

Strafford Regional Planning Commission and Economic Development District

Comprehensive Economic Development Strategy

2017 Annual Update

Adopted June 2018



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



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SRPC Staff

Jennifer Czysz, AICP Executive Director
James Burdin, AICP Regional Economic Development Planner
Nancy O' Connor, Program Content Coordinator
Shayna Sylvia, Communications and Outreach Specialist
Colin Lentz, Regional Transportation Planner
Rachel Dewey, Data Analyst
Rachael Mack, GIS Planner
Ken Mayo, Editor

Strafford EDD Strategy Committee

Dan Barufaldi, Director of Economic Development City of Dover
Charlie French, UNH Cooperative Extension
Marcia Gasses, Town Planner Barrington
Mary Ellen Humphrey, Economic Development Town of Durham
Ute Luxem, Profile Bank
Dennis McCann, Executive Director, Strafford Economic Development Corporation
Karen Pollard, Director of Economic Development City of Rochester
Denise Roy-Palmer, Executive Director Wentworth Economic Development Corporation
Shanna B. Saunders, Director of Planning and Community Development City of Somersworth
John Scruton, Barrington
Deanna Strand, Executive Director Dover Adult Learning
David Watters, Senator NH Senate
Jennifer Marsh, Economic Development Specialist City of Rochester
Robin Comstock, Director of Economic Development City of Somersworth

Strafford EDD Board of Directors

Barrington

Steve Diamond
Vacant (1)

Durham

Wesley Merritt
Wayne Burton
Leslie Schwartz

Madbury

Tom Crosby
Mark Avery

New Durham

Vacant (2)

Nottingham

Dirk Grotenhuis
Gary Anderson

Somersworth

Scott Orzechowski
Vacant (2)

Brookfield

Ed Comeau
Dianne Smith

Farmington

John Law
Martin Laferte

Middleton

Janet Hotchkiss
Jon Hotchkiss

Newmarket

Peter Nelson
Lisa Henderson

Rochester

Sandra Keans
Donald Hamann
Rick Healey
Vacant (1)

Strafford

Donald Coker
Vacant (1)

Strafford County

George Maglaras

Dover

Marcia Gasses
David Landry
Lindsey Williams
Stephanie Benedetti

Lee

Fred Kaen
Vacant (1)

Milton

Vacant (2)

Northwood

Scott Martin
Victoria Parmele

Rollinsford

Michael Rollo
Suzanne Huard

Wakefield

Steve Brown
Vacant (1)



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

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

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

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

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

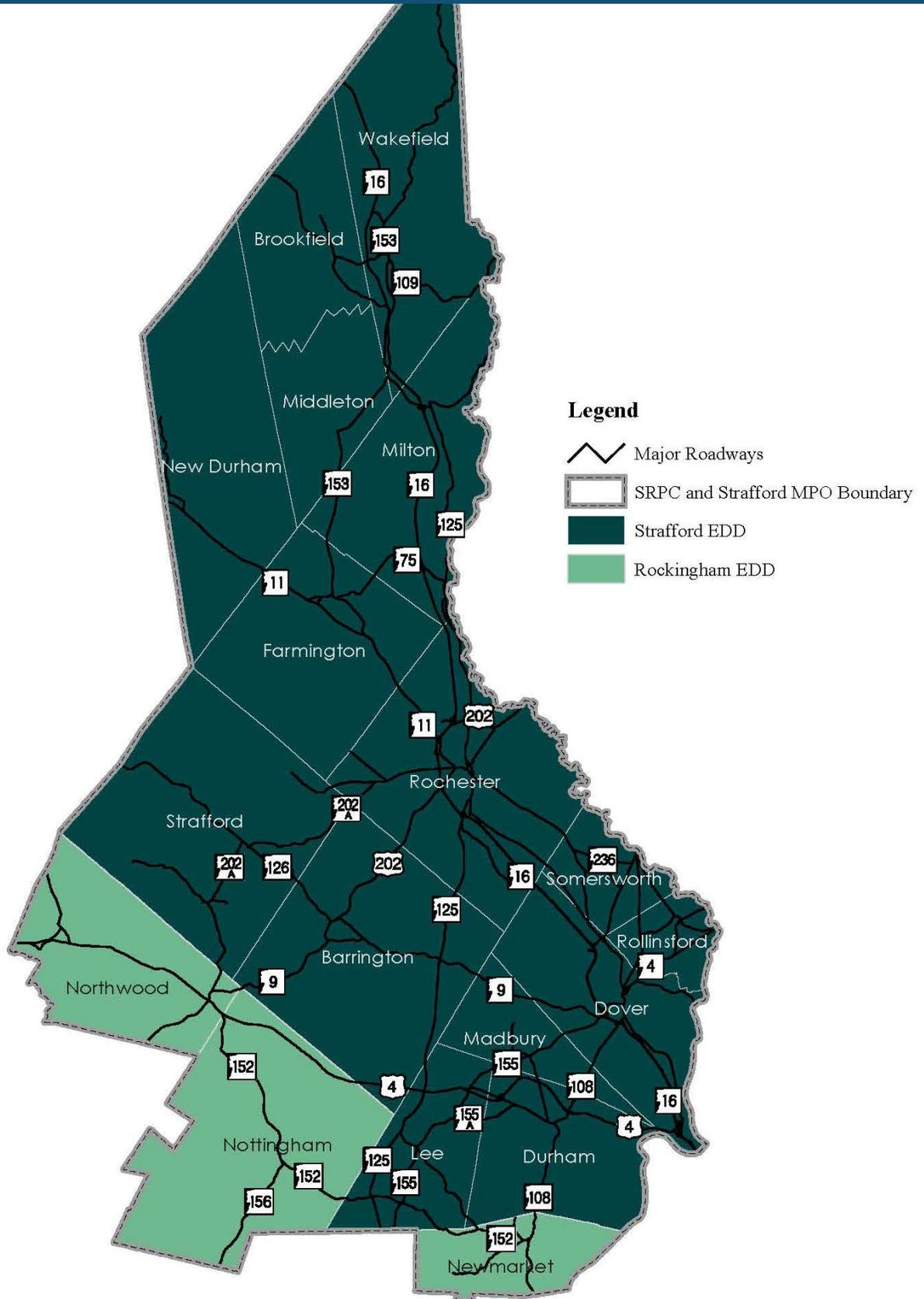


Figure 1: SRPC, Strafford MPO, and Strafford EDD Boundaries Source: SRPC

CEDS and the operation of the Strafford EDD.

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

The Strafford EDD Strategy Committee met to update this document and to strategize about the process for the next broader CEDS update. They reviewed the content sections and the priority project list, as well as updated data and benchmarks. The Strafford EDD Board of Directors approved the content of this strategy at its June 28, 2018 meeting following a 30-day public comment and review period.

Strafford CEDS Vision and Goals

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

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

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

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

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

Performance-Based Planning

In our last update, to better understand the underlying forces that affect our local and regional economies, we made a particular effort to integrate performance-based planning and performance management approaches. This also aligns Strafford EDD's planning practices with the performance-based planning practices of SRPC's other core functions.

We modeled our approach on the Partnering for Performance NH Project, which was tasked with establishing a common framework for performance-based planning in transportation in the state¹. SRPC staff identified performance measures and indicators that will inform the planning and project development processes of both the Strafford EDD and the Strafford MPO. For the purposes of this plan, we define each type of metric as follows:

- **Indicators:** Measurements of existing or historical conditions that can be used to identify economic trends and inform future actions in the Strafford EDD. Indicators are used in each subject area to provide data-driven analysis of the region's economy. While Strafford EDD or other organizations may set goals for "improving" indicators, and can enact policies to influence progress towards those goals, the organization generally lacks direct control over the indicator. For example, Strafford EDD may set a goal of increasing median household incomes by attracting high-paying jobs. Strafford EDD could encourage progress towards this goal by attempting to recruit new businesses to the area or by giving local businesses incentives to expand. However, the businesses themselves are ultimately responsible for creating or relocating the desired jobs.
- **Performance Measures:** Quantifiable measurements of the Strafford EDD's progress towards a goal. Performance measures are used in the Action Plan and Evaluation section to measure progress towards the implementation of the Action Plan in 2017 and towards completing projects from the Priority Project List over the life of the CEDS from 2011. While in some cases these measures can be impacted by external influences, ultimately the responsible organization has the ability to ensure that action items or projects are completed. For example, a municipality may need external funding to complete a project, but they have the ability to submit applications for funding or set aside local funds until they have raised enough to begin work.

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

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



Economic Growth

Introduction

Economic growth is an increase in economic production and outputs. It is one factor influencing economic development in a region. Economic growth is simply increased economic production and outputs. We define economic development, based on the work of Feldman et al., as the expansion of capacities that contribute to the economic health of a region by creating the conditions necessary for long-term economic growth and resiliency to prevent, withstand, and counteract periods of economic disruption¹. This section focuses on the indicators and data indicative of growth in the wealth of the CEDS' region.

Goal

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

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

Household Income

Statewide median household income in New Hampshire remained more or less constant between 2012 and 2016 after adjusting for inflation, according to American Community Survey (ACS) estimates as shown in Table 1. Over the same period, median household income in Strafford County rose by 3.6 percent. Lee, Madbury, and Middleton saw significant growth while Durham and Farmington saw the greatest decline in median income over this time period. Note that the number of households sampled in most Strafford EDD region communities is small, so the margin of error is rather large, ranging from \$2,000 in the larger cities to \$18,000 in the smallest towns. Therefore, it would be unwise to rely on the data to accurately characterize the magnitude of changes in median income. Rather, the data is best used to indicate the trend in household income within each community over time. It is safest to say only that Durham, Farmington, Barrington, and Brookfield likely experienced losses, while Lee, Middleton, Madbury, Wakefield, Somersworth, and Dover probably saw growth in their median household incomes. The margin of error at the county level is less (\$1,000 to \$2,000) and even less at the state level (\$500), but even so median income data alone cannot encompass the financial health of these regions.

