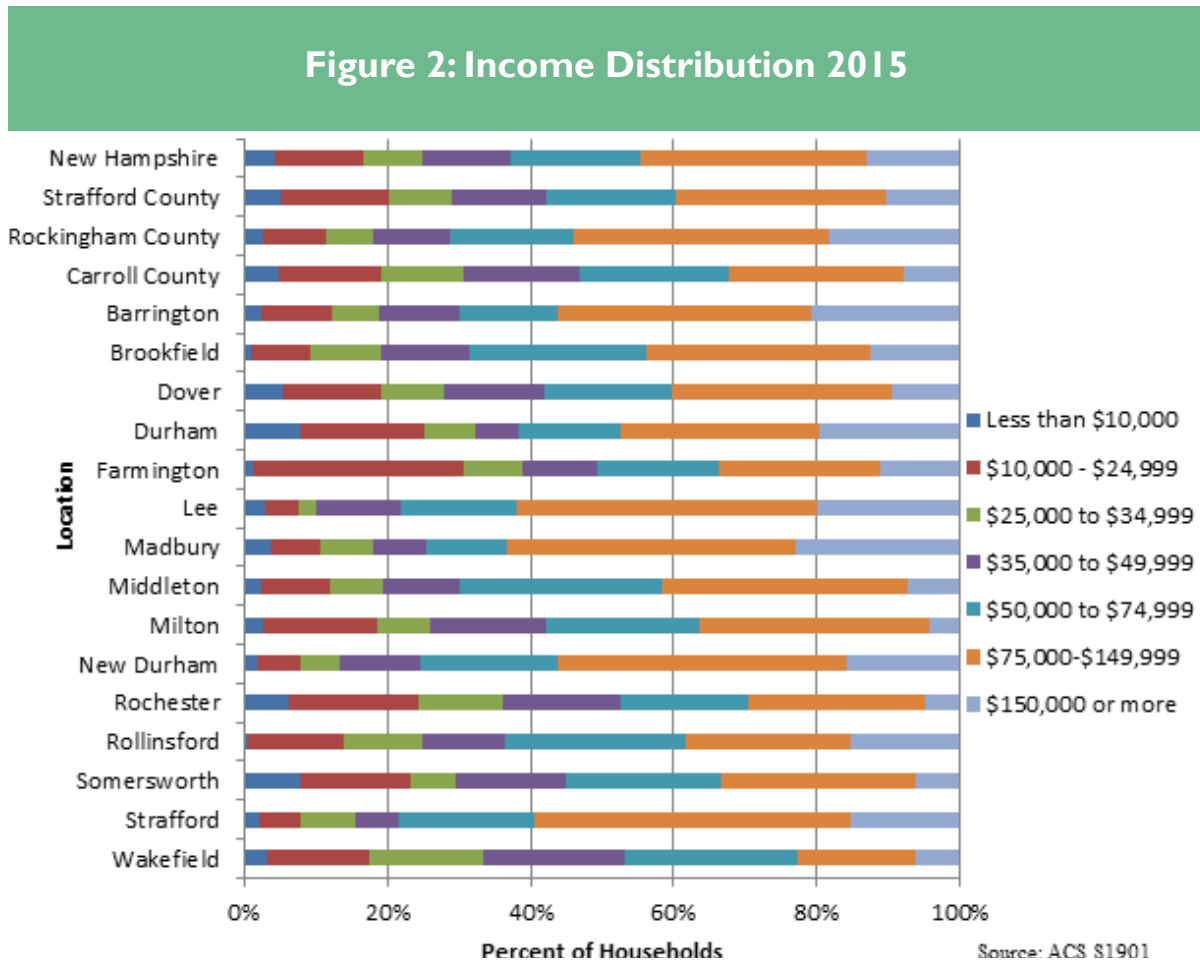
Statewide median household income in New Hampshire fell by approximately 2 percent between 2011 and 2015 after adjusting for inflation, according to American Community Survey (ACS) estimates as shown in Table 1. Over the same period, median household income in Strafford County decreased 2.5 percent, while incomes in Carroll and Rockingham Counties remained relatively unchanged. Rochester saw the greatest decline in median income, more than 15 percent, while Lee, Madbury, and Middleton saw significant growth. Note that the number of households sampled in most Strafford EDD region communities is small, so the margin of error is rather large, ranging from \$2,000 in the larger cities to \$18,000 in the smallest towns. Therefore, it would be unwise to rely on the data to accurately characterize the magnitude of changes in median income. Rather, the data is best used to indicate the trend in household income (up or down) within each community over time. It is safest to say only that Rochester, Farmington, Rollinsford, and Brookfield likely experienced losses, while Lee, Middleton, Madbury, and Strafford probably saw growth in their median household incomes. The margin of error at the county level is less (\$1,000 to \$2,000) and even less at the state level (\$500), but even so median income data alone cannot encompass the financial health of these regions.

Table 1: Median Household Income, 2011-2015

Community	Households (2015)	2011 (2015 Dollars)	2012 (2015 Dollars)	2013 (2015 Dollars)	2014 (2015 Dollars)	2015	Percent Growth (2011-2015)
New Hampshire	520,251	\$68,148	\$67,023	\$66,054	\$66,062	\$66,779	-2.01%
Strafford County	47,149	\$62,265	\$60,430	\$59,856	\$59,649	\$60,711	-2.50%
Carroll County	21,206	\$53,279	\$52,509	\$51,758	\$52,453	\$53,306	0.05%
Rockingham County	118,095	\$81,644	\$80,458	\$78,704	\$79,459	\$81,198	-0.55%
Barrington	3,356	\$84,247	\$84,355	\$82,978	\$82,526	\$81,326	-3.47%
Brookfield	305	\$70,478	\$69,789	\$65,504	\$65,388	\$65,536	-7.01%
Dover	12,668	\$60,620	\$57,696	\$58,395	\$60,107	\$61,008	0.64%
Durham	3,116	\$73,068	\$74,508	\$72,499	\$67,656	\$71,190	-2.57%
Farmington	2,624	\$57,190	\$57,243	\$52,283	\$50,690	\$50,821	-11.14%
Lee	1,776	\$77,405	\$77,293	\$95,167	\$96,194	\$95,000	22.73%
Madbury	626	\$86,769	\$85,166	\$90,376	\$98,082	\$98,125	13.09%
Middleton	569	\$55,475	\$57,503	\$59,451	\$61,320	\$68,385	23.27%
Milton	1,676	\$62,134	\$61,389	\$61,782	\$60,101	\$60,000	-3.43%
New Durham	970	\$86,641	\$83,113	\$79,848	\$78,673	\$82,000	-5.36%
Rochester	12,760	\$55,366	\$50,961	\$49,862	\$48,169	\$46,979	-15.15%
Rollinsford	1,010	\$69,160	\$65,660	\$63,959	\$63,342	\$62,130	-10.17%
Somersworth	4,589	\$54,116	\$55,078	\$54,156	\$53,155	\$54,868	1.39%
Strafford	1,409	\$88,417	\$88,451	\$95,271	\$97,445	\$95,707	8.25%
Wakefield	2,250	\$44,851	\$46,788	\$44,190	\$44,846	\$47,568	6.06%

Source: American Community Survey S1901

Medians and averages provide a snapshot of a data set, but they cannot convey the distribution of data and can be skewed by a small but heavily weighted portion of the data. In the case of median household income, we know the middle value for a community, but not how income is distributed throughout that community. Figure 2 illustrates this distribution by showing the percentage of households falling into particular income brackets.



For example, median household incomes in Middleton and Durham were comparable in 2015, between \$50,000 and \$75,000. But Durham has approximately twice the percentage of households earning \$150,000 or more, or \$10,000 or less, and a substantially lower percentage of households earning between \$50,000 and \$75,000. Middleton’s population is far more concentrated in the middle income brackets, while Durham’s is more concentrated in the extreme high and low brackets. These income brackets are especially useful when considering the percentage of households earning a living wage.

Table 2: Living Wage by Family Size and Working Adults

Household Makeup	1 Adult	1 Adult 1 Child	1 Adult 2 Children	1 Adult 3 Children	2 Adults (1 Working)	2 Adults (1 Working) 1 Child
Living Wage	\$22,859.20	\$49,441.60	\$57,803.20	\$72,009.60	\$36,691.20	\$45,011.20
Poverty Wage	\$10,400.00	\$14,560.00	\$20,800.00	\$22,880.00	\$14,560.00	\$20,800.00
Household Makeup	2 Adults (1 Working) 2 Children	2 Adults (1 Working) 3 Children	2 Adults	2 Adults 1 Child	2 Adults 2 Children	2 Adults 3 Children
Living Wage	\$49,878.40	\$57,678.40	\$36,691.20	\$54,371.20	\$62,940.80	\$74,464.00
Poverty Wage	\$22,880.00	\$27,040.00	\$12,480.00	\$20,800.00	\$20,800.00	\$24,960.00

Living Wage Calculator, MIT

The living wage estimates for Strafford County presented in Table 2 were produced with the Living Wage Calculator developed by Dr. Amy K. Glassmeier and the Massachusetts Institute of Technology. They were meant to cover all expected expenses for a family of a given size, including food, lodging, clothing, and childcare, and were considered when identifying useful income categories for comparison. For example, the lowest bracket of \$10,000 or less is a poverty income for any household size, including a single adult. The next bracket, \$10,000 to \$25,000, is close to the poverty-level income for the largest households, but is approximately a living income for a single adult. The \$35,000 mark is a living income for a household of 2 adults regardless of whether one or both are working.

As shown in Table 3, 62 percent of households in Strafford County consisted of 2 people or fewer according to the 2010 census. However, this figure does not differentiate between households of 2 adults and households of a single working adult and a dependent child, which would require nearly \$50,000 for a living income. A \$50,000 annual income is also a living income for a household of two adults and one or two dependent children so long as only one adult is working. It is not enough to cover the increased costs of childcare if both adults work.

Table 3: Strafford County Household Size, 2010

Household Type	Number	Percent
Total households	47,100	100.0%
1-person household	12,367	26.3%
2-person household	17,000	36.1%
3-person household	7,921	16.8%
4-person household	6,259	13.3%
5-person household	2,372	5.0%
6-person household	823	1.7%
7-or-more-person household	358	0.8%
Average household size	2.44	(X)

Source: ACS S1901

The \$75,000 mark is a living income for all household sizes covered by the MIT Living Wage Calculator. For economic growth in a community to be considered truly successful, it should not only increase the median income, but also consistently move individuals or households to higher income brackets. Table 4 shows the percentage of households that earned \$75,000 or more in each county and the state. Although we did see an increase of 1.2 points in the percentage of Strafford County households earning \$75,000 or more from 2011 to 2015, this increase trailed the change at the state level and in neighboring counties over the same period.

Meanwhile, Strafford County saw comparatively few changes at the opposite end of the spectrum, where the portion of households earning \$35,000 or less remained roughly 28 percent as shown in Table 5. This stability is consistent with the state as a whole. Carroll County saw a 2 percent decrease in this population in 2012 but has remained stable since then. Rockingham County, meanwhile, has seen some improvement in recent years after remaining largely unchanged from 2011 to 2013.

Table 4: Percent of Households Earning \$75,000 or More Annually

Year	County			New Hampshire
	Strafford	Caroll	Rockingham	
2011	38.6%	29.0%	51.6%	42.5%
2012	32.5%	28.7%	52.4%	43.1%
2013	38.2%	30.6%	51.8%	43.0%
2014	38.9%	32.1%	52.7%	44.0%
2015	39.7%	32.3%	53.8%	44.5%

Source: American Community Survey S1901

Table 5: Percent of Households Earning \$35,000 or Less Annually

Year	County			New Hampshire
	Strafford	Caroll	Rockingham	
2011	28.1%	32.5%	19.7%	25.4%
2012	28.8%	30.9%	19.4%	25.6%
2013	28.1%	30.6%	19.7%	25.7%
2014	28.5%	30.8%	18.9%	25.0%
2015	28.9%	30.5%	17.9%	25.0%

Source: American Community Survey S1901

This lack of improvement is mitigated somewhat by decreasing percentages of households in the very lowest bracket, but even those gains have been limited. As Table 6 shows, Strafford County consistently has a higher percentage of households earning \$10,000 or less in a year than Rockingham County and the state as a whole. Strafford County improved in this regard for three consecutive years, but took a step back in 2015.

Table 7 shows changes in the \$35,000-\$75,000 bracket over time. The decrease in this bracket over time is largely due to the increase in households earning more than \$75,000, with very few households moving up from the \$35,000 or less bracket to take their place.

Table 6: Percent of Households Earning \$10,000 or Less Annually

Year	County			New Hampshire
	Strafford	Caroll	Rockingham	
2011	5.9%	5.5%	3.1%	4.4%
2012	5.7%	5.5%	3.1%	4.4%
2013	5.3%	5.3%	3.0%	4.5%
2014	4.7%	4.9%	2.9%	4.0%
2015	5.0%	4.8%	2.7%	4.2%

Source: American Community Survey S1901

Table 7: Percent of Households Earning \$35,000-\$75,000 Annually

Year	County			New Hampshire
	Strafford	Caroll	Rockingham	
2011	33.3%	38.5%	28.6%	31.9%
2012	32.7%	40.4%	28.3%	31.3%
2013	33.7%	38.7%	28.5%	31.3%
2014	32.7%	37.1%	28.5%	30.8%
2015	31.4%	37.0%	28.2%	30.5%

Source: American Community Survey S1901

Unemployment & Underemployment

Data on employment nationwide is gathered by the Bureau of Labor Statistics and grouped into 6 different measures⁴:

- U-1: Persons unemployed 15 weeks or longer, as a percent of the civilian labor force.
- U-2: Persons who have lost jobs or completed temporary jobs, as a percent of the civilian labor force.
- U-3: Total unemployed, as a percent of the civilian labor force.
- U-4: Total unemployed plus discouraged workers, as a percent of the civilian labor force plus discouraged workers.
- U-5: Total unemployed, plus discouraged workers, plus all other marginally attached workers, as a percent of the civilian labor force plus all marginally attached workers.
- U-6: Total unemployed, plus all marginally attached workers, plus total employed part time for economic reasons, as a percent of the civilian labor force plus all marginally attached workers.

U-3 is considered to be the official “unemployment rate” and is the measure used most often to track unemployment, making it the most easily available at all levels of analysis.

U-6 is the most inclusive category and the closest to measuring underemployment; it comprises marginally attached workers (people who are not working and have not searched for a job in the prior 4 weeks) and “involuntary part-time workers,” persons employed part time for economic reasons (those working less than 35 hours per week who want to work full time but had their hours reduced or are unable to find a full-time job).

According to New Hampshire Employment Security and the Bureau of Labor Statistics, the unemployment rate in Strafford County has been consistently lower than in the nation, state, and neighboring counties over the last 5 years, as shown in Table 8. Strafford County’s unemployment rate has fallen steadily since 2012. Overall, the trend is indicative of steady and consistent job growth.

Underemployment is more difficult to analyze at the local level. Due to the small sample size of the Current Population Survey from which these measures are generated, U-6 and other national employment measures are not available below the state level. The Bureau of Labor Statistics only provides those measures as rolling 4-quarter moving averages. Since 2011, New Hampshire’s U-6 rate has followed a trend similar to the U-3 rate, with yearly improvements and rates that are consistently below the national average.

⁴ <https://www.bls.gov/lau/stalt.htm>

Table 8: Annual Average U-3 Unemployment Rates by Year

Year	County			New Hampshire	United States
	Strafford	Caroll	Rockingham		
2011	5.3%	5.5%	5.6%	5.8%	8.9%
2012	5.4%	5.3%	5.8%	6.0%	8.1%
2013	4.9%	5.0%	5.4%	5.4%	7.4%
2014	4.0%	4.2%	4.6%	4.5%	6.2%
2015	3.1%	3.6%	3.6%	3.7%	5.3%
2016	-	-	-	2.8%	4.9%

Source: NHES

Table 9: Annual Average U-6 Unemployment Rates by Year

Year	New Hampshire	United States
2011	11.3%	15.9%
2012	11.2%	14.7%
2013	10.9%	13.8%
2014	9.7%	12.0%
2015	8.0%	10.4%
2016	6.4%	9.6%

Source: Bureau of Labor Statistics

Employment Clusters

New Hampshire Employment Security projects an approximately 6.5 percent growth in total jobs in the SRPC planning region between 2014 and 2024. As shown in Table 10, most of these new jobs will come from service-providing industries, with the biggest growth occurring in the “health care and social assistance”, “educational services”, and “retail” sectors. Goods-producing industries are not projected to grow significantly – most of these sectors employ very few people in the SRPC region, but the “Manufacturing” sector was fourth in terms of estimated employment in 2014, and is projecting to remain relatively unchanged. Using location quotients to compare employment in the SRPC region to state-wide levels, only “finance and insurance” and “educational services” show a large degree of specialization. These areas of specialization in the SRPC region are not expected to change by 2024.

Location quotients (LQ) allow a comparison between the industry mixes of two areas. In Table 10, the LQ compares industries in the SRPC region to statewide employment in that industry. If the LQ is less than one, the identified industry employs fewer people in the SRPC region than statewide. If the LQ is greater than one, employment in the SRPC region is higher for that industry than in New Hampshire as a whole. An LQ equal to one means the industry employs people at exactly the same rate in the SRPC region as the state as a whole.

Table 10: SRPC Region Employment by Industry

NAICS Code	Industry	2014			2024			SRPC Percent Change
		SRPC Estimated Employment	NH Estimated Employment	LQ	SRPC Projected Employment	NH Projected Employment	LQ	
101000	Total Goods-Producing Industries	7,009	92,177	0.964	7,074	92,820	0.971	0.93%
11	Agriculture, Forestry, Fishing and Hunting	149	1,989	0.950	136	2,041	0.849	-8.72%
21	Mining	29	534	0.688	30	557	0.686	3.45%
23	Construction	1,540	23,202	0.841	1,649	24,693	0.850	7.08%
31-33	Manufacturing	5,291	66,452	1.009	5,259	65,529	1.022	-0.60%
102000	Total Service-Providing Industries	43,431	543,357	1.013	46,614	587,311	1.011	7.33%
22	Utilities	n	2,321	n	n	2,120	n	n
42	Wholesale Trade	1,211	27,123	0.566	1,306	28,912	0.575	7.84%
44-45	Retail Trade	6,832	94,410	0.917	7,217	98,818	0.930	5.64%
48-49	Transportation and Warehousing	1,040	15,782	0.835	1,045	16,072	0.828	0.48%
51	Information	1,079	12,019	1.138	1,009	11,808	1.088	-6.49%
52	Finance and Insurance	4,031	28,823	1.773	4,237	31,553	1.710	5.11%
53	Real Estate and Rental and Leasing	383	6,837	0.710	409	7,298	0.714	6.79%

Table 10: SRPC Region Employment by Industry

NAICS Code	Industry	2014			2024			SRPC Percent Change
		SRPC Estimated Employment	NH Estimated Employment	LQ	SRPC Projected Employment	NH Projected Employment	LQ	
54	Professional, Scientific, and Tech. Serv.	1,476	32,443	0.577	1,650	36,656	0.573	11.79%
55	Management of Companies and Enterprises	n	8,180	n	n	8,515	n	n
56	Administrative and Support and Waste Management Serv.	2,164	32,982	0.832	2,469	38,239	0.822	14.09%
61	Educational Serv.	8,272	62,811	1.669	8,745	65,363	1.704	5.72%
62	Health Care and Social Assistance	7,018	87,159	1.021	7,985	101,655	1.000	13.78%
71	Arts, Entertainment, & Recreation	651	11,013	0.749	722	12,170	0.756	10.91%
72	Accommodation and Food Services	4,311	55,962	0.976	4,603	59,928	0.978	6.77%
81	Other Services	1,940	26,579	0.925	2,062	27,893	0.941	6.29%
	Government	2,798	38,913	0.911	2,924	40,311	0.924	4.50%
	Self-Employed Workers	3,044	42,417	0.910	3,258	45,113	0.920	7.03%
	Total Employment	53,484	677,951	1.000	56,946	725,244	1.000	6.47%

n = Employment estimates in this industry were not reported because they fell below reasonable privacy thresholds.

