

STRAFFORD EDD, UPDATE COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY 22

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STRAFFORD
Economic Development District

THE ROLE OF THE COMMISSION

Strafford Regional Planning Commission works with municipalities, statewide organizations and other partners to provide technical assistance with planning documents, outreach, projects and regulations. We create a space for our stakeholders to connect and share information, and we provide information to the public, offering opportunities for engagement with important planning initiatives.

We serve our communities in two additional designated roles, as a Metropolitan Planning Organization, and as an Economic Development District. We work closely with the NH Department of Transportation to implement data collection programs, assist and advocate for local transit agencies and municipal projects, and create long-range plans which address safety and quality of life. With guidance from our partners, we maintain a regional economic development strategy that includes economic trends and local priority projects. We also assist local communities with economic development strategies and facilitate regional discussion.

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Brookfield	Newmarket
Dover	Northwood
Durham	Nottingham
Farmington	Rochester
Lee	Rollinsford
Madbury	Somersworth
Middleton	Strafford
Milton	Wakefield

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Strafford EDD Strategy Committee

The Strategy Committee provides advice and guidance to the Strafford EDD, the CEDS, and its priority project list. It represents the private sector, public officials, community leaders, and representatives of workforce development, higher education, and labor groups. 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.

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Strafford EDD Board of Directors

The full body of the Strafford Regional Planning Commission as determined by RSA 36:46 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.

Barrington - Steve Diamond, John Huckins	Brookfield - Ed Comeau, Vacant (1)	Dover - Lindsey Williams, Stephanie Benedetti, David Landry, Vacant (1)
Durham - Wesley Merritt, Leslie Schwartz, Vacant (1)	Farmington - Randy Orvis, William Fisher	Lee - Dawn Genes, Katrin Kasper
Madbury - Tom Crosby, Mark Avery	Middleton - Janet Hotchkiss, Jon Hotchkiss	Milton - Vacant (2)
New Durham - Vacant (2)	Newmarket - Peter Nelson, Lisa Henderson	Northwood - Scott Martin, Victoria Parmele
Nottingham - Charlene Andersen, Gary Anderson	Rochester - Donald Hamann, Rick Healey, Joe Boudreau, Barbara Holstein	Rollinsford - Herb Ueda, Vacant (1)
Somersworth - Mark Richardson, Michael Bobinsky, Richard Michaud	Strafford - Donald Coker, Vacant (1)	Wakefield - Victor Vinagro, Evan McDougal

INTRODUCTION

Strafford Regional Planning Commission (SRPC) is one of nine regional planning commissions in New Hampshire. SRPC provides technical planning assistance to its municipalities, which include 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 designated as the 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 part of the EDD operated by the Regional Economic Development Center in Rockingham County. The Strafford EDD maintains a CEDS to establish and promote our region's economic development priorities.

SRPC adopted its first CEDS in 2011 and has continued to update the document on a five-year cycle. The 2021-2025 CEDS outlines a regional strategy for future economic development and prosperity based on the themes and goals developed by the CEDS Strategy Committee. This 2022 CEDS acts as our first annual update to that plan. It provides 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.

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).

Data cannot always be analyzed for the exact region of the Strafford EDD if the original source data is compiled for different geographies. 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. If county data is available, Strafford County is used as an approximation of Strafford EDD, but data is also provided for Carroll and Rockingham Counties where possible.

SRPC staff began data collection and outreach for this update in winter 2021. SRPC staff convenes a network of economic development stakeholders and technical experts called the Seacoast Economic Development Stakeholders, which originally met in response to the COVID-19 pandemic. SRPC staff leveraged 4 meetings of the Seacoast Economic Development Stakeholders for the purpose of acting as the SRPC CEDS Strategy Committee.

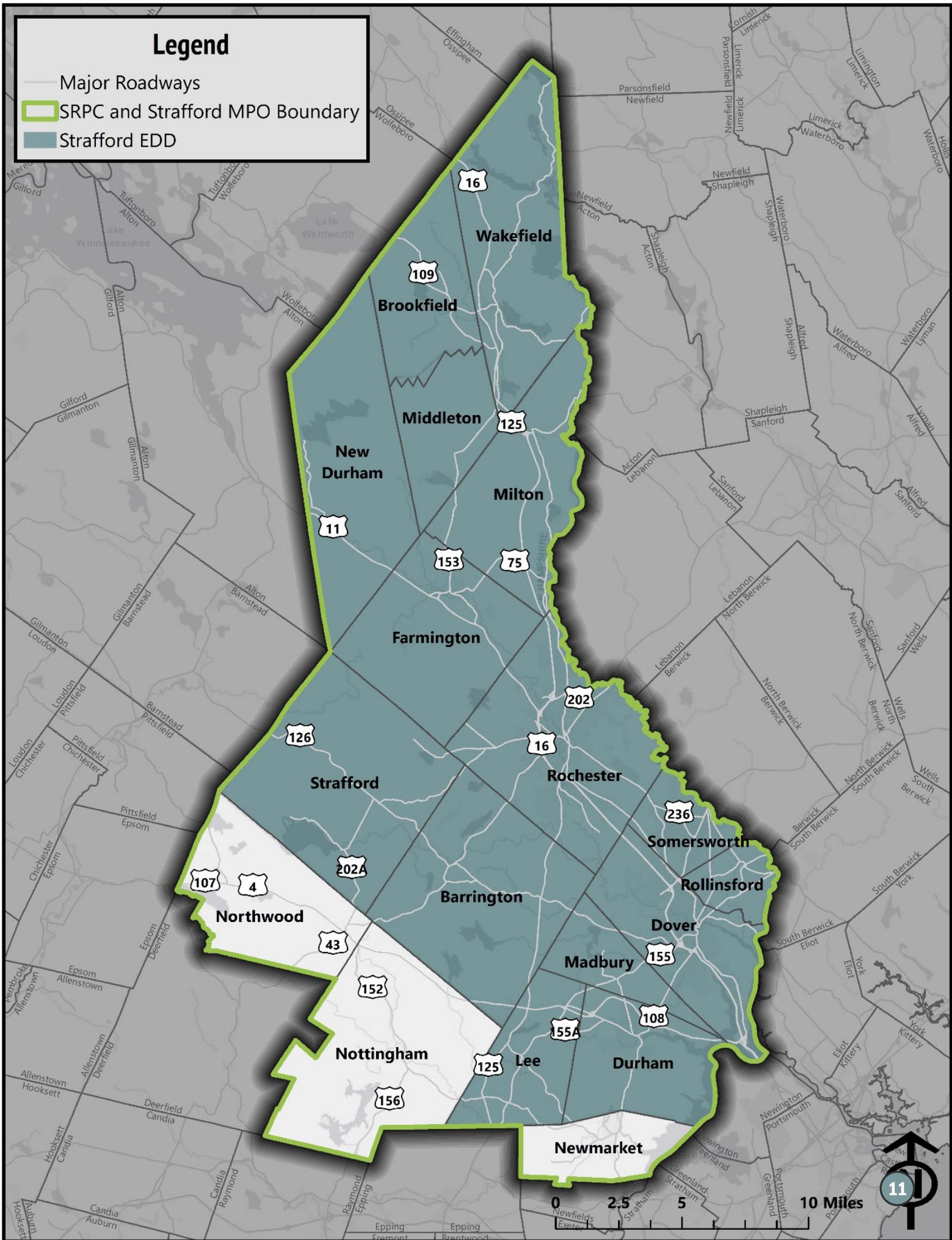
SRPC Staff conducted project solicitation from February through April 2022. Notifications and project forms were sent to all municipalities in the region, as well as a variety of other public- and non-profit sector partners. The Strafford EDD Board of Directors granted preliminary approval of the priority project list at its April 15, 2021 meeting.

A full draft of this plan was released for public comment on May 6, 2022. Notice appeared on that date in Foster's Daily Democrat, and copies of the plan were made available to the public at the Dover, Somersworth, and Rochester public libraries and city halls. The plan was also available on the SRPC website, and comments were solicited from both the Strafford EDD Strategy Committee and Strafford EDD Board of Directors during this period. The Strafford EDD

Board of Directors adopted this strategy at its June 16, 2022 meeting following the 30-day public comment and review period.

Legend

- Major Roadways
- SRPC and Strafford MPO Boundary
- Strafford EDD



Strafford CEDS Vision and Themes

This update continues analysis of our region's economy based upon the goals and themes established in the 2021-2025 CEDS:



Economic Growth – Promote the economic success of our region, including overall employment, business growth, and business expansion.



Business Operations – Understand how changing workplace dynamics like telework, flexible scheduling, supply chains, and industry clusters will impact our region.



Housing – Assure that our region has available, affordable, and quality housing to attract and retain a qualified workforce and for attracting new businesses.



Infrastructure – Plan and advocate for physical improvements such as water, sewer, utilities, and broadband that are resilient and responsive to our region's needs.



Mobility and Accessibility – Encourage community development that creates a high-quality experience of being in and moving around our communities for people of all ages and abilities, and for all modes of transportation.



Age Friendliness – Promote community development that is responsive to residents of all ages and abilities to allow the growing population of older residents to remain in our region as they age while also attracting and supporting younger families with school-aged children.



Workforce and Education – Understand the strengths of our region's workforce and encourage opportunities for all residents to access the education, training, or re-training that they need to pursue their careers in a dynamic job market. Promote educational environments that are sources of entrepreneurs, start-up businesses, and new intellectual property.



Community Vibrancy – Consider the strengths of our region and communities that make them attractive to businesses, residents, and visitors, including downtowns and the built environment; natural resources; tourism attractors; and local recreation and entertainment.



Childcare – Assure that our region has an adequate supply of affordable and quality childcare to support our workforce and prepare our children for the future.

Lenses and Perspectives

These overarching principles will impact many, if not all of the themes addressed above. We have therefore decided to use the following principles as a framework for all analysis in the CEDS, highlighting their interaction with all facets of our region's economy.

- **Equity and Environmental Justice** – The fair treatment and meaningful involvement of all people regardless of race, color, national origin, or income with respect to the region's economic priorities and opportunities and their resulting impacts on our communities and environment.
- **Resiliency** – Prepare for economic disruptions by 1) lessening the likelihood of their occurring, 2) mitigating the negative impacts if a disruption does occur, and 3) improving the region's ability to recover quickly and fully from disruptions. This lens includes

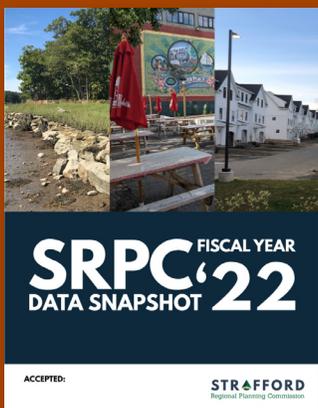
significant discussion of our region's response to and recovery from the COVID-19 pandemic. Unlike prior years, the 2022 CEDS contains a separate resiliency chapter to act as a final deliverable of SRPC's CARES Act grant from EDA. This chapter documents resiliency activities SRPC has undertaken throughout the COVID-19 pandemic to serve as a toolkit for future economic disruptions.

- Partnership and Collaboration – The 15 municipalities within the Strafford EDD are economically interdependent with each other and neighboring communities in NH, ME, and MA.

The Region's Demographics

SRPC's *Regional Data Snapshot* contains region-wide analyses of various demographics, indicators, and performance measures that inform all of SRPC's core planning areas. First adopted in 2021, the *Regional Data Snapshot* serves as a central collection of metrics related to regional planning. This approach allows for an in-depth description of each metric, while also promoting interdisciplinary data analyses and conclusions by juxtaposing wide variety of quantitative and spatial datasets. The *2022 Regional Data Snapshot* includes the most current publicly available data for metrics contained in the 2021 edition and adds new metrics. Many of these metrics act as economic indicators and are incorporated herein by reference. The 2022 Regional Data Snapshot can be found on SRPC's website at <http://strafford.org/docs/regional-data-snapshot-2022/>

The 2022 Regional Data Snapshot includes the first data releases from the 2020 Census, which indicates that the total population of the Strafford EDD is 136,845 residents, up approximately 6.1 percent from 2010, and the NH Office of Planning and Development projects that this number will continue to grow to just over 150,000 by 2040.¹ Median ages for all but two SRPC municipalities have risen or held steady, and residents aged 55 and older continue to be the largest growing share of the region's population.² While the region is still comparatively younger than other parts of the state and New Hampshire as a whole, this aging population has implications for many of our key themes, particularly in terms of demand for housing and an available workforce. As we will discuss further in the Housing and Workforce and Education chapters, these concepts have become increasingly linked since the COVID-19 pandemic.



For more detailed information and in-depth analysis of the region's demographics, please see the **2022 Regional Data Snapshot**.



ECONOMIC GROWTH

The *CEDS 2021-2025*, which was adopted just over one year into the pandemic, noted that many economic indicators had been severely affected but were recovering, albeit still not back to pre-pandemic levels. As expected, with the increase in vaccine rollout and availability, greater consumer confidence, and high demand for consumer goods and services, we continue to move towards pre-pandemic levels, and in some cases have seen an even greater improvement. However, in response to consumer behaviors and other factors such as geopolitical tensions, new challenges have emerged as businesses struggle to keep up the pace with the surge in consumer demand- including record-high inflation rates, strains on supply chains, increased cost of goods, and workforce shortages.



Support the attraction, retention, and expansion of business, as well as investments and employment in the region through inclusive growth and regional collaboration.

Current Trends

Inflation has been one of the most prominent recent economic trends in our nation, state, and region. Some inflationary factors have been caused by monetary policies (i.e., reduced interest rates), fiscal policies (i.e., CARES Act, ARPA, stimulus checks), geopolitical tensions around the world (Russia-Ukraine war), supply chain disruptions (caused in part by Covid-19 related business closures and growing demand for products and services), and labor shortages (caused by “the great resignation,” early retirement trends, a reduction in labor force participation, barriers to immigration, a shortage of workforce housing and affordable childcare, and the re-training of workers who switched or abandoned certain industries).³ According to the Bureau of Labor Statistics, the February 2022 all-items Consumer Price Index in the New England Region increased by 6.9 percent from February 2021⁴, with the highest increases seen in gas, shelter, and food⁵ (for reference, the target inflation rate is 2 percent per year).⁶ Needless to say, the multi-layered impacts of inflation have differed amongst socio-economic groups. For middle and lower-income households (typically renters), the increasing costs of gas, housing, and food cuts into the resources needed for other non-discretionary expenses such as utilities, taxes, and debt, putting a greater financial burden on these groups. On the other hand, higher-wealth individuals (typically homeowners) have benefitted from an increase in assets as a result of appreciation and monetary policies.

In response, the Federal Reserve raised interest rates by a quarter of a percentage in March 2022,⁷ and again by a half percentage point in the first week of May 2022,⁸ in an effort to combat inflation, which will have an impact on credit card loans, auto loans, and mortgage rates. This has been the biggest increase since 2018, and analysts indicate that we should anticipate a few more increases throughout 2022 and 2023.⁹ As a result, we can expect to see a slowdown in consumer spending.

As noted in our last CEDS update, New Hampshire’s total labor force participation dropped by roughly 40,000 people from February to November 2020.¹⁰ By February 2021, the labor force participation rate in Strafford County grew but still lagged pre-pandemic levels (labor force for February 2021 was roughly 2,000 people short compared to the same month in 2020).¹¹ Since

the date of that report, the labor force in Strafford County has decreased, ending with 71,860 people in January 2022¹², roughly 3,190 people short compared to pre-pandemic levels (February 2020 = 75,050).¹³

Furthermore, at the time of our last update unemployment levels were steadily rising to pre-pandemic levels but had still not reached them yet. This economic indicator has greatly improved since, not only reaching pre-pandemic levels (3.1 percent in March 2020)¹⁴ but also showing continuous progress. In December 2021, unemployment in Strafford County reached 2.1 percent.¹⁵

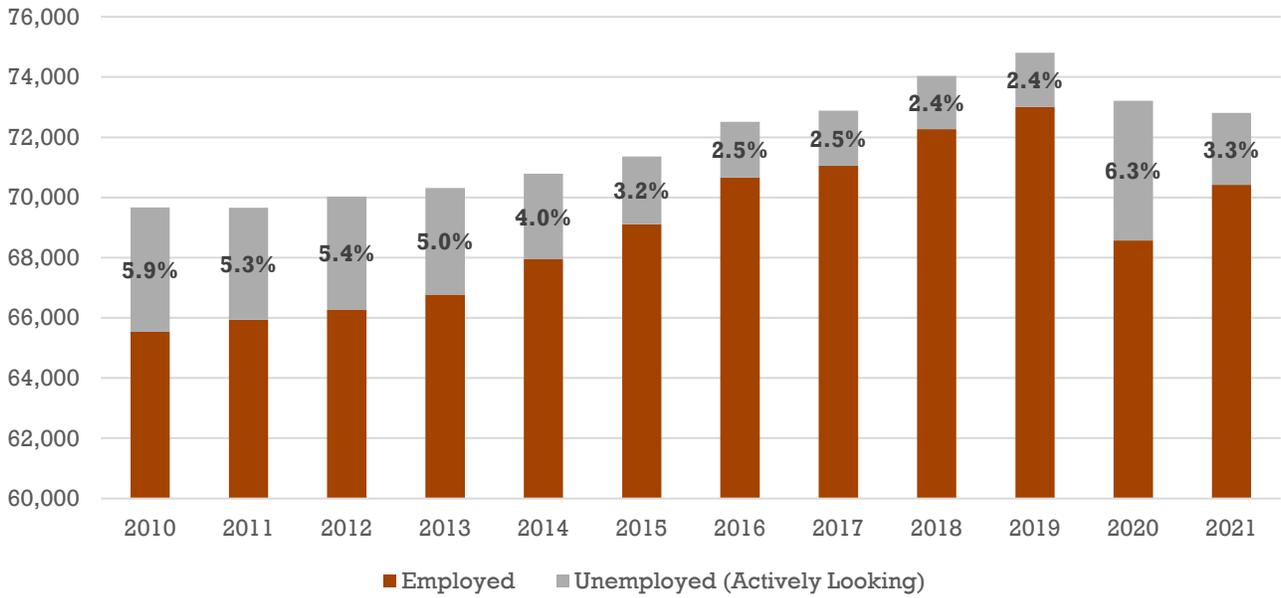
By April 2020, more than 90,000 unemployment claims had been filed in New Hampshire,¹⁶ with some of the hardest-hit sectors being the service industry. Since then, unemployment claims have reached lower than pre-pandemic levels, a promising sign for economic recovery. In February 2022, New Hampshire Employment Security reported a total of 1,854 initial claims filed by residents¹⁷ (in February 2020, the number of claims filed was 2,039).¹⁸ This has been one of the lowest levels that the state has seen in decades.¹⁹

Policy actions and government support programs have continued to offer support to the hardest-hit businesses to help offset the economic impacts of the pandemic. A few of these included the Paycheck Protection Program (PPP), enhanced unemployment benefits, economic impact checks and financial assistance to state and local governments through the State and Local Fiscal Recovery Fund (SLFRF). At the time of this writing (May 2022), however, many of those benefits and programs have closed or are running out. For example, the Small Business Administration (SBA) officially closed the second and final round of PPP in May 2021. By the end of the program, a total of 16,617 forgivable loans had been distributed to New Hampshire businesses, totaling a net amount of \$1,156,553,713.²⁰ Likewise, the Economic Injury Disaster Loan program (EIDL), another crucial program that offered financial support to small businesses, ended on December 31, 2021. In their latest report, the SBA indicated that as of January 2022, 14,093 New Hampshire businesses had received a total of \$1,088,914,934 between all the EIDL iterations.²¹ Over the last year, \$23,159,735 of the SLFRF has been distributed to our region's 18 municipalities.²² These funds were intended to help replace lost public sector revenue, respond to the public health crisis and economic impacts caused by the pandemic, provide premium pay for essential workers, and promote investments in water, sewer, and broadband infrastructure. Please refer to the chart on the data page for a breakdown of fund distribution amongst our communities.



SRPC has maintained open communication with businesses and municipalities to learn about their needs and provided them with targeted support and information on resources and funding opportunities. Through active and consistent engagement efforts, we have convened and advocated for economic recovery efforts and practices that support a cohesive regional economy. SRPC's partnerships with public and private organizations have also allowed us to increase technical assistance capacity offered to the businesses in our communities.

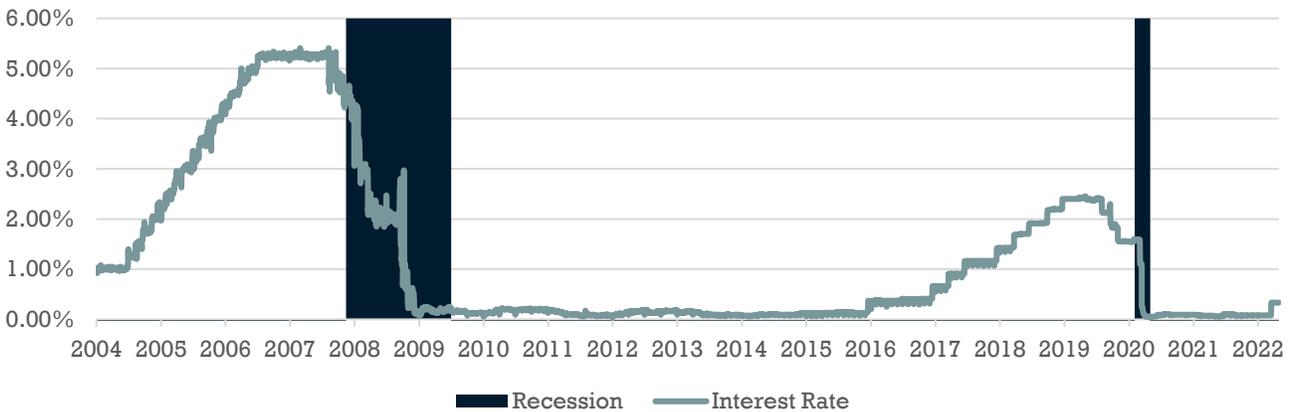
Stafford County Labor Force Participation (Adjusted Annual Avg.)