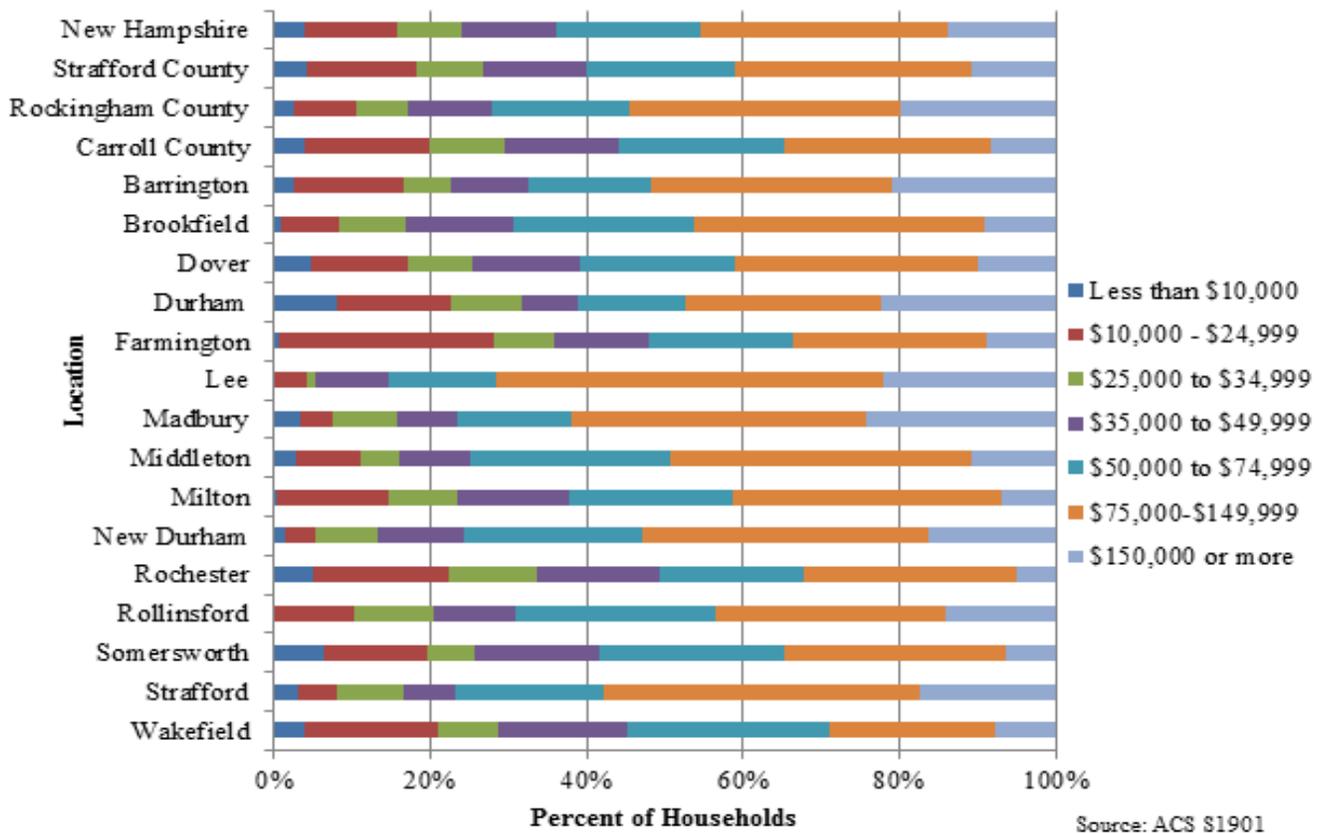
Table 1: Median Household Income, 2011-2016

Community	Households (2016)	2012 (2016 Dollars)	2012 (2016 Dollars)	2014 (2016 Dollars)	2015 (2016 Dollars)	2016 (2016 Dollars)	% Growth (2012-2016)
New Hampshire	521,373	\$67,917	\$67,917	\$66,946	\$67,680	\$68,485	0.83%
Strafford County	47,779	\$61,236	\$61,236	\$60,447	\$61,531	\$63,533	3.62%
Carroll County	20,783	\$53,209	\$53,209	\$53,155	\$54,026	\$56,289	5.47%
Rockingham County	118,672	\$81,531	\$81,531	\$80,523	\$82,294	\$82,398	1.05%
Barrington	3,311	\$85,480	\$85,480	\$83,631	\$82,424	\$78,956	-8.26%
Brookfield	314	\$70,720	\$70,720	\$66,264	\$66,421	\$64,688	-9.32%
Dover	12,793	\$58,466	\$58,466	\$60,912	\$61,832	\$63,096	7.34%
Durham	3,234	\$75,502	\$75,502	\$68,561	\$72,151	\$67,241	-12.29%
Farmington	2,746	\$58,007	\$58,007	\$51,369	\$51,507	\$52,305	-10.90%
Lee	1,720	\$78,324	\$78,324	\$97,481	\$96,282	\$105,769	25.95%
Madbury	635	\$86,302	\$86,302	\$99,395	\$99,450	\$98,750	12.61%
Middleton	598	\$58,270	\$58,270	\$62,141	\$69,308	\$73,958	21.21%
Milton	1,715	\$62,208	\$62,208	\$60,906	\$60,810	\$65,679	5.29%
New Durham	970	\$84,222	\$84,222	\$79,727	\$83,107	\$79,853	-5.47%
Rochester	12,953	\$51,641	\$51,641	\$48,814	\$47,613	\$50,759	-1.74%
Rollinsford	1,026	\$66,536	\$66,536	\$64,190	\$62,969	\$66,111	-0.64%
Somersworth	4,646	\$55,813	\$55,813	\$53,867	\$55,609	\$60,943	8.42%
Strafford	1,432	\$89,631	\$89,631	\$98,749	\$96,999	\$91,190	1.71%
Wakefield	1,991	\$47,412	\$47,412	\$45,446	\$48,210	\$53,224	10.92%

Source: American Community Survey S1901

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

Figure 2: Income Distribution, 2016



For example, median household incomes in Farmington and Durham were comparable in 2016, between \$50,000 and \$75,000. But Durham has approximately twice the percentage of households earning \$150,000 or more, or \$10,000 or less. Farmington’s population is more concentrated in the middle income brackets, while Durham’s is more concentrated in the extreme high and low brackets. These income brackets are especially useful when considering the percentage of households earning a living wage.

The living wage estimates for Strafford County presented in Table 2 were produced with the Living Wage Calculator developed by Dr. Amy K. Glassmeier and the Massachusetts Institute of Technology. They were meant to cover all expected expenses for a family of a given size, including food, lodging, clothing, and childcare, and were considered when identifying useful income categories for comparison. For example, the lowest bracket of \$10,000 or less is a poverty income for any household size, including a single adult. The next bracket, \$10,000 to \$25,000, is close to the poverty-level income for the largest households, but is approximately a living income for a single adult. The \$35,000 mark is a living income for a household of 2 adults regardless of whether one or both are working. As shown in Table 3, 62

percent of households in Strafford County consisted of 2 people or fewer according to the 2010 census. However, this figure does not differentiate between households of 2 adults and households of a single working adult and a dependent child, which would require nearly \$50,000 for a living income. A \$50,000 annual income is also a living income for a household of two adults and one or two dependent children so long as only one adult is working. It is not enough to cover the increased costs of childcare if both adults work. The \$75,000 mark is a living income for all household sizes covered by the MIT Living Wage Calculator, while \$150,000 is approximately twice the highest living wage mark and is used to differentiate between middle-income households earning a living wage and high-income households earning significantly more.

Table 2: Living Wage by Family Size and Working Adults

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

Living Wage Calculator, MIT

Table 3: Strafford County Household Size, 2010

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

For economic growth in a community to be considered truly successful, it should not only increase the median income, but also consistently move individuals or households to higher income brackets. Table 4 shows the percentage of households that earned \$75,000 or more in each county and the state. Although we did see an increase of 2.5 points in the percentage of Strafford County households earning \$75,000 or more from 2011 to 2016, this increase trailed the change at the state level and in neighboring counties over the same period.

Meanwhile, Strafford County saw comparatively few changes at the opposite end of the spectrum, where the portion of households earning \$35,000 or less remained roughly 28 percent before a drop of two percent in 2016 as shown in Table 5. This stability, followed by improvement in 2016, is consistent with the state as a whole. Further data would be necessary to determine whether this sudden change is representative of a larger trend.

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

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

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

Year	County			New Hampshire
	Strafford	Caroll	Rockingham	
2011	38.6%	29.0%	51.6%	42.5%
2012	32.5%	28.7%	52.4%	43.1%
2013	38.2%	30.6%	51.8%	43.0%
2014	38.9%	32.1%	52.7%	44.0%
2015	39.7%	32.3%	53.8%	44.5%
2016	41.10%	34.90%	54.50%	45.60%

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

Year	County			New Hampshire
	Strafford	Caroll	Rockingham	
2011	28.1%	32.5%	19.7%	25.4%
2012	28.8%	30.9%	19.4%	25.6%
2013	28.1%	30.6%	19.7%	25.7%
2014	28.5%	30.8%	18.9%	25.0%
2015	28.9%	30.5%	17.9%	25.0%
2016	26.9%	29.5%	17.1%	24.1%

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

Year	County			New Hampshire
	Strafford	Caroll	Rockingham	
2011	5.9%	5.5%	3.1%	4.4%
2012	5.7%	5.5%	3.1%	4.4%
2013	5.3%	5.3%	3.0%	4.5%
2014	4.7%	4.9%	2.9%	4.0%
2015	5.0%	4.8%	2.7%	4.2%
2016	4.3%	4.1%	2.6%	4.0%

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

Year	County			New Hampshire
	Strafford	Caroll	Rockingham	
2011	33.3%	38.5%	28.6%	31.9%
2012	32.7%	40.4%	28.3%	31.3%
2013	33.7%	38.7%	28.5%	31.3%
2014	32.7%	37.1%	28.5%	30.8%
2015	31.4%	37.0%	28.2%	30.5%
2016	32.00%	35.80%	28.50%	30.40%

Source All: American Community Survey S1901

Unemployment and Underemployment

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

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

U-3 is considered to be the official “unemployment rate” and is the measure used most often to track unemployment, making it the most easily available at all levels of analysis. U-6 is the most inclusive category and the closest to measuring underemployment; it comprises marginally attached workers (people who are not working and have not searched for a job in the prior 4 weeks) and “involuntary part-time workers,” persons employed part time for economic reasons (those working less than 35 hours per week who want to work full time but had their hours reduced or are unable to find a full-time job).