Source: NHES Employment Projections

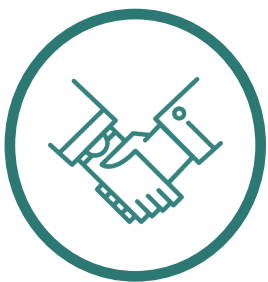


Regional Collaboration

SRPC Commission Meeting Source: SRPC

Introduction

Like much of New England, the Strafford EDD is politically fragmented. It is made up of 15 communities in Strafford and Carroll counties, each of which has different needs depending on its population size and demographics, commercial tax base, geographical challenges, and other factors. While regional organizations such as SRPC can provide technical assistance to these communities, jurisdictional boundaries across regional agencies create additional roadblocks to effective regional collaboration. (For example, SRPC's jurisdiction as a regional planning commission and a metropolitan planning organization is the same, but does not align with its jurisdiction as an economic development district.) Despite these challenges, the Strafford EDD continues to identify and support opportunities for regional collaboration within and across regions.



Goal

Strafford EDD strives to provide opportunities for regional collaboration and leadership in economic development among businesses, communities, institutions, governments, and other parties.

Commuting Data

The cities of Portsmouth, Rochester, Dover, and Somersworth and the town of Durham are the primary local population and employment centers, combining to employ 46.6% of Strafford EDD workers as of 2014. Table 11 demonstrates the importance of these communities⁵, but also demonstrates how the region's proximity to other large employment centers like Portsmouth, Concord, Manchester, and metro Boston mean the region's economic strength is inextricably linked to locations and populations outside the EDD. Boston and Nashua, for example, each employ more than 1 percent of the region's workers. Only about 41.1 percent of Strafford EDD workers are employed within the district, and the remaining 58.9 percent work in other communities throughout the region.

The distribution of locations where the Strafford EDD region's workers live is similarly varied. While the top five communities providing workers to the Strafford EDD are within the district, the region does import a large percentage of its workforce from other locations. As with the list of employment centers, neighboring counties in New Hampshire are heavily represented on Table 12, with many communities in York County, Maine, joining the list. Roughly 51.6 percent of the workers in the Strafford EDD region also live in the area, while the remaining 48.4 percent commute from outside the Strafford EDD.

⁵ <https://onthemap.ces.census.gov/>

Table 11: Job Locations for Strafford EDD Residents, 2014

Location	County	Workers	Share
All County Subdivisions	N/A	54,897	100.00%
Dover*	Strafford, NH	8,229	15.00%
Portsmouth	Rockingham, NH	6,472	11.80%
Rochester*	Strafford, NH	5,904	10.80%
Durham*	Strafford, NH	2,519	4.60%
Somersworth*	Strafford, NH	2,400	4.40%
Manchester	Hillsborough, NH	2,004	3.70%
Concord	Merrimack, NH	1,541	2.80%
Newington	Rockingham, NH	1,284	2.30%
Exeter	Rockingham, NH	1,253	2.30%
Nashua	Hillsborough, NH	1,166	2.10%
Barrington*	Strafford, NH	1,043	1.90%
Seabrook	Rockingham, NH	724	1.30%
Salem	Rockingham, NH	716	1.30%
Farmington*	Strafford, NH	572	1.00%
Boston	Suffolk, MA	556	1.00%
All Other Locations	N/A	18,514	33.72%

*Denotes community within the Strafford EDD

Source: OnTheMap, ACS 2014

Existing transportation linkages, for both automobile traffic and public transportation, are important for maintaining these connections. Employers and employees who are separated by even longer distances are increasingly likely to rely on telecommuting technology, making access to broadband internet an important resource for Strafford EDD employers and workers alike. Finally, the difference between where workers live and where they work could reflect the availability of housing options and amenities that people find either desirable or affordable.

Regional Context

The location of resources and markets is one of the primary factors that companies will consider when deciding where to locate, making geographical context an important factor for regions to consider when formulating development strategies. While a firm may draw employees only from communities within an hour’s commute, they frequently distribute the goods they produce to markets that are much further away. Figure 3 shows the regional context of the Strafford EDD with a buffer of 250 miles outlined in blue and 500 miles in green. Within 250 miles of the Strafford EDD (roughly the distance a commercial trucker can travel in a day to make a

Table 12: Home Locations for Strafford EDD Workers, 2014

Location	County	Residents	Share
All County Subdivisions	N/A	46,209	100.00%
Rochester *	Strafford, NH	6,623	14.30%
Dover*	Strafford, NH	5,838	12.60%
Somersworth*	Strafford, NH	2,204	4.80%
Barrington *	Strafford, NH	1,635	3.50%
Farmington*	Strafford, NH	1,465	3.20%
Portsmouth	Rockingham, NH	1,359	2.90%
Durham*	Strafford, NH	1,111	2.40%
Milton*	Strafford, NH	978	2.10%
Berwick	York, ME	831	1.80%
Strafford*	Strafford, NH	816	1.80%
Lee *	Strafford, NH	783	1.70%
Wakefield*	Carroll, NH	754	1.60%
Manchester	Hillsborough, NH	719	1.60%
Lebanon	York, ME	704	1.50%
Newmarket	Rockingham, NH	633	1.40%
South Berwick	York, ME	521	1.10%
New Durham*	Strafford, NH	494	1.10%
Alton	Belknap, NH	490	1.10%
Rollinsford*	Strafford, NH	486	1.10%
Concord	Merrimack, NH	468	1.00%
Nottingham	Rockingham, NH	466	1.00%
Sanford	York, ME	443	1.00%
All Other Locations	N/A	16,388	35.46%

*Denotes community within the Strafford EDD

Source: OnTheMap, ACS 2014

Figure 3: Strafford EDD Regional Context



round trip), firms have access to most of New England, as well as Montreal and Quebec City in Canada and New York City. This area includes access to the St. Lawrence Seaway and the entire eastern seaboard from New York to Maine. Within 500 miles of the Strafford EDD (a day's trip in one direction) are Baltimore and Washington to the south; Pittsburgh, Buffalo, and Toronto to the west; and large portions of Quebec, New Brunswick, and Nova Scotia to the northeast. This area includes access to Lake Ontario and Lake Erie, the mouth of the St. Lawrence Seaway, and shipping centers in and around Philadelphia and the Chesapeake Bay.

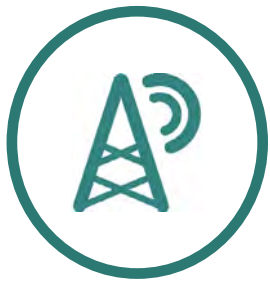


Infrastructure

View of Little Bay and General Sullivan Bridges Source: SRPC

Introduction

Infrastructure development is essential to supporting economic development. Businesses rely on the transportation network to bring employees to their sites, products to markets, and customers to their storefronts. Internet access is critical for running businesses and finding jobs. Many people work from home over an internet connection or operate small businesses online. High-quality infrastructure can expedite redevelopment and leverage private investment in a municipality. For the purposes of this plan, we define infrastructure as the physical or organizational networks or facilities that support economic activity.



Goal

Strafford EDD will promote improved access to the critical regional infrastructure of transportation, utilities, water and wastewater, waste management, built environment, banking, and finance.

Alternative Fuel Stations

Alternative fuels are a critical component of ongoing planning to promote energy independence or to support environmental resiliency and combat climate change. A variety of alternative fuel types have been developed for the transportation sector in response to the environmental impacts and fluctuating costs of gasoline and diesel fuel. But for fuel options such as compressed natural gas and liquefied petroleum gas, or transportation alternatives such as electric vehicles, to be viable on a broad scale, infrastructure investment is needed to support increased access to these alternatives for consumers and businesses.

A measurement for available public infrastructure to support alternative fuels was developed as part of the Partnering for Performance NH program using data from the Alternative Fuels Data Center. As of December 29, 2016, only five alternative fueling stations were located in the Strafford EDD region: four electric charging stations and one liquefied petroleum gas station. It is difficult to determine whether poor access to infrastructure is hindering the adoption of alternative technologies, or low demand for these technologies is retarding the growth in supporting infrastructure. However, it seems safe to say the use of alternative fuels within the Strafford EDD region is limited. SRPC will continue to monitor the availability of alternative fueling stations to inform its work as both an economic development district and a metropolitan planning organization.



Durham EV Charging Station at Pettee Brook
Source: SRPC

Table 13: Strafford EDD Alternative Fuel Stations by Type

Fuel Type	Station Name	Location	Access Days / Time
Electric	Somersworth Nissan	Somersworth	Dealership business hours
Electric	Pettee Brook	Durham	24 hours daily
Electric	GE WattStation	Durham	24 hours daily
Electric	JD Howard Dental	Dover	24 hours daily
Liquefied Petroleum Gas	U-Haul	Rochester	7am-7pm M-Th and Sat, 7am-8pm F, 9am-5pm Sun

Source: Alternative Fuels Data Center

Red-Listed Bridges

Infrastructure maintenance is an important factor for communities to consider when exploring development opportunities. The quality of existing infrastructure, or local collaboration to install new infrastructure, can play a significant role in corporate site selection. Poorly maintained infrastructure, on the other hand, can make the transportation of goods and people more difficult, which in turn can make a commute less desirable or the logistics of transporting products to market more expensive or more complex.

An analysis of a region’s bridge inventory can provide a useful benchmark for assessing the quality of local transportation infrastructure. The New Hampshire Department of Transportation (NHDOT) evaluates bridge quality and groups bridges into four categories⁶:

- Green bridges are functional and have no identified deficiencies.
- Yellow bridges are beginning to show wear and tear or are approaching a state of being deficient.
- Red bridges—or bridges that are “on the red list”—have some sort of structural deficiency either because their design differs from current standards or they need repair.
- Black-listed bridges have been closed due to safety concerns.

Approximately 11.5 percent of the 243 bridges identified in the Strafford EDD were on either the red or black list as of 2016⁷. The inventory of red list bridges in the Strafford MPO* has fluctuated over time, but has not shown any consistent growth or decline.

* The Stafford MPO includes the municipalities within the Strafford EDD ,in addition to the communities of Nottingham, Northwood, and Newmarket.

6 https://www.nh.gov/dot/org/commissioner/balanced-scorecard/departments/documents/2012_bs_performance_bridgecond.pdf

7 https://www.nh.gov/dot/org/projectdevelopment/bridgedesign/documents/2015_nh_state_redlist_10yrplan.pdf



Bridge over Broadway St. in Dover
Source: SRPC

Table 14: Bridges in Strafford EDD, 2016		
Type	Number	Percent
Green	144	59.3%
Yellow	71	29.2%
Red	27	11.1%
Black	1	0.4%
Total	243	100%

Source: NHDOT

Table 15: Strafford MPO Red List Bridges			
Owner:	State	Municipal	Total
2016	9	20	29
2015	10	21	31
2014	7	20	27
2013	7	19	26
2012	7	19	26
2011	14	16	30

Source: NHDOT Red List for Strafford MPO

Public Transit

The SRPC region is served by two fixed-route bus systems: The Cooperative Alliance for Seacoast Transportation (COAST) and Wildcat Transit. COAST is an independent public entity that provides public transportation services to communities in Strafford and Rockingham counties and to Berwick, Maine. Wildcat Transit is the University of New Hampshire’s transportation service and provides fixed-route bus service to and around the University’s Durham campus. As of 2015, these services had a combined annual ridership of over 1.8 million trips

To better understand the population these organizations serve, Partnering for Performance NH is developing a methodology to track the total population living within a quarter mile of fixed-route transit service. Data from the 2015 ACS shows that approximately 36 percent of Strafford EDD residents are served by COAST or Wildcat⁸. This service area includes 49% of Strafford EDD residents living below the poverty level⁹. This metric will require additional development to ensure that future route changes are tracked yearly and that population estimates are as accurate as possible. Note too that demand response transit for disabled, elderly, or other passengers is available from a variety of providers in the Strafford EDD region. Efforts to develop an accurate and meaningful methodology to track and compare access to and use of these programs are ongoing, and we hope to have information available in future updates of this strategy.

In addition to local fixed-route service, Strafford EDD benefits from several inter-city transportation services. C&J Bus provides inter-city bus service from Dover to Portsmouth and on to Newburyport, Mass., Boston Logan International Airport, and Boston’s South Station. Data provided by C & J shows that 74,465 passengers traveled from Dover to Boston Logan, and 56,405 passengers traveled from Dover to South Station in 2015.

8 For the purposes of this metric, “Served by Transit” means the population living within 0.25 miles of a transit stop in a census-designated Urbanized Area, or within 0.5 miles of a transit stop that is not in an Urbanized Area. Population was assumed to be evenly distributed across Census block groups.

9 The US Census Bureau excludes all institutionalized people, people in military group quarters, people in college dormitories, and unrelated individuals under 15 years old from the total population before calculating poverty levels. Therefore, roughly 7,000 UNH students living in campus dorms and 1,500 individuals living in other group quarters and institutions have been excluded from the total population prior to poverty level calculations. While we are unable to determine poverty levels for these individuals, the presence of Wildcat Transit on and around UNH’s campus suggests that those 7,000 students are served regardless of their poverty status.

Table 16: Total Annual Ridership for SRPC Fixed Route Bus Providers

Year	COAST	Wildcat	Total Ridership
2011	432,036	1,138,687	1,590,971
2012	477,245	1,094,611	1,571,856
2013	481,088	1,184,426	1,665,514
2014	469,002	1,242,324	1,711,326
2015	471,759	1,342,247	1,814,006

Source: COAST, Wildcat Transit



Coast, C & J, and Wildcat Transit buses (left to right) Source: SRPC



Amtrak Downeaster arrives at the Dover Train Station Source: SRPC

The Amtrak Downeaster provides passenger rail service from Brunswick, Maine, to Boston’s North Station, including stops within Strafford EDD at Dover and Durham/UNH. Amtrak provides yearly ridership information for the stations along each route that could be used to track demand for these services. As shown in Table 17, more than 115,000 passengers boarded or alighted at stations in the Strafford EDD. Fluctuations in ridership over this time make trends difficult to identify, but continuing to track this data yearly will help us get a clearer picture of local use of this service in the future.

Table 17: Downeaster passengers boarding and alighting at Strafford EDD stations

Year	Dover	Durham	Total
2014	55,144	58,893	114,037
2015	46,834	52,898	99,732
2016	52,457	63,046	115,503

Source: Amtrak State Fact Sheets



Resources and Environment

Mill Pond Dam, Durham Source: SRPC

Introduction

Strafford County's location in the seacoast region of New Hampshire provides numerous natural resources that contribute to the economic value, recreational opportunities, and natural beauty of our region. These natural resources include the Cocheco, Salmon Falls, Lamprey, Oyster, and Bellamy coastal rivers, which support a variety of ecosystems. While the environmental impacts on these resources are important in their own regard, the continued health of these resources also has important implications for the health of the region's economy.



Goal

The Strafford EDD and its communities will capitalize on both the built environment and natural resources through measures that protect, preserve, manage, and promote quality of life and an increasing diversity of resource usage.

Rooms and Meal Tax

Travel and tourism is New Hampshire's second largest industry in terms of jobs supported primarily by out-of-state funding¹⁰. While the full impact of visitors to a particular area can be difficult to measure, the state's Office of Energy and Planning provides monthly information on meals and rooms tax receipts at the county level¹¹. This data serves as a useful indicator of the health of the local tourism industry¹².

As shown in Table 18, Strafford County consistently generates less meals and rooms revenue than neighboring Carroll and Rockingham counties. While Strafford County has access to the larger seacoast region and the I-95 corridor via the Spaulding Turnpike, I-95 itself, along with many ocean-front tourism opportunities, are located in neighboring Rockingham County and York County, Maine. Meanwhile, Carroll County extends north to the White Mountains National Forest and includes Lake Winnepesaukee and other lakes that attract large numbers of tourists.

Table 18 allows us to see when the recession most strongly impacted tourism in each county. Both Rockingham and Carroll counties began their decline in 2008, with revenues returning to pre-recession levels by 2011-2012. Strafford County, meanwhile, shows no decline in business until 2010, and revenues also took longer to return to pre-recessionary levels.

Table 18: Meals and Rooms Total Receipts, 2006-2016 (Millions of 2016 Dollars)

Year	Strafford	Carroll	Rockingham
2006	\$173.7	\$221.2	\$899.8
2007	\$182.2	\$223.0	\$892.3
2008	\$182.4	\$219.9	\$866.7
2009	\$185.4	\$210.4	\$851.0
2010	\$167.0	\$207.6	\$850.6
2011	\$168.9	\$220.1	\$889.4
2012	\$174.5	\$222.5	\$915.8
2013	\$178.4	\$232.0	\$953.1
2014	\$187.4	\$241.0	\$1010.6
2015	\$196.3	\$250.1	\$1094.1
2016	\$205.5	\$258.1	\$1155.0
Percent Growth 2006-2016	18.3%	16.7%	28.4%

Source: NH OEP

¹⁰ <http://www.visitnh.gov/media/nh-travel-and-tourism-information/economic-highlights.aspx>

¹¹ <https://www.nh.gov/oep/data-center/economic.htm>

¹² The logic model from the 2011 CEDS identified revenues from the rooms and meals tax as the intended indicator. However, a rate increase from 8 to 9 percent in July 2009 makes the historic data inconsistent. Therefore, the total receipts are a more useful indicator since they are the underlying figures upon which the tax revenues are based and allow accurate comparisons over a longer period of time.