Northeast Urban Monthly CPI Percent Change (2020-2022)



Federal Interest Rates (2004 - April 2022)



SRPC State and Local Fiscal Recovery Fund

Municipality	Population	Estimated 2019 Total Award	Estimated 2019 Approved Budget	Estimated % of Budget	First Tranche Award Estimate
Barrington	9264	\$969,845	\$7,124,100	14%	\$484,922
Brookfield	688	\$72,026	\$872,847	8%	\$36,013
Durham	16293	\$1,705,708	\$27,351,349	6%	\$852,854
Farmington	6973	\$730,001	\$6,943,076	11%	\$365,000
Lee	4569	\$478,327	\$4,117,240	12%	\$239,164
Madbury	1883	\$197,131	\$1,986,503	10%	\$98,565
Middleton	1838	\$192,420	\$1,870,487	10%	\$96,210
Milton	4624	\$484,085	\$4,563,423	11%	\$242,042
New Durham	2706	\$283,290	\$3,057,148	9%	\$141,645
Newmarket	9156	\$958,538	\$12,194,371	8%	\$479,269
Northwood	4309	\$451,108	\$3,616,815	12%	\$225,554
Nottingham	5136	\$537,686	\$3,877,280	14%	\$268,843
Rollinsford	2586	\$270,727	\$2,402,076	11%	\$135,364
Somersworth	11968	\$1,252,926	\$18,670,317	7%	\$626,463
Strafford	4212	\$440,953	\$2,597,267	17%	\$220,476
Wakefield	5110	\$534,964	\$5,513,976	10%	\$267,482

Economic Injury and Disaster Loan Program for Small Businesses

IDL Loans	New Hampshire (\$)	# of Businesses Approved
COVID-19 EIDL dollars	\$1,072,757,934	11767
Targeted EIDL Advance	\$11,237,000	1342
Supplemental Targeted Advance	\$4,920,000	984



BUSINESS OPERATIONS

Networking and collaboration efforts with economic development stakeholders in and around our region have allowed us to understand the current trends that businesses in our communities have been experiencing. One of the most notable trends we have seen has been the growth and expansion of businesses, however, that has come with its own challenges such as staffing shortages caused by factors such as infrastructure barriers, supply chain disruptions, and limited supply of workforce housing. Other trends that have continued include outdoor dining, remote work, and e-commerce.



Support entrepreneurship and resiliency through technical support, networking and collaboration, innovation, and ongoing adaptation strategies.

Current Trends

Some municipalities, such as Somersworth and Dover, have seen growth in the number of businesses that have relocated their operations from places such as New York, New Jersey, Philadelphia, or other parts of the state. When asked about the factors that incentivized them to move here, both employers and employees referenced quality of life, return on investment, geographic proximity to large urban areas, opportunity for expansion, and the region's strong economy, giving businesses more confidence that they will be able to sell their product or service. Moreover, due to the proximity to the University of New Hampshire and the Community College System of NH, we have come to learn that businesses are attracted to the availability of a highly educated workforce, and that the K-12 public school system is seen as an attractive bonus to companies as it helps draw employees with school-aged children and youth who prioritize high-quality education. In addition to companies coming from out-of-state, there is also growth happening within the region. As the Economic Development Manager for the City of Somersworth noted, there are several communities in our region that offer the ideal type of infrastructure for small businesses to grow into, such as large mill buildings in city and town centers.²³

At the same time, despite the growing interest in the Seacoast region of New Hampshire, there are barriers that have limited business growth and expansion. According to David Choate, commercial real estate specialist and Vice President of the NH division of Colliers²⁴, there have been many inquiries from companies who are interested in relocating here, but obstacles such as high costs of housing and worker shortages have limited the ability for businesses to move forward.²⁵ In addition, land use and zoning restrictions, as well as infrastructure hindrances, have made it difficult for businesses to relocate to the area.

Moreover, similar to what we saw at the time of our last CEDS update, our region has continued to experience staffing shortages, but to an even greater extent than before. Conversations with local businesses and partners have taught us that one of the biggest challenges they currently face is around hiring and retaining workers, which has limited their ability to resume normal business operations and forced them to reduce hours and operations. Some of the underlying causes of this include the lack of housing inventory, a decrease in the labor force, and a lack of workers with specific skills needed to meet current demand and jobs available. In June 2021, in response to several factors including a decrease in the unemployment rate (which by then had dropped to nearly pre-pandemic levels), a slowdown in COVID-19 related hospitalizations, and businesses

facing serious challenges around recruitment, the state of New Hampshire ended its participation in the Federal Pandemic Unemployment Compensation (FPUC) program, where recipients of unemployment benefits were eligible for an additional \$300 per week. As a further incentive to hiring and retaining workers, bonuses were offered to unemployed people who returned to work for at least 8 consecutive weeks.²⁶ Businesses have also done their part, undertaking innovative solutions to help mitigate the workforce challenges, including increasing wages and benefits, offering sign-on and stay-on bonuses, and allowing more flexibility for employees. There has also been great emphasis amongst economic development stakeholders on the need to focus on training people for the jobs that are available, which will help match workers with job openings.

Another factor that has impacted business operations has been the major disruptions in supply chains, leading to an increase in the cost of goods and services, particularly for the goods-producing industries such as construction and manufacturing.²⁷ At the time of writing this, it is important to note this issue has been further exacerbated by geopolitical conflict between Russia and Ukraine.

Similar to last year, we have witnessed the resumption of several trends that proved to be successful in helping businesses thrive in their operations, including outdoor dining (despite the end of Emergency Order 2020-06²⁸), remote or hybrid work, online business models, and e-commerce. However, some of these have also come with challenges. Restaurants, for example, have been limited in their ability to continue with outdoor dining as they do not have the staff to be able to expand outdoors. Several of our region's Economic Development managers have heard from restaurant owners in their communities who said that the staffing shortages, combined with their efforts to increase capacity through outdoor dining, has had an impact on their quality of service. For example, they received complaints from customers who expressed feeling unattended when sitting outdoors, that more stress was put on already understaffed kitchens, and some even faced challenges with the number of available restrooms needed to accommodate the increased occupancy. As a result, we might expect to see some of the smaller restaurants with less capacity abandon outdoor dining.

As far as office space, the state has experienced an increase in the office vacancy rate since the second half of 2019, ending 2021 at an 11.2 percent vacancy rate.²⁹ Furthermore, despite the fact that some companies have downsized as a result of remote and hybrid work models, many leases are still in place, even for companies who have employees that are not returning to the office. However, some of these leases are expected to expire in 2022 and 2023 at which point we could see an increase in vacancy rates as companies vacate buildings.³⁰

On the other hand, there has been a high demand and low supply of industrial space (which consists of Manufacturing, Warehouse and Distribution, and Research and Development space), which has been one of the biggest growth inhibitors faced by companies in New Hampshire. Some of the causes limiting the availability of industrial space could be attributed to the high cost of construction, land availability, and supply chain issues. In response, base rents for industrial space have been escalating while vacancy rates have reached historic lows. In our region, Rochester has had one of the highest rates of industrial construction, in part due to access to available land to support new development.³¹

While many trends in business operations have ended (such as the removal of capacity restrictions and the return of in-person education and healthcare), others such as open dialogue, partnerships, and collaboration between businesses and public sector stakeholders have continued. As a result, companies have been able to capitalize on newly created networks which has led to a more cohesive and aligned regional economy.



Efforts such as the Consultant Technical Assistance Program have allowed us to provide technical assistance to small businesses at no cost to them and created connections with local private consultants and businesses to increase their operational capacity.³² Other projects, such as the Municipal Record Digitization Program, have enabled us to help our communities digitize their files to create a more resilient work environment. ³³ Moreover, through constant research and information sorting, we have been able to disseminate important resources, technical and financial assistance, and other relevant information to roughly 6,000 businesses in the region as well as our 18 municipalities.

New Hampshire Short-term Industry Employment Projections				
New Hampshire Industry (NAICS Sector)	2020 Estimated	2030 Projected	Numeric Change	Percent Change
Agriculture, Forestry, Fishing, and Hunting (11)	5406	5848	442	8.2%
Mining (21)	583	633	50	8.6%
Construction (23)	27887	29903	2016	7.2%
Manufacturing (31-33)	67284	69113	1829	2.7%
Utilities (22)	1998	1854	-144	-7.2%
Wholesale Trade (42)	27402	28326	924	3.4%
Retail Trade (44-45)	88758	86059	-2699	-3.0%
Transportation and Warehousing (48-49)	18384	20731	2347	12.8%
Information (51)	11735	12038	303	2.6%
Finance and Insurance (52)	27494	29058	1564	5.7%
Real Estate and Rental and Leasing (53)	6566	6984	418	6.4%
Professional, Scientific, and Technical Services (54)	39061	44839	5778	14.8%
Management of Companies and Enterprises (55)	8986	8863	-123	-1.4%
Administrative and Waste Management Services (56)	33417	35888	2471	7.4%
Educational Services (61)	60523	64626	4103	6.8%
Health Care and Social Assistance (62)	89984	102753	12769	14.2%
Arts, Entertainment, and Recreation (71)	9354	13288	3934	42.1%
Accommodation and Food Services (72)	47789	58932	11143	23.3%
Other Services, Except Public Admin. (81)	25502	28824	3322	13.0%
Government	39299	40161	862	2.2%
Self-employed	38182	37828	-354	-0.9%
Total	675594	726549	50955	7.5%



HOUSING

At the time of our last CEDS update, we noted that our region and New Hampshire as a whole were experiencing a shortage of housing supply needed to meet current and future demands, which in turn had impacted affordability and availability. This has continued and has been exacerbated by emerging trends such as inflation, even higher home prices, and rising interest rates. In comparison to last year, the sales price of homes in our county has increased, while the number of closed sales has decreased. This, however, is not due to lack of demand, but instead due to a lack of inventory in addition to the growing housing costs. While a few of the economic indicators have somewhat stabilized over the past year, they are still far from pre-pandemic levels and the market remains highly competitive due to discrepancies with supply and demand. Consequently, these housing conditions have exacerbated the challenge of attracting and retaining workers and limited the ability for new businesses to locate here. Moreover, the circumstances have affected different socio-economic groups in diverse ways, benefiting those who already owned homes prior to the rising prices, driving landlords to charge more from their rental properties, and putting more pressure on tenants. The increase in property values has also led to greater tax pressure on those who own and were already cost-burdened.



1. Encourage fair housing practices that make it possible for young professionals, families, seniors, and essential workers to have the option to come to live - or stay - in our region.
2. Prioritize safe, secure, and affordable housing for all, regardless of race, color, national origin, or income.
3. Strengthen the economic vitality and resiliency of communities through effective and inclusive planning practices and regional collaboration.

Current Trends

The current median purchase price in Strafford County has continued to increase in comparison to the year before. The year-over-year change in median sales price for single-family homes between January 2021 and January 2022 was 15.1 percent, going from \$317,250 to \$365,000.³⁴ For condos, the median sales price increased by 31.2 percent over the past year, from \$217,300 to \$285,000.³⁵

The number of homes for sale in New Hampshire has decreased. In January 2020, there were 3,275 single-family homes for sale in the state.³⁶ By January 2021, inventory reached 1,442³⁷; and by January of this year, only 931 single-family units were available for sale depicting a year-over-year decrease of 35.4 percent.³⁸ When looking at the data available since 2005, this is the lowest inventory of both single-family homes and condos for sale by month in New Hampshire.³⁹ While these numbers represent a historically low supply, this is still an improvement in the year-over-year change when comparing January 2020 to January 2021, where the percentage decrease was an alarming 56 percent.⁴⁰

Months of Supply Inventory (MSI) shows how many months it would take to sell all the existing housing stock at the current sale rate if no more units were added to the market. In a housing market that is considered sustainable, the (MSI) is 5 months. In January 2020, the MSI for single-family homes in New Hampshire was 2.2 months.⁴¹ This decreased to 0.8 by February 2021.⁴²

Fast forward to January of this year, and the supply of single-family homes dropped to 0.6, a 33.3 percent year-over-year decrease.⁴³

Over the last year, the number of closed sales for single-family homes in Strafford County has declined slightly, though the small sample size makes it difficult to predict whether this is a notable change. In January 2021, the number of closed sales went from 96 to 94 by January from January 2021 to January 2022, representing a 2.1 percent decrease.⁴⁴ The number of closed sales for condos over the same period in Strafford County decreased from 20 to 15 over the past year, a 25 percent decrease.⁴⁵ Similarly, the number of pending sales also decreased for both single-family homes and condos, with a more significant decrease for condos.⁴⁶

Compared to January of last year, the number of days that a single-family home was listed on the market increased slightly in January 2022 in Strafford County, going from 37 to 39 days (a 5.4 percent increase).⁴⁷ For condominiums, the increase was more significant, going from 32 to 40 days on the market (a 25 percent increase).⁴⁸

The percentage of list price received for single-family homes in New Hampshire has also increased year over year, going from 97.6 percent in January 2020, to 100.8 percent in January 2021, to 101.4 percent in January 2022.⁴⁹ Though higher than the previous years, this is an improvement as this percentage was even greater during each month from March to December last year, reaching an all-time high of 104.4 percent in June 2021.⁵⁰

The rental situation in our region has remained a challenge during this past year due to high demand and limited supply, which have led to higher rental costs and low vacancy rates. Vacancy rates for 2-bedroom units in Strafford County went from 2.10 percent in 2020 to 0.9 percent in 2021.⁵¹ Moreover, only 14 percent of 2-bedroom units in Strafford County are below what is considered affordable market rent (calculated at \$1,184; based on estimated 2021 renter household income.⁵²) According to the New Hampshire Housing Finance Authority (NHHFA), the median monthly gross rent in Strafford County for a 2-bedroom unit increased by 7.98 from \$1,291 in 2020 to \$1,394 in 2021.⁵³

In our last CEDS reporting we noted the presence of historically low mortgage interest rates. In January 2021, for example, the average interest rate for a 30-year loan was 2.71 percent. Since then, interest rates have gradually increased. The U.S. weekly average as of March 17, 2022, was 4.16 percent for a 30-year mortgage.⁵⁴ It is important to note that geopolitical tensions attributed to the situation between Russia and Ukraine, as well as current economic trends such as inflation, will likely continue to have an impact on interest rates. Please refer to the Economic Growth chapter for more details.

Further affecting the cost and availability of housing, the cost of building materials has skyrocketed over the past few months. In addition to that, the housing construction sector has been facing obstacles related to supply chain issues and labor shortages, putting an even greater strain on the housing inventory.⁵⁵

Several government support programs that were established to offset some of the housing impacts related to Covid-19 have come to an end over the past year, though new initiatives have also emerged. In response to the moratorium on evictions that ended on July 31, 2021, the NH Emergency Rental Assistance Program, a \$200 million federally funded rental assistance program, was launched. Since its launch in March 2021, this program has distributed \$119.1 million to 14,451 New Hampshire households through payments made to landlords and utility companies.⁵⁶ The New Hampshire Homeowner Assistance Fund is another short-term federally funded program launched in March 2022 that allows homeowners with incomes less than 125 percent of their area median income whose income has been disrupted due to Covid-19 to

apply for up to \$20,000 in aid for property-related expenses.⁵⁷ However, these are temporary solutions designed to help with current housing stability and once these come to an end in the near future, we might expect an increase in evictions and foreclosures.

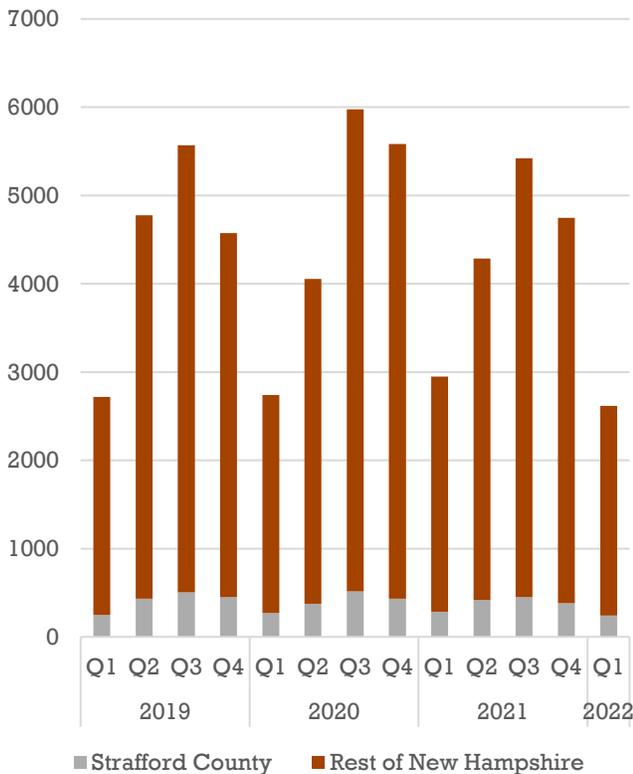
In response to the state’s housing crisis, NH Governor Chris Sununu recently announced a \$100 million housing fund, InvestNH, designed to alleviate the housing challenge by incentivizing the creation of multi-unit workforce housing amongst developers and municipalities around the state.⁵⁸ These funds, made available through the American Rescue Plan Act, must be spent by December 31, 2026, so we should expect to see the creation of new units in the next few years.

As we continue to wait for data to be released around migration patterns influenced by Covid-19, there are several factors that can help us understand this topic, including housing, population, and school enrollment. The 2020 NH Census data, for example, indicates that the highest population growth was seen in Belknap, Rockingham, and Strafford counties, which grew by 6 percent each.⁵⁹ However, without complete data, we cannot come to solid conclusions, but based on the housing conditions described above, we can only assume that Covid-19 has played a role in in-migration.

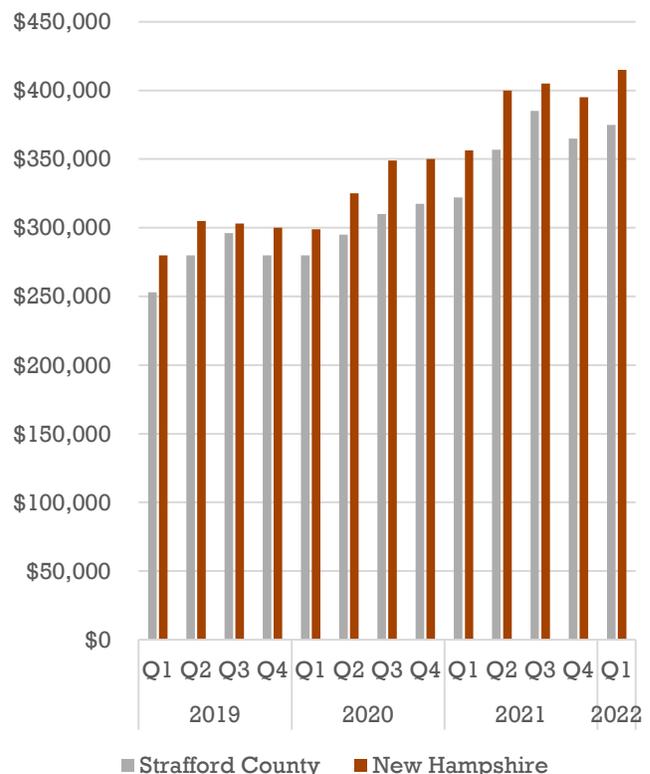


Our team has begun the process of updating SRPC’s Regional Housing Needs Assessment, which will provide an in-depth look at the housing needs of the region across all income levels. We have also facilitated regional discussions with economic development stakeholders concerning the impacts of housing on the overall health of the economy and maintained open communication with a range of audiences to help them understand the different ways in which housing can influence business operations as well as learn about some of the housing-related barriers that limit business growth and expansion.