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

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

Year	County			New Hampshire	United States
	Strafford	Caroll	Rockingham		
2011	5.3%	5.5%	5.6%	5.8%	8.9%
2012	5.4%	5.3%	5.8%	6.0%	8.1%
2013	4.9%	5.0%	5.4%	5.4%	7.4%
2014	4.0%	4.2%	4.6%	4.5%	6.2%
2015	3.1%	3.6%	3.6%	3.7%	5.3%
2016	2.6%	3.0%	3.0%	2.9%	4.9%
2017	2.4%	2.6%	2.9%	2.8%	4.4%

Source: NHES, Bureau of Labor Statistics

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

Year	New Hampshire	United States
2011	11.3%	15.9%
2012	11.2%	14.7%
2013	10.9%	13.8%
2014	9.7%	12.0%
2015	8.0%	10.4%
2016	6.4%	9.6%
2017	6.2%	8.5%

Source: Bureau of Labor Statistics

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

Employment Clusters

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

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

Table 10: SRPC Region Employment by Industry

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

Table 10: SRPC Region Employment by Industry Continued

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

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

Source: NHES Employment Projections



Regional Collaboration

Introduction

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

Goal

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

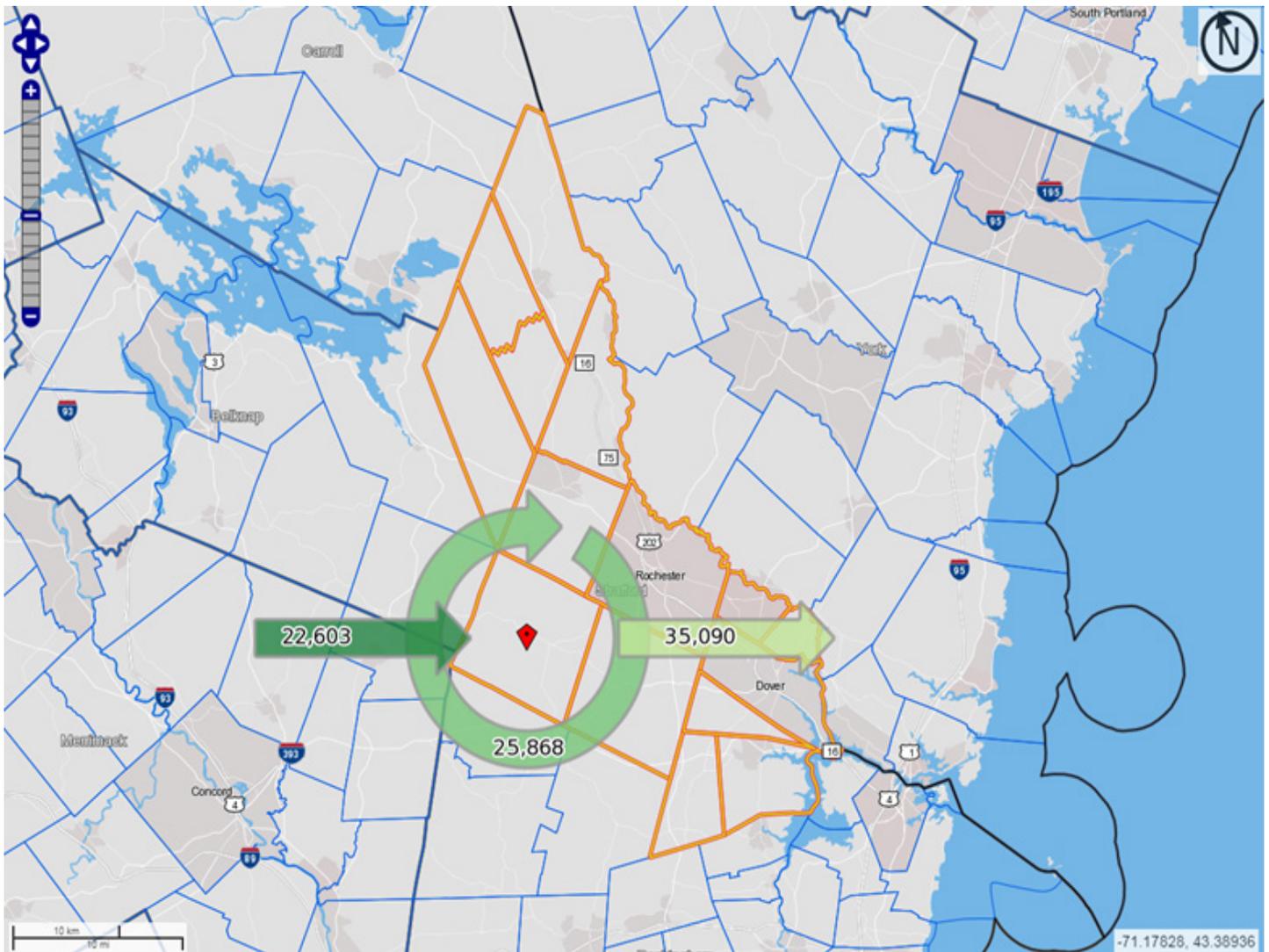
Regional Commuters

As shown in Figure 2, nearly 25,900 of the Strafford EDD's 48,500 employees also lived within the region in 2015. This figure represents 53.4 percent of the EDD's workforce, meaning the Strafford EDD imports nearly half its employees from other locations, including neighboring communities in both New Hampshire and Maine. Meanwhile, the 25,900 people who both work and live in the Strafford EDD make up only 42.4 percent of Strafford EDD residents with jobs, meaning 57.6 percent must go outside the region for work. Proximity to

other large employment centers like Portsmouth, Concord, Manchester, and metro Boston mean the region's economic strength is inextricably linked to locations and populations outside the EDD. While this can have positive impacts on the region's resilience by reducing dependence on a single large employer, it can also make the region vulnerable to events that disrupt the flow of goods and people between regions.

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

Figure 2. Commuters



Regional Context

The location of resources and markets is one of the primary factors that companies will consider when deciding where to locate, making geographical context an important factor for regions to consider when formulating development strategies. While a firm may draw employees only from communities within an hour's commute, they frequently distribute the goods they produce to markets that are much further away. Figure 3 shows the regional context of the Strafford EDD with a buffer of 250 miles outline in blue and 500 miles in green. Within 250 miles of the Strafford EDD (roughly the distance a commercial trucker can travel in a day to make a round trip), firms have access to most of New England, as well as Montreal and Quebec City in Canada and New York City. This area includes access to the St. Lawrence Seaway and the entire eastern seaboard from New York to Maine. Within 500 miles of the Strafford EDD (a day's trip in one direction) are Baltimore and Washington to the south; Pittsburgh, Buffalo, and Toronto to the west; and large portions of Quebec, New Brunswick, and Nova Scotia to the northeast. This area includes access to Lake Ontario and Lake Erie, the mouth of the St. Lawrence Seaway, and shipping centers in and around Philadelphia and the Chesapeake Bay.

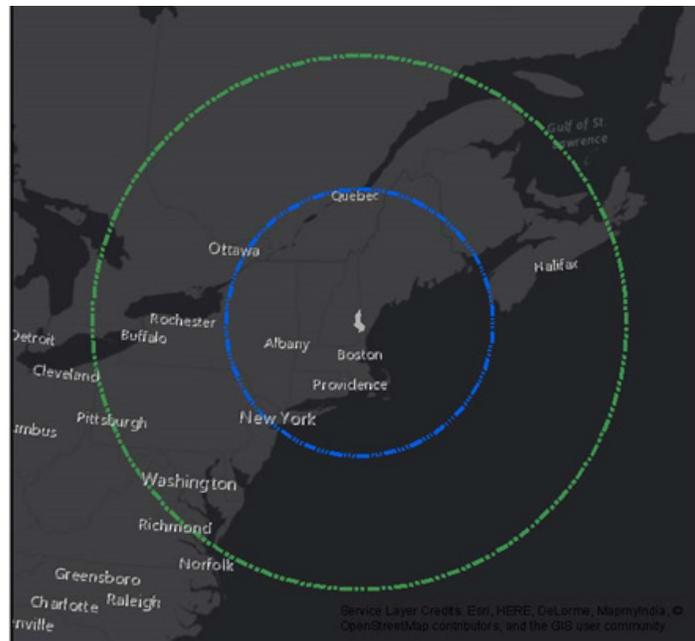


Figure 3. Strafford EDD Context

Table 11: Job Locations for Strafford EDD Residents, 2014

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

*Denotes community within the Strafford EDD

Source: OnTheMap, ACS 2014

Table 12: Home Locations for Strafford EDD Workers, 2014

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

*Denotes community within the Strafford EDD

Source: OnTheMap, ACS 2014



Infrastructure

Introduction

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

Goal

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

Alternative Fuel Stations

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

A measurement for available public infrastructure to support alternative fuels was developed as part of the Partnering for Performance NH program using data from the Alternative Fuels Data Center. As of May 24, 2018, fourteen alternative fueling stations were located in the Strafford EDD, consisting of a variety of electric vehicle charging stations, biodiesel, and propane/liquefied petroleum gas stations. However, several of these facilities are currently limited to wholesale distribution or are not available for widespread public use.

It is difficult to determine whether poor access to infrastructure is hindering the adoption of alternative technologies, or low demand for these technologies is retarding the growth in supporting infrastructure. However, it seems safe to say the use of alternative fuels within the Strafford EDD region is limited. SRPC will continue to monitor the availability of alternative fueling stations to inform its work as both an economic development district and a metropolitan planning organization.



Red Listed Bridges

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

An analysis of a region’s bridge inventory can provide a useful benchmark for assessing the quality of local transportation infrastructure.

The New Hampshire Department of Transportation (NHDOT) evaluates bridge quality and groups bridges into four categories:

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

Approximately 11.5 percent of the 243 bridges identified in the Strafford EDD were on either the red or black list as of 2016¹. The inventory of red list bridges in the Strafford MPO has fluctuated over time, but has not shown any consistent growth or decline.



Bridge over Broadway St. in Dover

Table 13: Bridges in Strafford EDD, 2017

Type	Number	Percent
Green	136	56.0%
Yellow	76	31.3%
Red	28	11.5%
Black	3	1.2%
Total	243	100%

Source: NHDOT

Table 14: Strafford MPO Red List Bridges

Owner:	State	Municipal	Total
2017	12	19	31
2016	9	20	29
2015	10	21	31
2014	7	20	27
2013	7	19	26
2012	7	19	26
2011	14	16	30

Source: NHDOT Red List for Strafford MPO

¹ https://www.nh.gov/dot/org/projectdevelopment/bridgedesign/documents/2015_nh_state_redlist_10yrplan.pdf



Downeaster, Dover

Public Transit

The SRPC region is served by two fixed-route bus systems: The Cooperative Alliance for Seacoast Transportation (COAST) and Wildcat Transit. COAST is an independent public entity that provides public transportation services to communities in Strafford and Rockingham counties and to Berwick, Maine. Wildcat Transit is the University of New Hampshire's transportation service and provides fixed-route bus service to and around the University's Durham campus. As of 2016, these services had a combined annual ridership of nearly 1.8 million trips, Table 15.