Hazard Mitigation Planning

In order to be eligible for Federal Emergency Management Agency (FEMA) hazard mitigation funding, municipalities must have updated hazard mitigation plans. Plans must identify hazards that are likely to affect a community and assess both the likelihood that such an event will occur and the severity of its likely impact. Hazard mitigation plans also contain strategies to mitigate the likelihood or severity of damage from various hazards and to improve preparedness and resilience in case of such events.

SRPC partners with its member municipalities to ensure their local hazard mitigation plans satisfy all FEMA criteria¹³. The number of communities with up-to-date hazard mitigation plans serves as an indicator of community resiliency and a balanced relationship between the built and natural environments.

SRPC is currently working with the towns of Strafford, Durham, Middleton, Milton, and Nottingham to update their plans, all of which expire in 2017. Once updated, the plans will remain in effect until 2022. The plans for Dover, Rochester, Newmarket, Farmington, and Lee will expire at different points in 2018.

¹³ <http://strafford.org/services/hazard.php>

Table 19: Community Hazard Mitigation Plan Expiration

Community	Expiration Date
Barrington	2021
Brookfield	2019
Dover	2018
Durham	2022
Farmington	2018
Lee	2018
Madbury	2019
Middleton	2022
New Durham	2021
Newmarket	2018
Northwood	2019
Nottingham	2022
Rochester	2018
Rollinsford	2021
Somersworth	2021
Strafford	2022
Wakefield	2021

Source: SRPC



Storm aftermath in Dover, NH Source: City of Dover
Page 27

Vehicle Emissions

Tracking air quality is important for determining changes in the health of the environment. Partnering for Performance New Hampshire (PFPNH) developed a performance measure based on data from the National Emissions Inventory (NEI) to analyze on-road emissions and measure the effectiveness of congestion mitigation or air quality standards. The NEI describes itself as “a comprehensive and detailed estimate of air emissions of criteria pollutants, criteria precursors, and hazardous air pollutants from air emissions sources.”¹⁴ The data is compiled from state and local air agencies and the US Environmental Protection Agency (EPA) and available on a 3-year cycle.

Data from the last three cycles suggests that Strafford, Carroll, and Rockingham counties improved their on-road emissions from 2008 to 2014. The limited number of data points makes meaningful conclusions difficult without more data to distinguish trends. Reductions in 2011, for example, were likely due in large part to recession-related reductions in transportation, as businesses experienced declines in consumption and households saw declines in their discretionary income and limited or eliminated unnecessary travel. In addition, Rockingham County’s large population compared to Carroll County skews emissions beyond a point of useful comparison. Carroll and Rockingham counties have similar per capita emissions, however, and those emissions are consistently above the state average. Strafford County, meanwhile, shows below-average per capita emissions. This disparity could be due to the presence of I-95 through Rockingham County and the more rural development patterns in Carroll County that require longer trips to access local markets and services. The difference in emissions could also be related to the differences in tourism discussed above. Additional data and research are necessary to clarify trends in emissions and to explore possible correlations with individual consumption or usage patterns.

Table 20: Mobile On-Road Emissions (Tons)

	2008	2011	2014
Carroll County	305,386	251,944	259,282
Rockingham County	1,914,66	1,853,682	1,780,511
Strafford County	582,173	480,309	525,347
New Hampshire	7,677,363	6,833,434	6,725,610

Source: NEI

Table 21: Mobile On-Road Emissions (Tons per Person)

	2008	2011	2014
Carroll County	6.4435	5.2722	5.4171
Rockingham County	6.4788	6.2707	5.9634
Strafford County	4.7397	3.8879	4.2010
New Hampshire	5.8383	5.1847	5.0698

Source: NEI, NH OEP

¹⁴ <https://www.epa.gov/air-emissions-inventories/national-emissions-inventory-nei>



Workforce and Entrepreneurial Development

Great Bay Advanced Technology & Academic Center Source: SRPC

Introduction

Access to training and education to prepare residents for available jobs and to attract new talent is an important driver of the local economy and essential to attract new businesses and support their growth.



Goal

Support the development of education and training initiatives relevant to businesses in the region. Provide quality education and training for residents and employees of all ages and abilities.

Population Age

Much has been written about the impending “Silver Tsunami,” the rapid aging of communities across the United States. As their populations continue to age, many communities are concerned that larger elderly populations will place stress upon service programs such as public health, welfare, and transportation, particularly if these elderly populations are no longer generating the income taxes that these services depend upon. The trend is particularly evident in New Hampshire. The median age in New Hampshire is about five years older than the national average and from 2011 to 2015 increased about twice as fast as the national figure. Rockingham and Carroll counties are even older than the state average, Carroll County significantly so, with a median age of 50.3 years in 2015. The median age in Strafford County, meanwhile, has consistently fallen just below the national average and has grown at roughly the same rate as the national figure. While a large portion of this difference may be related to the presence of UNH (Durham’s median age in particular reflects the significant percentage of college students living in the town), both Dover and Somersworth have large, comparatively young populations as well.

The dependency ratio can help determine whether the working-age population is large enough to support a dependent population made up of children and the elderly. The child dependency ratio is calculated by dividing the population of residents aged 0-15 by the population aged 15-65 and then multiplying by 100. The old-age dependency ratio is calculated the same way to compare the population over 65 with to the population aged 15 to 65 years old. The two ratios can then be combined to determine the total dependent population as a percentage of the working-age population.

Table 23 shows the total dependency ratios for the last five years. Carroll County is well above the statewide and national figures and increasing rapidly. However, both Strafford and Rockingham counties are at or below the statewide ratio, which is even lower than the national figure. Again, Strafford County’s data is heavily influenced by the presence

Table 22: Population Median Age, 2011-2015

Place	Median Age (Years)					Percent Change (2011-2015)	
	2011	2012	2013	2014	2015		
United States	37.0	37.2	37.3	37.4	37.6	1.6%	
New Hampshire	40.7	41.1	41.5	41.8	42.2	3.7%	
County	Strafford	36.6	36.7	36.9	36.9	37.2	1.6%
	Carroll	47.3	48.2	49.0	49.7	50.3	6.3%
	Rockingham	41.9	42.3	42.7	43.1	43.5	3.8%
Municipality	Barrington	37.4	38.2	41.6	43.4	44.1	17.9%
	Brookfield	43.6	47.4	45.2	46.7	44.4	1.8%
	Dover	35.6	35.6	36.1	36.6	36.7	3.1%
	Durham	20.7	20.7	20.8	20.7	20.8	0.5%
	Farmington	38.5	41.5	41.7	40.8	39.6	2.9%
	Lee	44.2	45.0	41.6	41.7	41.7	-5.7%
	Madbury	35.6	37.6	37.6	36.0	36.6	2.8%
	Middleton	41.7	40.9	41.5	40.3	40.4	-3.1%
	Milton	38.1	38.4	43.6	41.2	43.1	13.1%
	New Durham	44.5	44.5	45.0	45.6	45.4	2.0%
	Rochester	42.3	42.6	42.0	41.5	41.7	-1.4%
	Rollinsford	40.6	38.8	39.6	38.7	41.6	2.5%
	Somersworth	36.1	34.3	34.3	35.2	36.5	1.1%
	Strafford	40.4	43.0	45.2	45.0	45.8	13.4%
	Wakefield	45.7	47.6	51.5	50.1	52.5	14.9%

Source: American Community Survey S0101

of UNH's flagship campus in Durham, but the ratios for the three cities suggest that Strafford County's profile without UNH would still be comparable to Rockingham County. Analyzing the child and old-age dependency ratios separately sheds some light on how median ages are rising despite a below-average dependent population (see Appendix B for detailed child and old-age dependency data). All three counties and New Hampshire as a whole saw their old age dependency ratio increase faster than the national rate, but both Strafford and Rockingham began with ratios at or below the national average from 2011 to 2015. The total rise in median age is equally likely to be a result of declines in the child dependency ratio. Statewide, New Hampshire has seen the ratio of children to working age population decrease at more than twice the national rate, and both Carroll and Rockingham counties are decreasing even faster.

This alters the age conversation somewhat for local populations, particularly in Strafford County. If this trend continues or intensifies over the long term, lower birthrates could eventually lead to a smaller working age population and the stressors related to a larger elderly population could intensify. However, the balance in the overall dependency ratio means that this is unlikely to occur in the short term, particularly considering that New Hampshire's total dependency is actually below the national figure.

Revenue sources are important when considering the impact of dependent populations. Since New Hampshire relies on property taxes for revenues rather than a combination with income taxes, property owners will continue to contribute to public revenues even after they enter a dependent class, rather than disappearing from the income tax rolls after retirement.

Table 23: Total Age Dependency Ratios, 2011-2015

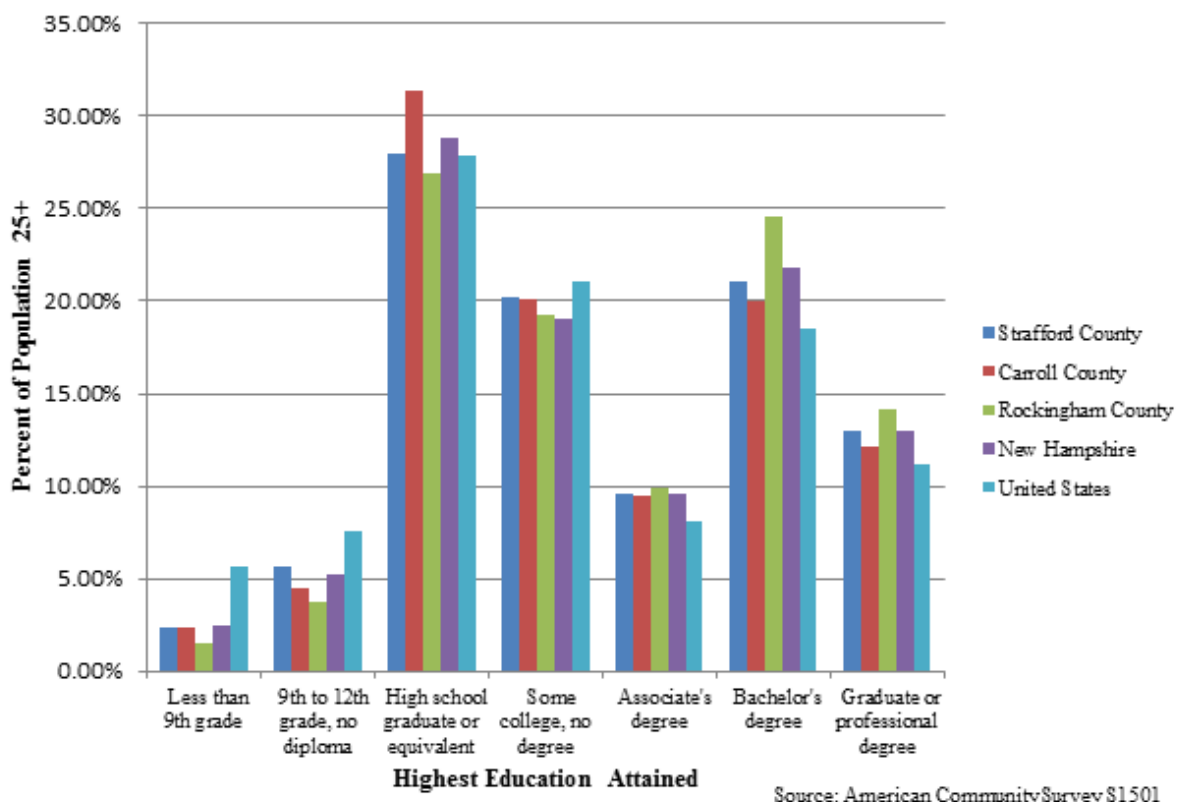
Place	Total Age Dependency Ratio					Percent Change (2011-2015)	
	2011	2012	2013	2014	2015		
United States	58.9	59.0	59.1	59.3	59.7	1.4%	
New Hampshire	54.8	54.8	55.0	55.2	55.7	1.6%	
County	Strafford	48.3	48.2	48.5	48.8	48.9	1.2%
	Carroll	64.2	64.8	65.9	66.7	68.2	6.2%
	Rockingham	55.1	55.0	55.2	55.2	55.5	0.7%
Municipality	Barrington	52.6	51.6	52.8	49.1	50.2	-4.6%
	Brookfield	57.4	65.7	79.5	87.6	90.2	57.1%
	Dover	47.6	48.2	51.3	51.3	50.5	6.1%
	Durham	20.3	19.9	21.9	22.0	20.8	2.5%
	Farmington	52.0	54.7	51.3	48.9	50.7	-2.5%
	Lee	57.0	66.6	54.8	59.5	57.5	0.9%
	Madbury	52.2	47.5	54.9	59.2	63.4	21.5%
	Middleton	48.6	48.6	48.8	53.3	56.5	16.3%
	Milton	58.6	62.3	60.0	56.8	58.9	0.5%
	New Durham	54.2	55.0	55.5	57.3	55.2	1.8%
	Rochester	55.8	53.6	53.3	55.1	56.2	0.7%
	Rollinsford	56.0	61.0	63.7	65.0	65.4	16.8%
	Somersworth	54.8	53.3	49.9	52.2	55.9	2.0%
	Strafford	64.4	61.8	62.3	59.3	54.4	-15.5%
	Wakefield	49.4	56.0	52.3	51.6	54.4	10.1%

Source: American Community Survey S0101

Educational Attainment

As shown in Figure 4, educational attainment at all levels in Strafford County tracked closely to the New Hampshire averages, according to the 2015 ACS 5-year estimates. Compared to the national figures, all three counties analyzed had a much smaller population without a high school diploma or equivalent, while their proportion of college degree holders (associate's or higher) were higher than the nation as a whole. Rockingham County has the largest percentage of residents with an Associate's degree or higher with 49%, compared to 44% for Strafford County and 42% for Carroll County.

Figure 4: Educational Attainment for Population 25 years and Over, 2015



Workforce Training Programs

In addition to secondary and post-secondary education programs, several workforce training programs provide job skills training, apprenticeships, or certification programs to help train or re-train workers in the Strafford EDD for available jobs. According to the NH Department of Resources and Economic Development, the Strafford County Community Partnership's Workforce Development program served 195 people in 2016¹⁵. Ten people participated in on-the-job training and 45 received occupational skills training. Nearly 100 are now employed. WorkReady NH, in partnership with Great Bay Community College, graduated 207 students from its program in 2016, 70 of whom were from Strafford County¹⁶.

¹⁵ Mark Laliberte, personal communication, April 24, 2017

¹⁶ Christina Wall, personal communication, April 28, 2017



Quality of Place

Downtown Dover Source: SRPC

Introduction

As a regional planning commission, SRPC is uniquely qualified to promote, improve, and plan for quality of place at the local and regional levels. Strafford EDD consists of communities that have vibrant downtowns and quality housing options, strong economies, and natural beauty. Strong civic engagement, health resources, and recreation opportunities make the Strafford EDD an excellent place for people of all ages to work and live.



Goal

Improve the health and welfare of residents and workers in the areas of wealth generation, human health and well-being, educational attainment, recreation, social services, and the environment.

Population Trends

As of 2015, Strafford EDD had a population of approximately 130,000 residents, according to the ACS 5-year averages. Nearly 96 percent lived in Strafford County, with the remaining 4 percent being residents of Brookfield and Wakefield in Carroll County. Strafford County's population is comparatively young; only 13.3 percent are older than 65, compared to 15.2 percent statewide. Meanwhile, 37 percent of the county's population is between the ages of 15 and 39. UNH's Durham campus accounts for a large portion of this segment; a full 69.1 percent of Durham's population is in this age group. At least 30 percent of the larger populations within the cities of Dover, Rochester, and Somersworth are in this age group, which may reflect the lifestyle preferences of younger individuals and households. The comparatively low proportion of residents under 15 years of age could be due to other demographic trends. Over the long term it could lead to a smaller working-age population unless this trend is counteracted by the movement of other working-age groups into the Strafford EDD. We discussed additional implications of these demographic trends and their implications for current and future services and workforce makeup in the Workforce and Entrepreneurial Development chapter.

Table 24: Population Age Breakdown, 2015

Place	Total Population	Under 15 Years	15 to 39 Years	40 to 64 Years	65 Years and Over	
United States	316,515,021	19.3%	33.7%	32.9%	14.0%	
New Hampshire	1,324,201	16.6%	30.6%	37.4%	15.2%	
County	Strafford	125,273	16.3%	37.0%	33.4%	13.3%
	Carroll	47,513	13.5%	22.6%	40.4%	23.5%
	Rockingham	299,006	16.9%	28.3%	40.4%	14.5%
Municipality	Barrington	8,749	19.4%	24.0%	45.0%	11.3%
	Brookfield	837	22.0%	20.4%	36.1%	21.6%
	Dover	30,534	16.3%	38.4%	31.3%	14.0%
	Durham	15,669	8.3%	69.1%	15.4%	7.2%
	Farmington	6,825	18.5%	32.1%	37.8%	11.7%
	Lee	4,363	17.1%	28.9%	40.7%	13.4%
	Madbury	1,858	22.8%	31.9%	33.8%	11.4%
	Middleton	1,723	21.0%	27.8%	39.3%	11.9%
	Milton	4,606	19.0%	27.8%	38.9%	14.3%
	New Durham	2,653	18.1%	23.9%	44.9%	12.8%
	Rochester	29,954	15.6%	31.8%	35.8%	16.7%
	Rollinsford	2,525	22.7%	26.2%	37.1%	14.0%
	Somersworth	11,778	18.9%	36.3%	32.3%	12.6%
	Strafford	4,036	18.6%	23.1%	45.6%	12.7%
	Wakefield	5,007	11.3%	24.2%	42.4%	22.2%

Source: American Community Survey S0101

Wealth Generation

Median household incomes in Strafford County were approximately \$6,000 below the statewide figure in 2015 and declined by approximately 2.5 percent from 2011–2015, according to ACS 5-year estimates after adjusting for inflation. This trend is concerning, particularly considering 2011 was early in the recovery from the Great Recession. As we discussed in the Economic Growth chapter, however, median income data is insufficient to get a full picture of the economic health of a region. As with many of the indicators in this plan, further work is necessary to get a complete picture of gains and losses during the recession and recovery.