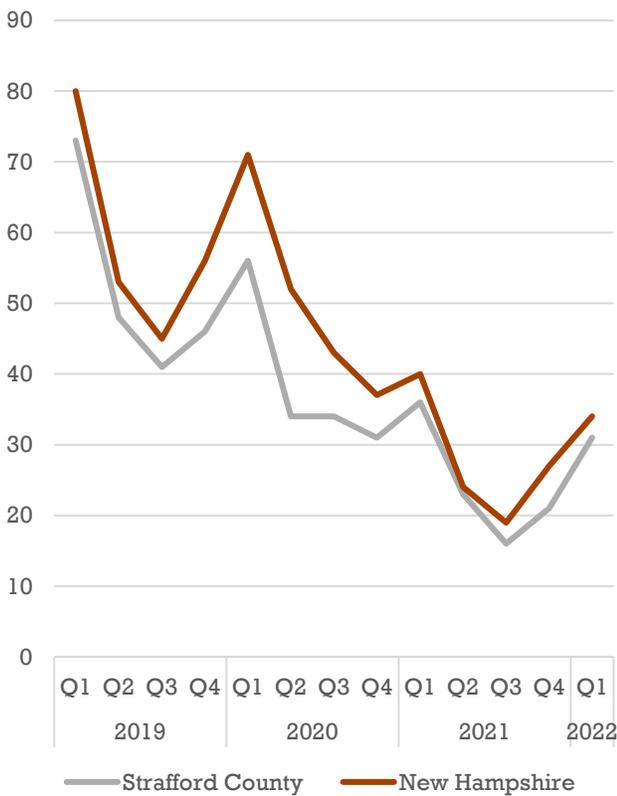
Number of Closed Sales (Single Family Homes)



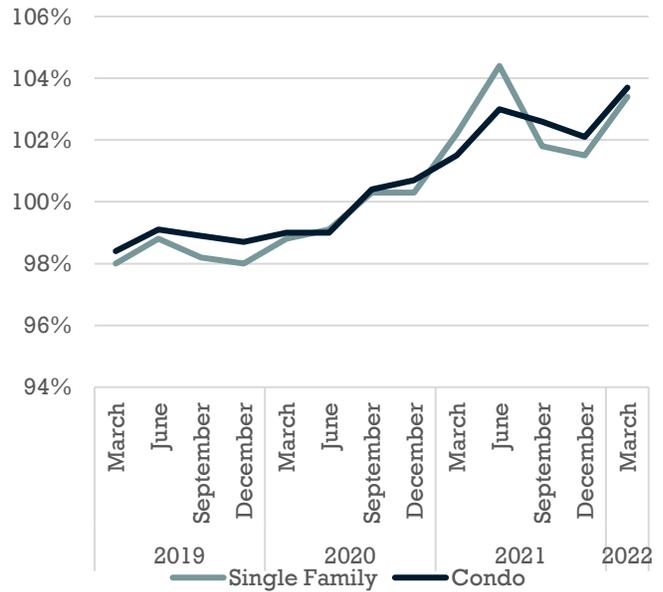
Median Purchase Price (Single Family Homes)



Average Days on Market (Single Family Homes)

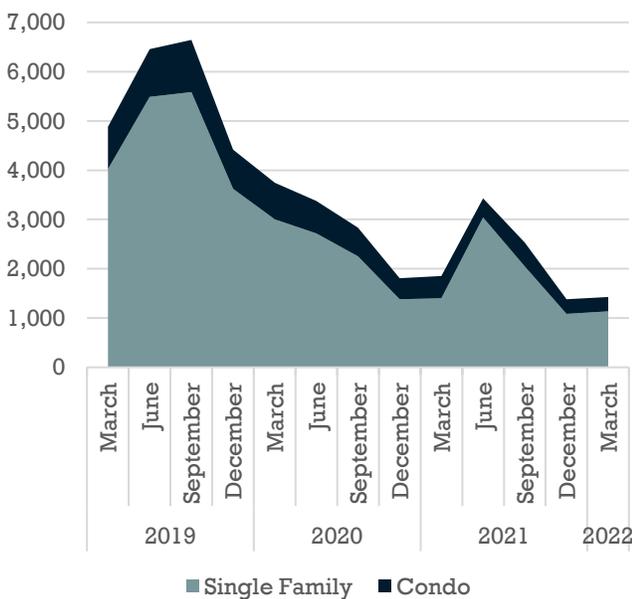


Percent of List Price Received New Hampshire

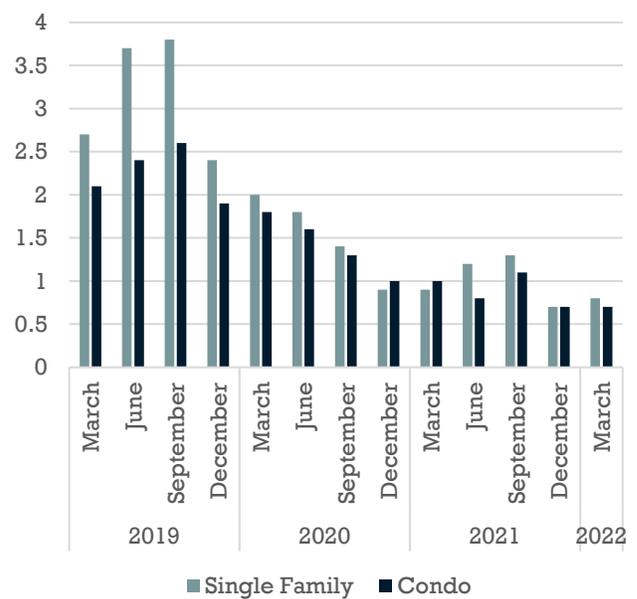


The chart above shows data only for the last month in each quarter. It does not represent the other months in the quarters.

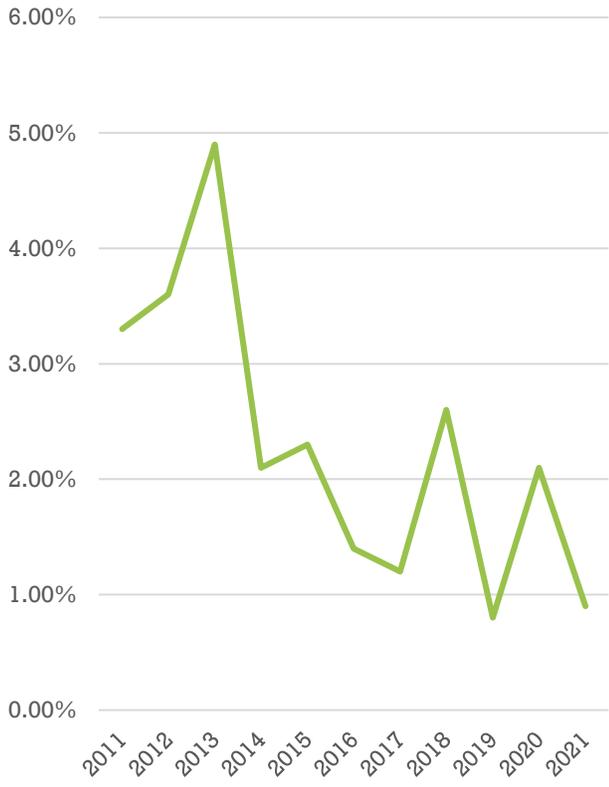
Homes for Sale (New Hampshire)



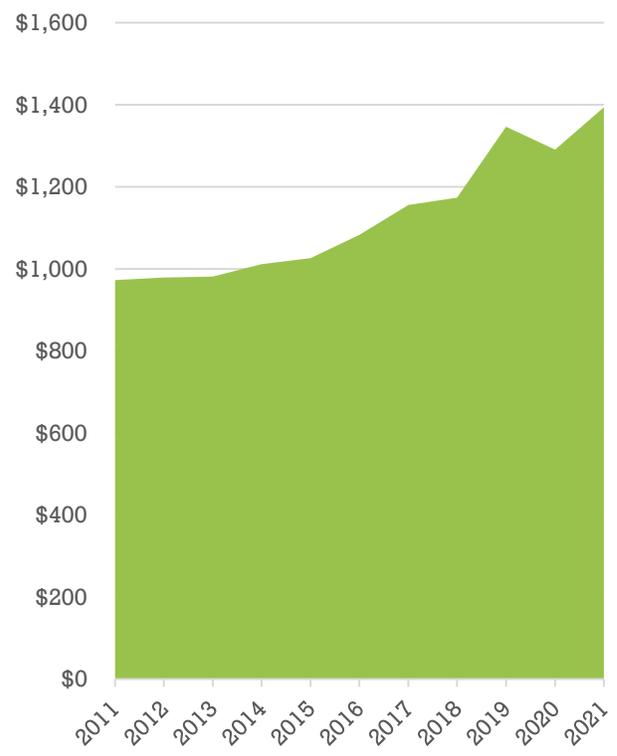
Months of Supply Inventory (New Hampshire)



**Vacancy Rates
(Strafford County)**



**Median Gross Rent for 2-
Bedroom Units
(Strafford County)**





INFRASTRUCTURE

Physical infrastructure systems are a necessary precondition for growth and development; they provide access to basic utilities, inputs, and information used by businesses and residents alike. The 2021-2025 CEDS assessed infrastructure systems such as public water, wastewater, stormwater, utilities, and broadband. It acknowledged the importance of transportation infrastructure, but limited discussion to freight transportation and referred readers to the [Strafford MPO's Metropolitan Transportation Plan](#) for discussion of other transportation issues.

This update notes that overall infrastructure conditions have changed little in the past year; projects that would fundamentally alter the state of a system typically require longer timelines for design and installation. This chapter adds discussion of two issues – cellular telephone networks and cyber threats – that were not discussed in the 2021-2025 CEDS but which have been highlighted by recent events. We conclude by discussing new federal funding opportunities and rising construction costs, which provide new opportunities or new barriers for infrastructure improvements.



1. Improve the resilience of the region's infrastructure.
2. Help partner organizations and municipalities to plan for their infrastructure needs, including access to funding.

Current Trends

The 2021-2025 CEDS noted an overall infrastructure network that was generally adequate for current usage, but that was beginning to deteriorate or that demonstrated emerging deficiencies in the face of anticipated growth or technological change.⁶⁰ In 2022 this overall outlook is essentially unchanged, but there have been some changes in circumstances related to specific infrastructure systems or funding outlooks. Federal programs may also impact the relevance of existing plans. For example, the Infrastructure Investment and Jobs Act (IIJA) changed definitions for an area to be 'unserved' or 'underserved' by broadband, making prior coverage maps outdated.⁶¹

The 2021-2025 CEDS documented a variety of ways in which behavioral changes in response to the Covid-19 pandemic impacted infrastructure systems (e.g. business shutdowns, remote work, and emergency orders preventing shutting off utilities for non-payment).⁶² While there were both personal choice and public policy bases for these decisions, New Hampshire state Covid-19 policies began to sunset in 2021, and any remaining emergency orders that were still in effect expired on June 11, 2021 when the State of New Hampshire allowed the declared state of emergency to expire.⁶³ Additionally, the Business Operations, Childcare, and Workforce & Education chapters explored the extent to which other factors impacted workers' ability or willingness to return to in-person work; demand on water, wastewater, and broadband usage had largely returned to pre-pandemic patterns at that time. However, slight changes are likely to persist as a result of decisions by workers to change jobs, leave employment to care for family members, or continue to work remotely.

Cellular Telephone Networks

Other pandemic-era practices identified new system deficiencies that are still coming to light. A business survey by the City of Somersworth found that many businesses along the Route 108 corridor did not have adequate cell phone network coverage.⁶⁴ This coverage gap was found to have existed since at least 2008, but not previously noted as an issue with many businesses simply relying on land-line office telephones. However, the issue surfaced in 2021 due to the large concentration of medical office buildings in the corridor; these businesses frequently required patients to remain in their cars and call the office from their personal cell phones to complete Covid-19 screening before entering the building. City staff were ultimately able to open a case with Verizon to begin addressing the coverage gap.⁶⁵ While this case was specific to Somersworth, it comes during a larger trend of cell phone carriers making new technological changes to their networks.⁶⁶

Service providers are in the process of disconnecting the older 3G service network in 2022, which could force consumers to make hardware or software upgrades to phones or other devices to stay connected.⁶⁷ Coverage maps for Verizon,⁶⁸ T-Mobile,⁶⁹ and AT&T⁷⁰ all show 5G service to be offered in portions of the SRPC region, but the service is not ubiquitous. All three coverage maps indicate that our region is among the first to receive 5G upgrades, likely due to our concentrated population and proximity to Boston and major highways. Ensuring adequate coverage and a smooth transition between technologies is important both from an economic and an equity perspective to ensure that all businesses and residents can have equal access to information and communications services.

Resiliency and Cyber Threats

Infrastructure systems are subject to a variety of natural and human threats. Many of these threats are described in the State of New Hampshire Multi-Hazard Mitigation Plan, updated by the NH Office of Homeland Security and Emergency Management.⁷¹ SRPC conducts similar analyses for its member municipalities during updates to local hazard mitigation plans. The 2021-2025 CEDS noted the importance of building systems that are resilient in the face of natural hazards and the impacts of climate change, and the resiliency that such systems in turn provide in the face of economic disruption. Many of the projects submitted for inclusion in the CEDS Priority Project List identify improved resiliency as one of their primary purposes. In one notable example, the Cities of Dover and Portsmouth are proposing emergency connections of their municipal water systems to protect against disruptions of supply or due to water quality.⁷²

The 2021-2025 CEDS did not directly address the potential impacts that cyber threats could have on public services and infrastructure. The field of cyber security is primarily concerned with protecting against damage and disruption to or theft of hardware, software, or information. Due to the variety of services they provide, local government organizations collect and store large amounts of personal data and other sensitive information. They also use their own information networks to provide essential services or operate their infrastructure systems, and many small jurisdictions may not have the staffing or financial resources to combat these attacks. Ransomware attacks on the Colonial Pipeline Company in April-May 2021 resulted in the shutdown of a system that typically transports 2.5 million barrels of fuel from the Gulf Coast to the Eastern Seaboard every day.⁷³

Federal officials have also cited the Russian invasion of Ukraine as a potentially significant source of cyber-attacks that pose a threat to businesses and governments alike.⁷⁴ While these attacks may not target public infrastructure in the United States directly, global information networks can make it difficult to predict the spread of malware once they have been released.

Two ransomware attacks in 2017, WannaCry⁷⁵ and NotPetya,⁷⁶ spread across the globe causing billions of dollars' worth of damages. The latter has been attributed to Russian military attacks on Ukrainian financial systems,⁷⁷ which then spread beyond the intended scope, impacting companies around the globe, including Russia.⁷⁸ In our region, both SRPC and the Town of Durham were impacted by ransomware during these global attacks.⁷⁹

Funding Infrastructure Improvements

Many infrastructure systems are likely to require significant upgrades in the coming years to satisfy future demand or improve their resiliency in the face of natural hazards, human disruption, environmental contamination, or system failure due to age. Funding for these improvements was also seen as a challenge for state and local agencies due to the scale of the anticipated improvements and availability of funding, especially when accounting for the impacts of Covid-19 on state and local budgets. Trends in early 2022 suggest mixed results for funding outlooks.

The federal government made significant investments in federal infrastructure programs, first as part of its Covid-19 stimulus package in the American Rescue Plan Act (ARPA)⁸⁰ and then as the Infrastructure Investment and Jobs Act (IIJA, also referred to as the Bipartisan Infrastructure Law or BIL).⁸¹ New Hampshire's allocation is expected to support a variety of transportation, broadband, water, and other infrastructure improvements.⁸²

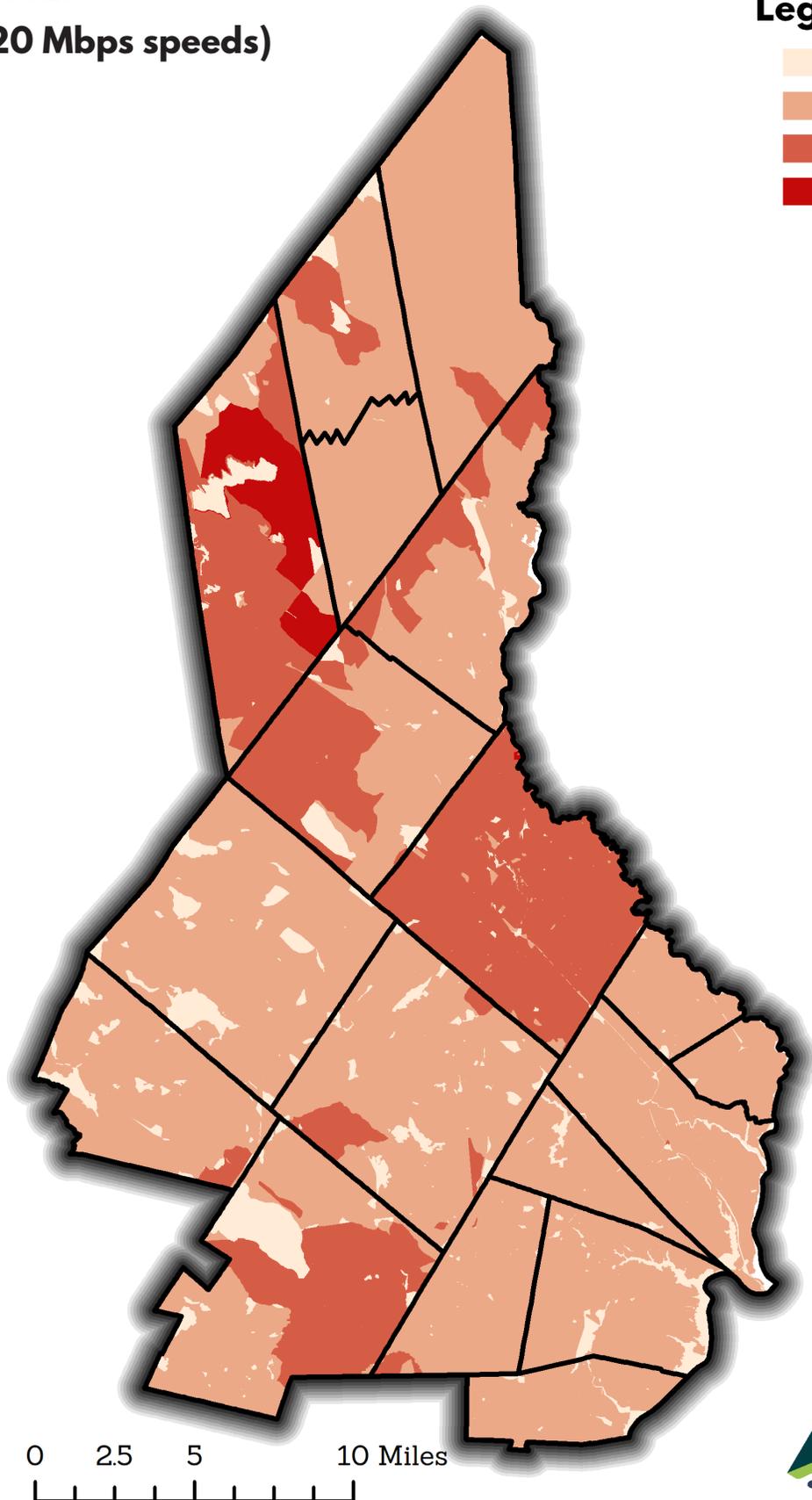
Meanwhile, construction costs for many projects are increasing due to inflation (see the Economic Growth chapter), higher commodity prices, and supply chain disruptions.⁸³ The construction industry in New Hampshire has seen high demand for contractors,⁸⁴ offset by shortages of both materials and available labor.⁸⁵ The Russian invasion of Ukraine has exacerbated these issues by further driving up the cost of fuel and international shipping.⁸⁶ Commodities markets have also been impacted by the war (Russia, for example, exports sawn lumber); some of these markets may only experience temporary disruptions as companies find alternative sources, while others are likely to experience longer-term disruptions.⁸⁷



SRPC's primary means of influencing the region's infrastructure come from our planning functions and our ability to advocate for projects and connect partner organizations to funding resources. Since the adoption of the 2021-2025 Priority Project List, SRPC economic development staff alone have written at least 25 letters of support for state or federal funding opportunities. As a Metropolitan Planning Organization, SRPC actively contributed to weighting transportation projects for the 2023-2032 Ten-Year Plan, which is under consideration for adoption;⁸⁸ in spring 2022 MPO staff began soliciting projects to be included in the 2025-2034 Ten Year Plan. SRPC also actively pursued funding for infrastructure-related work, such as the "Gulf of Maine Blue Economy Catalyst" project, which was submitted for EDA's Build Back Better Regional Challenge in collaboration with UNH. While the project did not receive funding, the proposed Blue Economy Master Plan has been added as a CEDS Priority Project for further development and includes an infrastructure assessment to identify high-potential sites for industry cluster development, and the infrastructure capacity or system expansions that would be necessary to support them.

Number of Providers Advertising Broadband Speeds (At least 100/20 Mbps speeds)

Legend





MOBILITY AND ACCESSIBILITY

The Covid-19 pandemic highlighted disparities in mobility and accessibility for people in the workforce, particularly for people with low income, disabilities, or other factors that impact their ability to access essential services. Social distancing policies disrupted both fixed-route and demand-response public transit and other regional transportation services. Economic conditions have also had side-effects for transportation such as rising fuel costs. Additionally, driver behavior may have shifted during the pandemic in a way that makes roads less safe. While the economy is in recovery, many of these impacts to mobility and accessibility have yet to return to pre-pandemic conditions.



1. Expand availability of alternative modes of transportation, by enhancing and promoting development of active transportation networks and public transit.
2. Improve roadway safety for pedestrians, bicyclists and people in non-motorized vehicles.

Current Trends

Public Transportation

The Cooperative Alliance for Seacoast Transportation (COAST) and UNH Wildcat Transit, the two main providers of fixed route public transportation services in the region, were heavily impacted by the pandemic. COAST has seen a steady increase in ridership volume especially since the end of the mask mandate on April 15, 2022 and is now at 65-70 percent of pre-pandemic volume.⁸⁹ UNH Wildcat Transit regional ridership was down 25 percent during the 2021-2022 academic year from the previous year due to the pandemic. UNH anticipates that it will need to adapt the frequency and area of its transit service to changing student needs.⁹⁰

Despite the pandemic, public transit remains vital to the regional economy. Economic modeling analysis showed that in fiscal year 2019, COAST was responsible for a total estimated economic benefit of \$25.89 million compared to their operating budget of \$5.98 million. This represents an economic return on investment of over \$4.30 for every \$1.00 invested.⁹¹ Because UNH Wildcat Transit is designed for students, faculty, and staff to access the campus, the same economic model does not apply. However, UNH is the region's largest employer and the benefits it provides to the region in terms of training, education, and innovation are invaluable. The university also generates value for neighboring municipalities, in terms of land values, housing demand, and other ancillary benefits.