To better understand the population these organizations serve, Partnering for Performance NH is developing a methodology to track the total population living within a quarter mile of fixed-route transit service. Data from the 2016 ACS shows that approximately 35 percent of Strafford EDD residents are served by COAST or Wildcat. This service area includes 50 percent of Strafford EDD residents living below the poverty level. This metric will require additional development to ensure that future route changes are tracked yearly and that population estimates are as accurate as possible. Note too that demand response transit for disabled, elderly, or other passengers is available from a variety of providers in the Strafford EDD region outside of the fixed-route service area. Efforts to develop an accurate and meaningful methodology to track and compare access to and use of these programs are ongoing, and we hope to have information available in future updates of this strategy.

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

The Amtrak Downeaster provides passenger rail service from Brunswick, Maine, to Boston's North Station, including

stops within Strafford EDD at Dover and Durham/UNH. Amtrak provides yearly ridership information for the stations along each route that could be used to track demand for these services. Data for the last three years has been compiled in Table 17. Fluctuations in ridership over this time make trends difficult to identify, but continuing to track this data yearly will help us get a clearer picture of local use of this service in the future.

Table 15: Total Annual Ridership for SRPC Fixed Route Bus Providers

Year	COAST	Wildcat	Total Ridership
2011	432,036	1,138,687	1,590,971
2012	477,245	1,094,611	1,571,856
2013	481,088	1,184,426	1,665,514
2014	469,002	1,242,324	1,711,326
2015	471,759	1,342,247	1,814,006
2016	459,531	1,325,972	1,785,503

Source: COAST, Wildcat Transit

Table 16: Downeaster passengers boarding and alighting at Strafford EDD stations

Year	Dover	Durham	Total
2014	55,144	58,893	114,037
2015	46,834	52,898	99,732
2016	52,457	63,046	115,503
2017	59,060	58,804	117,864

Source: Amtrak State Fact Sheets



Resources and Environment

Introduction

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

Goal

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

Rooms and Meals Tax

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

As shown in Table 16, Strafford County consistently generates less meals and rooms revenue than neighboring Carroll and Rockingham counties. While Strafford County has access to the larger seacoast region and the I-95

corridor via the Spaulding Turnpike, I-95 itself, along with many ocean-front tourism opportunities, are located in neighboring Rockingham County and York County, Maine. Meanwhile, Carroll County extends north to the White Mountains National Forest and includes large portions of Lake Winnepesaukee and other lakes that attract large numbers of tourists.

Table 16 allows us to see when the recession most strongly impacted tourism in each county. Both Rockingham and Carroll counties began their decline in 2008, with revenues returning to pre-recession levels by 2011-2012. Strafford County, meanwhile, shows no decline in business until 2010, and revenues also took longer to return to pre-recessionary levels.

Table 16: Meals and Rooms Total Receipts, 2007-2017 (Millions of 2017 Dollars)

Year	Strafford	Carroll	Rockingham
2007	\$186.7	\$228.5	\$914.2
2008	\$187.0	\$225.5	\$888.6
2009	\$190.0	\$215.6	\$872.3
2010	\$171.3	\$213.0	\$872.4
2011	\$173.1	\$225.6	\$911.9
2012	\$178.9	\$228.1	\$939.1
2013	\$182.9	\$237.9	\$977.0
2014	\$192.2	\$247.1	\$1,036.0
2015	\$201.3	\$256.5	\$1,121.9
2016	\$210.6	\$264.5	\$1,183.4
2017	\$209.9	\$273.0	\$1,199.1
Percent Growth 2007-2017	12.4%	19.5%	31.2%

Source: NH OEP

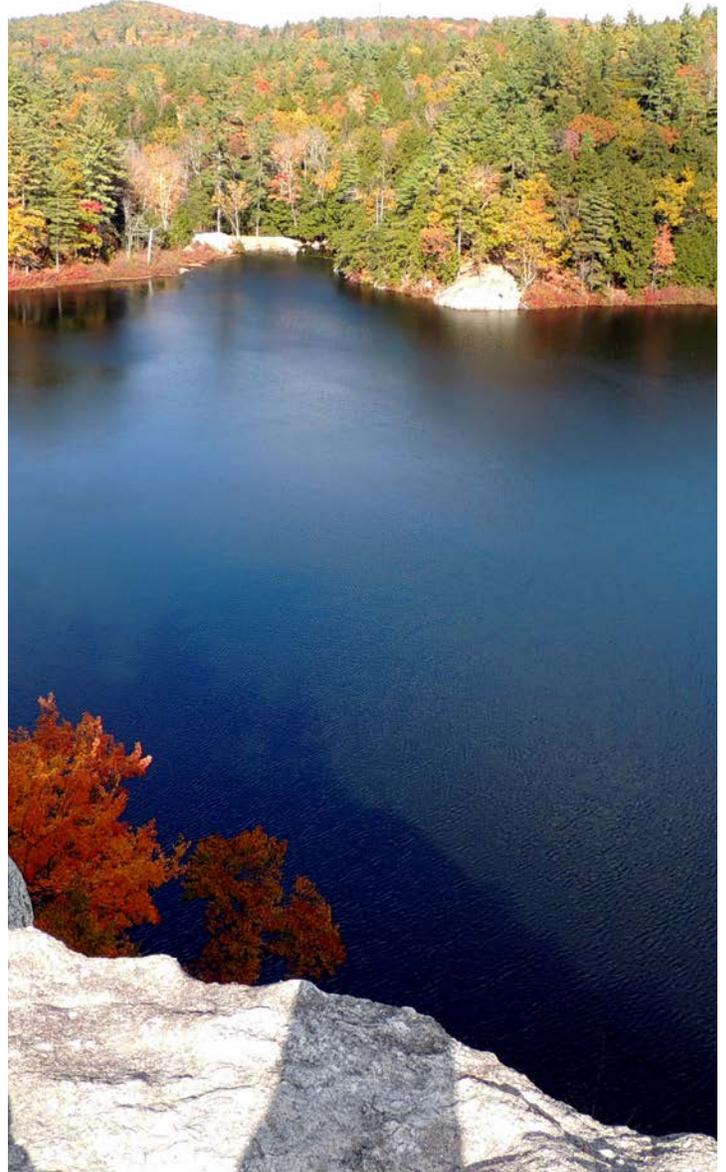


Table 17: Community Hazard Mitigation Plan Expiration

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

Source: SRPC

Hazard Mitigation Planning

In order to be eligible for Federal Emergency Management Agency (FEMA) hazard mitigation funding, municipalities must have up to date hazard mitigation plans. Plans must identify hazards that are likely to affect a community and assess both the likelihood that such an event will occur and the severity of its likely impact. Hazard mitigation plans also contain strategies to mitigate the likelihood or severity of damage from various hazards and to improve preparedness and resilience in case of such events. SRPC partners with its member municipalities to ensure their local hazard mitigation plans satisfy all FEMA criteria. The number of communities with up-to-date hazard mitigation plans serves as an indicator of community resiliency and a balanced relationship between the built and natural environments.

As shown in Table 17, SRPC is currently working with Dover, Rochester, Newmarket, Farmington, and Lee to update their plans, all of which expire in 2018. Once updated, the plans will remain in effect until 2022. The plans for Brookfield, Madbury, and Northwood will expire at different points in 2019



Vehicle Emissions

Tracking air quality is important for determining changes in the health of the environment. The data is compiled from state and local air agencies and the US Environmental Protection Agency (EPA) and available on a 3-year cycle.

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

Table 18: Mobile On-Road Emissions (Tons)

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

Source: NEI

Table 19: Mobile On-Road Emissions (Tons per Person)

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

Source: NEI, NH OEP



Workforce and Entrepreneurial Development

Introduction

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

Goal

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

Population Age

Much has been written about the impending “Silver Tsunami,” the rapid aging of communities across the United States. As their populations continue to age, many communities are concerned that larger elderly populations will place stress upon service programs such as public health, welfare, and transportation, particularly if these elderly populations are no longer generating the income taxes that these services depend upon. The trend is particularly evident in New Hampshire. The median age here is about five years above the national average and from 2012 to 2016 increased about twice as fast as the national figure. Rockingham and Carroll counties are even older than the state average, Carroll County significantly so, with a median age of 50.9 years in 2016. The median age in Strafford County, meanwhile, has consistently fallen just below the national average and has grown at roughly the same rate as the national figure. While a large portion of this difference may be related to the presence of UNH (Durham’s median age in particular reflects the significant percentage of college students living in the town), both Dover and Somersworth have large, comparatively young populations

as well.

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

Table 21 shows the total dependency ratios for the last five years. Carroll County is well above the statewide and national figures and increasing rapidly. However, both Strafford and Rockingham counties are at or below the statewide ratio, which is even lower than the national figure. Again, Strafford County's data is heavily influenced by the presence of UNH's flagship campus in Durham, but the ratios for the three cities suggest that Strafford County's profile without UNH would still be comparable to Rockingham County. Analyzing the child and old-age dependency ratios separately sheds some light on how median ages are rising despite a below-average dependent population.

All three counties and New Hampshire as a whole saw their old age dependency ratio increase faster than the national rate, but both Strafford and Rockingham began with ratios at or below the national average from 2012 to 2016. The total rise in median age is equally likely to be a result of declines in the child dependency ratio. Statewide, New Hampshire has seen the ratio of children to working age population decrease at more than twice the national rate, and both Carroll and Rockingham counties are decreasing even faster. These rates of decline, combined with child dependency ratios that were already well below the national average, significantly counteract the increases in the old-age dependency cohort.