Table 25: Median Household Income, 2011-2015

Community	Households (2015)	2011 (2015 Dollars)	2012 (2015 Dollars)	2013 (2015 Dollars)	2014 (2015 Dollars)	2015	Percent Growth (2011-2015)
New Hampshire	520,251	\$68,148	\$67,023	\$66,054	\$66,062	\$66,779	-2.01%
Strafford County	47,149	\$62,265	\$60,430	\$59,856	\$59,649	\$60,711	-2.50%
Carroll County	21,206	\$53,279	\$52,509	\$51,758	\$52,453	\$53,306	0.05%
Rockingham County	118,095	\$81,644	\$80,458	\$78,704	\$79,459	\$81,198	-0.55%
Barrington	3,356	\$84,247	\$84,355	\$82,978	\$82,526	\$81,326	-3.47%
Brookfield	305	\$70,478	\$69,789	\$65,504	\$65,388	\$65,536	-7.01%
Dover	12,668	\$60,620	\$57,696	\$58,395	\$60,107	\$61,008	0.64%
Durham	3,116	\$73,068	\$74,508	\$72,499	\$67,656	\$71,190	-2.57%
Farmington	2,624	\$57,190	\$57,243	\$52,283	\$50,690	\$50,821	-11.14%
Lee	1,776	\$77,405	\$77,293	\$95,167	\$96,194	\$95,000	22.73%
Madbury	626	\$86,769	\$85,166	\$90,376	\$98,082	\$98,125	13.09%
Middleton	569	\$55,475	\$57,503	\$59,451	\$61,320	\$68,385	23.27%
Milton	1,676	\$62,134	\$61,389	\$61,782	\$60,101	\$60,000	-3.43%
New Durham	970	\$86,641	\$83,113	\$79,848	\$78,673	\$82,000	-5.36%
Rochester	12,760	\$55,366	\$50,961	\$49,862	\$48,169	\$46,979	-15.15%
Rollinsford	1,010	\$69,160	\$65,660	\$63,959	\$63,342	\$62,130	-10.17%
Somersworth	4,589	\$54,116	\$55,078	\$54,156	\$53,155	\$54,868	1.39%
Strafford	1,409	\$88,417	\$88,451	\$95,271	\$97,445	\$95,707	8.25%
Wakefield	2,250	\$44,851	\$46,788	\$44,190	\$44,846	\$47,568	6.06%

Source: American Community Survey S1901



Woodbury Mill, Dover Source: SRPC

Housing

SRPC is responsible for maintaining both a regional master plan¹⁷ and a regional housing needs assessment¹⁸. Local Solutions for the Strafford Region, SRPC's master plan update in 2015, found that from 2000 to 2010, household growth was primarily driven by increases in one- and two-person households, offset by declines in younger households. The plan anticipates further growth in single-parent households; increased demand for rental units, including among older populations; demand for assisted living facilities to support an aging population; and a preference for downtown residences over suburban single-family homes, particularly among younger households. SRPC supplemented these findings in 2015 with the Fair Housing and Equity Assessment, which analyzed the region's fair housing infrastructure and the need to encourage fair housing practices in the region¹⁹.

17 http://strafford.org/cmsAdmin/uploads/localsolutionsforthestraffordregion_1-30-15_final.pdf

18 http://strafford.org/cmsAdmin/uploads/hna-full-draft-bcmedit13jan2015_finalforupload.pdf

19 <http://strafford.org/cmsAdmin/uploads/fhea.pdf>



Economic Resilience

King Tide photo Source: Ron Sher/PREP

Introduction

The federal Economic Development Administration defines economic resilience as the ability of a local or regional economy to prevent shocks and disruptions to its economic base, withstand these shocks and limit their impact when they do occur, and recover quickly when impacts are unavoidable²⁰. Resilience is a vital component of SRPC's core functions as a regional planning commission and as the administrators of the Strafford EDD and Strafford MPO; resilient themes are discussed across all of our planning functions. The Metropolitan Transportation Plan focuses on resilience as a major theme for evaluating and maintaining transportation infrastructure and investing in alternative transportation modes²¹. *Local Solutions for the Strafford Region* serves as the region's master plan and considers the intersection of transportation, environmental, and land use planning, including scenario planning that examines the resilience of proposed development patterns²². The CEDS builds upon these efforts by integrating resilient themes throughout the document.

²⁰ <https://www.eda.gov/ceds/content/economic-resilience.htm>

²¹ http://strafford.org/cmsAdmin/uploads/transdocs/15-40mtp_finalcomplete.pdf

²² http://strafford.org/cmsAdmin/uploads/localsolutionsforthestraffordregion_1-30-15_final.pdf

- **Economic Growth:** Unemployment in the Strafford region and in New Hampshire is among the lowest in the country. Statewide figures for underemployment, while higher than those for unemployment, also compare favorably to the rest of the country. However, our analysis of median household income shows a concerning lack of growth after adjusting for inflation, and is supported by a percentage of low-income households that has remained largely unchanged over the past five years. Additional strategies to support and diversify local businesses and to adapt to changing economic and environmental conditions would help the region become more resilient²³.
- **Regional Collaboration:** Our research suggests that the Strafford EDD is integrated into a larger regional economy, in terms of both employing workers from other regions and local workers finding jobs in other communities. The distribution of jobs throughout New Hampshire and neighboring states make strategies for improved mobility and communication particularly important for our residents.
- **Infrastructure:** Transportation infrastructure and services are an important component of mobility. Our research shows three consecutive years of increases in total fixed-route bus ridership. The small amount of historic inter-city bus and rail data has made similar conclusions difficult for those services. Work is ongoing to improve access to this data and to develop a reliable metric for evaluating access to demand response transportation services.
- **Resources and Environment:** SRPC works with many member communities to keep their local hazard mitigation plans up to date, thereby encouraging community resilience in response to environmental challenges. Tourism is a major industry in New Hampshire, and efforts to maintain environmental resources can have strong economic implications for a region. Additional research to compare the Strafford EDD's tourist economy to surrounding regions' could help us anticipate disruptions and plan more comprehensive approaches to the link between environmental and economic resilience.
- **Workforce and Entrepreneurial Development:** The Strafford EDD has a young and well-educated workforce compared to other parts of New Hampshire and the United States and benefits from a variety of higher education and workforce training resources including the University of New Hampshire flagship campus, Great Bay Community College, and the Community Action Partnership of Strafford County. These resources are essential to helping our workforce respond quickly to the changing demands of employers and changes in the regional economy.
- **Quality of Place:** The resources and institutions that support the other categories have contributed to communities with quality housing options, strong economies, and natural beauty. The strong civic engagement, health resources, and recreation available in the Strafford EDD will continue to support a high quality of place under a variety of circumstances.

The analyses in these sections focus primarily on steady-state resilience—long-term development strategies that help to mitigate or withstand economic disruptions²⁴. While SRPC recognizes the importance of responsive initiatives— protocols for limiting negative impacts and speeding recovery from disruptions—as important aspects of a resiliency strategy, we feel that such a strategy would be best developed as part of a full CEDS update and visioning process.

²³ Roseland, Mark. *Toward Sustainable Communities*. (New Society Publishers, 2012). P 11-12.

²⁴ <https://www.eda.gov/ceds/content/economic-resilience.htm>



Priority Project List

Somersworth downtown after reconstruction project Source: SRPC

Introduction

The priority project list is derived from the project solicitation process dating back to the 2011-2016 Comprehensive Economic Development Strategy. Strafford EDD staff meet with regional municipalities to solicit projects promoting economic development and the complete list is maintained and update annually.

Current Projects

Ongoing=Work is currently being done towards the project

On Hold=No work towards the project is being done, but the project is still of interest

Table 26: Current Priority Projects

Estimated Completion	Status	Project	Proponent	Level of Action	Potential Partners	Most Recent Status Updates
2017-2018	Ongoing	Dover Downtown Infill Development of City Owned Parking Lots 2011-011	City of Dover	Local, Regional	Private Developers	1st Street project phase II is underway. 3rd Street project preparing to submit to Planning Board. Additional parking lots could be made available if an opportunity arose.
2017-2018	Ongoing	The City of Rochester Sewer and Water Extension of Salmon Falls Road	City of Rochester	Local, Regional	DeMoulas & Stone Wall Kitchen	The City of Rochester received a \$1.9 million grant from the EDA for this project. The year-long design of the project is complete. Construction estimated at 12-18 months and currently underway.
2017-2018	Ongoing	Transportation Master Plan	City of Rochester	Local	N/A	Study and plan for downtown traffic and parking improvements has been scaled up to a full Transportation Master Plan. Previous project included focus on traffic circulation, integration of transit and bike/pedestrian infrastructure, and improvements to parking lot pavement, lighting, and signage. Updated project content will be the same but expanded to entire city.

Table 26: Current Priority Projects

Estimated Completion	Status	Project	Proponent	Level of Action	Potential Partners	Most Recent Status Updates
2017-2018	Ongoing	Downtown Wayfinding and Signage Program	City of Rochester	Local	N/A	Develop a complete wayfinding program from Spaulding Turnpike exits and monument signs at the Rochester Common, City Hall Complex, and Community Center. Project funded by City at \$100,000, of which 50% is expected to be used for design work, with remaining funds to be used to begin sign installation. Expected to require additional funding to finish installation. RFP process completed and proposals under review.
2017-2018	On Hold	Somersworth Washington Street Bridge Feasibility Study 2011-004	City of Somersworth	Local, Regional	N/A	Project is still of interest. Currently lacking funding.
2017-2018	Ongoing	Breton Cleaners Site Cleanup and Reuse Study 2011-008	City of Somersworth	Local	City of Somersworth	The City is moving forward with cleanup operations and has applied for funding through NH DES and US EPA.
2017-2018	WOngoing	Passenger Rail Study	City of Somersworth	Local, Regional, State	N/A	The City of Somersworth has formed a committee to study the possibility of re-establishing passenger rail in Somersworth. In order to properly move forward a feasibility study needs to take place.

Table 26: Current Priority Projects

Estimated Completion	Status	Project	Proponent	Level of Action	Potential Partners	Most Recent Status Updates
2017-2018	Ongoing	Solar Power Generation at St. Laurent Park	City of Somersworth	Local, Regional	N/A	The City went out with an RFP and is now moving forward with plans to install a 4,000 panel solar array. The City is currently finalizing the development project and expects permitting to be completed during summer 2017, with construction to begin in the fall.
2017-2018	Ongoing	Hilltop School Reuse Project	City of Somersworth	Local	N/A	Phase I and II Brownfields assessments conducted as part of Strafford EDD's Brownfield Assessment Grant from US EPA. City of Somersworth is exploring opportunities for reuse in the form of private residential development.
2017-2018	Ongoing	Downtown Tax Increment Financing Study	City of Somersworth	Local	EDA	Study completed, boundaries of downtown identified, and TIF currently being drafted. TIF expected to be in place by summer 2017.
2017-2018	Ongoing	Bus Upgrades	COAST	Local, Regional	N/A	State of Good Repair funding to upgrade bus radiator/cooling systems to a new electronic system that would improve fuel economy and reduce emissions
2017-2018	Ongoing	Bus Stop Upgrades	COAST	Local, Regional	N/A	Sustainability factor is that proper stop construction at key locations will reduce dwell time for the bus and idle emissions allowing traffic to pass by the bus instead of holding up a line of cars. This is shovel ready, but funding not yet secured. Project locations are already identified.

Table 26: Current Priority Projects

Estimated Completion	Status	Project	Proponent	Level of Action	Potential Partners	Most Recent Status Updates
2017-2018	Ongoing	Inter-City COAST Service/ Transportation Center	COAST	Local, Regional	N/A	Add a transportation center to NHDOT Park N' Ride at Exit 13. Expand COAST Routes to Gonic, Exit 12, stops at new commercial and industrial development. Exits 13, 14, and granite state business Park would be beneficial as well.
2017-2018	Ongoing	Regional Revolving Loan Fund Strafford Economic Development Corporation 2011-010	SEDC	Regional, State	EDA, NH Business Finance Authority, NH Community Loan Fund, Community Development Block Grant, City of Dover, City of Rochester, and Great Falls Development Corporation	Multiple funding sources have been identified. SEDC is preparing applications for funding.
2017-2018	Ongoing	Solar wall installation for a building with high air flow requirements	Town of Durham	Local	N/A	Multiple solar facilities installed
2017-2018	Ongoing	Pedestrian and bicycle infrastructure projects	Town of Durham	Local	N/A	Prior project was for ongoing facility improvements. Town is revisiting scope of project to target pedestrian-oriented engineered solutions. Currently determining whether a large-scale plan or study or targeted improvements would be more effective.

Table 26: Current Priority Projects

Estimated Completion	Status	Project	Proponent	Level of Action	Potential Partners	Most Recent Status Updates
2017-2018	On Hold	Town of Lee Feasibility Study for Anaerobic Digester-based Town Energy Park 2011-017	Town of Lee	Local, Regional	N/A	No changes
2017-2018	On Hold	Town of Lee Engineering and Feasibility Study for Town Center Combined District Heating Co-Generation, and Next-Generation Biomass Pelletizing Facility 2011-019	Town of Lee	Local	N/A	No changes
2017-2018	Ongoing	Feasibility and Design Study of Livestock Processing Facility 2011-020	Town of Lee	Local	N/A	No changes
2017-2018	Ongoing	Feasibility Study for the Extension of Water and Sewer Service in Milton 2011-006	Town of Milton	Local	N/A	Intent of exploring sewer extension to the Exit 17 area as part of the Design Workshop held on October 4, 2013. Town is seeking preliminary funding.

Table 26: Current Priority Projects

Estimated Completion	Status	Project	Proponent	Level of Action	Potential Partners	Most Recent Status Updates
2017-2018	Ongoing	Center for Agricultural and Natural Resource-Based Entrepreneurship (CANRE) 2011-001	UNH	Regional, State	Green Launching Pad, Small Business Development Center, the Stonyfield/UNH Entrepreneur Boot Camp, and the Manufacturing Extension Center	Center did not receive necessary funding, but UNH has increased programming to meet similar goals, including: Agriculture and Natural Resource Business Institute program, technical support to Strafford County growers, Trails and Downtowns program, and hiring a resource economics specialist.
2017-2018	Ongoing	Regional Revolving Loan Fund Wentworth Economic Development Corporation 2011-015	WEDCO	Regional, State	EDA, NH Business Development Finance Authority, NH Community Development Finance Authority's Community Development Block Grant program & Job Retention Fund, USDA's Intermediary Relending Program and Strafford Economic Development Corp	Provided funding to several business which resulted in job creation/retention
2017-2018	Ongoing	Rochester Riverwalk	City of Rochester	Local	N/A	Committee in place and meeting regularly. Currently in planning and visioning stages, but some branding and sign design under way in conjunction with the Downtown Wayfinding and Signage project.

Table 26: Current Priority Projects

Estimated Completion	Status	Project	Proponent	Level of Action	Potential Partners	Most Recent Status Updates
2017-2018	Ongoing	Planning Funding for Enterprise Park, Phase II Dover 2011-029	City of Dover	Local, Regional		Website promoting development opportunities. The Business Park is almost full and funding has been advocated for a second industrial park. The current business park includes more than 15 firms with 450 + employees.
2019-2021	On Hold	Free Public Wi-Fi	City of Rochester	Local	N/A	City still interested in expanding availability of public wi-fi in government buildings and parks, but the project is of lower priority than originally expected.
2019-2021	Ongoing	Granite Ridge Development District Utilities 2011-025	City of Rochester	Local, Regional	N/A	Phase I completed. Phase II work is under way. Planning for a future Phase III is underway, including evaluations of a possible future 1 million gallon water tower to support additional development.
2019-2021	Ongoing	Milton Rail Siding 2011-022	Town of Milton	Local, Regional, State	N/A	This project is still of interest. Additional rail volume is needed to make the project feasible.
2022+	On Hold	Business Incubator 2011-026	City of Rochester	Local, Regional	Richard W. Creteau Technology Center, Granite State College, Great Bay Community College, SCORE, and the Small Business Development Center	Feasibility study completed for 55 North Main Street Incubator, showed the demand for an incubator in Rochester, but also showed that project was not likely to be feasible at the planned location. Rochester is still interested in pursuing a business incubator, but needs to consider how to change the project focus to be more viable.

Table 26: Current Priority Projects

Estimated Completion	Status	Project	Proponent	Level of Action	Potential Partners	Most Recent Status Updates
2022+	Ongoing	Technology Park Durham Depot lot/ train station 2011-030	Town of Durham	Local, Regional	High Tech Businesses	The zoning in the town has been updated to encourage mixed use development in the downtown. Durham has worked with large developers to foster redevelopment in the downtown. Redevelopment would be in line with the eventual goal of downtown Durham being a high tech office park encompassed within mixed use buildings.
2022+	Ongoing	Library Community Center Lee 2011-032	Town of Lee	Local	N/A	Ongoing

New Projects

Ongoing=Work is currently being done towards the project

Proposed=Work towards the completion of the project has not yet begun

Table 27: New Projects

Estimated Completion	Status	Project	Proponent	Level of Action	Potential Partners	Most Recent Status Updates
2017-2018	Proposed	Pedestrian Plan Action Items	City of Dover	Local		Dover Pedestrian Plan includes recommendations for infrastructure and complete street improvements or reconfigurations to improve pedestrian safety, walkability, bicycle infrastructure, and downtown aesthetics.
2017-2018	Proposed	Economic Analysis for Rezoning	City of Dover	Local		The Dover City Council has expressed an interest in rezoning residentially-zoned property for commercial or light industrial use. This study would identify land that would maximize economic benefits of rezoning and limit the negative impact on existing residential properties.
2017-2018	Proposed	Salmon Falls Collaborative Implementation Support	SRPC	Regional, State	Salmon Falls Collaborative partners	SRPC has been identified as a stakeholder and resource for implementing several action items, including research into local codes and ordinances and developing model ordinances to improve stormwater and other environmental practices.

Table 27: New Projects

Estimated Completion	Status	Project	Proponent	Level of Action	Potential Partners	Most Recent Status Updates
2017-2018	Proposed	Explore Moose Mountains Technical Assistance	WEDCO	Regional	Explore Moose Mountains Region, Moose Mountain Regional Greenway	SRPC has been providing technical assistance and organizational guidance to EMMR to support launch of new website and regional marketing campaign. Continued assistance to include website and content development and additional technical assistance as needed.
2017-2018	Proposed	Brookfield Broadband Expansion Feasibility Study	Town of Brookfield	Local	SRPC, GRANIT, UNH Cooperative Extension, Others	The Town of Brookfield has expressed an interest in improved broadband access and speeds to support in-home businesses. Additional work needed to determine scope of a study or plan.
2017-2018	Proposed	Tanglewood Recreation Area and Public Trails Feasibility Study	Town of Middleton	Local		Tanglewood is an approximately 70-acre undeveloped subdivision that is now predominantly town-owned. Site has access and dirt circulation roads, but utilities and homes were not installed. Local interest in conserving the land, and public park and recreation trails would likely be more feasible than nearby sunrise lake due to predominant public ownership.
2017-2018	Proposed	Pierce Road/ Route 125 Industrial Park Expansion	Town of Barrington	Local	Private Businesses	Identified site for future industrial park. TIF possible to support new infrastructure and attract an anchor business.