Despite the importance of public transit in New Hampshire's economy, it remains critically underfunded. COAST is federally funded and relies on matching funds. The State only provides \$200,000 in matching funds so municipalities bear most of the cost of matching federal funds. The Bipartisan Infrastructure Law (BIL) increased federal funding for public transit, however, COAST will not be able to access the increased funding without meaningful state investment or increasing the financial burden on municipalities.

COAST On-Demand Vehicle. (COAST photo)



Demand-Response Transit Services

People 65 years and older are more likely to have a disability that impacts their independence and requires transportation assistance. New Hampshire's senior population is still growing rapidly, which signals an increased need for demand-response transportation services.⁹² Given that these services operate on an individual door-to-door basis, rather than a fixed route schedule that can serve more people, they cost significantly more. Demand for COAST's paratransit service (required under the Americans with Disabilities Act) grew 880 percent from 2008-2018, and COAST's cost to provide those services grew by 744 percent.⁹³ It now makes up more than 25 percent of the budget and will only increase with the growing senior population.⁹⁴

Electric Vehicle Charging

The pandemic also showed the vulnerability of our roads and bridges and of transportation networks that rely on fossil fuels. People drove far fewer miles early in the pandemic due to shutdowns and stay-in-place orders but driving rebounded quickly after these measures expired.⁹⁵ Nevertheless, even the short drop affected the revenues that the NH Department of Transportation needs to maintain roads and bridges. That emphasized a national challenge: how to maintain a highway network that relies on revenue from gas taxes that have been steadily declining as vehicles have become more efficient and electric vehicles make up more of the market. Lack of state revenue and missing matching dollars from the state are undermining the long-term sustainability and quality of New Hampshire's infrastructure. Moreover, the ongoing geo-political conflict in Ukraine has led to gas price increases unheard of since 2008, which in turn led to heightened public interest in purchasing of electric vehicles as they are not subject to the same price fluctuations in the global oil market.⁹⁶ However, this is still undetermined as the invasion could potentially have an inflationary effect on materials needed for battery manufacturing, such as nickel, and therefore affect the overall cost of batteries.⁹⁷

Regional Transportation

Regional and inter-regional transportation services have been recovering from Covid-19 but at a slow pace. C&J Bus lines connect the region to Boston, MA and New York City and expect that leisure travel will make a comeback first, followed by business travel. The expectations are that the C&J ridership will eventually return to pre-Covid levels as people who rode C&J buses before the pandemic will still need to take them to get to their destinations.⁹⁸ Amtrak's Downeaster line, which connects the region from Brunswick, ME to Boston, MA, is popular but ridership is restricted by current track capacity. In addition, Covid-19 is still affecting ridership which is below 50 percent of pre pandemic levels.⁹⁹ For more detailed information on the ridership volume for the Downeaster, please refer to the Data Page of this document. The transition to remote work could further affect passenger rail trends as less people will need to get to in-person work.¹⁰⁰ Data for 2020 and 2021 for NH Amtrak stations are still unavailable and will be included in next year's update. To incentivize regional transportation and outdoor recreation, Amtrak is now accepting bicycles on board at all Downeaster stations in Maine, New Hampshire and Massachusetts so people can enjoy their destination on foot and bicycle and get around more easily.¹⁰¹

Road Safety

The 2020 calendar year saw significant impacts due to shutdowns in response to Covid-19; traffic volumes were much lower than in recent years. Some experts predicted that as people drove less due to state-wide restrictions and increased options for remote work, roadway fatalities would decrease. In reality, the vehicle miles traveled (a measure of traffic volume) decreased significantly in March and April (down 22 and 44 percent respectively from the same months

in 2019) but began recovering as restrictions were eased. VMT have remained below 2019 levels in all but three months since March 2020. Despite these lower traffic volumes, the number of traffic fatalities stayed consistent with 2019.¹⁰² Driver behavior plays the biggest role in highway safety trends at the state and national level. Studies have found that drivers have become more prone to speeding as a result of pandemic-related stress.¹⁰³ Additionally, the relatively empty roads during the beginning of the pandemic encouraged people to drive faster, which is made even more dangerous by the prevalence of larger, heavier vehicles.¹⁰⁴

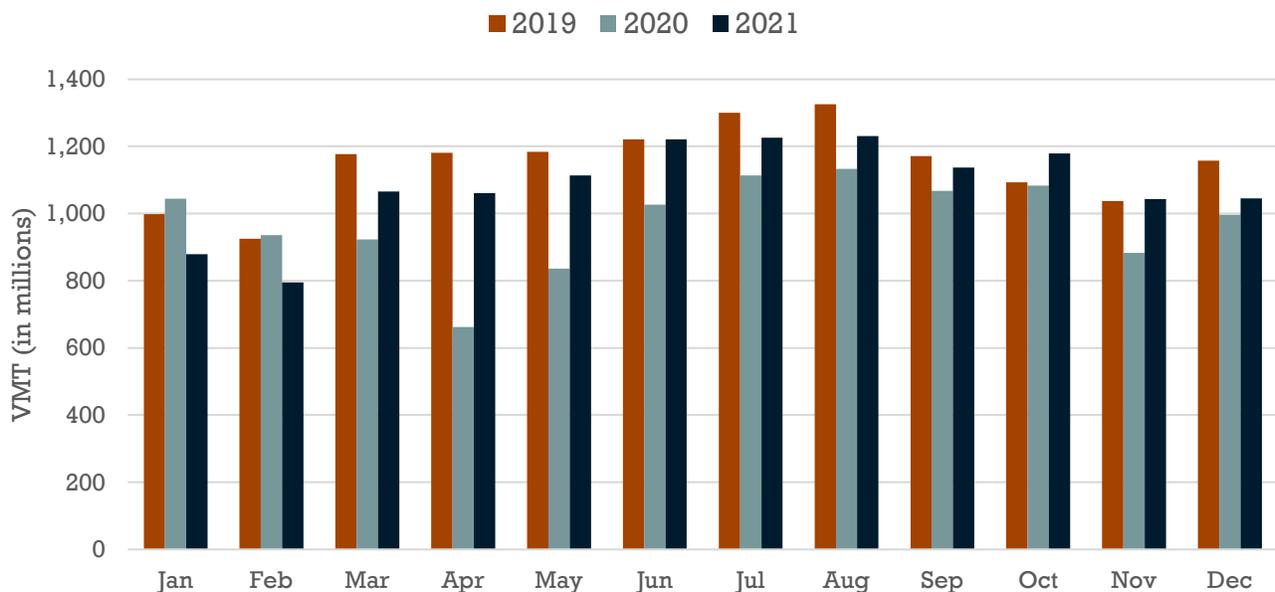


SRPC will continue to study and advocate for proactive planning between transportation and the built environment. By increasing the role of downtowns as economic hubs, we can make our communities more walkable, bikeable, and ADA accessible. The current outdoor dining initiatives already promote walkable vibrant communities, which could be improved by further development of pedestrian infrastructure in town centers, downtowns, and commercial areas.

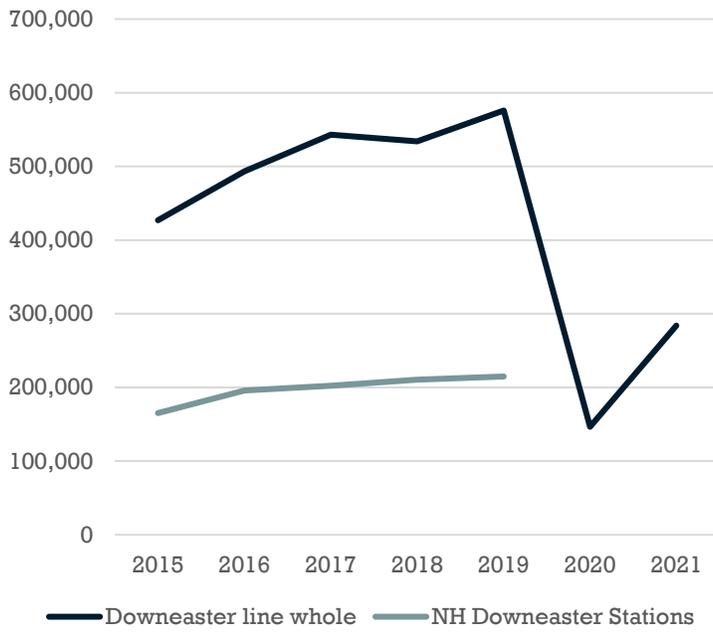
In addition, SRPC has helped to decrease transportation dependency by advocating for the economic benefits of public transit and promoting housing development that enables workers to live near their jobs and other services. SRPC will continue to promote new mixed-use, high-density development along major corridors with existing public transit to increase transportation efficiency.

SRPC is currently developing an “active transportation” plan for the region. The plan, which is set to be adopted in January 2023, will guide the development of non-motorized transportation facilities, and maximize the use of future investments for a safer, cleaner, and better-connected region. By increasing the transportation options and accessibility for people without vehicle access, including seniors, people with disabilities, and low-income households, we hope to improve the connectivity between SRPC communities and create new economic opportunities for people in our region.

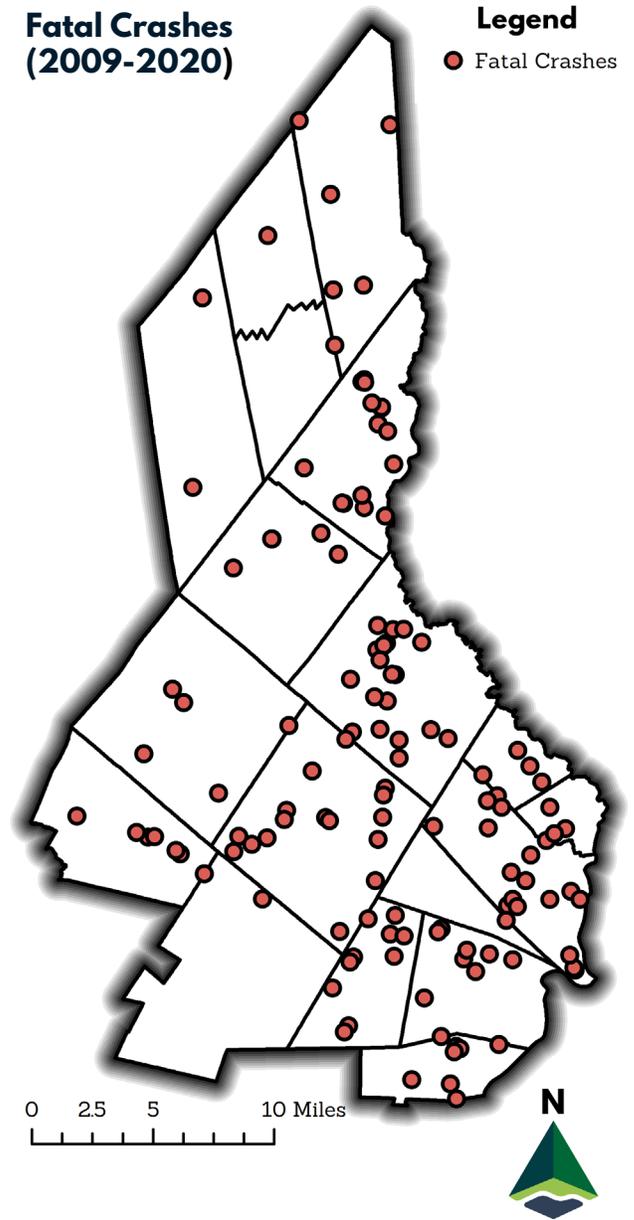
NH Monthly Vehicle Miles Traveled 2019-2021 (in millions)



Amtrak Downeaster Annual Ridership



Fatal Crashes (2009-2020)



Total Downeaster Ridership	
Year	Number of Riders
2018	533,949
2019	576,005
2020	146,282
2021	283,721



COAST Bus in Rochester. (COAST photo)



AGE FRIENDLINESS

Age friendliness is the concept that a community is welcoming, supportive, and inclusive of individuals at all stages of their lives. Analyses that seek to assess age friendliness must consider the impacts that age and correlated issues have on people of all ages in all planning functions. In addition to obvious differences stemming from their stage in life, different age cohorts will also have had different formative life experiences. This means that not only are there likely to be generational differences in expressed values or priorities, there are also likely to be barriers to accessing certain facilities or services that are cohort-specific. This chapter attempts to identify age-specific differences in access to economic opportunities and recovery from the Covid-19 pandemic. Many of these topics are discussed in greater detail in other chapters. In addition to other CEDS themes, this chapter also considers the AARP's eight domains of livability as a framework for understanding the impacts of age on daily life.¹⁰⁵



Support municipalities and policies that create economically inviting, healthy, and accessible communities for residents of all ages.

Current Trends

Health Services and Community Supports

The Health Services domain has been the most-emphasized livability domain in both the 2021-2025 CEDS and this update due to the ongoing Covid-19 pandemic. As of April 26, 2022, 58.3 percent of the population in Strafford EDD was fully vaccinated, with an additional 10.2 percent reporting having received at least one dose of the Covid-19 vaccine.¹⁰⁶ This was slightly lower than the statewide rate, which reports over 63 percent full vaccinations and a further 10.6 percent with at least one dose.¹⁰⁷ “Older adults continue to be one of the populations hardest hit by the coronavirus pandemic. Since the start of the pandemic, people 65 and older have been at greatest risk of hospitalization and death due to Covid-19 compared to other age groups and represent nearly 80% of all Covid-19 deaths as of September 29, 2021.”¹⁰⁸

Although vaccines were rolled out for children aged 5 to 11 in the fall of 2021, “nationally, more than a quarter (28.1%) of 5-11-year-olds had received at least one Covid-19 vaccine dose as of January 18, 2022. This represents just over 8 million of the approximately 28 million children in this age group in the United States.”¹⁰⁹ It is difficult to draw a comparison for this age group in New Hampshire because the Department of Health and Human Services does not publish vaccination data for children aged 5 to 11. Of all teens aged 12 to 19 in Strafford County, 37.1 percent are fully vaccinated as of April 26, 2022.¹¹⁰ Strafford County teens have the second lowest vaccination rate of all New Hampshire counties. These vaccination rates also affect families with children of all ages who as they made, and continue to make, decisions on social participation, childcare, and schooling options.

Social Opportunities

The AARP livability domains include three themes related to individuals' social experiences: Social Participation, Respect and Social Inclusion, and Civic Participation and Engagement. Taken collectively, these domains assess whether an individual has opportunities to make social

connections within their communities, whether they are respected and valued as members of their communities, and whether they have opportunities to be involved and engaged as citizens, workers, students, or other active participants in public life.

In a survey SRPC conducted in 2021, 75 percent of respondents identified social isolation as one of the “greatest challenges” facing themselves or their households, far greater than any other response.¹¹¹ Numerous organizations, from the National Council on Aging¹¹² to the World Health Organization¹¹³ have documented ways that the Covid-19 pandemic exacerbated issues of social isolation and loneliness among older adults and the potentially serious mental health consequences that derive from this isolation. Fortunately for this age group, widespread distribution of vaccines and boosters in 2021-2022 made more in-person gatherings possible. However, the slower development of vaccines for children has continued to cause disruptions and negative mental health consequences for parents whose children cannot be vaccinated, even if they are vaccinated themselves.¹¹⁴

While K-12 schools had operated a variety of remote learning and hybrid models throughout the 2020-2021 school year, a mandate by Governor Chris Sununu to provide full-time in-person learning by April 19, 2021, established more consistent policies across the state.¹¹⁵ The Governor cited educational, social, and mental health benefits to students as the primary reasons for his order.¹¹⁶

Many acknowledge that these mental health benefits extend beyond the students themselves. According to the Granite United Way, “a year of isolation and prolonged stress has jeopardized the mental health of our students, caregivers, educators, and workforce.”¹¹⁷ While in-person education was the norm in 2021-2022, outbreaks of Delta, Omicron, and other variants caused severe disruptions as teachers and students alike missed school over this academic year due to isolation and testing requirements for illnesses resembling Covid-19. Many of these same disruptions impacted other childcare programs such as summer camps and pre-school-aged daycare programs; for more on the impacts of Covid-19 on these programs and their implications for the workforce, see the Childcare chapter.

Housing

As discussed in the Housing chapter, the high costs and low availability of housing continues to threaten the economic vitality and age-friendliness in this region. Without affordable housing, families and younger people cannot enter communities or keep a job, and the older population are being priced out. Recent responses from SRPC’s Regional Housing Needs Assessment Survey cite cost of housing and affordability of housing as the greatest challenges that communities face.¹¹⁸

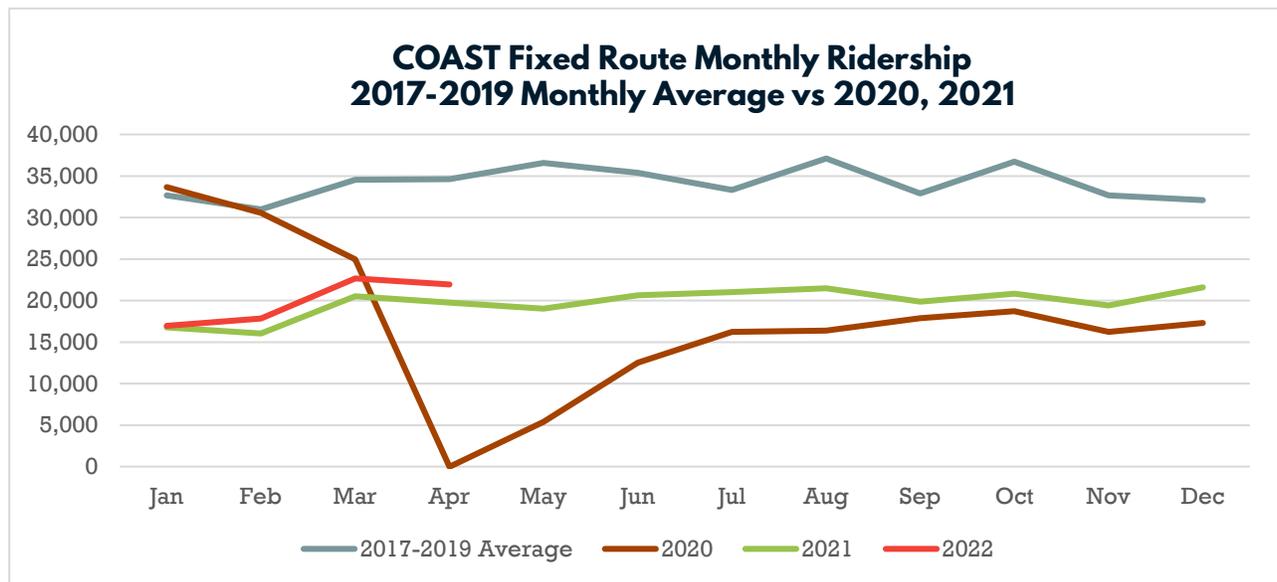
The rising cost of housing can impact populations, particularly those on a fixed income significantly.¹¹⁹ Strafford County is home to approximately 10 percent of all Social Security benefit recipients in the state of New Hampshire, where the average social security monthly payment is \$578.17 as of January 2022.¹²⁰ Accessory Dwelling Units have received attention in recent years, both for the affordability benefits they provide, and for the flexibility they offer to residents at different stages of their lives.¹²¹ “Seven percent of New Hampshire residents age 45-plus reported they have an [Accessory Dwelling Unit] on their property, and nearly half of such residents said they built it to allow an older family member or friend to live with them, according to a 2020 AARP survey.”¹²² Meanwhile, younger prospective homebuyers are facing increased competition in the housing market from older generations, as their comparatively low levels of savings and large student loan debts have made it difficult for many millennials to compete with older generations in the housing market.¹²³

Transportation

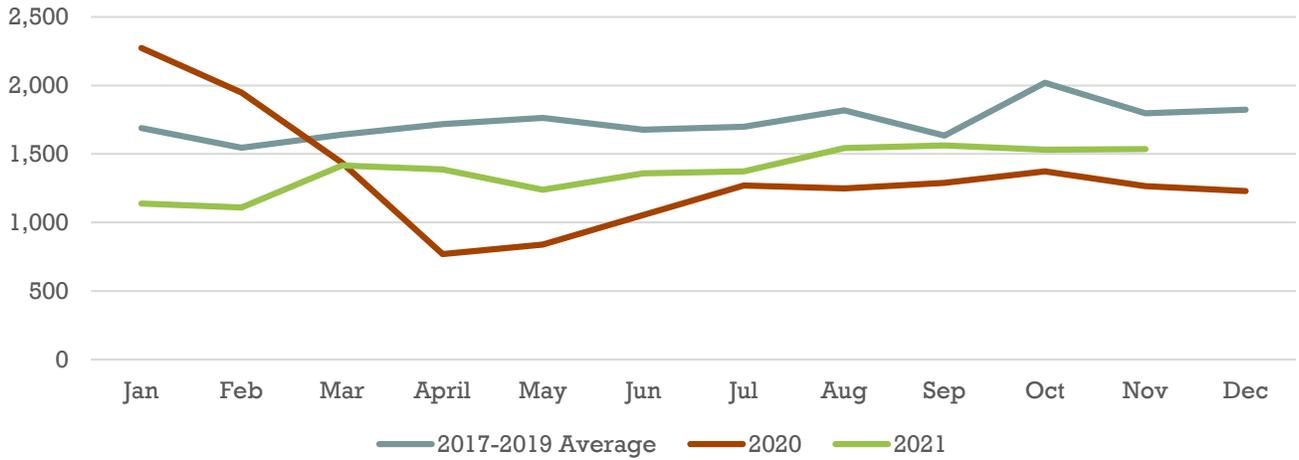
As discussed in the Mobility and Accessibility chapter, public transit ridership has been slow to recover from the pandemic, with potential implications for key age cohorts. Potential reductions in UNH Wildcat Transit ridership may require changes to service areas and frequencies; while Wildcat serves the entire UNH community, including faculty and staff, alterations to service areas could disproportionately affect students without access to a personal vehicle by further limiting their available housing options in an already-competitive housing market.¹²⁴ Meanwhile, the rapid increase in needs for COAST's demand-response services over the last decade have been largely driven by increases in the population over 65. These services are an important resource for aging residents to maintain independence and retain access to medical providers or other key services, while at the same time posing a challenge to COAST's business model due to their high cost when compared to fixed route services.