Table 20: Population Median Age, 2012-2016

Place	2012	2013	2014	2015	2016	Percent Change (2012-2016)	
	United States	37.2	37.3	37.4	37.6		37.6
New Hampshire	41.1	41.5	41.8	42.2	42.2	2.7%	
County	Strafford	36.7	36.9	36.9	37.2	37.1	1.1%
	Carroll	48.2	49.0	49.7	50.3	50.9	5.6%
	Rockingham	42.3	42.7	43.1	43.5	43.8	3.5%
Municipality	Barrington	38.2	41.6	43.4	44.1	44.3	16.0%
	Brookfield	47.4	45.2	46.7	44.4	45.7	-3.6%
	Dover	35.6	36.1	36.6	36.7	36.4	2.2%
	Durham	20.7	20.8	20.7	20.8	20.8	0.5%
	Farmington	41.5	41.7	40.8	39.6	40.8	-1.7%
	Lee	45.0	41.6	41.7	41.7	41.7	-7.3%
	Madbury	37.6	37.6	36.0	36.6	37.2	-1.1%
	Middleton	40.9	41.5	40.3	40.4	40.8	-0.2%
	Milton	38.4	43.6	41.2	43.1	43.6	13.5%
	New Durham	44.5	45.0	45.6	45.4	45.2	1.6%
	Rochester	42.6	42.0	41.5	41.7	41.6	-2.3%
	Rollinsford	38.8	39.6	38.7	41.6	44.2	13.9%
	Somersworth	34.3	34.3	35.2	36.5	35.6	3.8%
	Strafford	43.0	45.2	45.0	45.8	45.0	4.7%
	Wakefield	47.6	51.5	50.1	52.5	52.2	9.7%

Source: American Community Survey S0101

**Table 22: Total Age Dependency Ratios
2012-2016**

Place						Percent Change (2012-2016)	
	2012	2013	2014	2015	2016		
United States	59.0	59.1	59.3	59.7	60.3	2.2%	
New Hampshire	54.8	55.0	55.2	55.7	56.2	2.6%	
County	Strafford	48.2	48.5	48.8	48.9	49.4	2.5%
	Carroll	64.8	65.9	66.7	68.2	69.6	7.4%
	Rockingham	55.0	55.2	55.2	55.5	56.0	1.8%
Municipality	Barrington	51.6	52.8	49.1	50.2	53.1	2.9%
	Brookfield	65.7	79.5	87.6	90.2	81.3	23.7%
	Dover	48.2	51.3	51.3	50.5	51.0	5.8%
	Durham	19.9	21.9	22.0	20.8	20.9	5.0%
	Farmington	54.7	51.3	48.9	50.7	59.4	8.6%
	Lee	66.6	54.8	59.5	57.5	55.8	-16.2%
	Madbury	47.5	54.9	59.2	63.4	62.0	30.5%
	Middleton	48.6	48.8	53.3	56.5	51.6	6.2%
	Milton	62.3	60.0	56.8	58.9	52.9	-15.1%
	New Durham	55.0	55.5	57.3	55.2	56.7	3.1%
	Rochester	53.6	53.3	55.1	56.2	57.9	8.0%
	Rollinsford	61.0	63.7	65.0	65.4	63.1	3.4%
	Somersworth	53.3	49.9	52.2	55.9	52.9	-0.8%
	Strafford	61.8	62.3	59.3	54.4	53.8	-12.9%
	Wakefield	56.0	52.3	51.6	54.4	61.5	9.8%

Source: American Community Survey S0101

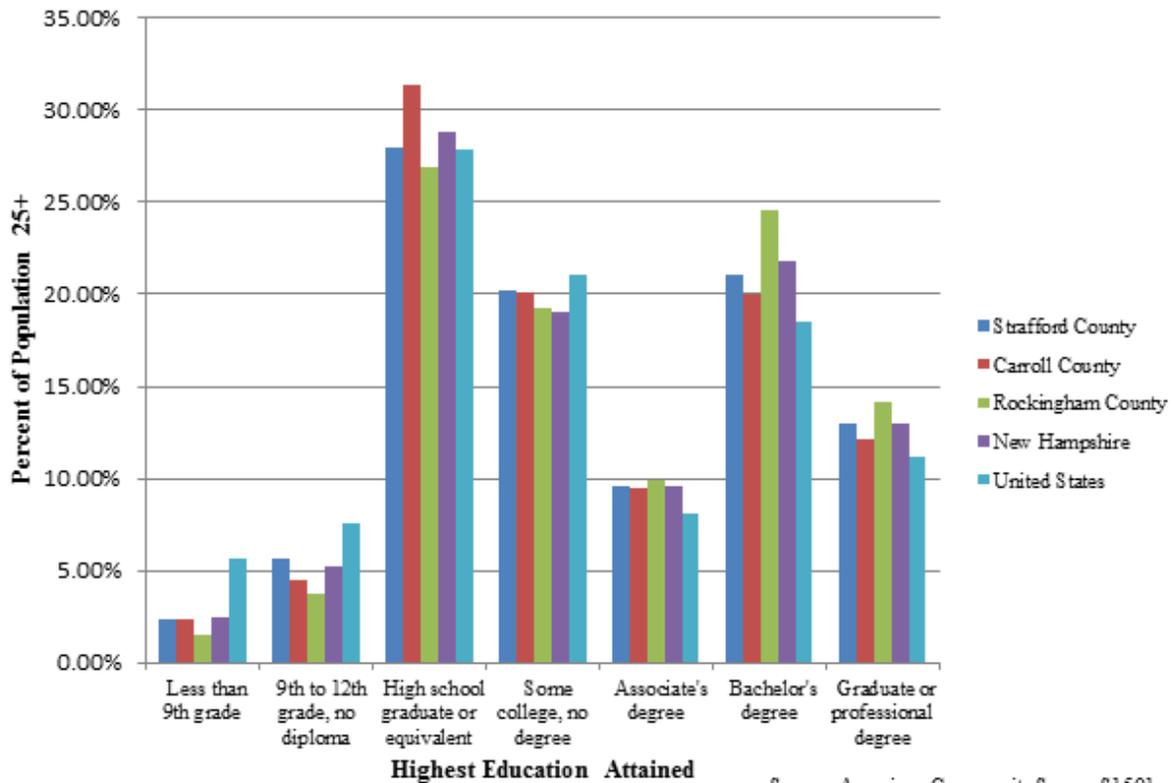
This alters the age conversation somewhat for local populations, particularly in Strafford County. While the old-age dependency ratio is increasing, it is offset by decreases in the child dependency ratio, which means that, overall, demand for services is roughly the same. If this trend continues or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

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

Educational Attainment

As shown in Figure 4, educational attainment at all levels in Strafford County tracked closely to the New Hampshire averages, according to the 2016 ACS 5-year estimates. Compared to the national figures, all three counties analyzed had a much smaller population without a high school diploma or equivalent, while their proportion of college degree holders (associate's or higher) were higher than the nation as a whole. Rockingham County has the largest percentage of residents with an Associate's degree or higher with nearly 50 percent, compared to 45 percent for Strafford County and 43 percent for Carroll County.

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



Source: American Community Survey S1501

Workforce Training Programs

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



Quality of Place

Introduction

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

Goal

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

Population Trends

As of 2016, Strafford EDD had a population of approximately 130,000 residents, according to the ACS 5-year averages. Nearly 96 percent lived in Strafford County, with the remaining 4 percent being residents of Brookfield and Wakefield in Carroll County. Strafford County's population is comparatively young; only 13.6 percent are older than 65, compared to 15.8 percent statewide. Meanwhile, 37.2 percent of the county's population is between the ages of 15 and 39. UNH's Durham campus accounts for a large portion of this segment; a full 69.4 percent of Durham's population is in this age group. At least 30 percent of the larger populations within

the cities of Dover, Rochester, and Somersworth are in this age group, which may reflect the lifestyle preferences of younger individuals and households. Strafford County's proportion of residents under 15 years of age is consistent with the state figure. We discussed additional implications of these demographic trends and their implications for current and future services and workforce makeup in the Workforce and Entrepreneurial Development chapter.

Wealth Generation

Median household incomes in Strafford County were approximately \$5,000 below the statewide figure in 2016 and grew by approximately 3.5 percent from 2012–2016, according to ACS 5-year estimates after adjusting for inflation. This trend illustrates the region's recovery from the Great Recession. As we discussed in the Economic Growth chapter, however, median income data is insufficient to get a full picture of the economic health of a region. As with many of the indicators in this plan, further work is necessary to get a complete picture of gains and losses during the recession and recovery.

Table 22: Population Age Breakdown, 2016

Place	Total Population	Under 15 Years	15 to 39 Years	40 to 64 Years	65 Years and Over	
United States	318,558,162	19.1%	33.7%	32.6%	14.5%	
New Hampshire	1,327,503	16.3%	30.8%	37.1%	15.8%	
County	Strafford	125,913	16.0%	37.2%	33.2%	13.6%
	Carroll	47,416	13.3%	22.7%	39.8%	24.2%
	Rockingham	300,365	16.5%	28.4%	39.7%	15.2%
Municipality	Barrington	8,770	19.5%	23.0%	45.3%	12.3%
	Brookfield	834	19.4%	21.0%	38.6%	21.1%
	Dover	30,750	16.6%	37.9%	31.1%	14.3%
	Durham	15,934	8.3%	69.4%	14.9%	7.6%
	Farmington	6,827	18.0%	30.1%	36.5%	15.3%
	Lee	4,388	17.5%	28.6%	40.9%	13.0%
	Madbury	1,844	23.8%	29.6%	37.1%	9.7%
	Middleton	1,740	20.1%	27.9%	40.5%	11.3%
	Milton	4,591	17.9%	28.1%	41.5%	12.4%
	New Durham	2,667	16.7%	26.5%	42.4%	14.3%
	Rochester	30,052	15.2%	32.3%	34.8%	17.5%
	Rollinsford	2,530	19.3%	26.1%	39.4%	15.3%
	Somersworth	11,756	18.6%	36.7%	32.8%	11.8%
	Strafford	4,064	18.9%	24.9%	43.7%	12.6%
	Wakefield	5,001	14.2%	24.1%	40.0%	21.6%