Table 27: New Projects

Estimated Completion	Status	Project	Proponent	Level of Action	Potential Partners	Most Recent Status Updates
2017-2018	Ongoing	Redemption Road Business Park Expansion	Town of Barrington	Local	Private Businesses	Redemption Road business park anchored by Turbocam, could have space for 5-6 additional firms. Minimal work would be needed as most infrastructure already installed.
2017-2018	Proposed	Town Center Improvements	Town of Barrington	Local		Rtes 9 and 125 form the de facto town center, with schools and other civic buildings in close proximity. Improvements to sidewalks, streetscapes, and other quality of place improvements would improve pedestrian and bicycle safety, public access to civic buildings, and anticipated commercial development.
2017-2018	Proposed	Swain Lake Area Recreation and Alternative Transportation Improvements	Town of Barrington	Local		The causeway on Swain Lake is a popular fishing destination, which creates conflict within a narrow right-of-way. Targeted pedestrian and bicycle infrastructure and improved public lake access would improve safety and quality of place and alleviate congestion.
2017-2018	Proposed	South drive TransitWay	UNH	Local		New transportation corridor envisioned in 2004 Campus Master Plan and reaffirmed in 2012. Expected to reduce congestion on Main Street, improve efficiency and transportation access around campus, and support future development with utility upgrades.

Table 27: New Projects

Estimated Completion	Status	Project	Proponent	Level of Action	Potential Partners	Most Recent Status Updates
2017-2018	Proposed	Downtown and Riverfront Connectivity	Town of Rollinsford	Local, Regional	South Berwick, SRPC, Southern Maine Planning and Development Commission	Rollinsford is interested in exploring downtown connections, including planning for walkability, development, connections to existing programming and trails, and connection to South Berwick.
2017-2018	Proposed	Madbury Public Library Capital Campaign	Town of Madbury	Local		The Design Development Phase of the project is complete and the preliminary cost estimate is \$1.3M. The Steering Committee continues to work with the architects to refine the plan and reduce the cost.
2017-2018	Proposed	Trail Development and Mapping	Town of Strafford	Local		The Town of Strafford would like to explore new opportunities for trail development and utilization
2019-2021	Proposed	North Fire Station	City of Rochester	Local		City wishes to locate a new fire station in the northern part of the city to improve response times and support current and expected future development along route 11 and other areas. City currently researching possible locations.
2019-2021	Proposed	North Main Street, Chestnut Hill Road Connector	City of Rochester	Local		Construct new bridge and new connector road to handle vehicle, pedestrian, and bicycle traffic over the Cocheco River. This would alleviate through traffic in the downtown area, supporting other efforts to improve safety and walkability and improving the quality of place. Expected to provide additional connection across the river to support growing commercial development along Route 11.

Table 27: New Projects

Estimated Completion	Status	Project	Proponent	Level of Action	Potential Partners	Most Recent Status Updates
2019-2021	Ongoing	Downtown Parking Infrastructure	City of Rochester	Local		The City recently acquired land near City Hall for use as public parking to support City Hall, the Rochester Opera House, and other downtown institutions. The parcel will be used for surface parking while options for structured parking are considered.
2019-2021	Proposed	Ridge Road Highway Garage	Town of Middleton	Local		New highway garage needed
2019-2021	Ongoing	Old Town Hall Restoration	Town of Middleton	Local	Private Donors	Historic preservation of Old Town Hall is underway. Renovations are approximately 75% complete. Estimating approximately \$375,000 needed to complete project.
2019-2021	Proposed	New Fire Station	Town of Middleton	Local		Town is exploring options to renovate and expand existing highway garage to add fire station capabilities.
2019-2021	Proposed	Downtown Durham Structured Parking	Town of Durham	Local	UNH, private businesses	Prior project for parking infrastructure was downscaled and completed with on-street and surface parking improvements. Durham now has opportunity to revisit more intense structured parking. Studies are currently underway to identify possible funding sources, locations, partners, and parking buildout.
2019-2021	Proposed	Route 108 Water/ Sewer Extension	Town of Durham	Local	Private Businesses	Extend water and sewer service to the Stone Quarry area along Route 108 to support future development.

Table 27: New Projects

Estimated Completion	Status	Project	Proponent	Level of Action	Potential Partners	Most Recent Status Updates
2019-2021	Proposed	Pan-Am/ Amtrak Downeaster Corridor Enhancements	UNH	Local, Regional, State	SRPC, municipalities with Downeaster access, transit organizations	UNH would like to advocate for additional Pan-Am/ Amtrak Downeaster corridor enhancements, including crossing improvements, bridge replacements, and siding development that would benefit both freight and passenger rail. Partners, funding, and scope of project need further development at this time.
2019-2021	Proposed	Somersworth Plaza Redevelopment	City of Somersworth	Local	Plan NH, SEDC, local property owners	The Somersworth Plaza is a classic “strip mall” property built in 1965 with the building set nearly 225 feet from the main road that is inconsistent with other urban design downtown. The City hopes to renovate the property with possible additional buildings on the street frontage.
2019-2021	Proposed	Somersworth Riverwalk	City of Somersworth	Local, Regional	Town of Berwick, Chinburg Builders, Aclara	The City owns approximately 10 acres of riverfront land off of Buffamsville Road that is currently called the "Riverwalk" We propose to obtain easement from property owners north of the parcel, including Chinburg Builders and Aclara all the way up to Canal Street for Rivwealk expansion. The Riverwalk will then use City sidewalk to traverse Market Street in a northerly direction to the Bridge and cross the River to Berwick to meet up with some proposed recreational trails on their side of the River.

Table 27: New Projects

Estimated Completion	Status	Project	Proponent	Level of Action	Potential Partners	Most Recent Status Updates
2019-2021	Proposed	10 Wallace Street Building Remediation	City of Rochester	Local	EPA, NHDES	The City is exploring opportunities to remediate contamination at the former Advanced Recycling property to allow for redevelopment. The City is currently working to identify and obtain sources of external funding.
2022+	Proposed	Route 108 Complete Streets	City of Somersworth	Local, Regional, State	City of Dover, City of Rochester, DOT, COAST	DOT 10 Year Plan project to complete an upgrade of Route 108 from Dover to Rochester to include sidewalk and bike infrastructure, drainage, landscaping and street trees.

Completed Projects

Completed=Work towards the project has been finished

Suspended=No work towards the project is being done and the project will not move forward

Table 28: Completed Projects

Status	Project	Proponent	Level of Action	Potential Partners	Most Recent Status Updates
Completed	Downtown Dover Public Parking Garage 2011-005	City of Dover	Local	N/A	Parking garage is completed and operational
Completed	Study Phase II Granite State Business Park Rochester 2011-016	City of Rochester	Local, Regional	Albany Engineered Composites, Safran Aerospace Engineering	Grand Opening of Granite State Business Park expansion - Safran/Albany USA, 345,000 square feet of building, 100 acres, \$9 million in infrastructure. \$150 AA private investment, 500 new jobs in aerospace
Completed	High Street Reconstruction Somersworth 2011-007	City of Somersworth	Local, Regional	N/A	Project was completed in 2014. Funding for phase II received as part of recent TAP round.
Suspended	Idea Greenhouse: Business Incubator/ Proof of Concept Center 2011-002	Idea Greenhouse	Local, Regional, State	N/A	Idea Greenhouse is no longer in business
Completed	Economic Development District Strafford Regional Planning Commission	SRPC	Regional, State	EDA	Strafford Regional Planning Commission was granted EDD status in 2015

Table 28: Completed Projects

Status	Project	Proponent	Level of Action	Potential Partners	Most Recent Status Updates
Completed	Downtown Durham Structured Parking Facility	Town of Durham	Local, Regional	N/A	Revamping of the parking strategy for downtown parking. Meters are being installed currently and it is an ongoing process. The town also has added 45 permit parking spots to support downtown businesses.
Completed	The Town of Farmington Study of Portions of Route 11 Corridor	Town of Farmington	Local, Regional	N/A	The Town of Farmington completed a regulatory review to identify area along NH Routes 11 and 153 that could accommodate strip development
Completed	Town of Lee Feasibility Study of Development Noble Farm 2011-018	Town of Lee	Local	N/A	The Town sold Noble Farm last fall to Jim Daley. Mr. Daley has received Planning Board approval for the first of 9 commercial warehouse storage buildings.
Completed	The Cotton Valley Trail's Route 16 Crossing Phase I 2011-027	Town of Brookfield/ Town of Wakefield	Local, Regional, State	State Bureau of Trails, Seven Lakes Snowmobile Club, and the Wakefield/ Brookfield Trails Rails Action Committee (TRAC)	Phase One from Turntable Park to Rt 16 is complete. A round trip is 1.55 miles.
Completed	Cotton Valley Trail Feasibility Study	Town of Brookfield/ Town of Wakefield	Local, Regional	State Bureau of Trails, Seven Lakes Snowmobile Club, and the Wakefield/ Brookfield Trails Rails Action Committee (TRAC)	Feasibility and design study completed. Implementation phases underway.

Table 28: Completed Projects

Status	Project	Proponent	Level of Action	Potential Partners	Most Recent Status Updates
Completed	The Cotton Valley Trail's Route 16 Crossing Phase II 2011-031	Town of Brookfield/ Town of Wakefield	Local, Regional, State	State Bureau of Trails, Seven Lakes Snowmobile Club, and the Wakefield/Brookfield Trails Rails Action Committee (TRAC)	Town of Wakefield indicated that all sections of the Cotton Valley Trail within Wakefield have been completed.
Completed	Ten Rod Road Rochester 2011-024	City of Rochester	Local	N/A	Entrance to industrial park needed to be relocated as part of construction project on the Spaulding Turnpike. Site access has been restored and lighting and signage redone in partial partnership with NH DOT.
Completed	Granite State Business Park Expansion	City of Rochester	Local, Regional	N/A	City has purchased additional 47 acres and is actively marketing the space. The business park now contains more than 400 acres of land that is either developable or in active use.
Complete	Frisbie Medical Office Building 2011-012	Frisbie Memorial Hospital	Local, Regional	N/A	The medical office building is complete. This location can be classified as another "campus" of Frisbie.



Action Plan and Evaluation

SRPC Planners Source: SRPC

Introduction

The CEDS Action Plan lays out a road map for all entities involved in economic development in the CEDS region so they can coordinate and share resources to achieve the greatest impact.

Structure of the CEDS Action Plan

This section provides an overview of the activities that the SRPC staff, the Strafford Economic Development District Strategy Committee, and the Strafford Economic Development District Board of Directors will undertake annually. These activities include operating the EDD, annually updating the CEDS document, and undertaking and providing technical assistance to activities and projects that will advance the economic development goals in this plan. All three entities will implement their combined economic development program by fully using their individual and combined resources, but will also seek partnerships with other public and private groups at the local, state, and federal levels.

These resources include the following:

Strategy Committee

The Strategy Committee provides advice and guidance to the Strafford EDD. It represents the private sector, public officials, community leaders, and representatives of workforce development, higher education, and labor groups. The committee provides technical input to the CEDS document and its priority project list. It unites the region and provides an opportunity for collaboration, leadership, and program development. The Strategy Committee will forge strategic alliances and communicate the region's needs and opportunities in the future.

SRPC Staff

SRPC staff supports the Strafford EDD in the following ways:

- Arranging and facilitating meetings, partnerships, and collaborative efforts.
- Developing, coordinating, and monitoring data requirements for indicators and performance measures.
- Providing information, outreach, and education activities regarding the CEDS and its action plan.
- Working with Strategy Committee members and stakeholders on specific projects and funding opportunities.
- Working with the Strategy Committee to ensure that the CEDS provides the best possible information and analysis relevant to the needs and concerns of the Strafford EDD.
- Working with the Strafford EDD Board of Directors to obtain local approval of the CEDS and support for the regional priorities outlined within it.
- Submitting the approved CEDS to the EDA and providing additional performance reports as necessary for the proper maintenance of the Strafford EDD. The performance reports discuss progress on CEDS implementation and document community, private, non-profit, and higher education involvement in the CEDS and in Strafford EDD efforts.
- Integrating CEDS policies, practices, and projects with the regional master plan, metropolitan transportation plan, and other regional planning documents to achieve the regional priorities of our communities and private, non-profit, and education sector partners.

Board of Directors

The full body of the Strafford Regional Planning Commission, a political subdivision of the state, also serves as the Strafford EDD Board of Directors. The Strafford EDD Board of Directors is responsible for approving the final CEDS based on input from SRPC staff, the Strategy Committee, and the general public.

Implementing the CEDS Goals

The CEDS goals and objectives were developed with input provided at Strategy Committee meetings. The Strategy Committee, drawing on the knowledge and experience of local economic development leaders and the SRPC and UNH Cooperative Extension staffs, provided the direction for the goals and objectives. There were six goals that addressed the areas of concern. SRPC staff is primarily responsible for tracking goal implementation; responsibility for the implementation efforts is shared by public, private, non-profit, and education sector partners in the region, the Strategy Committee, and SRPC.

An EDA short-term planning assistance grant has been the primary funding source for the preparation of this plan update and for implementation of the action plan in 2016 and 2017. The grant is supported by local matching funds from SRPC and other local partners. SRPC is grateful for the support and collaboration of these partners and looks forward to building on these relationships with each successive CEDS update. SRPC and the Strategy Committee hope that, as further improvements are made to the CEDS document and process, additional partners will make similar contributions to supporting the EDD and implementing the CEDS.

Project Development Process

In early 2017, SRPC decided to combine the CEDS project solicitation process with that of the Strafford MPO for upcoming updates to the New Hampshire Department of Transportation Ten Year Plan. This process allows SRPC staff to have a single conversation with local communities about the influence of transportation infrastructure on local economic development and to identify projects that are meaningful to both the transportation and economic goals of these municipalities. SRPC staff feels that these joint conversations help focus discussions on community priorities rather than individual funding sources. The staff also believes that future iterations of this process have the potential to improve the quality of proposed projects, which can be submitted for funding by EDA and by other federal, state, and private funding sources.

The project development process began in early January 2017 with project solicitation outreach to the Strategy Committee, municipalities, non-profits, and educational institutions. The purpose of this outreach was twofold. It provided information about the update process for both the CEDS and the NH Transportation Ten Year Plan, and it scheduled meetings with representatives of each municipality and additional stakeholder groups to discuss both the status of existing projects and local priorities for future projects. SRPC staff met with all 18 municipalities in the Strafford MPO planning area, 15 of which are also in the Strafford EDD. Meetings were also held with transit providers and local transportation agency offices as part of this process. A form was also distributed to collect community project submissions outside of the scheduled meetings.

After collecting and updating projects, SRPC staff reviewed each one to ensure that consistency with the goals and objectives outlined in the CEDS. The projects were then grouped by status and timeline for completion.

The Strategy Committee reviewed the resulting matrix of projects and decided that all submitted and updated projects should be included in the CEDS update for approval by the Strafford EDD Board of Directors. All parties to this process agreed that the joint project solicitation process was successful and future collaboration would help communities develop more competitive projects, move projects forward, and make more efficient use of their time and resources.

Table 29: Project Solicitation Meetings

Community/Organization	SRPC Relationship	Meeting Date
Barrington	Strafford MPO, Strafford EDD	2/22/2017
Brookfield	Strafford MPO, Strafford EDD	2/14/2017
Dover	Strafford MPO, Strafford EDD	2/2/2017
Durham/UNH	Strafford MPO, Strafford EDD	3/28/2017
Farmington	Strafford MPO, Strafford EDD	4/10/2017
Lee	Strafford MPO, Strafford EDD	2/6/2017
Madbury	Strafford MPO, Strafford EDD	1/27/2017
Middleton	Strafford MPO, Strafford EDD	2/15/2017
Milton	Strafford MPO, Strafford EDD	4/18/2017
New Durham	Strafford MPO, Strafford EDD	3/30/2017
Newmarket	Strafford MPO	1/24/2017
Northwood	Strafford MPO	2/1/2017
Nottingham	Strafford MPO	Submitted materials digitally in January 2017
Rochester	Strafford MPO, Strafford EDD	2/23/2017
Rollinsford	Strafford MPO, Strafford EDD	3/6/2017
Somersworth	Strafford MPO, Strafford EDD	1/19/2017
Strafford	Strafford MPO, Strafford EDD	3/9/2017
Wakefield	Strafford MPO, Strafford EDD	2/16/2017
COAST	Strafford MPO	1/4/17
Alliance for Community Transportation (ACT)	Strafford MPO	1/4/17
NHDOT District 3	Strafford MPO	2/21/17
NHDOT District 6	Strafford MPO	3/3/17

Table 30: Strafford 2016 CEDS Action Plan

Action	Implementation	Complete	In Progress	Status	Guidelines
Economic Development Planning	Apply for EDA Annual Planning Grant	✓		EDA short-term planning grant runs through 6/30/2017. SRPC staff working to extend grant to 12/31/2017; will apply for renewed funding from 1/1/2018–12/31/2018 in late 2017.	EDA Priorities and Guidance
	Design annual review planning process		✓	SRPC staff wanted to use the 2016 update to make the CEDS more data oriented. We plan to build on this experience to continually improve the update process.	
	Obtain EDD Status	✓		Economic Development District status granted in 2015.	
	Design and carry out CEDS evaluation tasks		✓	SRPC staff has learned about collaboration and organizational performance measures through work on the SHRP2 program. We plan to use this knowledge to improve our evaluation process in future updates.	
	Complete EDA semi-annual progress report	✓		First report under grant period completed and submitted.	
Research	Update 2011-2016 CEDS with most recent data	✓		Used most recent data from American Community Survey, Bureau of Labor Statistics, NHDES, and other state and regional sources.	Strafford CEDS Vision, Mission, Principles, Goals, and Objectives
	Update project profiles annually	✓		Project solicitation process included meetings with all municipalities to ensure up-to-date information on new and existing projects	
	Continue cluster analysis research		✓	NHDES employment estimates and projections used to analyze employment clusters. Additional cluster mapping tools can build on future analysis.	
	Establish and measure benchmarks		✓	A primary goal of this update was to develop consistent tools and indicators of economic performance for current and future use. The SRPC staff has learned from the SHRP2 program and plans to build on these indicators in the future.	