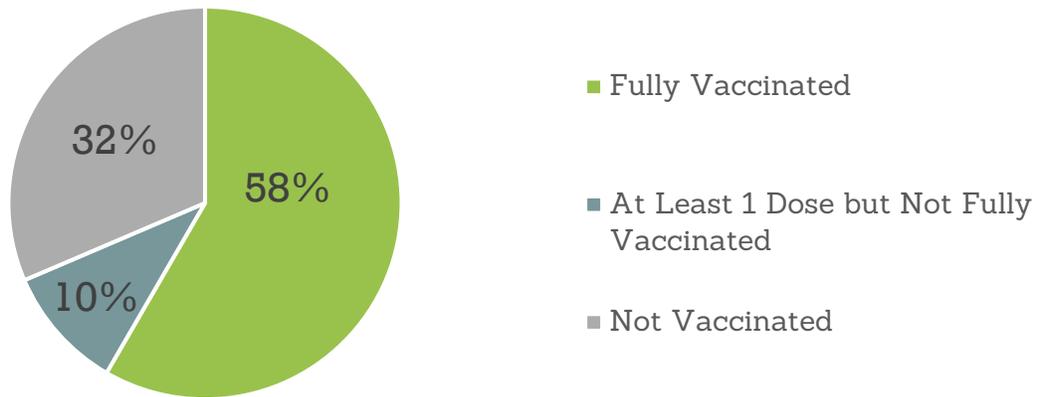
SRPC continues to work with our communities to raise awareness of and promote affordable housing, food security, outdoor recreation, age-friendly practices, and design. We strive to include and consider the needs of all age groups when conducting planning processes whether as part of specific projects such as [Communities for Healthy Aging Transitions](#),¹²⁵ or as a broader tenet of SRPC's work. It is our priority to ensure that people of all ages are welcome, included, accounted for, and have the resources they need in all of our communities.



COAST Demand Response Ridership 2017-2019 Monthly Average vs 2020, 2021



All (Age 5+) Strafford EDD Vaccinations 4/26/22





WORKFORCE AND EDUCATION

Healthy economies and vibrant communities provide an innovative workforce to meet current and future industry needs and create a competitive economic advantage for New Hampshire. Even prior to Covid-19, many industries struggled to find qualified workers. Time and again, we hear from partners working closely with businesses in and around the region that finding employees is one of the greatest challenges they face, and this obstacle has only been exacerbated by the pandemic.



1. Continue to be a positive connection between all the actors that play an important role in the workforce and education sectors, including employers, educational institutions, housing stakeholders, industry partners and municipalities that must all be connected and “in the loop” with each other.
2. Continue to develop and strengthen relationships and partnerships that will support a healthy regional workforce.

Current Trends

In the past year, workforce challenges have amplified. In December 2021, unemployment in Strafford County was 2.1 percent,¹²⁶ one percent lower than it was before Covid-19. On the surface, this seems like a positive trend, but it does not tell the whole story. As noted in the NH Fiscal Policy Institute’s September 2021 Issue Brief, “While the state’s unemployment rate has dropped to pre-pandemic levels, other data show that overall employment remains lower than pre-pandemic levels, with fewer people participating in the workforce due to key challenges such as the limited availability of childcare.”¹²⁷ Putting more stress on an already fragile situation, the “great resignation”¹²⁸ simultaneously occurred. For many speculated upon reasons, workers left their jobs and careers in unprecedented numbers. “All told, over 38 million workers have quit their jobs [nationally] during 2021. Some of those may be [job switchers](#), leaving low-wage industries like food services for higher pay, and some may be the millions of workers who are still remaining on the sidelines”¹²⁹, meaning those who are currently unemployed and not looking for work.

Decisions by workers under 18 or over 65 to return to work may continue to be impacted by the pandemic, and some older workers also seem to have retired earlier than previously planned. However, early Covid-19 workforce trends are very different from the trends we have seen during this past year. According to the data in SRPC’s 2022 Data Snapshot, at the beginning of the pandemic, workers under the age of 24 or over the age of 65 in Strafford County faced the highest percentages of job loss, but they have also been the fastest to recover. Workers under 21 and over 65 are the only two age groups that have returned to pre-pandemic workforce levels (meaning that the 2021 quarterly numbers exceed the same quarter in 2019 and are almost back to Quarter 1 of 2020.) Meanwhile, workers aged 25-64 saw fewer job losses at the beginning of the pandemic but have not yet fully recovered. This data also shows that the initial Covid-19 shutdowns and restrictions lifted in New Hampshire by the end of Quarter 3 and in Quarter 4 of 2020 is where we see the biggest recovery for workers aged 25-64. In fact, after the slight uptick in Quarter 4 of 2020, workers aged 45-64 started declining again in the first half of 2021.¹³⁰

As the Covid-19 pandemic continued and different variants emerged, employers continued to struggle to find workers. “Experts said hiring challenges predate the pandemic but have become more dire as businesses try to get back on track after 15 months of limited income.”¹³¹ The reduction in labor force participation, housing, and childcare are all factors that are contributing to the workforce shortage in our region. Please refer to the related chapters in this update for further insight into those issues.

In all, this put more pressure on an already stretched workforce and affected industries in numerous detrimental ways. As a result, employers have had to become more creative in their efforts to attract workers. They are paying higher wages, offering sign-on, stay-on, and referral bonuses, training and educational opportunities, childcare, allowing flexible schedules and remote work opportunities, enhancing benefits, and using innovative marketing techniques to advertise open positions.¹³²

In response, the New Hampshire Department of Health and Human Services (DHHS) has made workforce investment one of the top three priorities in the spending plan for American Rescue Plan Act (ARPA) monies. According to DHHS, one of their main goals is to “Increase access and quality of services for beneficiaries by expanding workforce capacity through recruiting, retaining, and career laddering HCBS [Home and Community Based Services] workforce using means such as payments for sign-on bonuses, retention bonuses, ladder advancement stipends, and competency/education/training support stipends.”¹³³

In addition, education and skills training have changed during this time. Many schools have returned to in-person formats, and new shorter skills training courses in direct response to employer needs have been created to entice potential employees to prepare to join the workforce much quicker than previously. Notably, educational institutions, including K-12, and employers are making significant efforts to promote careers in the trades, incentivizing students straight out of high school (or even workers who are looking to switch careers), to learn a new skill that doesn't involve the traditional 4-year path to obtaining a degree.¹³⁴ In addition to this, reputable institutions of higher education in our region, such as the University of New Hampshire and the Community College System of New Hampshire, have placed an emphasis on structuring their training and education programs to meet the current and evolving needs of employers.

Meanwhile, the state continues to promote other business education resources and training programs such as WorkReady NH,¹³⁵ WorkInvest NH,¹³⁶ and Apprenticeship NH.¹³⁷ in an effort to provide training for employees to match the skills that employers are currently seeking.



SRPC has continued and strengthened its Seacoast Economic Development Stakeholders weekly meetings. These have expanded to include representatives from Great Bay Community College, the University of New Hampshire, the Small Business Development Center, Chambers of Commerce, NH Department of Business and Economic Affairs, economic development directors, staff and directors from other Regional Planning Commissions, small business owners, housing advocates, among others, and these relationships have been greatly expanded upon and strengthened due to these frequent meetings.

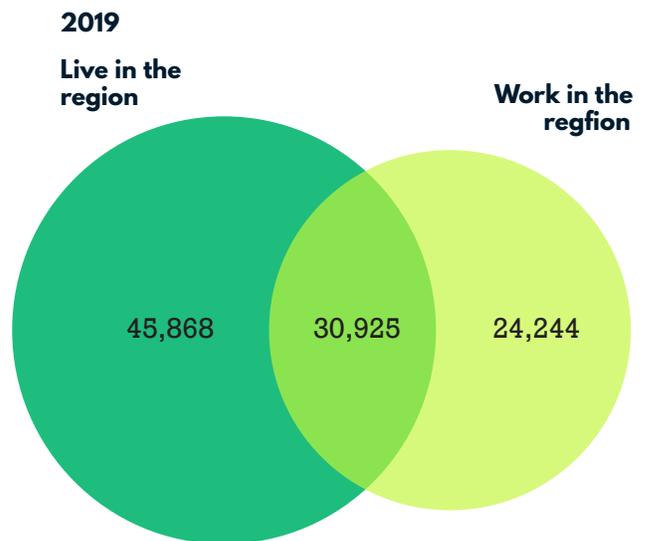
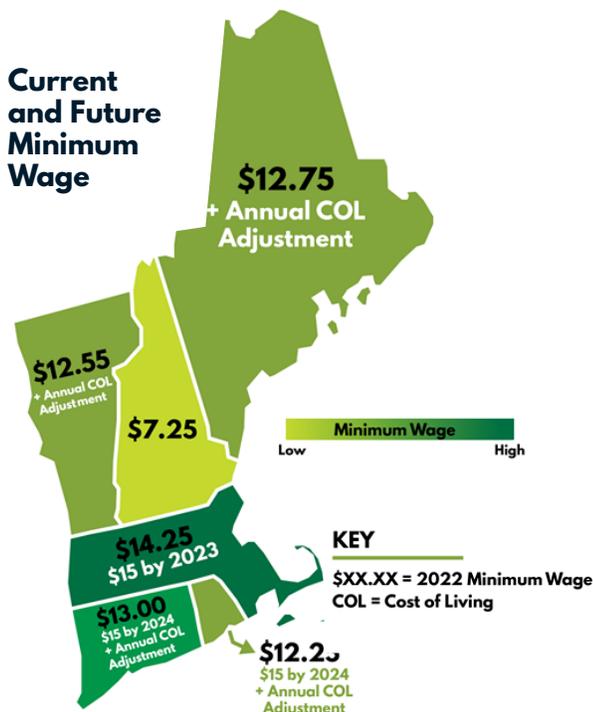
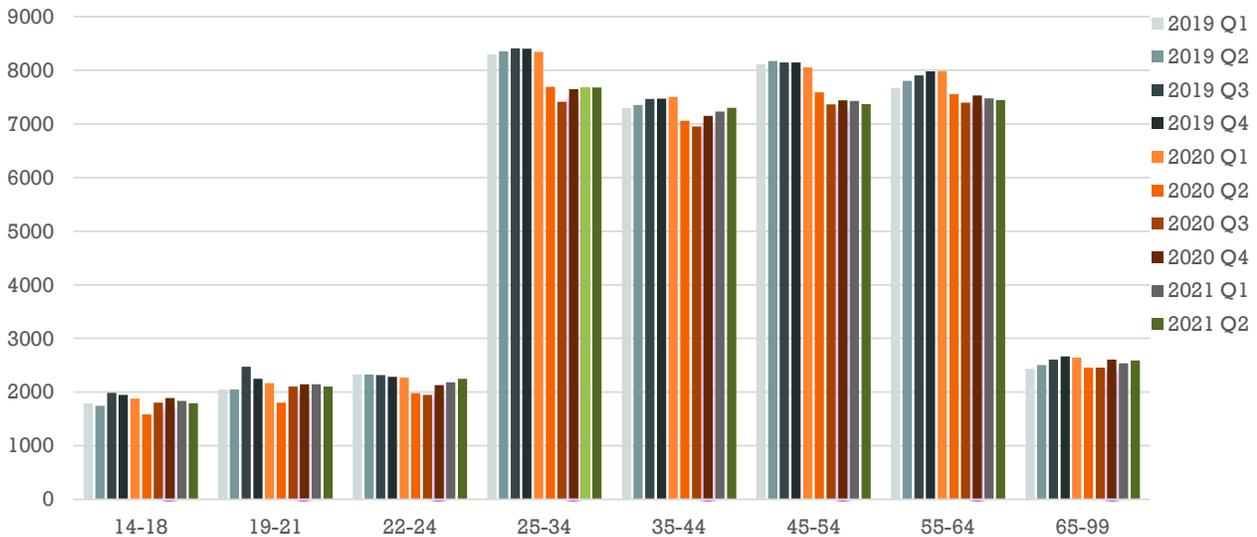
SRPC staffs these meetings, manages the invitee list, creates the agenda, maintains the recordings and notes, and works to invite guest speakers on relevant topics. This is SRPC's greatest ability to provide a positive connection between actors in the workforce and education realm. It allows everyone involved to understand and collaborate on challenges facing employers and employees.

Modelled on this collaboration, the [NH Department of Business and Economic](#)



[Affairs](#) has created a new initiative for four different economic regions in the state (identified as Central-Southern, Northern, Seacoast, and Southwest regions) called the Collaborative Economic Development Regions (CEDRs) and provided a \$50,000 grant to each area.¹³⁸ The Seacoast group has presented a proposal for this funding to focus on assisting small businesses in the region with workforce recruitment and development, using expert talks, podcasts, videos, and print materials demonstrating successful attraction and retention techniques, innovative ideas, and general advice.

Workforce By Age (Strafford County)





COMMUNITY VIBRANCY

The 2021-2025 CEDS identified aspects of our region that make it an attractive and enjoyable place to live and visit and acknowledged a broad variety of both rural and urban features that vary by community. We especially noted the importance of cultural amenities, historical downtowns, green spaces, and natural resources that promote outdoor recreation and increase tourism as major draws. In the past year, the significance of these aspects has only been amplified.



1. Continue supporting efforts that enhance community vibrancy through initiatives that increase community diversity and engagement.
2. Advocate for actions that would expand the resiliency of downtowns and areas of cultural and historical significance and promote outdoor recreation and green spaces.

Current Trends

Growing Interest from Outside the Region

Strategy committee members noted increased interest from out-of-state and out-of-region workers and businesses who wished to relocate; many such individuals planned to work remotely while enjoying the high quality of life the region has to offer.¹³⁹ Amongst the many appealing features that contribute to the high quality of life cited by both businesses and individuals are access to educational opportunities and proximity to high-quality academic institutions, quality healthcare, stability of the economy, high return on investment and the natural beauty of the area which is defined by its estuaries and coastal environment. Young families especially tend to gravitate towards this area, which they believe is good for the future of their children and family members in terms of education, health care quality and job opportunities. Many are attracted by the quiet rural character of the smaller communities but enjoy the convenient access and proximity to lively cultural and historical amenities of urban areas.¹⁴⁰ However, the current lack of good and affordable housing¹⁴¹ remains to be the primary barrier for people trying to move to the region.¹⁴²

Outdoor Dining

Outdoor dining continues to be a major booster, enhancing community vibrancy and spurring economic development.¹⁴³ Some of the most prominent impacts and obstacles impacting outdoor seating include loss of parking revenue, late night noise, allowing dogs¹⁴⁴, following ADA accessibility requirements, pedestrian safety, and setting up of outdoor barriers and seating furniture without obscuring the pedestrian right of way, to name a few.¹⁴⁵ The fragmented nature of regulations on restaurants forces small business owners with limited resources to navigate a broad range of federal, state, and local regulations regarding zoning, site operations, public rights-of-way, health codes, and alcohol sales. SRPC has been working to help promote outdoor dining adaptations that are business- and pedestrian-friendly by helping businesses navigate the rapidly changing policies and challenges that arise from them. Despite the difficulties, outdoor dining continues to be very popular, and businesses have shown very adaptive behavior to meet changing customer needs by coming up with innovative solutions to attract new customers.



Dover Community Trail. (SPRC photo)

Venues, Arts and Culture

Live events have gradually returned after restrictions on gatherings were lifted, although many events still take place in smaller numbers and with more caution.¹⁴⁶ Smaller venues continue to struggle to stay open despite state and federal support programs, such as the Paycheck Protection Program, Live Venue Assistance Program, or the Shuttered Venue Operators Grant, all of which expired by the end of 2021.¹⁴⁷ Although most arts and culture-related businesses have reopened, the sector is still hurting, and probably will for a while as performing arts was one of the hardest hit sectors during the pandemic. While audiences are slowly starting to return to the venues, the overall attendance is still 65 to 75 percent of pre-pandemic levels.¹⁴⁸ According to the SMU DataArts, unemployment in the arts doubled the national average during the pandemic, disproportionately affecting women and people of color.¹⁴⁹ Furthermore, SMU DataArts predicts that it will take performing arts industries throughout 2024 to offset the ticket losses but this greatly depends on venue type and what happens with the pandemic. Many arts organizations are taking serious steps to alter their business models by marketing to new audiences, finding new streamlining options and continuing to offer hybrid programming to meet the demand in a comfortable and safe manner for attendees.

Open, Green Outdoor Spaces

Open, green outdoor spaces are important indicators of community vibrancy especially for the smaller, more rural communities that enjoy the peace and quiet this region has to offer. The importance of green spaces such as trails, public squares, parks, and other outdoor recreation sites that can be used and enjoyed by people of all ages has only increased in the past year. Public places, both indoor and outdoor, continue to be vital for community development and tend to increase social cohesion and improve trust amongst residents.

Many people in our region have cited the recreational and educational opportunities, the public transit options, the historic downtowns, community character and access to natural resources and diverse events as some of the most important features of their communities and the reasons why they chose to stay.¹⁵⁰ Even in 2021, despite drops in outdoor recreation employment, NH's outdoor recreation continued to be a significant driver of the state's economy, with activities such as boating, bike riding, fishing, and RV camping contributing \$2.2 billion to New Hampshire's economy.¹⁵¹ Similarly, the proximity to walking and biking trails can lead to business creation and expansion, increased spending by locals and visitors and improved desirability factor for housing located close to outdoor recreation opportunities.¹⁵² A recent study has shown that well marked trails that connect to downtowns have potential to strengthen communities, improve business engagement and increase tourism in the region.¹⁵³

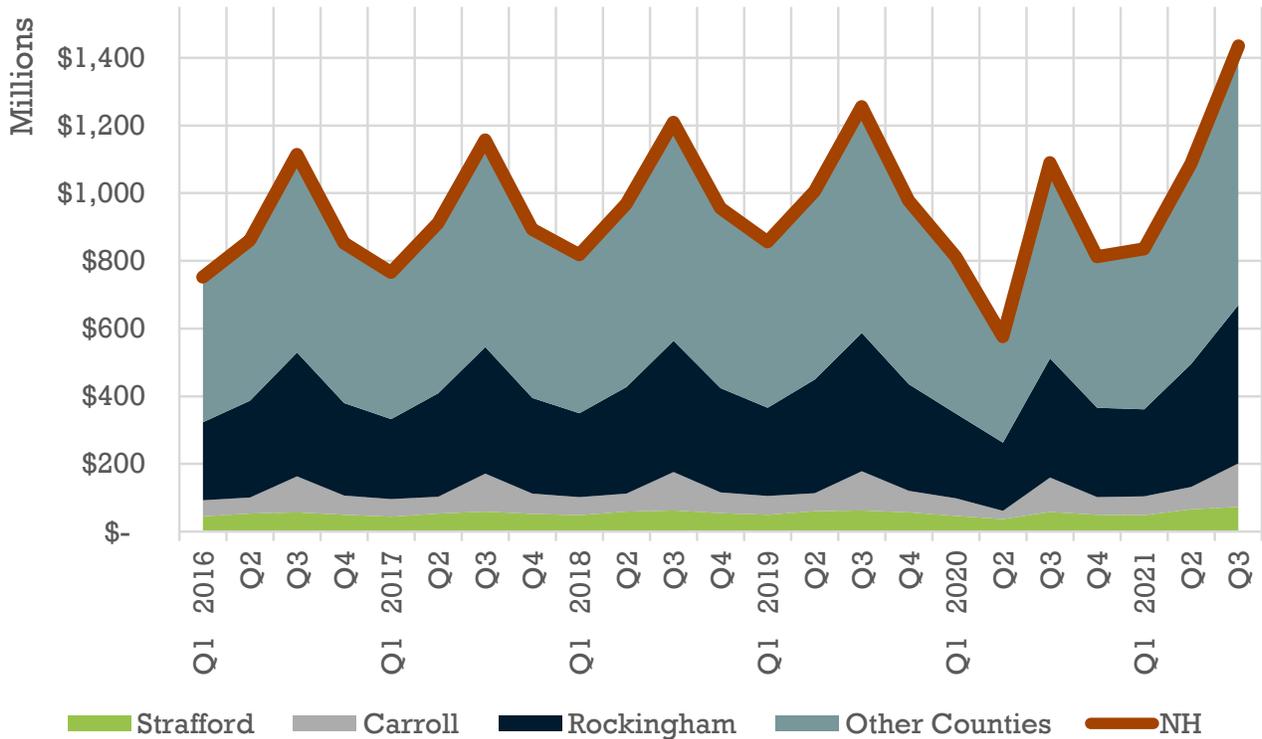
Meals and Rooms Tax

The rich variety and beauty of the natural surroundings in NH attract people from all around. This makes tourism and hospitality another significant indicator of community vibrancy. Meals and Rooms Tax data is an effective way of tracking spending in the hospitality industry and can be an important indicator of community vibrancy. Although Strafford County is not as popular of a tourist destination as Carroll, Grafton, or Rockingham Counties, it still benefits from being positioned between the mountains and lakes to the north and the ocean to the southeast. Many people come to this area for a day trip while staying in the Seacoast region, and especially in the fall which is popular for leaf peeping. This trend is reflected in the record high Meals and Tax receipts for the third quarter of 2021, indicating that tourism and hospitality sectors have mostly recovered after huge losses in the second quarter of 2020 at the onset of the pandemic.¹⁵⁴



SRPC completed Promoting Outdoor Play (POP!) project which promoted recreational sites and opportunities throughout the region. The interactive map tool gave people the opportunity to learn about the available public recreation sites and encouraged them to spend more time outdoors. SRPC will continue to advocate for healthy outdoor lifestyles by maintaining and updating the dataset for the most efficient user experience. SRPC is also working on creating a similar deliverable for the Arts and Culture inventory. This project will compile existing resources on arts and culture sites in the SRPC region, collect new data on arts and culture sites, and then create a single online resource to present all this information about the arts and culture resources available in our region. The project is currently in the data collection phase and focused on the Explore Moose Mountains area. Furthermore, by leveraging SRPC's Brownfields Program, we were able to strengthen and promote vibrant communities by increasing opportunities for facility rehabilitation, development, land acquisition and maintenance of hazardous sites.