Source: American Community Survey S0101

Table 23: Median Household Income, 2012-2016

Community	Households (2016)	2012 (2016 Dollars)	2013 (2016 Dollars)	2014 (2016 Dollars)	2015 (2016 Dollars)	2016(2016 Dollars)	Percent Growth (2012-2016)
New Hampshire	521,373	\$67,917	\$66,904	\$66,946	\$67,680	\$68,485	0.83%
Strafford County	47,779	\$61,236	\$60,626	\$60,447	\$61,531	\$63,533	3.62%
Carroll County	20,783	\$53,209	\$52,424	\$53,155	\$54,026	\$56,289	5.47%
Rockingham County	118,672	\$81,531	\$79,717	\$80,523	\$82,294	\$82,398	1.05%
Barrington	3,311	\$85,480	\$84,045	\$83,631	\$82,424	\$78,956	-8.26%
Brookfield	314	\$70,720	\$66,346	\$66,264	\$66,421	\$64,688	-9.32%
Dover	12,793	\$58,466	\$59,146	\$60,912	\$61,832	\$63,096	7.34%
Durham	3,234	\$75,502	\$73,432	\$68,561	\$72,151	\$67,241	-12.29%
Farmington	2,746	\$58,007	\$52,955	\$51,369	\$51,507	\$52,305	-10.90%
Lee	1,720	\$78,324	\$96,391	\$97,481	\$96,282	\$105,769	25.95%
Madbury	635	\$86,302	\$91,539	\$99,395	\$99,450	\$98,750	12.61%
Middleton	598	\$58,270	\$60,263	\$62,141	\$69,308	\$73,958	21.21%
Milton	1,715	\$62,208	\$62,576	\$60,906	\$60,810	\$65,679	5.29%
New Durham	970	\$84,222	\$80,875	\$79,727	\$83,107	\$79,853	-5.47%
Rochester	12,953	\$51,641	\$50,504	\$48,814	\$47,613	\$50,759	-1.74%
Rollinsford	1,026	\$66,536	\$64,782	\$64,190	\$62,969	\$66,111	-0.64%
Somersworth	4,646	\$55,813	\$54,853	\$53,867	\$55,609	\$60,943	8.42%
Strafford	1,432	\$89,631	\$96,496	\$98,749	\$96,999	\$91,190	1.71%
Wakefield	1,991	\$47,412	\$44,759	\$45,446	\$48,210	\$53,224	10.92%

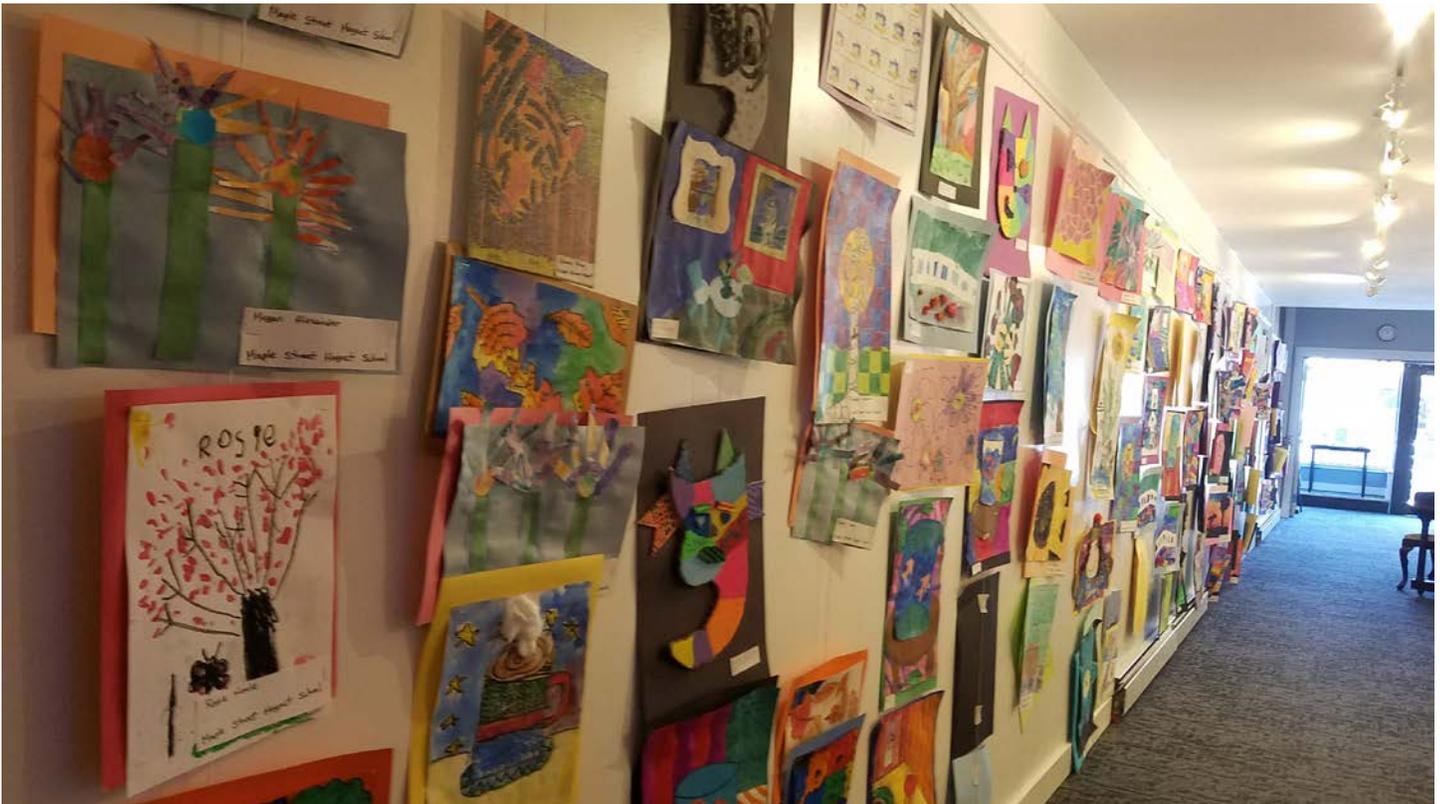
Source: American Community Survey S1901

Housing

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



Newmarket Mills



Economic Resilience

Introduction

The federal Economic Development Administration defines economic resilience as the ability of a local or regional economy to prevent shocks and disruptions to its economic base, withstand these shocks and limit their impact when they do occur, and recover quickly when impacts are unavoidable. Resilience is a vital component of SRPC's core functions as a regional planning commission and as the administrators of the Strafford EDD and Strafford MPO; resilient themes are discussed across all of our planning functions.

The Metropolitan Transportation Plan focuses on resilience as a major theme for evaluating and maintaining transportation infrastructure and investing in alternative transportation modes. Local Solutions for the Strafford Region serves as the region's master plan and considers the intersection of transportation, environmental, and land use planning, including scenario planning that examines the resilience of proposed development patterns. The CEDS builds upon these efforts by integrating resilient themes throughout the document.

- **Economic Growth:** Unemployment in the Strafford region and in New Hampshire is among the lowest in the country. Statewide figures for underemployment, while higher than those for unemployment, also compare favorably to the rest of the country. However, our analysis of median household income shows a concerning lack of growth after adjusting for inflation, and is supported by a percentage of low-income households that has remained largely unchanged over the past five years. Additional strategies to support and diversify local businesses and to adapt to changing economic and environmental conditions would help the region become more resilient.
- **Regional Collaboration:** Our research suggests that the Strafford EDD is integrated into a larger regional economy, in terms of both employing workers from other regions and local workers finding jobs in other

communities. The distribution of jobs throughout New Hampshire and neighboring states make strategies for improved mobility and communication particularly important for our residents.

- **Infrastructure:** Transportation infrastructure and services are an important component of mobility. Our research shows three consecutive years of increases in total fixed-route bus ridership. The small amount of historic inter-city bus and rail data has made similar conclusions difficult for those services. Work is ongoing to improve access to this data and to develop a reliable metric for evaluating access to demand response transportation services.
- **Resources and Environment:** SRPC works with many member communities to keep their local hazard mitigation plans up to date, thereby encouraging community resilience in response to environmental challenges. Tourism is a major industry in New Hampshire, and efforts to maintain environmental resources can have strong economic implications for a region. Additional research to compare the Strafford EDD's tourist economy to surrounding regions' could help us anticipate disruptions and plan more comprehensive approaches to the link between environmental and economic resilience.
- **Workforce and Entrepreneurial Development:** The Strafford EDD has a young and well-educated workforce compared to other parts of New Hampshire and the United States and benefits from a variety of higher education and workforce training resources including the University of New Hampshire flagship campus, Great Bay Community College, and the Community Action Partnership of Strafford County. These resources, as well as relationships forged between institutions of higher learning, training and employers, are essential to helping our workforce respond quickly to the changing demands of employers and changes in the regional economy.
- **Quality of Place:** As discussed elsewhere, the population of Strafford EDD is comparatively young and has access to a variety of education and training resources that can spur innovation in the local economy.

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



Action Plan and Evaluation

Purpose of the CEDS Action Plan

The CEDS Action Plan in Table 24 lays out a road map for staff and those involved in economic development in the CEDS region so they can coordinate and share resources to achieve the greatest impact.

Structure of the CEDS Action Plan

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

These resources include the following:

Strategy Committee

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

SRPC Staff

SRPC staff supports the Strafford EDD in the following ways:

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

Board of Directors

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

Implementing the CEDS Goals

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

An EDA short-term planning assistance grant was the primary funding source for the preparation of the last plan update and for implementation of the action plan in 2016 and 2017. The grant was supported by local matching funds from SRPC and other local partners. SRPC is grateful for the support and collaboration of these partners and looks forward to building on these relationships with each successive CEDS update. A similar funding opportunity is expected for FY19.

SRPC and the Strategy Committee hope that, as further developments are made to the CEDS document and process, additional partners will make similar contributions to supporting the EDD and implementing the CEDS.

Project Development Process

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

In January 2017, staff did project solicitation outreach to the Strategy Committee, municipalities, non-profits,

and educational institutions. The purpose of this outreach was twofold. It provided information about the update process for both the CEDS and the NH Transportation Ten Year Plan, and it scheduled meetings with representatives of each municipality and additional stakeholder groups to discuss both the status of existing projects and local priorities for future projects.

SRPC staff met with all 18 municipalities in the Strafford MPO planning area, 15 of which are also in the Strafford EDD. Meetings were also held with transit providers and local transportation agency offices as part of this process. A form was also distributed to collect community project submissions outside of the scheduled meetings. After collecting and updating projects, SRPC staff reviewed each one to ensure that consistency with the goals and objectives outlined in the CEDS.

The Strategy Committee reviewed the resulting matrix of projects and decided that all submitted and updated projects should be included in the CEDS update for approval by the Strafford EDD Board of Directors.

For this document, we reached out to all parties that had submitted projects for last year's update and asked them to let us know the current status of projects, as well as to add any new projects that had come up over the past year. These are listed in the Priority Project List found below in Table 25.