Table 30: Strafford 2016 CEDS Action Plan

Action	Implementation	Complete	In Progress	Status	Guidelines
Outreach	CEDS implementation kickoff meeting		✓	Meetings focused on updates and improvements to the CEDS. Efforts to expand the Strategy Committee are ongoing.	Strafford CEDS Vision, Mission, Principles, Goals, and Objectives
	Continue regional collaboration involvement in CEDS		✓	SRPC staff met with all communities in the Strafford EDD to solicit projects and hopes to carry momentum forward into implementing projects from the CEDS.	
	Present information at local economic development committees		✓	SRPC staff improved project solicitation process to include meetings with all communities and conducted additional outreach as opportunities presented themselves.	
	Present information to local champions in Economic Development		✓	Initial outreach to local chambers of commerce and other groups conducted; no presentations scheduled yet.	
Technical Assistance	Carry out annual project solicitation process	✓		Working with the Strafford MPO on project solicitation helped to broaden conversations about transportation and development linkages.	Strafford CEDS Vision, Mission, Principles
	Apply for EDA funding for projects of highest priority included within CEDS		✓	The City of Rochester received a \$1.9 million EDA grant for ongoing project to extend sewer and water along Salmon Falls Road. We expect to submit other applications over the next two cycles.	
	Assist with grants and loans from other funding sources		✓	Several CEDS priority projects received funding through an EPA Brownfield Assessment grant managed by SRPC.	
	Assist in project or services development		✓	SRPC staff will build on the success of this year's project solicitation process to play a larger role in developing and advancing projects in the region.	
	Update SRPC website with CEDS information on separate pages		✓	Approved and adopted CEDS is available at http://Strafford.org/ . Discussion of providing CEDS data and indicators in an online database requires further consideration.	
	Direct technical assistance provided to municipalities, non-profits, and businesses		✓	SRPC staff expects to provide further technical assistance to advance and complete projects submitted to the priority project list.	

Evaluation

As indicated in the introduction to this plan, SRPC staff will work with the Strategy Committee to develop additional performance measures to more effectively evaluate the implementation of the CEDS and the administration of the Strafford EDD. For the purposes of evaluating progress to date, we are basing our review on two performance measures: the number of CEDS priority projects completed, and the number of Strafford CEDS 2016 Action Plan items completed.

Since the CEDS was drafted in 2011, 13 CEDS priority projects have been completed. One additional project is considered suspended because the non-profit partner sponsoring the project is no longer in business.

Since the last CEDS update we have completed six of the 19 items in the Strafford CEDS 2016 Action Plan and work is ongoing on the remaining 13. Table 30 outlines the current status of each action item, including a description of progress made and work that remains. Several of the ongoing action items are better suited to policies or strategies for operating the Strafford EDD rather than action items to be completed. SRPC staff will reconsider these items in future iterations of the CEDS Action Plan.

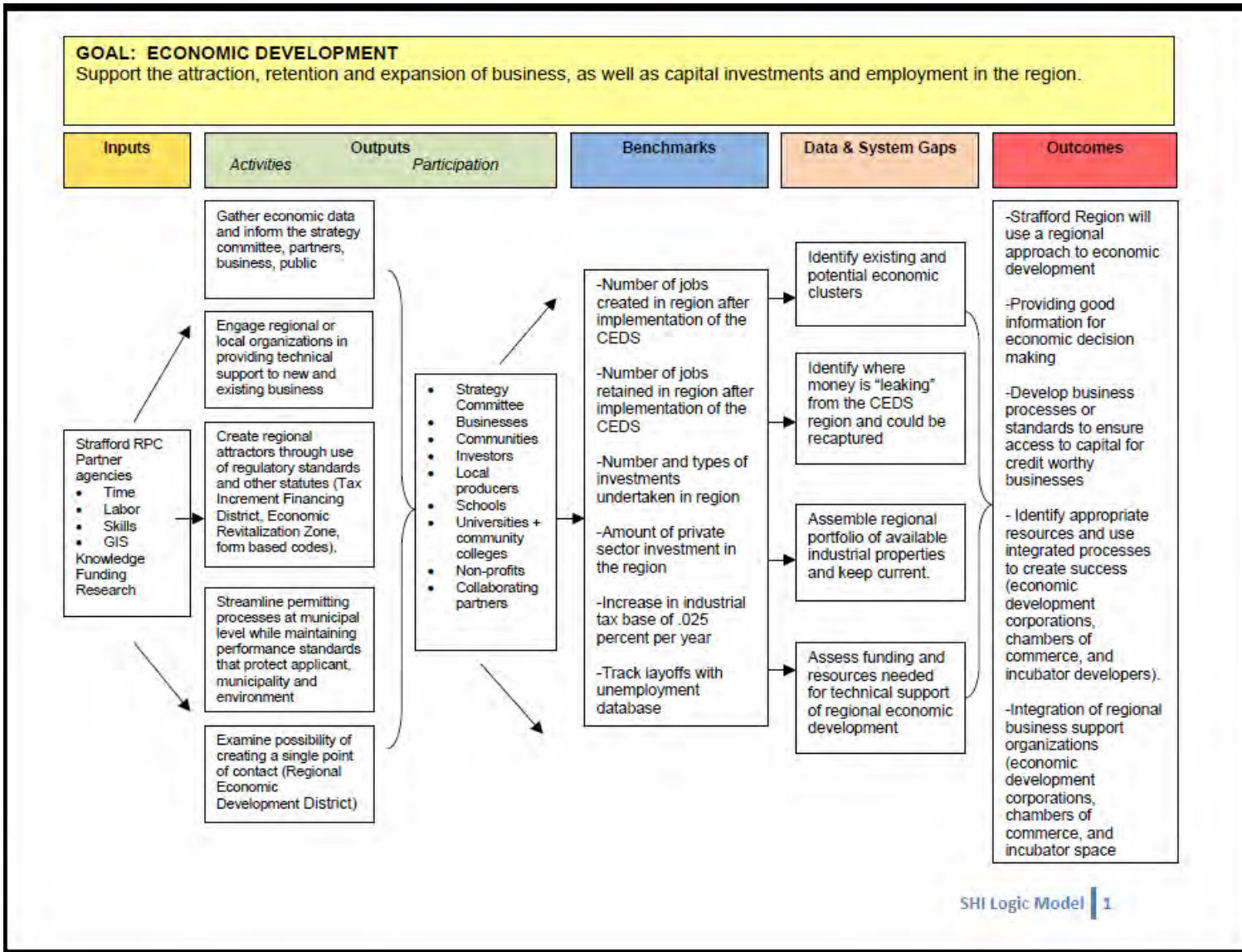
Appendix A : CEDS Logic Model and SWOT Analysis

Figure 12. Strengths, Weaknesses

SWOT ANALYSIS				
Internal			Internal	
Strengths	Infrastructure Development/ Natural Resources -A lot of water potential energy source -Good access to Portsmouth, Boston, and Portland -Attractive environment for professionals -Nor'easter Train (AMTRAK) -Location on Rt. 16 & 95 equidistance Boston & Portland, Maine & between the seacoast and resorts/ Lake Country -Good Intermodal transportation -Access to global markets through Portsmouth Harbor -Access to international airports within 90 minutes -Most of the time access to reliable energy -Ability to open rail service to Northern Strafford County if needed -Bay Bridge Construction for 10 years will make the commute north to cheaper business locations more attractive	Workforce Development -Skilled/educated workforce -UNH -Non-union state -High level of self employment -32% of population over 25 has at least 4 year degree -Excellent and diverse educational institutions in the region -Access to a variety of community colleges and UNH -Strafford County exports more workforce that it imports which gives businesses a great opportunity to hire people who wish to shorten their commute	Infrastructure Development/ Natural Resources -Little access to water, sewer, and three phase power outside of cities -No parking at UNH -Bridge squeeze point 12,000 commute from Dover to Portsmouth, Shipyard, and Boston. -Transportation in Northern parts of the area are far less developed than Southern parts	Workforce Development -High High School dropout rate -High poverty levels -Workforce housing is expensive -Education decline significant going North -Poverty increases South-North
	Sector Development -Existing NH high-technology base -Positive attitude toward economic base development -Knowledge base manufacturing base growing -Well developed tourism sector and growing; NH Children's -Museum and Woodman institute -College educated workforce with a wide variety of skill sets -Redeveloped mills in multiple locations in Strafford County offer access to affordable business ventures -Sufficient office space in Rochester	Business Development Climate -Growing research and development sector at UNH -NH economy is strong relative to the US average and most other states -No income tax -Desire of communities to attract business for tax diversification -3 Business Parks and 5 ERZ districts in Dover alone -Pro business government -Revolving loan funds -Economic Incentive Zones -High underemployment provides readily available inexpensive labor force -Strong interest in many local communities to attract business	Sector Development -Most agricultural land has been built on -Rural communities bear the burden of residential growth i.e. school/funding -Scarcity of remaining land lots of wetlands ridge below surface -Retail wages are low vs. cost of living -Former Economic strongholds, like manufacturing cannot compete in the global market	Business Development Climate -Tax structure leads to uneven distribution of business -Far end of the supply chain -Limited to start up and small businesses -Small percent of population wants development -Most businesses are south oriented towards Portsmouth, Dover -Less resources in areas north of Rochester
			Internal	
			Weaknesses	

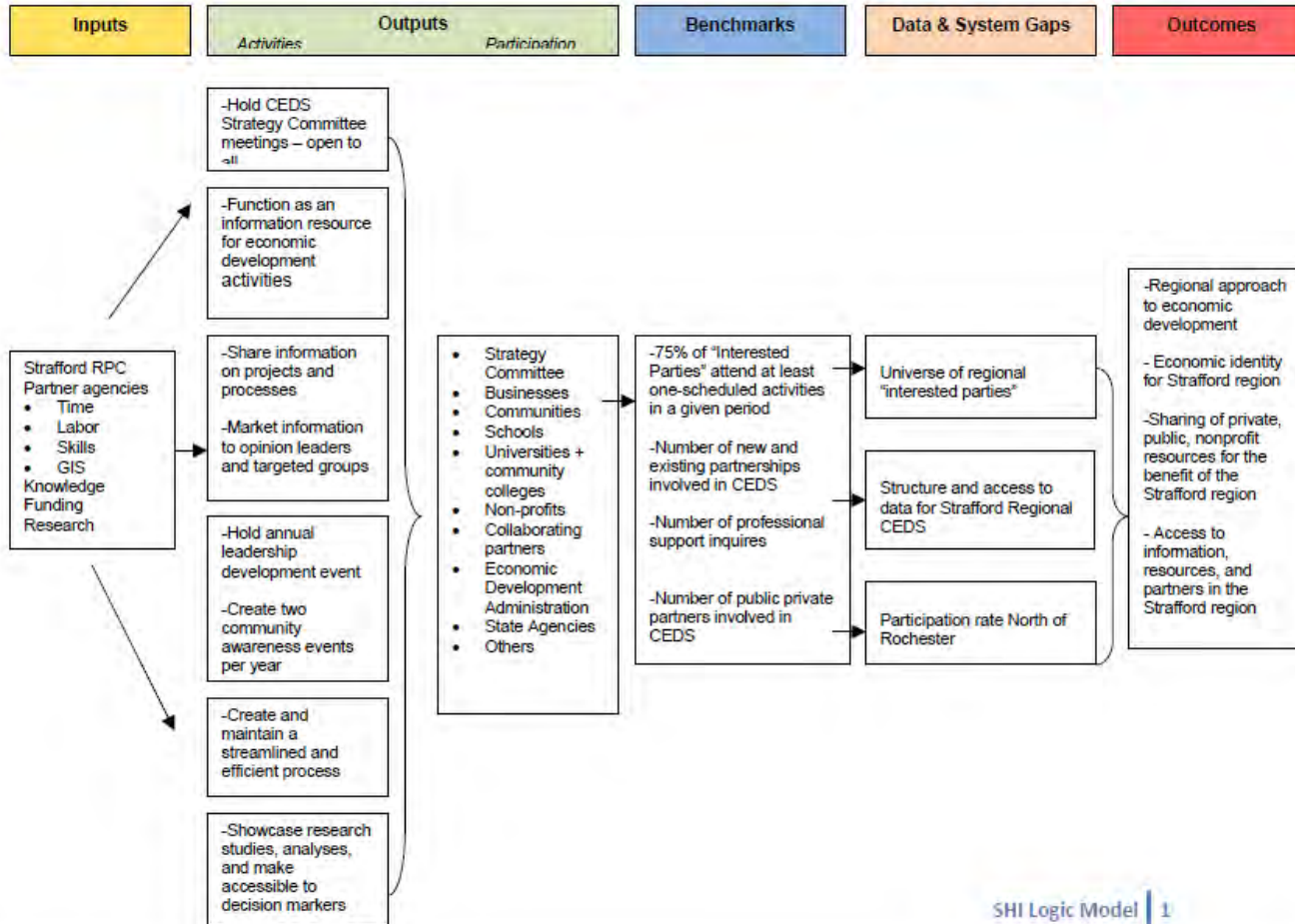
Figure 13. Opportunities and Threats

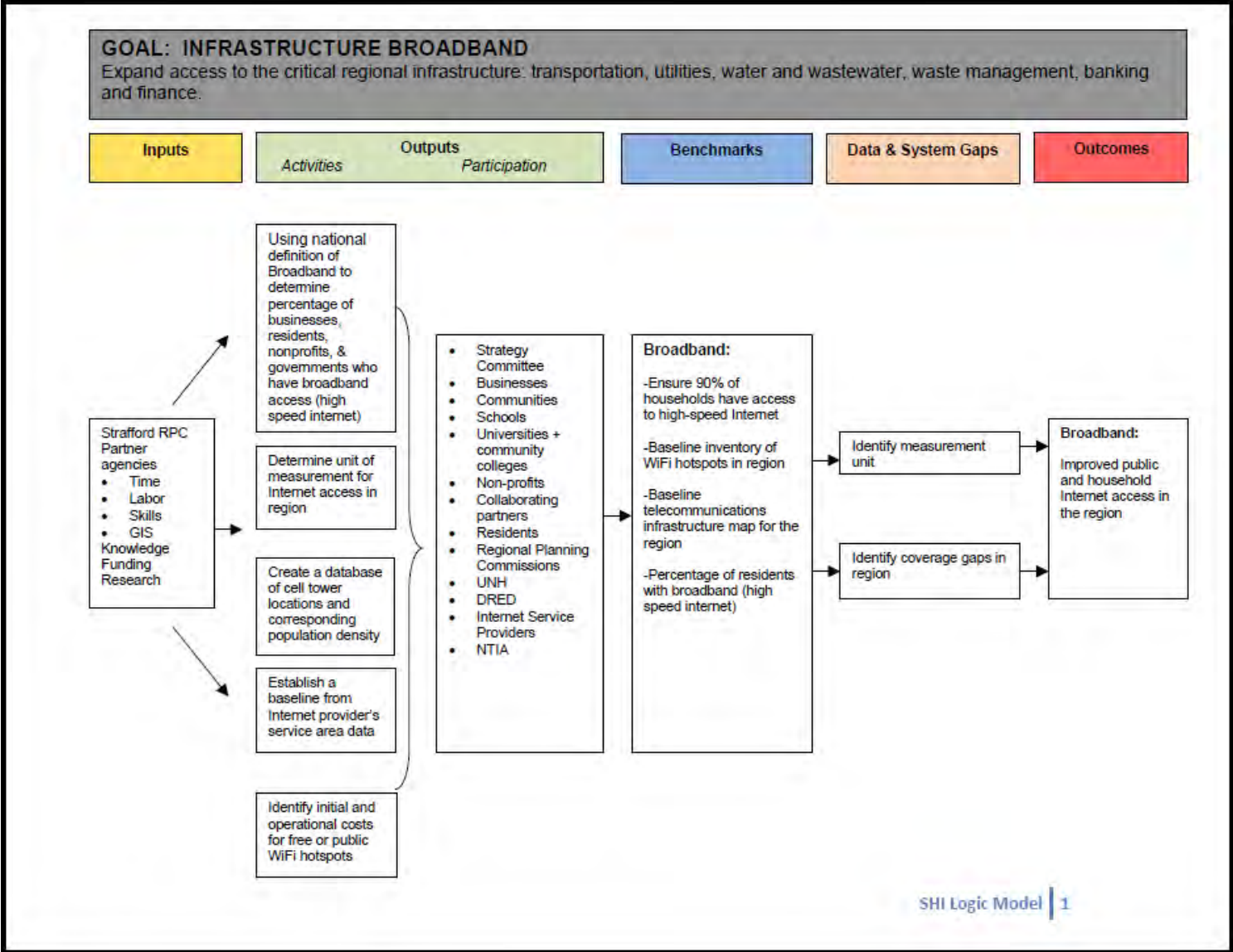
SWOT ANALYSIS				
External	<p>Infrastructure Development/ Natural Resources</p> <ul style="list-style-type: none"> -Promote recreation -Large clean water supplies -Rivers represent possibilities thru port opportunities to ocean -UNH Resource Center -Recycling Facilities 	<p>Workforce Development</p> <p>-There are no opportunities</p> <ul style="list-style-type: none"> -Quality of place and life brings educated and trained residents to the area -12,000 commuter export in Dover is available to Dover, businesses with no commute -NH job training grant program -Attractive area to live with relatively low crime rates 	<p>Infrastructure Development/ Natural Resources</p> <ul style="list-style-type: none"> -Deficits and fiscal challenges within the communities and the state government will most likely put a drag on economic recovery -A slow growth period in NH and the nation is likely through 2012 -Regional highways, bridges, need upgrades and exposure of capacity -Most natural resources are imported -not sufficient federal funding to increase infrastructure after the end of stimulus 	External
Opportunities	<p>Sector Development</p> <ul style="list-style-type: none"> -Niche Market manufacturing -Attract hospitality industry for access to regional leisure resources: fishing, skiing, hunting etc... -Knowledge base manufacturing intellectual property development and exchange thru tech events and university systems in the region -Tourism opportunities around natural and built attractions, history, lakes, etc... 	<p>Business Development Climate</p> <ul style="list-style-type: none"> -No income tax, no retail tax, (except meal tax) -Lean government (Strength Weakness) -"Live free or die" mentality -SBDC and Score to support businesses -Leverage UNH as a magnet for breeder business and high tech synergies in physical marine science -Close to Boston, MIT, Harvard, Northeastern, Brown etc... -Pro business development atmosphere in New England region 	<p>Sector Development</p> <ul style="list-style-type: none"> -Mass production is outsourced -Dependence of imports on basic components in the area of manufacturing and electronics -risk of outsourcing of service centered professions:(i.e. reading of X-rays in India, hospital billing in South Africa, etc.) -Underdeveloped UNH technology industry base Failure to produce revenue through taxation to invest in the future -No broad base tax -High taxes/deficits -High fuel energy costs -Routine high labor in manufacturing has gone off shore, and not returning 	Threats
	<p>Workforce Development</p> <ul style="list-style-type: none"> -Failure of the State to meet its obligation to fund public education including UNH -Secondary education is not aligned with workforce requirements -Local college grads move elsewhere for greater perceived opportunity -Internationally low public school standards lead to workforce less educated than other nations 	<p>Business Development Climate</p> <ul style="list-style-type: none"> -Communities compete with one another to expand their tax base making collaboration such as the CEDS challenging -Federal and State investment at Pease -DOT funding focus on large projects that drive development to Nashua and Manchester -Utility monopolies in energy and internet -High energy cost and water rates limit business development 		