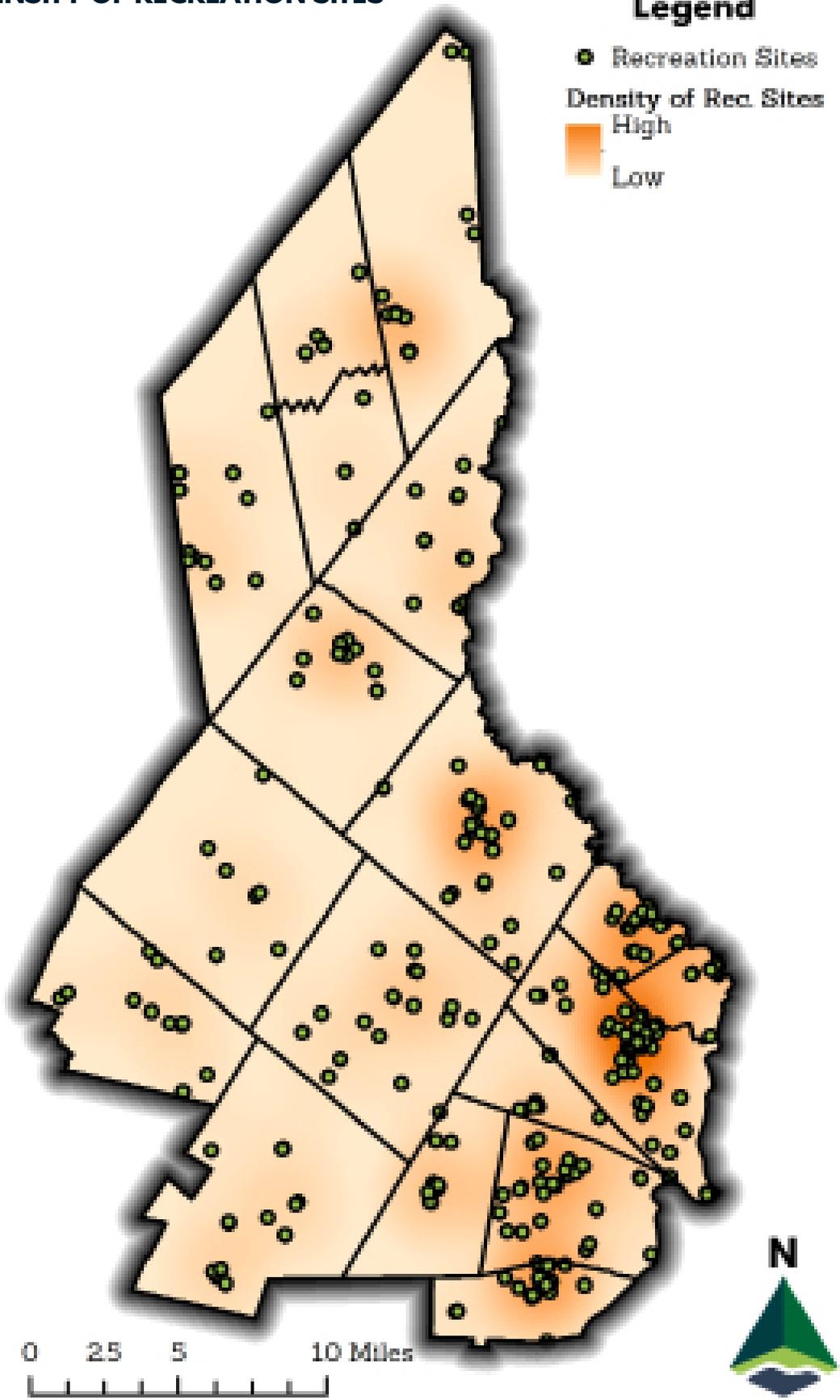
Total Meals and Rooms Receipts by Quarter (Calendar Year)



DENSITY OF RECREATION SITES

Legend

- Recreation Sites
- Density of Rec. Sites
 - High
 - Low





CHILDCARE

Adequate childcare services are an essential part of a healthy economy and community. A significant share of the workforce is comprised of parents of young children. Insufficient, expensive, or unpredictable childcare creates additional barriers for working parents, which may force them to make difficult decisions for their families or careers.



Promote collaboration and support to this industry to help create a stronger network and provide data and partnership where needed.

Current Trends

The Covid-19 pandemic has had profound impacts on the childcare system. This system includes childcare centers serving children before they reach K-12 schooling as well as before- and after-school and summer programs for older children requiring supervision. Although the K-12 school system primarily fills educational needs, it also provides child supervision needs and security in tandem with daycare and other childcare found outside the home. Together, they have faced similar challenges as a result of the Covid-19 pandemic. Additional discussion of K-12 schools' impacts on families can be found in the Age Friendliness chapter. The purpose of this section is to highlight issues specific to childcare for pre-kindergarten aged children. Without these programs, many of the parents of the enrolled children would be unable to work. However, insufficient staffing availability, high costs, and unpredictable coverage have continued to burden families and childcare providers alike that were already strained prior to the pandemic.

Insufficient Availability

Prior to the pandemic there was only enough capacity at New Hampshire childcare centers for less than 42 percent of children under 6-years-old.¹⁵⁵ In 2020, this capacity dropped to less than 30 percent.¹⁵⁶ The reduced capacity was and continues to be driven by Covid-19 directly and indirectly. This includes, but is not limited to, direct loss of workers, inconsistent availability of existing staff, continued facility expenses despite reduced tuition, and increased costs to meet CDC guidance for sanitation and social distancing.

A childcare desert is an area in which the number of children under 5-years-old is at least three times the capacity of the area's childcare centers. In the Strafford EDD region, there are childcare deserts in almost every community. The communities in the northern half of the Strafford EDD are sparsely populated and may rely on the childcare networks and facilities of Wolfeboro, Rochester, Dover, and other employment centers.

In addition to limited spaces in childcare facilities, these centers operate primarily during normal business hours. This limits parents' employment options if they are dependent on childcare centers to provide care. These limitations may include work hours and physical proximity. A parent must work close enough to be able to get from work to the childcare center in time for pick up or face additional fees; a challenge if a parent has a long commute or works outside the standard 9-5 hours. Working parents may find themselves reliant on a child's sibling, grandparent, neighbor, or other adult to ensure a child leaves or arrives "on time." Additionally, if a parent does not have a car, access to another means of transportation can further complicate access to childcare. In

urbanized areas of the Strafford EDD, parents may need to plan childcare or working schedules around the limited public transportation that is available.

A shortage of teachers and qualified childcare staff impacts the number and age of children who can be served by a given center. As of November 2021, the childcare sector had still not recovered 108,000 workers lost nationwide since the onset of the Covid-19 pandemic.¹⁵⁷ Childcare centers operate in compliance with low state mandated staff-to-child ratios to ensure that staff can provide adequate care to each child¹⁵⁸. These ratios and continued worker shortages, along with Covid-19 space and sanitization requirements may create challenges for centers to operate at their pre-pandemic capacities.

A study by the Carsey School of Public Policy at UNH found that for households reporting insufficient access to childcare, the “lack of access triggered a household employment loss” for one-fifth of these households in December 2021.¹⁵⁹ This loss of employment in turn results in lost income and may remove that parent from the workforce. More information about trends in the workforce can be found in the Workforce and Education chapter.

High Costs

The cost of childcare continues to be a burden for families. New Hampshire households making the state median income¹⁶⁰ pay an average of 17 percent of their income¹⁶¹ to keep an infant in day care. Parents of four-year-olds pay an average of 14 percent of the median household income.¹⁶²

Single parents of infants in Strafford County could pay 19 percent of their income (assuming the MIT Living Wage¹⁶³ for a single adult with one child). Families living in poverty may not be able to afford childcare at all, as the average infant care cost is 73 percent of a single parent’s salary (at the poverty line) or 61 percent for a 2-parent household. Notably, the Living Wage Calculator also provides estimates for households where one parent is assumed to stay home with the children; this juxtaposition can effectively demonstrate the financial tradeoffs that parents must consider when making employment decisions.¹⁶⁴ A variety of state and federal childcare programs, such as economic impact payments¹⁶⁵ and paid leave rights¹⁶⁶ aided during the pandemic. However, many of these have ended despite continuing uncertainty around Covid-19 and remaining disruptions.

Retention is even more difficult if the childcare workers become parents themselves. In New Hampshire the average cost for an infant in childcare is \$13,355 a year¹⁶⁷, while the median annual wages are \$24,322 per year for a childcare worker and \$31,442 for pre-school teachers.¹⁶⁸ A childcare workers’ median wage is not a living wage for any household configuration in Strafford County, and a pre-school teachers’ median wage is only a livable wage in a household with no children and two working adults.¹⁶⁹

Unpredictable Coverage

Childcare coverage has become less consistent and more unpredictable since the beginning of Covid-19. An exposure can result in days spent at home for childcare workers, children, and their parents. As of spring 2022, quarantine requirements are 5 days of quarantine and 5 days of wearing a mask.¹⁷⁰ Results of PCR tests can take days to receive, followed by 5 days of quarantine if the result is positive.¹⁷¹ At home testing is faster and more convenient, so a child showing symptoms, but testing negative at home may only be out of childcare for a couple of days. Families with children of all ages have been impacted by isolation periods, quarantine requirements, and teacher shortages.

New Hampshire recommends childcare centers follow the CDC childcare provider guidelines

that include isolation guidance for children and staff of childcare providers.¹⁷² While the isolation time has been reduced, the CDC guidance on isolation duration was longer earlier in the pandemic, which resulted in more time home. If a teacher or staff member became sick or feared exposure, schools and childcare facilities operated at a reduced capacity. This resulted in facilities temporarily closing, leaving its families and children without care or supervision outside the home. This again created a burden on parents who may face employment challenges for this period.

While vaccinations have allowed restrictions and guidelines to change substantially, there is still not an approved vaccine for children under 5-years-old. Both Moderna and Pfizer are nearing completion of a vaccine for children aged 6 months to 6 years. Vaccine expansion to these children will likely reduce outbreaks in childcare centers and allow for consistent coverage and predictable capacity.



There is ample evidence that childcare affects the whole economic outlook for the Strafford EDD region. Over the past year, SRPC has learned more about available childcare industry data and mapped childcare deserts in the region. Both have been included in the updated 2022 Regional Data Snapshot, making this information easily accessible to communities.

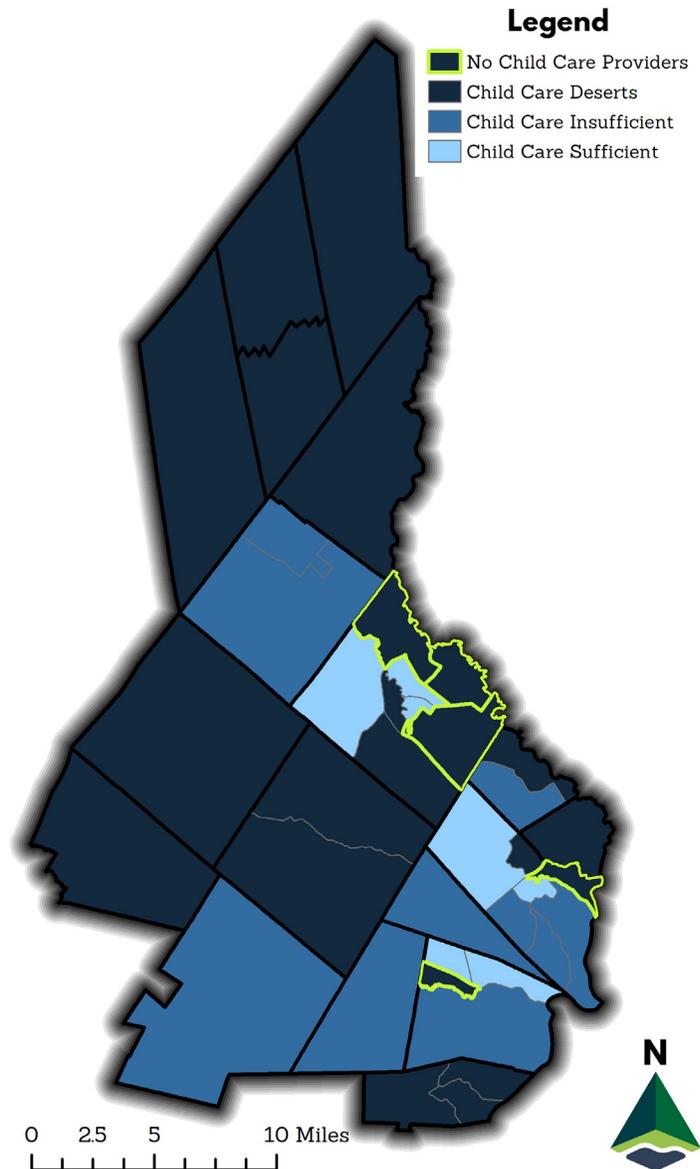
Childcare experts from Early Learning New Hampshire presented at a SEDS call on March 1, 2022¹⁷³ providing economic development stakeholders in the region invaluable insight into the industry and the challenges inherent to it. This conversation highlighted the critical nature of childcare to the economy. SRPC can leverage these new relationships to expand knowledge, help our municipalities to make connections and access funding and resources.

Percent of Living Wage Salaries				
Type of Care	Annual Rate	Percent of Income		
		NH Median	Two Parents	Single Parents
Infant	\$13,355	17%	18%	19%
Toddler	\$12,416	16%	16%	18%
4-year-old	\$10,926	14%	14%	16%
Before/After School	\$3,600	4.62%	4.76%	5.20%

* Married Parent and Single Parent income estimates are from the MIT Living Wage Calculator for Strafford County. Assumes 1 child households, where all parents are working.

Childcare Desert Map

- **“No childcare providers”** indicates census tracts with no childcare available. This creates additional demand for childcare in neighboring areas.
- **“Childcare deserts”** are census tracts with more than 50 children under age five that [contain] either no childcare providers or so few options that there are more than three times as many children as licensed childcare slots.
- **“Childcare insufficient”** is an area that has a deficit of childcare where there is less than one childcare space available.
- **“Childcare sufficient”** indicates census tracts where there is one or more spaces available in the facilities present for every child who should require supervision or care outside the home.



Percent of Poverty Salaries

Type of Care	Annual Rate	Percent of Income		
		NH Median	Two Parents	Single Parents
Infant	\$13,355	17%	61%	77%
Toddler	\$12,416	16%	57%	71%
4-year-old	\$10,926	14%	50%	63%
Before/After School	\$3,600	4.62%	16.39%	20.65%

* Two Parent and Single Parent income estimates are from the MIT Living Wage Calculator for Strafford County. Assumes 1 child households, where all parents are working.

RESILIENCY ADDENDUM

In 2020, SPRC received a CARES Act grant from the US Economic Development Administration (EDA) designated to support economic recovery and resiliency planning and to provide technical assistance to communities, businesses and other organizations impacted by the Covid-19 pandemic and within SRPC's service area. As a result of this funding opportunity, SPRC was able to hire an Economic Recovery Coordinator to facilitate these efforts and carry out recovery projects and initiatives. This Resiliency Addendum summarizes work completed over the past year to improve resiliency.

Through economic recovery and resilience planning, our organization focused on both short-term and long-term efforts that strive to expedite the economic recovery and integrate disaster recovery planning into our future plans. We worked with regional stakeholders, partners, committee members and municipal staff members to accomplish these goals. Moreover, through research and networking, we strived to better understand the local needs and helped to improve awareness of available funding opportunities, disseminated federal, state, and local resources to small businesses, and helped foster new partnerships in order to support the recovery process.

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Service: Record Digitization

Project Timeline January '22 - September '22

Fast Facts

14

communities signed up for assistance through this SRPC program.

4

The total interns (3) and full time employees (1) hired to assist with scanning,

3,100

documents scanned in Somersworth, Dover and Newmarket combined.

5

municipalities visited as of April 30, 2022.

Overview

Emergency shutdowns and stay-at-home orders for non-essential businesses and personnel forced many organizations to shift to remote work, including many municipal departments. While many municipal staff were able to work remotely to the best of their abilities, their jobs often depend on having access to files (e.g., land use or building department files for permitting or enforcement) that frequently exist only in a paper form at town offices. In response, SRPC launched a program to promote organizational resiliency by increasing the capability of remote work, and enabled access to digital records for the public.¹⁷⁴

Using CARES Act funds, SRPC acquired small and large-format scanners to digitize municipal records, including site plans, road maps, tax cards, and any other documents up to 44" wide. The scanners create searchable PDF/As that can be opened with any PDF viewer and meet state statutory requirements for record retention. Both scanners also have built in Optical Character Recognition (OCR) capability, which converts handwritten notes into machine-encoded text that is readable and searchable. In addition to the equipment, SRPC was able to hire and provide full-time staff support at no additional cost to our dues-paying municipalities.

SRPC staff facilitated the transportation and the setup of the scanning equipment at each municipality, where it remained for a period of 2 to 4 consecutive weeks, depending on the need of the municipality as well as the availability of time slots. The process of scanning the documents was carried out with the support of SRPC staff members, interns, and municipal staff members on weekdays during office hours. Cooperation and assistance from municipal staff made the scanning more efficient while also enabling them to receive training on how to do the scanning themselves. After funding from the CARES culminates in September 2022, the equipment will remain available for municipalities to borrow so they can continue digitizing records on their own.

Staff



Tesimonials

SRPC worked diligently to assist in the creation of a searchable file to hold the City Clerk's Street layout plans. They worked each day with enthusiasm and were successful in digitizing over 50 layout plans. We are grateful for the hard work and dedication of this great team! Thank you SRPC!

- Kelly Waters, City of Rochester

We really appreciated the opportunity to have our older applications and plans scanned, in order to upload the documents into Treeno, for public access. The information provided to us ahead of time was very helpful.

- Jean Glidden, City of Dover

The City of Somersworth was able to partner with Strafford Regional Planning Commission to use CARES Act funding for Covid recovery to digitize large Planning files: Site Plan and Subdivisions. The staff at SRPC was professional and efficient in scanning records for various Departments within the City. This project will help to increase searchability of files, efficiency within the Department, easier access to documents, transparency with the public, and prevent file loss. We are thankful for all the work that the team at SRPC did over the four-week period.

- Michelle Mears, City of Somersworth

It was a pleasure to work with the SRPC staff and interns to help digitize some of the Newmarket Conservation Commission files. Having a digital record of the Commission's meetings and activities is a valuable historical record of caring for our town conservation areas, parks, wetlands, trails, and other community conservation values. Thanks for providing this service.

- Wendy Chase and Ellen Snyder, Town of Newmarket

The Strafford Regional Planning Commission interns help to scan and digitize some old paper tax cards that we had. The interns were very professional and efficient. I was truly grateful for their help in getting this project completed for me!

- Karen Edwards, Town of Durham

SRPC worked diligently to assist in the creation of a searchable file to hold the City Clerk's Street layout plans. They worked each day with enthusiasm and were successful in digitizing over 50 layout plans.

- City of Rochester



Collaboration : Seacoast Economic Development Stakeholders

Project Timeline March '20 - present

Fast Facts

89

calls between Mar. '20 and Nov. '21.

1,417

cumulative meeting attendees between Mar. '20 and Nov. '21.

127

distinct partners attending meetings between Mar. '20 and Nov. '21.