Table 24: Strafford 2017 CEDS Action Plan

Action	Implementation	Complete	In Progress	Status	Guidelines
Economic Development Planning	Apply for EDA Annual Planning Grant		X	Will apply for a new EDA planning grant that will be awarded in July 2018 if successful	EDA Priorities and Guidance
	Design annual review planning process	X		Update process focused on providing latest data update to existing plan.	
	Obtain EDD Status	X		Economic Development District status granted in 2015.	
	Design and carry out CEDS evaluation tasks		X	SRPC staff has learned about collaboration and organizational performance measures through work on the SHRP2 program. We offered a survey to strategy committee members in Spring 2018 to help us to improve our process and collaboration regionally. We plan to revisit this self-evaluation after this update is finished.	
Research	Complete EDA semi-annual progress report	X		We submitted 3 semi-annual reports during the 2016-2017 grant period.	EDA Performance Measures Guidance & Strafford CEDS Performance Measures
	Update 2011-2016 CEDS with most recent data	X		Used most recent data from American Community Survey, Bureau of Labor Statistics, NHDES, and other state and regional sources.	
	Update project profiles annually	X		Project solicitation process included reaching out to all project partners to ensure up-to-date information on new and existing projects.	
	Continue cluster analysis research		X	NHDES employment estimates and projections used to analyze employment clusters. Additional cluster mapping tools can build on future analysis.	
	Establish and measure benchmarks		X	A primary goal of the prior update was to develop consistent tools and indicators of economic performance for current and future use. We plan to revisit these indicators and measures to ensure that they accurately depict the economic health of the region and adjust as needed	
Outreach	CEDS implementation kickoff meeting		X	Meetings focused on updates and improvements to the CEDS. Efforts to expand the Strategy Committee are ongoing.	

Table 24: Strafford 2017 CEDS Action Plan Continued

Action	Implementation	Complete	In Progress	Status	Guidelines
Outreach	Continue regional collaboration involvement in CEDS		X	SRPC staff checks in regularly with communities to ensure that information is available, and any needs are being met.	Strafford CEDS Vision, Mission, Principles, Goals, and Objectives
	Present information at local economic development committees		X	SRPC staff participate in regional roundtables and committees with an economic development focus to keep current with regional developments and offer assistance where needed.	
	Present information to local champions in Economic Development		X	Initial outreach to local chambers of commerce and other groups conducted; no presentations scheduled yet.	
Technical Assistance	Carry out annual project solicitation process	X		SRPC staff worked with municipalities and other partners to update their lists of projects generated in the 2016 update.	Strafford CEDS Vision, Mission, Principles
	Apply for EDA funding for projects of highest priority included within CEDS		X	The City of Rochester received a \$1.9 million EDA grant for ongoing project to extend sewer and water along Salmon Falls Road. We expect to submit other applications over the next two cycles.	
	Assist with grants and loans from other funding sources		X	Several CEDS priority projects received funding support through an EPA Brownfield Assessment grant managed by SRPC.	
	Assist in project or services development		X	SRPC staff continues to provide technical assistance to communities for developing and advancing projects.	
	Update SRPC website with CEDS information on separate pages	X		Approved and adopted CEDS is available at http://Strafford.org/ . Discussion around how best to report on progress requires further consideration and will be a topic for the strategy committee to work on.	
	Direct technical assistance provided to municipalities, non-profits, and businesses			X	

Evaluation

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

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

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



Priority Project List

Spaulding Turnpike Construction

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

Table 25: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
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Barrington

2017-2018	Ongoing	Pierce Road/ Route 125 Industrial Park Expansion	Town of Barrington	Private Businesses	Identified site for future industrial park. TIF possible to support new infrastructure and attract an anchor business.	Barrington has entered into an agreement with an excavation company to clear ledge and prepare the site for development. An application has been submitted for initial excavation and site plan permits.
2017-2018	Ongoing	Redemption Road Business Park Expansion	Town of Barrington	Private Businesses	Redemption Road business park anchored by Turbocam, could have space for 5-6 additional firms. Minimal work would be needed as most infrastructure already installed.	Redemption Road business park anchored by Turbocam as additional lots available for future development. Infrastructure is already installed, but extensive site work would be necessary to prepare for additional development.

Table 25: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
2017-2018	Proposed	Town Center Improvements	Town of Barrington		Rtes 9 and 125 form the de facto town center, with schools and other civic buildings in close proximity. Improvements to sidewalks, streetscapes, and other quality of place improvements would improve pedestrian and bicycle safety, public access to civic buildings, and anticipated commercial development.	Rtes 9 and 125 form the de facto town center, with schools and other civic buildings in close proximity. Improvements to sidewalks, streetscapes, and other quality of place improvements would improve pedestrian and bicycle safety, public access to civic buildings, and anticipated commercial development.
2017-2018	Proposed	Swain Lake Area Recreation and Alternative Transportation Improvements	Town of Barrington		The causeway on Swain Lake is a popular fishing destination, which creates conflict with narrow right-of-way. Targeted pedestrian and bicycle infrastructure and improved public lake access would improve safety and quality of place and alleviate congestion.	The causeway on Swain Lake is a popular fishing destination, which creates conflict with narrow right-of-way. Targeted pedestrian and bicycle infrastructure and improved public lake access would improve safety and quality of place and alleviate congestion.

Table 25: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
Brookfield						
2017-2018	Proposed	Brookfield Broadband Expansion Feasibility Study	Town of Brookfield	SRPC, GRANIT, UNH Cooperative Extension, Others	The Town of Brookfield has expressed an interest in improved broadband access and speeds to support in-home businesses. Additional work needed to determine scope of a study or plan.	Ongoing
COAST						
2017-2018	Ongoing	Bus Upgrades	COAST	N/A	State of Good Repair funding to upgrade bus radiator/cooling systems to a new electronic system that would improve fuel economy and reduce emissions	Purchased the following revenue service vehicles that were delivered in 2017. One (1) light-duty Cutaway Three (3) ADA Accessible Minivans

Table 25: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
2017-2018	Ongoing	Bus Stop Upgrades	COAST	N/A	Sustainability factor is that proper stop construction at key locations will reduce dwell time for the bus and idle emissions allowing traffic to pass by the bus instead of holding up a line of cars. This is shovel ready, but funding not yet secured. Project locations are already identified.	
2017-2018	Ongoing	Inter-City COAST Service/ Transportation Center	COAST	N/A	Add a transportation center to NHDOT Park N' Ride at Exit 13. Expand COAST Routes to Gonic, Exit 12, stops at new commercial and industrial development. Exits 13, 14, and granite state business Park would be beneficial as well.	
2018-2019	Preliminary Design	Repair and Repave COAST Parking Lot at 42 Sumner Dr.	COAST	N/A		Will begin working with selected firm to initiate the preliminary design for this facility enhancement.
2018-2019	Preliminary Design	New COAST Admin./Oper./Maint. Facility at 42 Sumner Drive	COAST	N/A		Will begin working with selected firm to initiate the preliminary design for this new facility.

Table 25: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
2018-2019	Preliminary Design	New COAST Bus Storage Facility	COAST	N/A		Will begin working with selected firm to initiate the preliminary design for this new facility.
2018-2019		Real-time Bus Information System	COAST	N/A		Solicitation of a real-time bus information system for internal operations use and external passenger use is being initiated.
2018-2019	Preliminary Design	Solar Array	COAST	N/A		Will begin working with selected firm to initiate the preliminary design for this facility enhancement.
2018-2019		Traffic Signal Prioritization	COAST	Municipalities		Would like to deploy traffic signal prioritization for public transit in cooperation with select communities (Dover, Somersworth, Rochester)
2018-2019	Procured	Replacement & Expansion <30 ft. Light-duty Buses	COAST	N/A		Purchased 5 such vehicles in Fall 2017 & Spring 2018. Deliveries occurring in Spring/Summer 2018.
2018-2019		Replacement & Expansion ADA Accessible Minibuses	COAST	N/A		Purchase at least two (2) such vehicles.

Table 25: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
2018-2019		Replacement Operations Support Vehicle	COAST	N/A		Purchase at least on (1) such vehicle.
Dover						
2017-2018	Ongoing	Dover Downtown Infill Development of City Owned Parking Lots 2011-011	City of Dover	Private Developers	1st Street project phase II is underway. 3rd Street project preparing to submit to Planning Board. Additional parking lots could be made available if an opportunity arose.	
2017-2018	Ongoing	Planning Funding for Enterprise Park, Phase II Dover 2011-029	City of Dover		Website promoting development opportunities. The Business Park is almost full and funding has been advocated for a second industrial park. The current business park includes more than 15 firms with 450 + employees.	

Table 25: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
2017-2018	Proposed	Pedestrian Plan Action Items	City of Dover		Dover Pedestrian Plan includes recommendations for infrastructure and complete street improvements or reconfigurations to improve pedestrian safety, walkability, bicycle infrastructure, and downtown aesthetics.	
2017-2018	Proposed	Economic Analysis for Rezoning	City of Dover		The Dover City Council has expressed an interest in rezoning residentially-zoned property for commercial or light industrial use. This study would identify land that would maximize economic benefits of rezoning and limit the negative impact on existing residential properties.	
Durham						
2017-2018	Ongoing	Solar wall installation for a building with high air flow requirements	Town of Durham	N/A	Multiple solar facilities installed	Ongoing

Table 25: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
2017-2018	Ongoing	Pedestrian and bicycle infrastructure projects	Town of Durham	N/A	<p>Prior project was for ongoing facility improvements. Town is revisiting scope of project to target pedestrian-oriented engineered solutions. Currently determining whether a large-scale plan or study or targeted improvements would be more effective.</p>	Ongoing
2022+	Ongoing	Technology Park Durham Depot lot/train station 2011-030	Town of Durham	High Tech Businesses	<p>The zoning in the town has been updated to encourage mixed use development in the downtown. Durham has worked with large developers to foster redevelopment in the downtown</p> <p>Redevelopment would be in line with the eventual goal of downtown Durham being a high tech office park encompassed within mixed use buildings.</p>	<p>The location for this UNH Research Park under consideration is a UNH owned parcel known as West Edge. Recently the census tract that includes this site was nominated by the governor for designation as an Opportunity Zone. The town is also looking for other incentive opportunities to help bring this to fruition. The Town is working with UNH to create zoning that facilitates their vision for a University Research Park. There will need to be infrastructure investment as well as possibly planning dollars to help flesh out this opportunity.</p>

Table 25: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
2019-2021	Proposed	Downtown Durham Structured Parking	Town of Durham	UNH, private businesses	Prior project for parking infrastructure was downscaled and completed with on-street and surface parking improvements. Durham now has opportunity to revisit more intense structured parking. Studies are currently underway to identify possible funding sources, locations, partners, and parking buildout.	This is a high priority with the town and important steps should begin to figure out where, when and how it will be funded. Opportunity may come along to partner with other redevelopment projects in the downtown. Important that the town be poised and ready to go.
2019-2021	Proposed	Route 108 Water/Sewer Extension	Town of Durham	Private Businesses	Extend water and sewer service to the Stone Quarry area along Route 108 to support future development.	This has been accomplished by the RiverWoods Project.
Lee						
2017-2018	On Hold	Town of Lee Engineering and Feasibility Study for Town Center Combined District Heating Co-Generation, and Next-Generation Biomass Pelletizing Facility 2011-019	Town of Lee	N/A	No changes	No change