GOAL: REGIONAL COLLABORATION

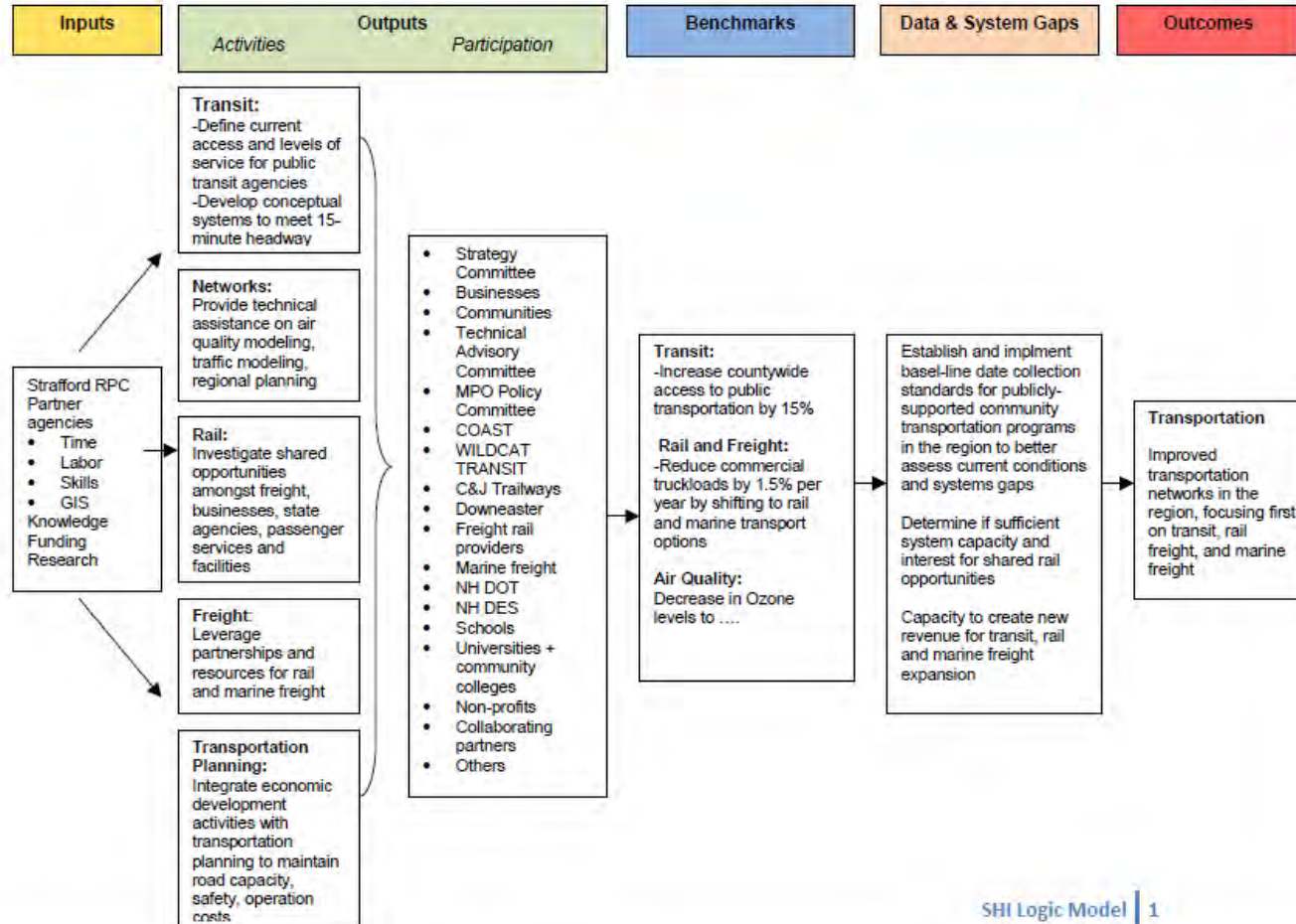
Provide opportunities for regional collaboration and leadership in economic development among businesses, communities, institutions, governments and other parties.





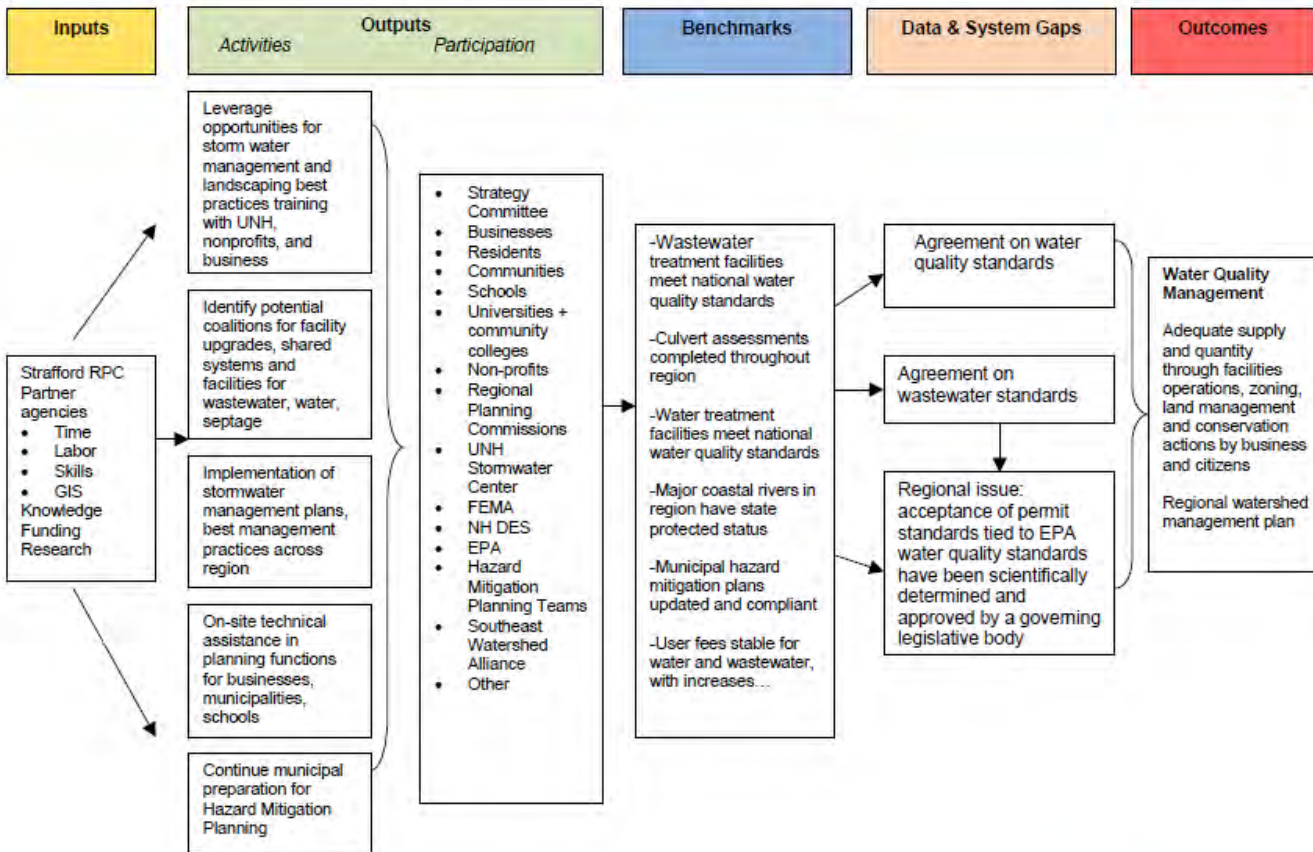
GOAL: INFRASTRUCTURE TRANSPORTATION

Expand access to the critical regional infrastructure: transportation, utilities, water and wastewater, waste management, banking and finance.



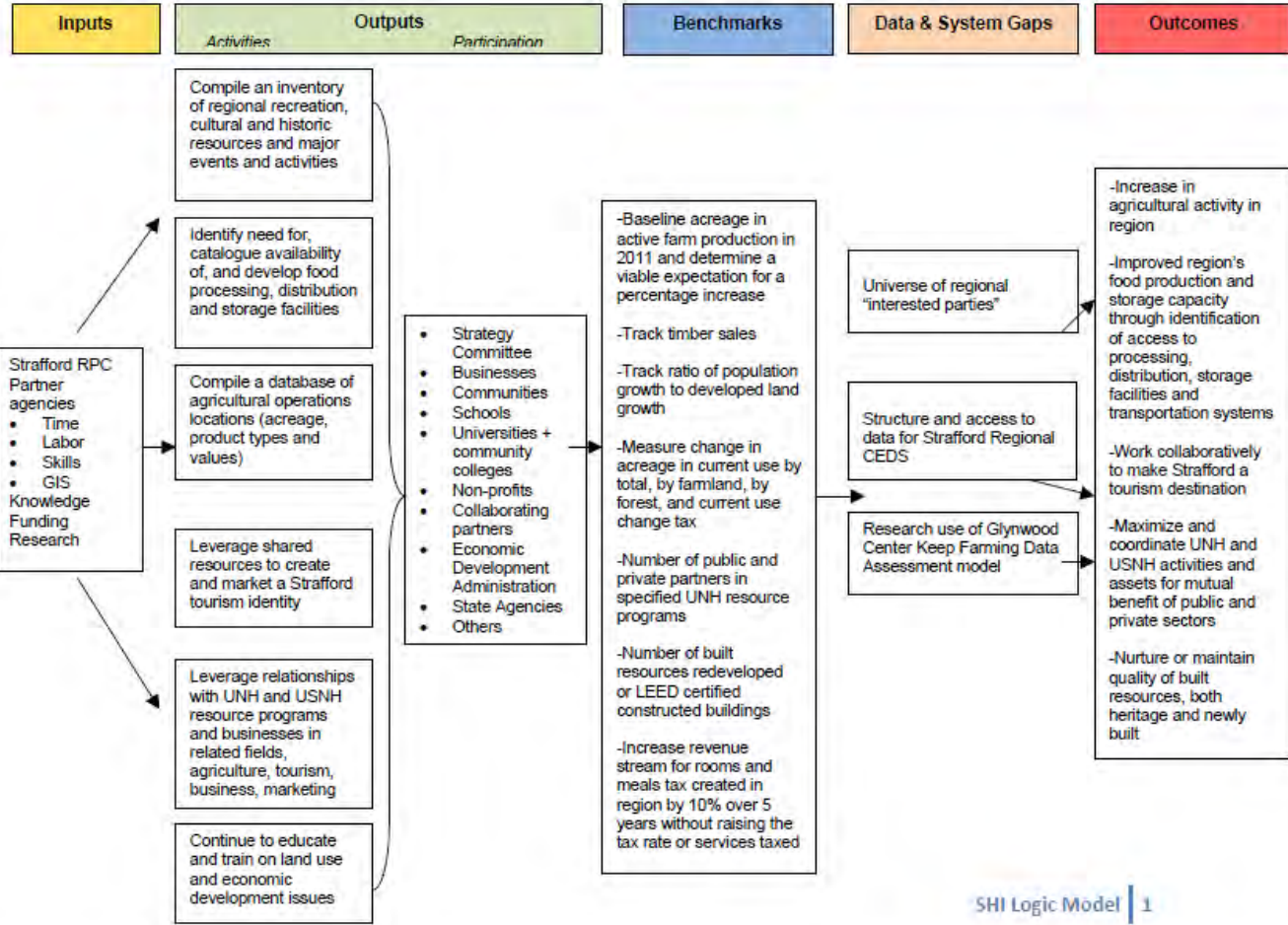
GOAL: INFRASTRUCTURE WATER QUALITY MANAGEMENT

Expand access to the critical regional infrastructure: Maintain water quality supply and treatment that meets human and ecosystem health standards within economic constraints.



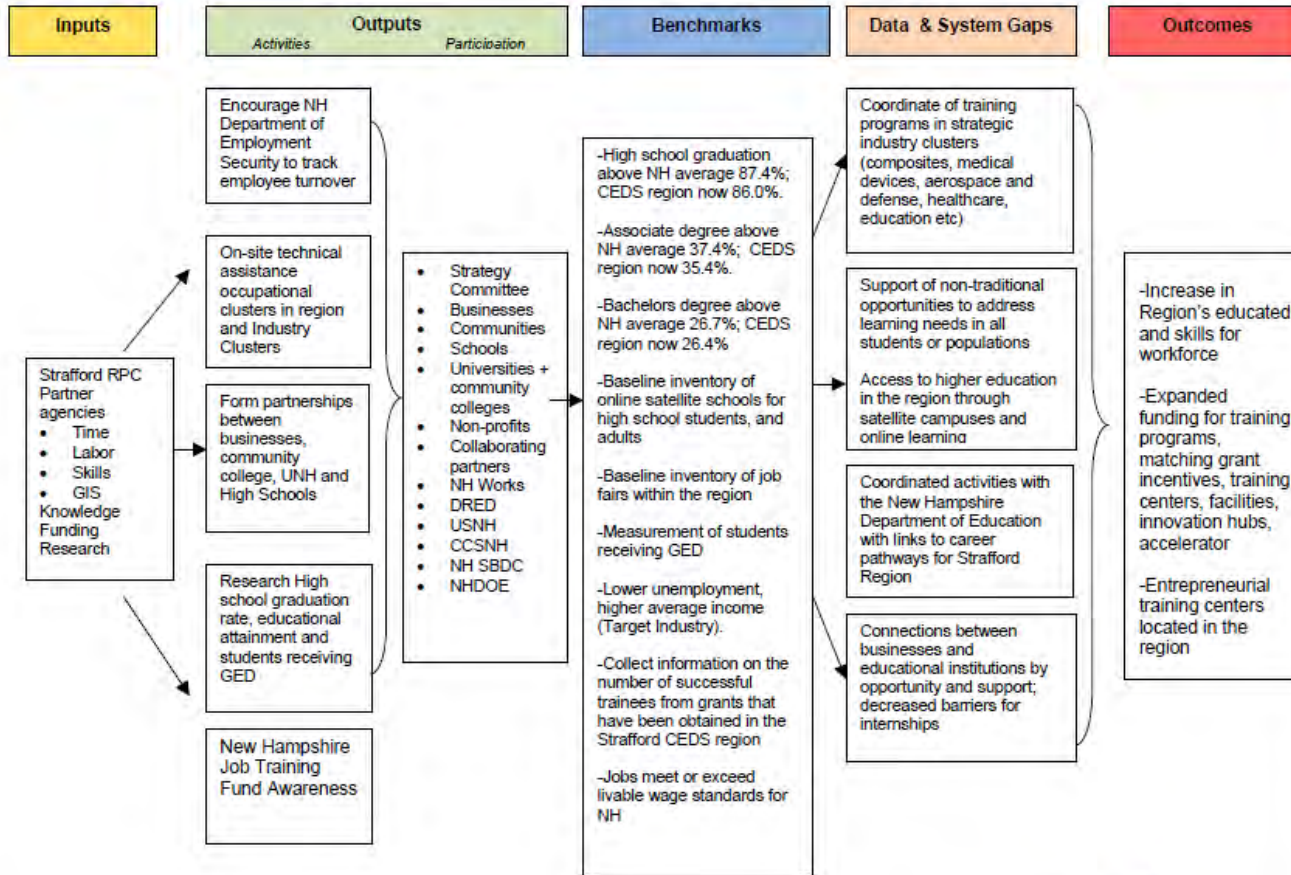
GOAL: RESOURCE AND ENVIRONMENT

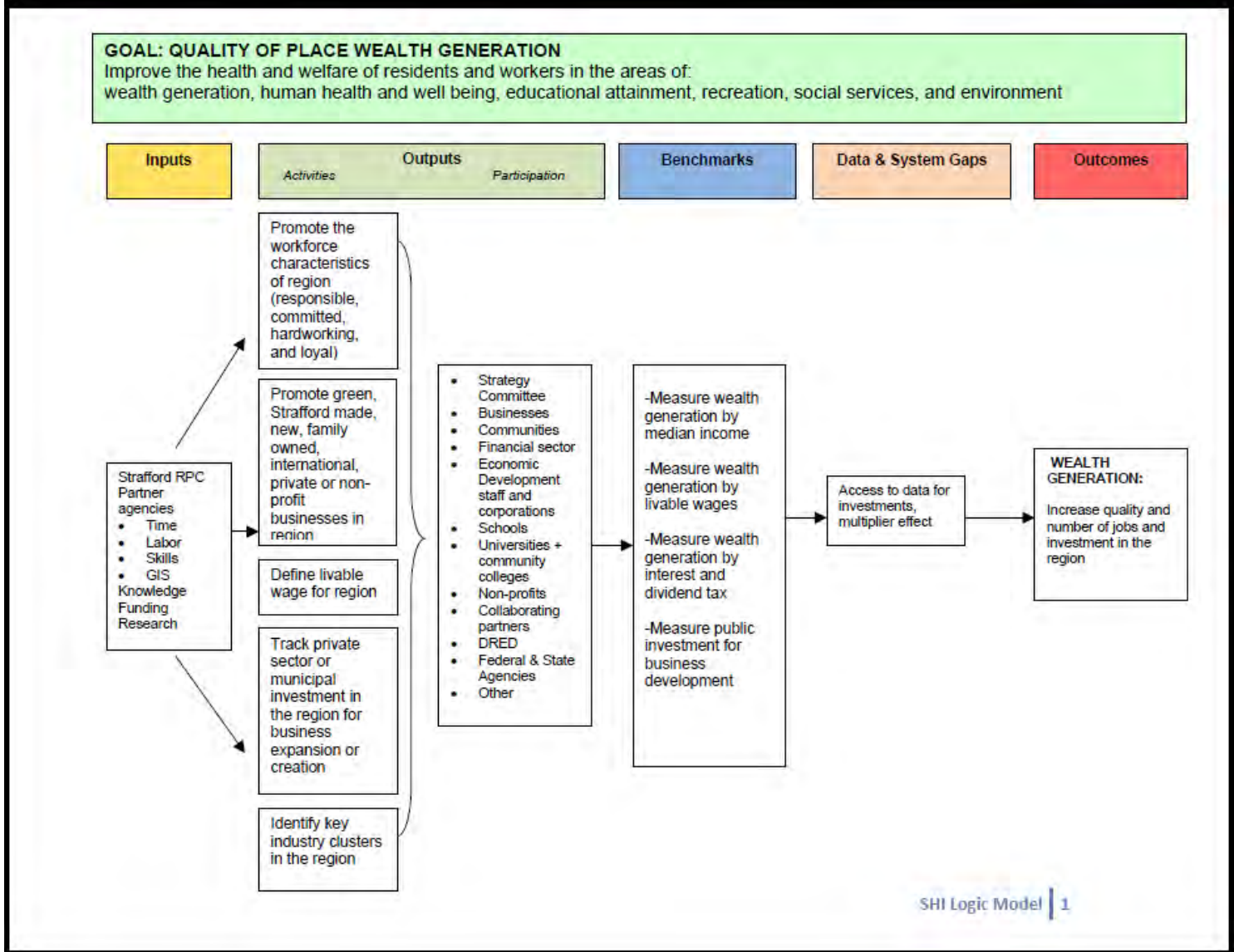
Capitalize on built environment and natural resources through measures that protect, preserve, manage and promote quality and an increasing diversity of resource usage.