Overview

The Seacoast Economic Development Stakeholders (SEDS) is a collective entity of economic development stakeholders from Strafford and Rockingham Counties who meet regularly to collaborate, share information and resources, and work collaboratively to promote the economic vitality of our communities and region. SRPC convened the group in March 2020 to increase awareness and improve information sharing on the fast-changing state and local regulations brought by the pandemic. SEDS members include municipal economic development managers, chamber of commerce directors, and staff from planning commissions, and representatives from other allied organizations that play a key role in economic development. In addition, SEDS members serve as a critical voice to help develop local and regional priorities and projects to be incorporated into the Strafford EDD's Comprehensive Economic Development Strategy by acting as our Strategy Committee.

The New Hampshire Department of Business and Economic Affairs (NH BEA) recognized the success of the SEDS model, which served as inspiration for the Collaborative Economic Development Regions (CEDRs) proposed in NH BEA's [2021 Economic Recovery and Expansion Strategy](#). NH BEA has recognized the Seacoast Economic Development Stakeholders as the CEDR for the greater seacoast region and has sought to replicate its success through the creation of new CEDRs throughout the state.

During FY 2022, SEDS used their platform to advance conversations about key issues affecting the region, such as Housing, Business Operations, Human Resources, Real Estate, Health Care, and the potential impacts of the Russian invasion of Ukraine on New Hampshire businesses.

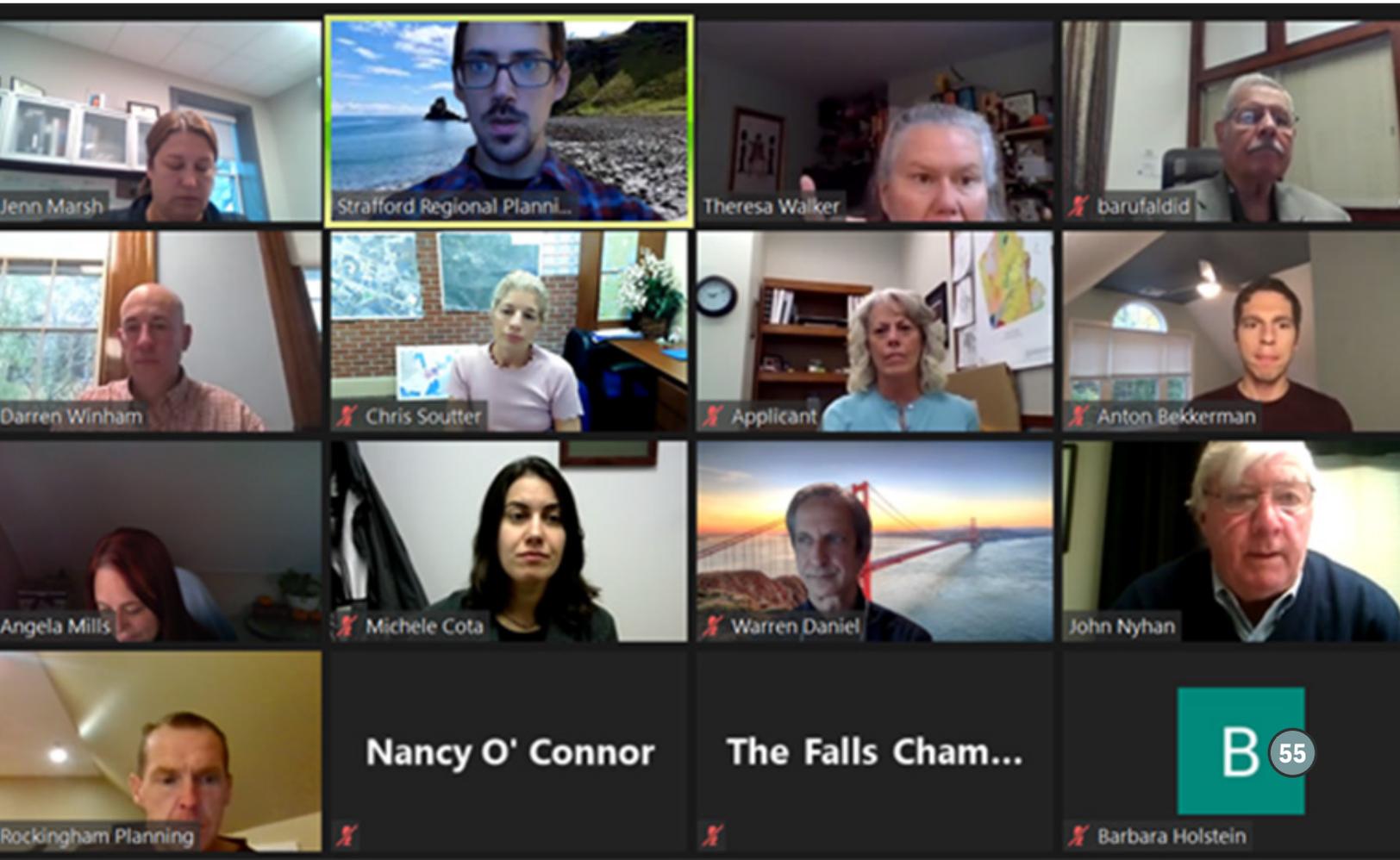
In fall 2021, SRPC and the SEDS worked in collaboration with the UNH Cooperative Extension to develop and submit a proposal for a Blue Economy Innovation Hub for the Build Back Better Regional Challenge program sponsored by EDA. While the proposal was not funded through that program, it has been added to the CEDS as a priority project, and SRPC and UNH have discussed opportunities to restructure the component tasks to make them more suitable for other funding sources.

Staff



Partners

Participants include municipal and chamber of commerce staff from Strafford and Rockingham Counties and other regional or statewide partner organizations such as the NH Small Business Development Center (SBDC), NH BEA, Rockingham Planning Commission (RPC), Wentworth Economic Development Corporation, SRPC Strafford Economic Development Corporation (SEDC), the Regional Economic Development Center (REDC), UNH Cooperative Extension, US Small Business Administration (SBA), NH State Council of Arts, Center for Women and Enterprise (CWE), Workforce Housing Coalition of the Greater Seacoast, and Great Bay Community College (GBCC).



Project: Promoting Outdoor Play

Project Timeline Jul. '20 - Jun. '22

Fast Facts

9,267 views on the POP! as of May 31, 2022.	197 combined followers on the POP! social media pages (130 on Facebook and 67 on Instagram)	8 birdhouses/locations included in the POP! summer recreation passport program
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Overview

In 2021, SRPC developed a tool called Promoting Outdoor Play (POP!), an online interactive map viewer that shows locations, data, and photographs of every publicly accessible recreation site in the Strafford geographical area.¹⁷⁹ The viewer includes over 300 recreational sites including playgrounds, parks, ice skating and sledding sites, beaches and public pools, indoor facilities and even fitness centers with the goal of encouraging people to get outside and enjoy the region. This tool was built using funding from the NH Children’s Health Foundation (NHCHF).

SRPC launched an extensive marketing campaign in the summer of 2021 to share this resource. Partnering with the Children’s Museum of New Hampshire, SRPC staff created both a digital and physical “passport program.” Birdhouse installations at select parks included stickers and stamps for participants to track their progress in printed passports, and QR codes to facilitate digital sharing over social media. The Promoting Outdoor Play initiative was well-received by our communities and exemplified the popularity of outdoor recreation and activities that continue to be a major draw for people moving to or living in this region.

POP! helped increase awareness of the available outdoor opportunities in the region, helped create a sense of place, and increased community engagement. By compiling and sharing information about recreation opportunities available to the public, the project also helped to strengthen community resiliency in times when people felt isolated and stuck indoors. Moving forward, maintenance of the online recreation map viewer will be a priority for sustaining this initiative. SRPC will work to regularly update the site and will continue to promote the Story Map with the most up-to-date information available. The enhancement of natural resources is a continuous effort and SRPC is currently working on regional inventory to broaden POP! to include Arts and Culture.

Staff





Project: Economic Benefits of Public Transit

Project Timeline Jul. '19 - Jun. '21

Fast Facts

78,324

healthcare-related trips COAST provided in 2019, which were worth approximately **\$1,973,228** in kept appointments for healthcare providers in the region.¹⁷⁵

\$25.8 mil

The amount in regional economic benefits that are correlated with COAST's services. With an operating budget of **\$5.98 million**, COAST's provides an economic return on investment of over **\$4.30** for every **\$1.00** invested.¹⁷⁶

\$6.31 mil

The amount in labor income spread amongst 120 jobs that can be attributed to COAST's operations spending in FY2019.¹⁷⁷

Overview

In 2021, SRPC and Rockingham Planning Commission (RPC) conducted a joint study on the relationship between public transit and the economy in the region of Southeast New Hampshire and southern Maine (called the "Economic Benefits of Transit" Study)¹⁷⁸ The study quantified the economic impact provided by the Cooperative Alliance for Seacoast Transportation (COAST), the only federally funded transit provider in the region. While COAST can access funding from the Federal Transit Administration (FTA), federal regulations require them to demonstrate a proportionate share of matching funds. Currently, the State of New Hampshire provides minimal assistance, shifting much of the responsibility for cost-sharing to local municipalities.

Our research demonstrated that public transit plays an important role in the region's economy and generates significant benefits despite constraints. The economic benefits of public transit strengthen long-term resiliency planning in a myriad of ways, including improved mobility, access to employment and healthcare, and educational opportunities, all of which lead to increased social equity and overall higher quality of life. As part of the Economic Benefit of Transit study, SRPC and RPC staff interviewed involved stakeholders including numerous managers of Seacoast restaurants and hotels. Many of the stakeholders said they would not be able to sustain their businesses without COAST's services as many people working in Portsmouth or Dover would likely not be able to afford housing near their jobs. In addition to the Economic Benefit of Transit study's final report, SRPC and RPC created an [interactive StoryMap](#) that highlights the linkages between public transit and economic development. Demonstrating the economic value of public transit to decision-makers is critical for sustainable funding and ensuring the region prioritizes developing a responsive multimodal network.

Staff



Staff: Economic Recovery Coordinator

Timeline Oct. '20 - Sept. '22

Overview

With the CARES Act funding, SRPC hired a full-time Economic Recovery Coordinator to provide technical assistance and support to municipal staff and private and non-profit businesses in the region's 18 communities. Some of the efforts have included networking, engagement, and connecting businesses with organizations such as the NH Small Business Development Center, Center for Women and Enterprise, the Small Business Administration, and other organizations and stakeholders. The Recovery Coordinator worked to become familiar with the many rapidly evolving state and federal programs available and provided direct technical assistance to small businesses so they could more easily navigate and access the resources and funding opportunities as they became available. In conjunction with the rest of the SRPC team, new programs were implemented to increase capacity for both businesses and municipalities, such as the Record Digitization Program, the Consultant Technical Assistance Program, and several consistent outreach efforts that have worked to inform and shape the outputs of the Economic Development team's work.

Staff



Service: Consultant Technical Assistance

Project Timeline: July '21 - June '22

Fast Facts

4

consultants partnered with SRPC to provide businesses with technical assistance. The consultants included ANS Networking Goode Cybersecurity, Open the Door Biz and Savior Faire.

6

different technical assistance categories, with the most popular being marketing, advertising, and web development.

81

businesses assisted in **13** of SRPC's **18** communities.

143

hours of assistance provided as of Apr. 30, 2022.

Overview

SRPC launched a Consultant Technical Assistance program with the CARES Act funding to support small businesses as they work to recover from the impacts of Covid-19. We have partnered with private consultants to provide free technical support to small businesses in the following areas: Website Development, Marketing and Advertising, Graphic Design, Audio Visual Support, Generic IT services and Cybersecurity. By hiring private consultants, we were able to execute 3 rounds of assistance and provided businesses with up to 9 hours of assistance (3 hours per round) in any of the categories listed above, which was offered at no cost to small business owners on a first come, first serve basis.¹⁸⁰

Staff



Testimonials

“Thank you for contacting me about this program. I was able to receive help in areas that I have no experience in. It in turn led to a larger customer base and more sales.

- Little River Designs

Words cannot express my appreciation to the Strafford Regional Planning Commission for their care and concern about my small wholesale distribution business. I wanted to help my country in its PPE need, but it was quite overwhelming. Their assistance was top rate, and thanks to Savior

Faire, the website designer, I feel as though I have a new lease on my business's life. My emoji should show praying hands for the gratitude I feel.

- New England Niche Wholesalers, LLC

We work with seniors who suffer from dementia helping them and their families with the red tape that is Medicaid. Record storage and security are two major concerns of ours and on our limited budget they seemed to be unsolvable. The advice and support we've been given by ANS through the Stafford County Economic Development program has, literally, been a lifesaver.

- Peace of Mind Medicaid Consultant

Savoire Faire did an amazing job. Our situation was somewhat unique in that we have hundreds of pieces of great content, most of which is impossible to find on our existing website. They produced a great new architecture and a brilliant path forward that will enable us to meet our growth goals. Even better, they offered a way so that I can do much of the work on the new website it built. I feel like there's a big new world out there that I can go out and conquer. Now I just need to figure out how to pay for the new website!

- Paine Publishing, LLC

2021 was a hard year to launch our company Accelerated Tech Solutions. But we knew that our mission of getting girls excited in STEM by teaching them about drone technology and mapping was needed more than ever. We were so excited when Strafford Regional Planning Commission offered to fund professional help to get us started. Not only did we get great marketing advice from Christina Papas of Open the Door we are currently developing our project website with help from Stephanie McLaughlin from Savoir Faire to launch our newest project 1,000 Drones for 1,000 Girls.

- Accelerated Tech Solutions

I received feedback from Christina Pappas regarding my digital marketing strategy. Her advice to continue pushing online engagement through posts and contests has been working. We've experienced stronger brand recognition and growth and are also beginning our PR push now into Fall by partnering with SkiNH and working with the Fall Chamber of Commerce.

- Terracea

Continuing to develop and grow the unique custom portable commercial and residential building business of Tiny House Northeast has been made easier through the warm and generous spirit of the team at the Strafford Regional Planning Commission. The challenges of 2020/2021 meant our own team of all skill types were less available, even as we sought to design-build more to satisfy home office and affordable housing needs. Natalie and Zuzana pointed us to the right help. We deeply appreciate the funding made possible by the agency of the SRPC to help keep us "moving" in the right direction!

- Tiny House Northeast

Service: Business Outreach and Engagement

Project Timeline: January '21 - present

Overview

In response to the rapidly changing information that came as a consequence of the pandemic, SRPC has been actively engaged in outreach and research efforts by compiling various up-to-date opportunities for small businesses owners, including but not limited to funding opportunities and tools to support business operations and capacity building. The resources, which are presented in very high level, simple to read format, are disseminated to a list of roughly 6,000 registered businesses in the SRPC geographical region via e-mail. The e-mails, which also include the latest updates on federal, state, and local funding opportunities to help businesses with the economic impacts of Covid-19, are sent out approximately once a month.¹⁸¹ The e-mails also include SRPC's programs aimed at assisting businesses and providing technical assistance such as the Consultant Technical Assistance Program as well as surveys that help gather information that will aid in increasing resiliency and improving economic growth of the region.

In FY 2022, SRPC:

- Continued the support for small businesses by providing them with access to financial resources and grants.
- Facilitated partnerships between businesses, public entities, and other regional stakeholders by identifying their needs and connecting them to appropriate resources.
- Improved community vibrancy and resiliency through small business support, engagement and communication.
- Sent out monthly emails to over 6000 small businesses, thanks to a list of "Businesses in Good Standing provided by the NH Secretary of State Corporate Division at the beginning of the pandemic.
- Has helped connect small businesses to IRS business tax filing resources, various federal, state, private and non-profit grant opportunities, CWE businesses resiliency webinars, SBDC and SCORE advising services, informed them about Economic Revitalization Zones and Opportunity zones available in their area, incubator spaces and much more.

Staff



Testimonials

Just wanted to thank you for these emails. I find them incredibly useful, interesting and informative. As a publisher of a monthly newsletter, I aspire to be as compelling. I took advantage of the technical assistance mentioned in and earlier email, and it changed my entire outlook on my business. Now I just have to find \$10K to fund the website redesign.

- Paine Publishing

Committee: Resiliency Subcommittee

Project Timeline: Sept. 2020 - present

Overview

In early 2021, in response to the ongoing challenges experienced during the Covid-19 pandemic, a group of SRPC commissioners suggested creating a sub-committee to work on resiliency. The purpose of the sub-committee was to think about ways in which the Strafford Region can become more proactive and resilient to any future challenges, ensure that there are plans in place to prevent interruptions, and react more swiftly and efficiently. The Resiliency Subcommittee conducts outreach to our communities to gather their concerns and approaches to the many resiliency challenges they face. It also provides critical opportunities for collaboration as well as a more regional approach to challenges. The committee looks to bring attention to resiliency topics by coordinating subject matter expertise and community insights to SRPC communities through timely public information and discussion sessions.

The subcommittee meets monthly and has, as of May 2022, held five public roundtables. Our first roundtable, held in April 2021, was focused on Hazard Mitigation from Planning to Project Implementation. The second, held in July 2021, looked at water conditions, drought, and our region's dependency on water. The third in December focused on stormwater, flooding, and community preparedness. The February 2022 roundtable examined Energy and common challenges in SRPC communities. The next public roundtable will be held on May 19, 2022, and we will look at resources to protect local food systems to become more resilient.

Project Specifics

To date, SRPC has facilitated four roundtables with a total of 90 attendees. A fifth event is scheduled for June 2022. These included:

- April 2021: Hazard Mitigation: from Planning to Project Implementation – guest speakers Heather Dunkerly and Kayla Henderson from Department of Safety and Homeland Security and Emergency Management (HSEM). [View recording](#).¹⁸²
- July 2021: Drought – guest speakers Annie Ropeik NH Public Radio; Ted Diers, NH Department of Environmental Services. [View recording](#).¹⁸³
- December 2021: Flood and Water Management – guest speakers Rayann Dionne, Flood Mitigation and Resilience Specialist, NH Department of Environmental Services; Bill Boulanger, Dover Community Services. [View recording](#).¹⁸⁴
- February 2022: Energy – guest speakers Sam Evans Brown from CleanEnergy NH and Bill Baber from Dover Energy Commission. [View recording](#).¹⁸⁵
- June 2022: Resiliency-Protecting Our Local Food Systems

Staff & Commissioners



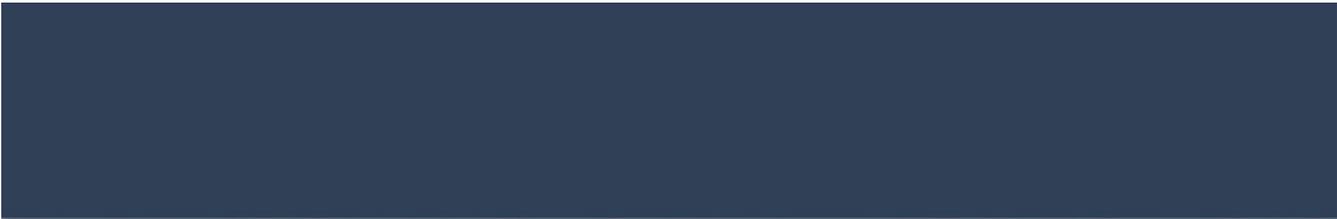
Project: Mighty Small

Project Timeline March '20 - persnet

Overview

In the early days of the Covid-19 pandemic, the Strafford EDD staff worked to help the region's small businesses quickly adapt to the pandemic. In June 2020, SRPC in collaboration with Emmett Soldati, the owner of Teatotaller Tea House in Somersworth, launched Mighty Small, an online platform designed to ease the search for and support of Main Street businesses. The main purpose of the website was to share information with businesses and customers at the very beginning of the pandemic and to provide the most up-to-date information about the rapidly changing hours and services offered to alleviate the losses caused by the shutdown. The website provided users with an interactive way to engage with their local small businesses, including information on which shops were open, which offered online shopping, and what was the best way to support them. Business owners could submit their information and be added to the interactive maps and search results. Importantly, it also provided a basic web presence for businesses without a stand-alone website. However, the website became obsolete with bigger platforms such as Google and Yelp filling in the gap at a much faster rate and on larger scale.¹⁸⁶

Staff



MIGHTY SMALL
— REDISCOVER MAIN STREET —



CEDS PRIORITY PROJECT LIST

The priority project list is a key component of the CEDS. These projects are submitted by municipalities and other partner organizations as projects that most reflect their economic development, infrastructure, and resiliency needs. Inclusion on the priority project list is a requirement to be eligible for certain EDA funding opportunities. Additionally, inclusion in a regional plan frequently makes projects more competitive for other state and federal programs even if not required for eligibility. Its purpose is to help the Strafford EDD connect municipalities and other partner organizations to resources and advocate on behalf of projects that advance our region's economic priorities.

Solicitation for projects occurred in February through April 2022. In order to be included on the Strafford EDD priority project list, a project must meet two criteria:

- All projects must be sponsored by a municipality or non-profit organization. Public-private partnerships can be included provided they are sponsored by a public or non-profit organization.
- The project must align with one or more of the goals or themes contained in the CEDS. Project submission forms are included in Appendix A asked sponsors to identify how their project aligned with these themes.