Table 25: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
2022+	Ongoing	Library Community Center Lee 2011-032	Town of Lee	N/A	Ongoing	This project has developed into a Town Center (multiple buildings) Project. They anticipate asking the voters for approval and a bond in 2019

Madbury

2017-2018	Proposed	Madbury Public Library Capital Campaign	Town of Madbury		The Design Development Phase of the project is complete and the preliminary cost estimate is \$1.3M. The Steering Committee continues to work with the architects to refine the plan and reduce the cost.	Cost estimate came in at \$1.5M. Town has capped cost at \$1.3M. Town has raised \$975k toward project; a large portion at 2018 town meeting. Friends still have \$ to raise. There will have to be some redesign to reduce costs.
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Middleton

2019-2021	Proposed	Ridge Road Highway Garage	Town of Middleton		New highway garage needed	No update
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Table 25: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
2017-2018	Proposed	Tanglewood Recreation Area and Public Trails Feasibility Study	Town of Middleton		Tanglewood is an approximately 70-acre undeveloped subdivision that is now predominantly town-owned. Site has access and dirt circulation roads, but utilities and homes were not installed. Local interest in conserving the land, and public park and recreation trails would likely be more feasible than nearby sunrise lake due to predominant public ownership.	No update
2019-2021	Ongoing	Old Town Hall Restoration	Town of Middleton	Private Donors	Historic preservation of Old Town Hall is underway. Renovations are approximately 75% complete. Estimating approximately \$375,000 needed to complete project.	No update
2019-2021	Proposed	New Fire Station	Town of Middleton		Town is exploring options to renovate and expand existing highway garage to add fire station capabilities.	No update

Table 25: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
Rochester						
2017-2018	Ongoing	The City of Rochester Sewer and Water Extension of Salmon Falls Road	City of Rochester	DeMoulas & Stone Wall Kitchen	The City of Rochester received a \$1.9 million grant from the EDA for this project. The year-long design of the project is complete. Construction estimated at 12-18 months and currently underway.	
2017-2018	Ongoing	Transportation Master Plan	City of Rochester	N/A	Study and plan for downtown traffic and parking improvements has been scaled up to a full Transportation Master Plan. Previous project included focus on traffic circulation, integration of transit and bike/pedestrian infrastructure, and improvements to parking lot pavement, lighting, and signage. Updated project content will be the same but expanded to entire city.	RFP for Transportation Master Plan released

Table 25: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
2017-2018	Ongoing	Downtown Wayfinding and Signage Program	City of Rochester	N/A	<p>Develop a complete wayfinding program from Spaulding Turnpike exits and monument signs at the Rochester Common, City Hall Complex, and Community Center. Project funded by City at \$100,000, of which 50% is expected to be used for design work, with remaining funds to be used to begin sign installation.</p> <p>Expected to require additional funding to finish installation. RFP process completed and proposals under review.</p>	
2017-2018	Ongoing	Rochester Riverwalk	City of Rochester	N/A	<p>Committee in place and meeting regularly. Currently in planning and visioning stages, but some branding and sign design under way in conjunction with the Downtown Wayfinding and Signage project.</p>	

Table 25: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
2019-2021	On Hold	Free Public Wi-Fi	City of Rochester	N/A	City still interested in expanding availability of public wi-fi in government buildings and parks, but the project is of lower priority than originally expected.	
2019-2021	Ongoing	Granite Ridge Development District Utilities 2011-025	City of Rochester	N/A	Phase I completed. Phase II work is under way. Planning for a future Phase III is underway, including evaluations of a possible future 1 million gallon water tower to support additional development.	
2022+	On Hold	Business Incubator 2011-026	City of Rochester	Richard W. Creteau Technology Center, Granite State College, Great Bay Community College, SCORE, and the Small Business Development Center	Feasibility study completed for 55 North Main Street Incubator, showed the demand for an incubator in Rochester, but also showed that project was not likely to be feasible at the planned location. Rochester is still interested in pursuing a business incubator, but needs to consider how to change the project focus to be more viable.	

Table 25: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
2019-2021	Proposed	North Fire Station	City of Rochester		City wishes to locate a new fire station in the northern part of the city to improve response times and support current and expected future development along route 11 and other areas. City currently researching possible locations.	
2019-2021	Proposed	North Main Street, Chestnut Hill Road Connector	City of Rochester		Construct new bridge and new connector road to handle vehicle, pedestrian, and bicycle traffic over the Cocheco River. This would alleviate through traffic in the downtown area, supporting other efforts to improve safety and walkability and improving the quality of place. Expected to provide additional connection across the river to support growing commercial development along Route 11.	

Table 25: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
2019-2021	Ongoing	Downtown Parking Infrastructure	City of Rochester		The City recently acquired land near City Hall for use as public parking to support City Hall, the Rochester Opera House, and other downtown institutions. The parcel will be used for surface parking while options for structured parking are considered.	
Rollinsford						
2017-2018	Proposed	Downtown and Riverfront Connectivity	Town of Rollinsford	South Berwick, SRPC, Southern Maine Planning and Development Commission	Rollinsford is interested in exploring downtown connections, including planning for walkability, development, connections to existing programming and trails, and connection to South Berwick.	
Somersworth						
2017-2018	On Hold	Somersworth Washington Street Bridge Feasibility Study 2011-004	City of Somersworth	N/A	Project is still of interest. Currently lacking funding.	Nothing has changed.

Table 25: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
2017-2018	Ongoing	Breton Cleaners Site Cleanup and Reuse Study 2011-008	City of Somersworth	DES & EPA	The City is moving forward with cleanup operations and has applied for funding through NH DES and US EPA.	The former Breton's Cleaners site has been abandoned and taken by the City for back taxes. The City has received DES funding for building demo and EPA funding for soil remediation. The project continues.
2017-2018	Ongoing	Passenger Rail Study	City of Somersworth	N/A	The City of Somersworth has formed a committee to study the possibility of re-establishing passenger rail in Somersworth. In order to properly move forward a feasibility study needs to take place.	Nothing has changed.
2017-2018	Ongoing	Solar Power Generation at Somersworth Landfill	City of Somersworth	NH Solar Garden DES & EPA	The City went out with an RFP and is now moving forward with plans to install a 4,000 panel solar array. The City is currently finalizing the development project and expects permitting to be completed during summer 2017, with construction to begin in the fall.	The City went out with an RFP and is considering moving forward with plans to install a 4,000 panel solar array. The City is still gathering information regarding the impact of the installation on the City's superfund site. Projected install is Summer 2019.

Table 25: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
2017-2018	Ongoing	Hilltop School Reuse Project	City of Somersworth	Chinburg	<p>Following a formal study to examine the feasibility of the 15 possible building reuse alternatives proposed by community members, The Friends of Somersworth, a local community organization, is working on a reuse plan for the building which would become and arts and cultural center housing various art-related businesses, an educational center and community rooms. Significant funding is needed to get the building up to code. The City Council recently voted down an ordinance to supply the organization with \$1,000,000 in match for grant funding</p>	The property has recently been sold to a private developer with a 3.5 year buildout timeframe.
2017-2018	Ongoing	Downtown Tax Increment Financing Study	City of Somersworth	N/A	<p>Study completed, boundaries of downtown identified, and TIF currently being drafted. TIF expected to be in place by summer 2017.</p>	This has been considered and rejected by the City as it conflicted with the existing 79-E purpose.

Table 26: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
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Strafford Economic Development Corporation

2017-2018	Ongoing	Regional Revolving Loan Fund Strafford Economic Development Corporation 2011-010	SEDC	EDA, NH Business Finance Authority, NH Community Loan Fund, Community Development Block Grant, City of Dover, City of Rochester, and Great Falls Development Corporation	Multiple funding sources have been identified. SEDC is preparing applications for funding.	SEDC has drafted an application to the US Economic Development Administration for \$700,000 to capitalize a Regional Revolving Loan Fund for business lending. This fund would fold into their existing lending efforts and provide critically needed money to lend. Historically, funds leverage 1:1 to 1:10 match ratios. They would look particularly to the EDA funds as a way for to finance drug rehabilitation organizations to provide services throughout the region. They are trying to finance a continuum of care for these stricken members of the workforce and get them back into availability for employment. They want to be able to provide financing to businesses who employ, or may employ these people. They anticipate submitting an application in June 2018.
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Table 26: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
Strafford						
2017-2018	Proposed	Trail Development and Mapping	Town of Strafford		The Town of Strafford would like to explore new opportunities for trail development and utilization	
University of New Hampshire						
2017-2018	Ongoing	Center for Agricultural and Natural Resource-Based Entrepreneurship (CANRE) 2011-001	UNH	Green Launching Pad, Small Business Development Center, the Stonyfield/UNH Entrepreneur Boot Camp, and the Manufacturing Extension Center	Awaiting approval for the submitted Center for Agriculture and Natural Resource-based Entrepreneurship (CANRE). The purpose of the project is to provide; "Training to communities within Strafford County and the Seacoast Area to build their capacity to foster entrepreneurship activity within the community and to implement a regional approach to economic development."	Ongoing

Table 26: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
2017-2018	Proposed	South drive TransitWay	UNH		New transportation corridor envisioned in 2004 Campus Master Plan and reaffirmed in 2012. Expected to reduce congestion on Main Street, improve efficiency and transportation access around campus, and support future development with utility upgrades.	Ongoing

Wentworth Economic Development Corporation (WEDCO)

2017-2018	Ongoing	Regional Revolving Loan Fund Wentworth Economic Development Corporation 2011-015	WEDCO	EDA, NH Business Development Finance Authority, NH Community Development Finance Authority's Community Development Block Grant program & Job Retention Fund, USDA's Intermediary Relending Program and Strafford Economic Development Corp	Provided funding to several business which resulted in job creation/retention	
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Table 26: 2018 Priority Projects

Project Term	Status	Project	Proponent	Potential Partners	2017 Status Updates	2018 Status
2017-2018	Proposed	Explore Moose Mountains Technical Assistance	WEDCO	Explore Moose Mountains Region, Moose Mountain Regional Greenway	<p>SRPC has been providing technical assistance and organizational guidance to EMMR to support launch of new website and regional marketing campaign.</p> <p>Continued assistance to include website and content development and additional technical assistance as needed.</p>	