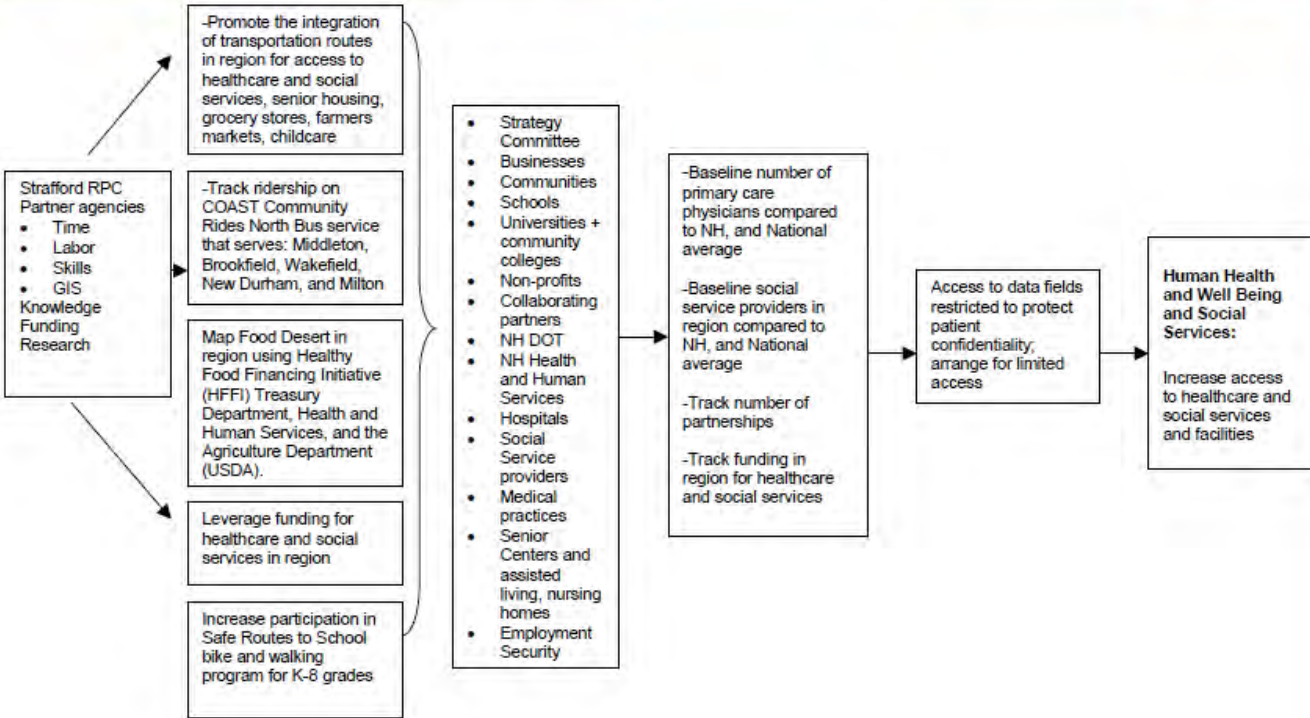
GOAL: WORKFORCE AND ENTREPRENEURIAL DEVELOPMENT

Support development of education and training initiatives relevant to businesses in the region. Provide quality education and training for residents and employees of all ages and abilities



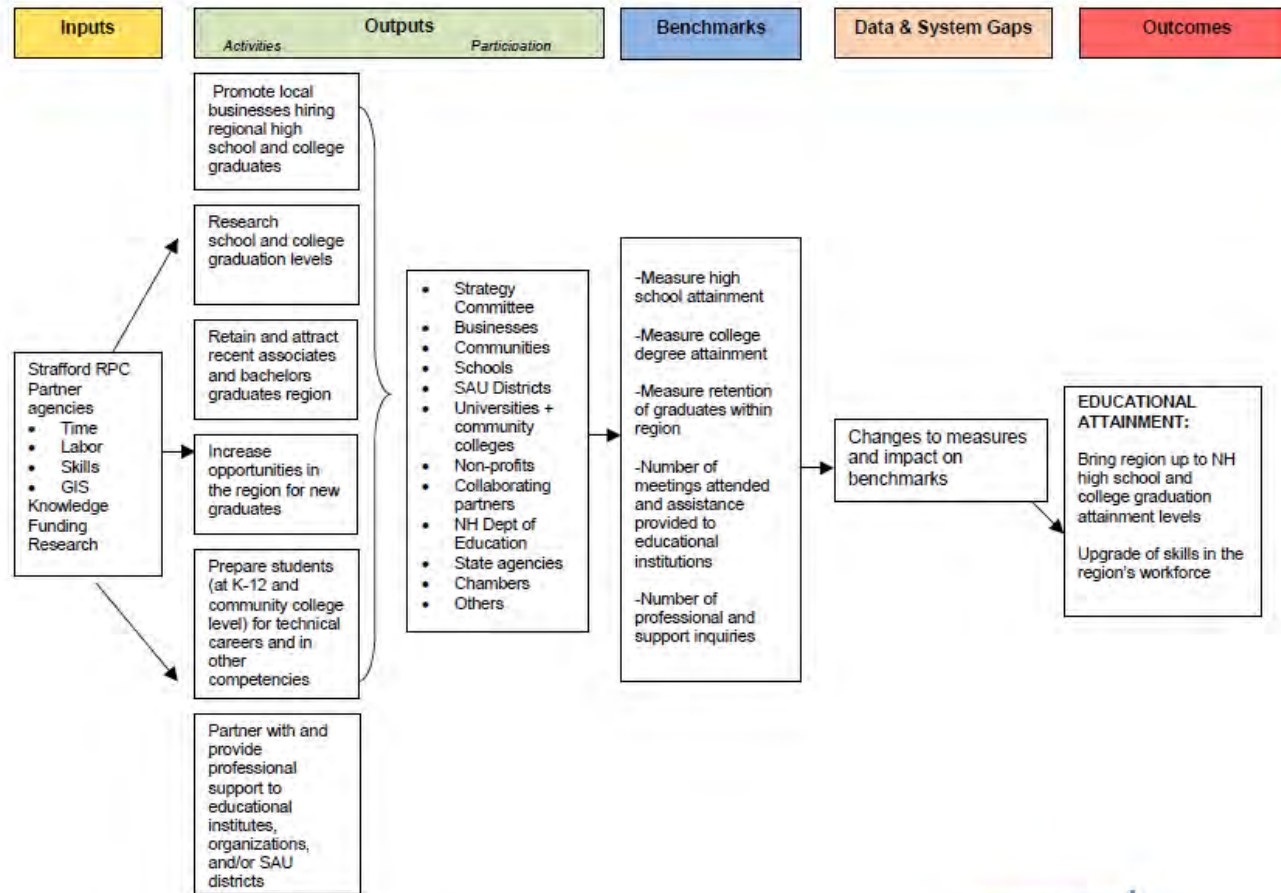


GOAL: QUALITY OF PLACE HUMAN HEALTH WELL BEING AND SOCIAL SERVICES
 Improve the health and welfare of residents and workers in the areas of:
 Wealth generation, human health and well being, educational attainment, recreation, social services, and environment



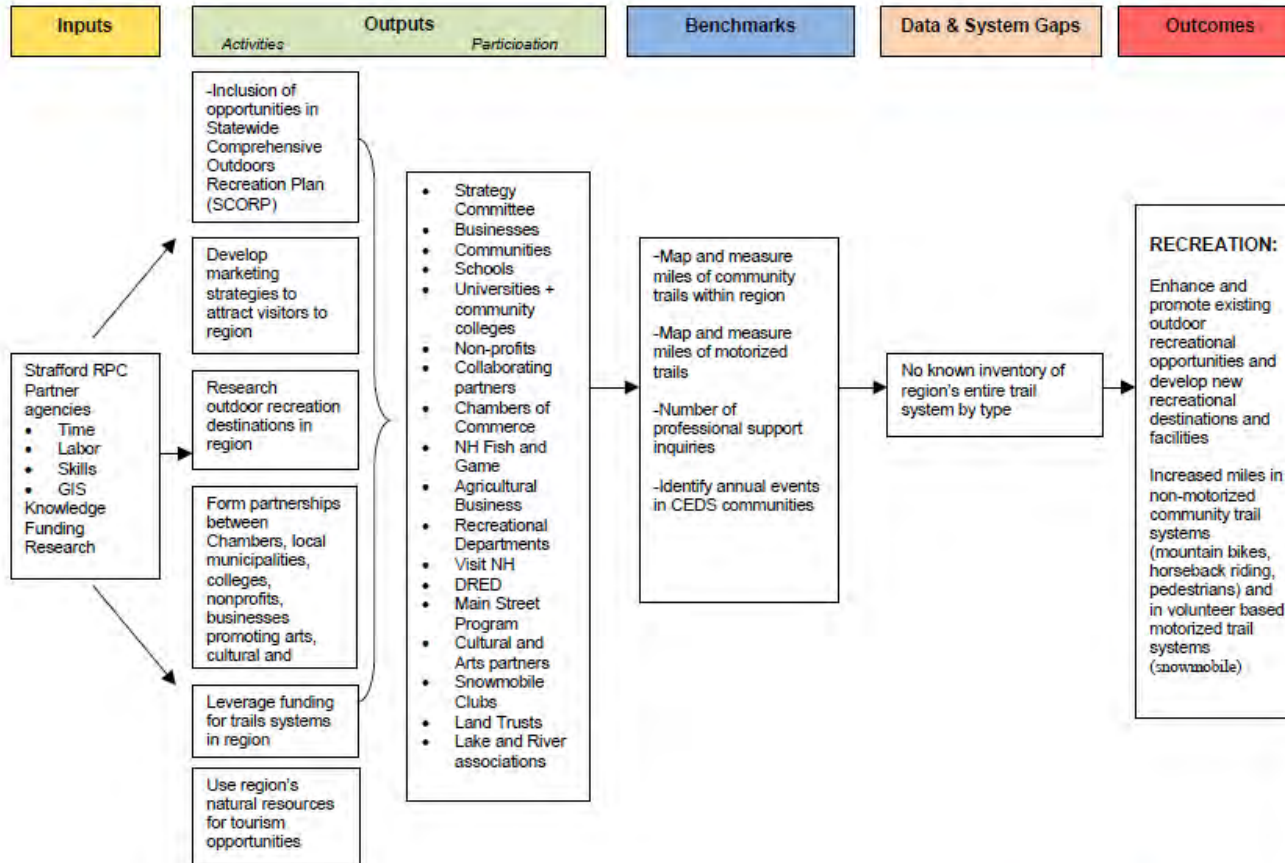
GOAL: QUALITY OF PLACE EDUCATIONAL ATTAINMENT

Improve the health and welfare of residents and workers in the areas of:
Wealth generation, human health and well-being, educational attainment, recreation, social services, and environment



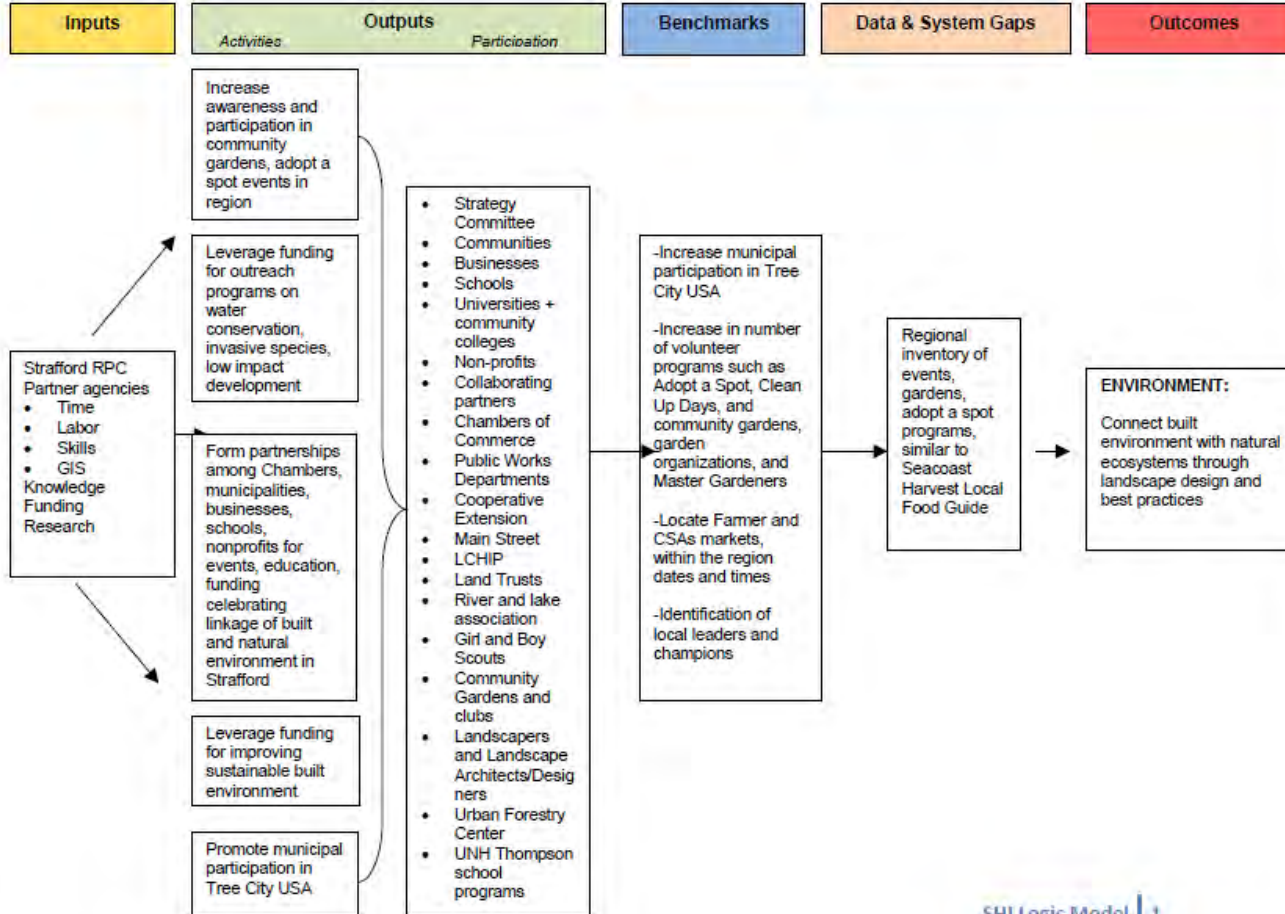
GOAL: QUALITY OF PLACE RECREATION

Improve the health and welfare of residents and workers in the areas of:
wealth generation, human health and well being, educational attainment, recreation, social services, and environment



GOAL: QUALITY OF PLACE ENVIRONMENT

Improve the health and welfare of residents and workers in the areas of: wealth generation, human health and well being, educational attainment, recreation, social services, and environment.



Appendix B : Charts and Data

Old Age Dependency Ratio, 2011-2015

Place	Median Age (Years)					Percent Change (2011-2015)	
	2011	2012	2013	2014	2015		
United States	20.5	20.9	21.4	21.9	22.5	9.8%	
New Hampshire	20.6	21.2	22.0	22.8	23.7	15.0%	
County	Strafford	17.5	17.8	18.5	19.1	19.7	12.6%
	Carroll	33.1	34.3	36.1	37.7	39.4	19.0%
	Rockingham	19.1	19.9	20.8	21.7	22.6	18.3%
Municipality	Barrington	10.1	11.1	15.2	16.4	17.0	68.3%
	Brookfield	27.8	32.1	37.1	42.7	40.9	47.1%
	Dover	18.2	18.5	19.6	20.4	21.0	15.4%
	Durham	7.7	7.1	8.3	8.5	8.7	13.0%
	Farmington	17.9	20.4	19.4	17.5	17.7	-1.1%
	Lee	20.1	26.2	20.2	23.9	21.0	4.5%
	Madbury	10.6	11.0	12.8	14.1	18.7	76.4%
	Middleton	14.1	14.3	15.4	17.6	18.7	32.6%
	Milton	20.7	21.5	24.0	21.2	22.7	9.7%
	New Durham	19.9	19.2	20.2	21.0	20.1	1.0%
	Rochester	23.2	24.0	24.0	25.0	26.2	12.9%
	Rollinsford	20.7	20.6	21.4	21.1	23.1	11.6%
	Somersworth	19.5	16.8	16.1	17.5	19.4	-0.5%
	Strafford	19.7	20.6	22.7	21.8	19.5	-1.0%
Wakefield	26.8	32.9	32.4	30.2	34.1	27.2%	

* For explanation of dependency ratio see the *Population Age* section on page 30.

Source: American Community Survey S0101

Child Dependency Ratio , 2011-2015

Place	Median Age (Years)					Percent Change (2011-2015)	
	2011	2012	2013	2014	2015		
United States	38.4	38.0	37.7	37.4	37.2	-3.1%	
New Hampshire	34.2	33.6	33.0	32.4	31.9	-6.7%	
County	Strafford	30.8	30.3	30.1	29.8	29.3	-4.9%
	Carroll	31.1	30.4	29.8	29.1	28.8	-7.4%
	Rockingham	36.0	35.1	34.4	33.6	32.9	-8.6%
Municipality	Barrington	42.5	40.5	37.6	32.7	33.1	-22.1%
	Brookfield	29.6	33.6	42.4	44.9	49.3	66.6%
	Dover	29.4	29.7	31.7	30.9	29.5	0.3%
	Durham	12.6	12.8	13.6	13.5	12.1	-4.0%
	Farmington	34.0	34.3	32.0	31.3	33.0	-2.9%
	Lee	37.0	40.3	34.6	35.6	36.4	-1.6%
	Madbury	41.6	36.5	42.0	45.1	44.7	7.5%
	Middleton	34.5	34.3	33.5	35.7	37.8	9.6%
	Milton	37.9	40.7	36.0	35.6	36.2	-4.5%
	New Durham	34.3	35.8	35.3	36.4	35.1	2.3%
	Rochester	32.5	29.5	29.3	30.0	30.0	-7.7%
	Rollinsford	35.4	40.4	42.3	43.9	42.2	19.2%
	Somersworth	35.3	36.4	33.9	34.7	36.5	3.4%
	Strafford	44.6	41.2	39.7	37.6	34.9	-21.7%
Wakefield	22.6	23.0	19.9	21.5	20.3	-10.2%	

* For explanation of dependency ratio see the *Population Age* section on page 30.