Project ID	Title	Sponsor	Status	Project Cost*
BAR1	Barrington's first sidewalks	Barrington	No update	\$1,253,514
BRK1	Public Arts Initiative	Governor Wentworth Arts Council	No update	\$7,500
COAST1	COAST Administration, Operations, and Maintenance Facility	COAST	Status updated	\$12,632,500
CWE1	Community Classrooms: Support for New, Existing, and Aspiring Women Entrepreneurs	Center for Women & Enterprise	Status updated	\$20,000

Project ID	Title	Sponsor	Status	Project Cost*
DOV1	Redevelopment of environmentally stressed plating plant and grounds on Broadway in downtown Dover	Dover	No update	\$2,500,000
DOV2	Public Infrastructure Investment to Assist with Private Development	Dover	No update	\$1,000,000
DOV3	Public Infrastructure Investment to Assist with Pedestrian and Vehicular flow	Dover	No update	\$12,000,000
DOV4	Community Trail connection and expansion to Knox Marsh Rd	Dover	No update	\$800,000
DOV5	Central Avenue Reconstruction	Dover	No update	\$3,000,000
DOV6	Whittier Street Sidewalk	Dover	No update	\$650,000
DOV7	Downtown Waterfront Shoreline Stabilization/Riverwalk	Dover	No update	\$3,500,000
DOV8	Chestnut Street Bridge Repair	Dover	No update	\$800,000

Project ID	Title	Sponsor	Status	Project Cost*
DOV9	Henry Law Avenue and River Street Reconstruction	Dover	No update	\$2,400,000
DOV10	Neighborhood Street Reconstruction	Dover	No update	\$2,400,000
DOV11	Public Safety Fire/Police Training Structure	Dover	No update	\$1,500,000
DUR1	Madbury Rd Improvements	Durham	Status updated	\$2,885,000
DUR2	Fire Station Renovation and Overflow	Durham	Status updated	\$520,000
DUR3	Critical Facilities Backup Generators	Durham	Funded - completion pending	\$580,000
DUR4	66 Main Street Parking	Durham	Status updated	\$7,000,000
DUR5	Beech Hill Tank Mixing System	Durham	Status updated	\$275,000

Project ID	Title	Sponsor	Status	Project Cost*
DUR6	Southern Strafford County Communications System	Durham	Funded - completion pending	\$2,500,000
DUR7	Wastewater Treatment Plant Odor Control System	Durham	Status updated	\$750,000
DUR8	Bickford-Chesley House Preservation	Durham	Status updated	\$437,475
DUR9	Durham Old Town Hall Preservation	Durham	Status updated	\$366,270
DUR10	Oyster River Dam	Durham	Status updated	\$1,462,950
FAR1	Sidewalk Network Expansion	Farmington	Status updated	\$990,160
FAR2	Re-Development of the Old Fire Department Lot	Farmington	Status updated	\$0
FAR3	Farmington Red-Listed Bridges	Farmington	New project	\$0

Project ID	Title	Sponsor	Status	Project Cost*
FAR4	Farmington Levee	Farmington	New project	\$0
MIL1	Pedestrian & Utilities Upgrades	Milton	No update	\$2,600,000
MIL2	Mending Fences and Developing Water Solutions	NH Farm Museum	No update	\$45,000
NDU1	Boodey Farmstead Restoration	New Durham	New project	\$300,000
NDU2	Meetinghouse Restoration	New Durham	New project	\$280,000
ROC1	Portland St Sidewalk extension	Rochester	TAP Grant received	\$900,000
ROC2	Route 11 Safety and Capacity Improvements	Rochester	No update	\$5,200,000
ROC3	Union Street Parking lot	Rochester	No update	\$0

Project ID	Title	Sponsor	Status	Project Cost*
ROC4	Cocheco Well Upgrades	Rochester	No update	\$5,000,000
ROC5	Round Pond Reservoir Capacity	Rochester	No update	\$6,000,000
ROC6	Wastewater Phosphorus Upgrades	Rochester	No update	\$15,000,000
ROC7	Re-line drinking water pipeline	Rochester	No update	\$2,000,000
ROC8	Rebuild Portland Street Bridge	Rochester	No update	\$1,000,000
ROC9	Lead Service Line Replacements	Rochester	No update	\$0
ROC10	North Main Street/Chestnut Hill Road Connector	Rochester	No update	\$0
ROC11	Additional Facility adjacent to Recovery Transitional House for Women	Hope on Haven Hill	Status updated	\$2,200,000

Project ID	Title	Sponsor	Status	Project Cost*
ROC12	Innovation Drive Extension	Rochester	New project	\$2,500,000
ROC13	Innovation Drive Sewer Pump Station	Rochester	New project	\$2,750,000
ROC14	Freight Study	Rochester	New project	\$20,000
ROC15	Rochester Riverwalk Expansion	Rochester	New Project	\$2,000,000
SBDC1	NH SBDC Inclusivity Project	NH Small Business Development Center	No update	\$0
SEDC1	Revolving Loan Fund	Strafford Economic Development Corporation	Status updated	\$2,000,000
SOM1	Library Accessibility Improvements	Somersworth	No update	\$500,000
SOM2	National Guard Readiness Center Reuse	Somersworth	No update	\$0

Project ID	Title	Sponsor	Status	Project Cost*
SOM3	Fire Station Training Tower and Equipment	Somersworth	No update	\$336,000
SOM4	Constitutional Way Complete Streets	Somersworth	No update	\$1,086,000
SOM5	Main Street Complete Streets	Somersworth	No update	\$6,400,000
SOM6	Fire Pumper Engine 2	Somersworth	Complete	\$650,000
SOM7	Millennium Field Improvements	Somersworth	No update	\$200,000
SOM8	Hamilton Water Tower	Somersworth	No update	\$6,324,800
SOM9	JA Prince Garage	Somersworth	New project	\$660,382
SRPC1	Arts and Culture Inventory and Online Guide	Strafford Regional Planning Commission	Status updated	\$40,000

Project ID	Title	Sponsor	Status	Project Cost*
SRPC2	Brownfields Assessment Program	Strafford Regional Planning Commission	Status updated	\$300,000
SRPC3	Regional Housing Needs Assessment	Strafford Regional Planning Commission	Status updated	\$40,000
SRPC4	Spaulding Turnpike Exit 10 – Promotion and Advocacy of the Transportation TYP Project	Strafford Regional Planning Commission	New Project	\$1,914,106
STRCO1	Strafford County P25 Radio System	Strafford County	No update	\$3,400,000
UNH1	Immersive Learning for Workforce Development	University of New Hampshire	No update	\$1,914,333
UNH2	Economic Recovery and Resilience Resource Hub	University of New Hampshire	Complete	\$420,000
UNH3	West Edge Innovation Neighborhood (replaces UNH Research Park)	University of New Hampshire	Status updated	\$80,000,000
UNH4**	Economic resilience through enhanced capacity to monitor future threats and mobilize resources to combat future disease outbreaks	University of New Hampshire	Status updated	\$0

Project ID	Title	Sponsor	Status	Project Cost*
UNH5	Expansion of UNH's Jackson Estuarine Laboratory in support of a resilient NH coastal economy	University of New Hampshire	Funded - completion pending	\$3,813,000
UNH6	A STEM-Focused Outdoor Walking Museum at the Living Bridge	University of New Hampshire	No update	\$750,000
UNH7	Sources and Fate of PFAS in New Hampshire Community Wastewater Systems	University of New Hampshire	No update	\$900,000
UNH8	South Drive Infrastructure Improvements	University of New Hampshire	Status updated	\$3,510,000
UNH9	Blue Economy Master Plan	University of New Hampshire	New project	\$500,000
UNH10	Cybersecurity Center and Testbed	University of New Hampshire	New project	\$3,000,000
WAK1	Wakefield Sewer Project	Wakefield	No update	\$800,000
WAK2	Sanbornville Precinct water system upgrades	Sanbornville Precinct	No update	\$5,000,000

Project ID	Title	Sponsor	Status	Project Cost*
WAK3	Gafney Library Expansion	Gafney Library	No update	\$1,450,000
WEDCO1	Intersection Improvement-Cotton Valley Rail Trail & Rte. 16	Wentworth Economic Development Corporation	No update	\$0
WEDCO2	Explore Moose Mountains Region	Wentworth Economic Development Corporation	No update	\$63,100
WEDCO3	Moose Mountains Scenic Byway	Wentworth Economic Development Corporation	No update	\$0
	80 Total Projects	22 Partner Organizations	12 New Projects; 20 Updated; 42 No Update; 4 Funded; 2 Complete	\$236,023,989
<p>*Projects for which no cost estimate was available are entered as \$0; where projects provide a range, the highest cost estimate was used for this table. **Costs for this project overlap with revised project for West Edge Innovation Neighborhood</p>				

ACTION PLAN AND EVALUATION

CEDS Performance Measures

The Following performance measures will be used to evaluate the success of future CEDS updates within this five-year cycle, as well as implementation of CEDS priorities. These performance measures were established for the 2021-2025 five-year update and therefore will begin tracking implementation efforts after the adoption of this CEDS in 2021.

Performance Measure	2022 Performance
Number of local governments explicitly invited to participate in project solicitation.	17 – all 15 Strafford EDD municipalities, plus Strafford County and the Sanbornville Water Precinct
Number of local governments to submit/update priority projects.	11 – 9 member municipalities, plus Strafford County and the Sanbornville Water Precinct
Total local government projects submitted for inclusion in the CEDS.	54
SRPC Projects submitted for inclusion in the CEDS.	3
Other partner organizations to submit priority projects for inclusion in the CEDS.	10
Total projects submitted by other partner organizations for inclusion in the CEDS.	24
Total projects included in the CEDS.	78
Total cost of proposed CEDS projects.	\$232,082,984
Number of organizations with a project included in the CEDS.	22
Number of CEDS priority projects to report receiving outside funding.	5
Total value of outside funds received for implementing CEDS projects.	Exact funding not reported for all projects. Data to be updated upon adoption if available.
Number of CEDS priority projects to be fully implemented.	2 projects reported as fully complete
Number of Strategy Committee meetings at which CEDS planning was discussed.	SRPC staff to tally once adoption has occurred.

Performance Measure	2022 Performance
Number of Strategy Committee meetings at which CEDS implementation was discussed.	SRPC staff to tally once adoption has occurred.
Total attendees at Strategy Committee meetings.	SRPC staff to tally once adoption has occurred.
Unique attendees at Strategy Committee meetings.	SRPC staff to tally once adoption has occurred.
Number of Board of Directors meetings at which CEDS planning was discussed.	SRPC staff to tally once adoption has occurred.
Number of Board of Directors meetings at which CEDS implementation was discussed.	SRPC staff to tally once adoption has occurred.
Total attendees at Board of Directors meetings.	SRPC staff to tally once adoption has occurred.
Unique attendees at Board of Directors meetings.	SRPC staff to tally once adoption has occurred.
Thirty-day public comment period prior to adoption? (yes/no)	Yes
Economic indicators in the SRPC Regional Data Snapshot were updated to include the latest available data as part of the annual CEDS update? (yes/no)	Yes – The 2022 Regional Data Snapshot was released in April 2022 and includes protocols to update indicators as data sources release new data.
Total SRPC action items identified for implementing CEDS goals.	24 - See the list below.
Total number of action items completed within the five-year cycle.	1 - See the list below.
Number of action items with significant progress towards completion, or ongoing action items that were addressed within the period covered by this update.	20- See the list below.



SRPC Action Plan

The following is a compiled list of all SRPC action items identified in the CEDS. SRPC staff has reviewed all 2021 action items. Where there was significant overlap between actions these may have been combined or re-written to make each action distinct and measurable. Staff then provided a status update for each action, including identifying new actions.

1. Continue to convene the Seacoast Economic Development Stakeholders (SEDS) group to encourage and facilitate regular sharing of information and ideas.
 - a. Status: Ongoing
 - b. Themes: All
 - c. Status Details: The group continues to meet regularly. As of May 2022 meetings will be bi-weekly as stabilizing economic and public health conditions have required less frequent or immediate discussions by the group.
2. Maintain open communication with businesses and municipalities regarding economic development issues, best practices, or funding opportunities.
 - a. Status: Ongoing
 - b. Themes: All
 - c. Status Details: SRPC continues to use a variety of electronic communications platforms such as our newsletter, "Bits and Pieces" emails, email updates to our Businesses in Good Standing list, and social media.
3. Provide technical assistance to municipalities, businesses, and non-profits in our region to support recovery efforts and lessen the economic impact of the pandemic.
 - a. Status: Ongoing
 - b. Themes: All
 - c. Status Details: SRPC has a long history of providing direct technical assistance to our member municipalities. This action has been combined with other items such as assistance to regulated MS4 communities, development of business retention strategies, or development and revision of outdoor dining policies. SRPC's CARES Act funding will expire in September 2022; SRPC staff will need to discuss the extent to which direct assistance to businesses (which we did not previously provide, and which was supported entirely by the CARES Act grant) will continue beyond the expiration of that funding.
4. Cultivate strong relationships with a wide variety of partner organizations to promote regional approaches to economic development and to advocate on behalf of our region.
 - a. Status: Ongoing
 - b. Themes: All

- c. Status Details: SRPC has continued to engage with our municipalities and local chambers of commerce. Our CARES Act work has also strengthened our relationships with partner organizations such as the NH Small Business Development Center, the Center for Women & Enterprise NH, the US Small Business Administration, Great Bay Community College, and the UNH Cooperative Extension.
5. Support and promote business resiliency plans and their benefits to withstand business shocks as a result of economic disruptions.
 - a. Status: No Progress
 - b. Themes: Economic Growth, Business Operations, Resiliency
 - c. Status Details: Through communication initiatives, SRPC has shared programming by others (e.g. the Resiliency Academy training developed by NH SBDC and the UNH Cooperative Extension), but has not implemented any specific programming of its own.
6. Operate a Consultant Technical Assistance Program using CARES Act funding to provide direct assistance to businesses in our region.
 - a. Status: In Progress
 - b. Themes: Economic Growth, Business Operations, Resiliency
 - c. Status Details: SRPC launched a program to provide small businesses with up to nine hours of free technical assistance with pre-selected consultants in the fields of website development, marketing and advertising, graphic design, audio-visual support, cybersecurity, and generic IT services¹⁸⁷. The program has been highly successful, but would require additional funding to operate beyond the expiration of CARES Act funds.
7. Operate a Municipal Record Digitization Program using CARES Act funding to improve the organizational resilience of our municipalities by increasing availability of digital records.
 - a. Status: In Progress
 - b. Themes: Business Operations, Resiliency
 - c. Status Details: SRPC purchased both normal and large-format scanners and has established a schedule to provide free staff scanning support to our municipalities in 2022 prior to expiration of CARES Act funds. After grant funds expire, SRPC anticipates retaining the scanning equipment and making it available to communities to check out on an as-needed basis.
8. Work with the SEDS to identify and promote best-practices for small businesses to attract and retain employees, including innovative marketing and hiring practices.
 - a. Status: In Progress
 - b. Themes: Business Operations, Resiliency

- c. Status Details: SRPC has worked with the SEDS to develop a proposal for ARPA funds that are being administered by NH BEA. Currently BEA anticipates reviewing those proposals for possible award in June 2022.
- 9. Update SRPC's Regional Housing Needs Assessment
 - a. Status: In Progress
 - b. Themes: Housing
 - c. Status Details: All nine regional planning commissions received funding through NH BEA for the purpose of a collaborative update to all RHNA's statewide. The commissions began committee work in September 2021 to develop a consistent approach to data collection and public outreach, both of which began in 2022. The project will continue into FY22, with potential adoption of a completed RHNA in late 2022 or early 2023.
- 10. Collect regional childcare data on the childcare system.
 - a. Status: Ongoing
 - b. Themes: Childcare
 - c. Status Details: Progress towards identifying new data sources was limited early in the year, but conversations with the SEDS, including a presentation by Early Learning NH provided valuable qualitative data for this update, and helped to identify valuable data sources for this update and the future.
- 11. Continue to work with municipalities to ensure that local hazard mitigation plans are updated regularly to improve the resilience of municipal infrastructure and encourage more resilient development patterns and techniques.
 - a. Status: Ongoing
 - b. Themes: Resiliency, Infrastructure
 - c. Status update – SRPC worked on 4 plans (Somersworth, Rollinsford, New Durham, Barrington) in 2021-2022 and is currently finalizing grant agreements with HSEM for plans due to be updated in 2022-2023.
- 12. Continue to work with SRPC's coastal municipalities to plan for the impacts of climate change and sea-level rise on their communities.
 - a. Status: Ongoing
 - b. Themes: Resiliency, Community Vibrancy
 - c. Status Details: In FY 2022, SRPC staff aided in the Development of the Durham Climate Adaptation Master Plan Chapter, worked with Dover on the Building Resilience by Building Equity project to include historically underserved communities in decision-making and planning processes, partnered with NHDES, NOAA, NERR and others to implement Phase II of the Scaling Up Living Shorelines in the Great Bay Estuary project to protect against rising tides and erosion, worked with Rockingham Planning Commission to develop the Resilient

Land Use Guide for NH: Adapting to Climate Change & Coastal Hazards, and kicked off the Seacoast Flood Smart project In FY 2023, staff aim to implement model regulations from the Resilient Land Use Guide and help carry out action items from the Building Equity project.

13. Analyze our region's broadband capabilities and plan for addressing identified weak points; specifics can include updates to the 2015 Broadband Plan, promotion of news and information related to broadband planning in New Hampshire, and direct technical assistance to municipalities seeking to improve their broadband access.
 - a. Status: In progress
 - b. Themes: Infrastructure
 - c. Status Details: SRPC staff updated coverage maps from publicly available data as part of the 2022 SRPC Data Snapshot. Staff has maintained contact with NH BEA's broadband staff and has followed other case studies from around the state but has not identified a more substantial role for SRPC in the immediate future.
14. Maintain an up-to-date Priority Project List for the purpose of supporting local infrastructure projects and advocate on behalf of priority projects to potential funders.
 - a. Status: Ongoing
 - b. Themes: Infrastructure
 - c. Status Details: SRPC staff conducted project solicitation for this update from February-April 2022 and has updated the priority project list.
15. Maintain an up-to-date Regional Master Plan for the purpose of providing local and regional planning data to identify infrastructure needs and potential solutions.
 - a. Status: In Progress
 - b. Themes: All
 - c. Status Details: SRPC submitted this project for consideration in the Congressionally-Directed Spending round in 2021. SRPC was informed that our funding proposal was approved in early 2022, but as of this update the award process was not yet complete.
16. Leverage SRPC's Brownfields Program to increase opportunities for facility rehabilitation, development and land acquisition and maintenance to strengthen and promote vibrant communities.
 - a. Status: Ongoing
 - b. Themes: Community Vibrancy, Economic Growth
 - c. Status Details: SRPC's current EPA Brownfields Assessment Grant will expire in September 2022. SRPC has applied for additional funds and anticipates EPA award decisions to be announced in May or June 2022.
17. Promote recreational sites and opportunities through the Promoting Outdoor Play

- (POP!) project.
- a. Status: Complete
 - b. Themes: Community Vibrancy, Age Friendliness
 - c. Status Details: The project successfully developed, released, and promoted a digital database of recreational sites for use by our member communities and the general public. The interactive web-tool and the GIS data that supports it will be available beyond the end of this project, and we hope to be able to maintain both as time and funding allow.
18. Create an interactive Arts and Culture web tool modeled on the highly-successful POP! project.
- a. Status: In Progress
 - b. Themes: Community Vibrancy, Age Friendliness
 - c. Status Details: SRPC is currently working on compiling data for portions of our region, but does not currently have the resources to build out the tool for the entire region.
19. Plan for, study, advocate relationship between transportation and the built environment
- a. Status: In Progress
 - b. Themes: Community Vibrancy, Age Friendliness
 - c. Status Details: SRPC is also designated as the Metropolitan Planning Organization for our region and conducts a variety of transportation planning initiatives as part of our Metropolitan Transportation Plan and other initiatives.
20. Increase the connectivity between communities by linking them with multi-modal infrastructure that includes public transit options and safe routes for bicycles and pedestrians.
- a. Status: In Progress
 - b. Themes: Community Vibrancy, Age Friendliness, Accessibility and Mobility
 - c. Status Details: SRPC is also designated as the Metropolitan Planning Organization for our region and conducts a variety of transportation planning initiatives as part of our Metropolitan Transportation Plan and other initiatives.
21. Increase accessibility for people with disabilities by adding ramps, railings, curb cuts and platforms so that they can reach essential and leisure services.
- a. Status: No Progress
 - b. Themes: Community Vibrancy, Age Friendliness, Accessibility and Mobility
 - c. Status Details: No Progress
22. Consider people of all ages across all planning functions and promote opportunities for

further information and resources.

- a. Status: Ongoing
 - b. Themes: Community Vibrancy, Age Friendliness
 - c. Status Details: The Communities for Healthy Aging Transition (CHAT) project and analysis in the CEDS are contributing to our understanding of how broad issues affecting our communities may have disproportionate impacts on certain age cohorts.
23. Use Communities for Healthy Aging Transition (CHAT) action plans to inform all communities of possible opportunities.
- a. Status: In Progress
 - b. Themes: Community Vibrancy, Age Friendliness
 - c. Status Details: The project is currently extending into its second year, in which SRPC anticipates completing a limited number of detailed age-friendliness profiles of member communities, with recommendations for future action items.
24. Stay involved with food security issues and research potential funding sources.
- a. Status: In Progress
 - b. Themes: Community Vibrancy, Age Friendliness
 - c. Status Details: SRPC is planning a Resiliency Committee roundtable on food systems and local resiliency for May 2022.

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