



STRAFFORD EDD

COMPREHENSIVE

ECONOMIC DEVELOPMENT STRATEGY

YEARS
**2021-
2025**

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The Role of the Economic Development District

Strafford Economic Development District (SEDD) is a sub-division of SRPC, which carries out all economic development planning activities.

With guidance from our partners, we maintain a regional economic development strategy which includes current economic trends and local priority projects. We also assist local communities with their economic development strategies and facilitate regional discussion.

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Dover	Rollinsford
Durham	Somersworth
Farmington	Strafford
Lee	Wakefield
Madbury	
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Strafford EDD 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.

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Strafford EDD Board of Directors

The full body of the Strafford Regional Planning Commission as determined by RSA 36:46 also serves as the Strafford EDD Board of Directors. The Strafford EDD Board of Directors is responsible for approving the final CEDS based on input from SRPC staff, the Strategy Committee, and the general public.

Barrington Steve Diamond, John Huckins	Brookfield Ed Comeau, Vacant (1)	Dover Lindsey Williams, David Landry Stephanie Benedetti, Vacant (1)
Durham Wesley Merritt, Wayne Burton, Leslie Schwartz	Farmington Randy Orvis, William Fisher	Lee Vacant (2)
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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 designated as the Strafford Economic Development District (Strafford EDD) by the Economic Development Administration (EDA) of the US Department of Commerce in 2015. The Strafford EDD comprises the municipalities of Strafford County plus Brookfield and Wakefield. Newmarket, Northwood, and Nottingham are served by the Regional Economic Development Center. This designation requires that we update a Comprehensive Economic Development Strategy (CEDS) to establish and promote our region's economic development priorities.

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

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

The CEDS was originally adopted in 2011 as an analysis of the region's unique advantages and disadvantages and a vision for the future of the region's economy. It provides analysis of the region's economy, updates to the priority project list, and an evaluation of our progress in implementing the CEDS and the operation of the Strafford EDD. The 2021-2025 CEDS outlines a regional strategy for future economic development and prosperity based on the themes and goals developed by the CEDS Strategy Committee. This document is a new five-year vision plan for the region, and we will continue to provide an annual update to this document throughout the five-year period.

SRPC staff began data collection and outreach for this update in fall 2019 and held a multidisciplinary public forum in January 2020 to discuss the region's economic development, transportation, and housing priorities. Feedback from this forum informed selection of themes and subsequent data collection and goal setting. Physical distancing requirements and the closure of non-essential businesses in April 2020 as a result of the COVID-19 pandemic prevented subsequent public input opportunities, and the significant rise in unemployment and larger financial uncertainty surrounding the pandemic called many of the themes and data previously collected into question. After consulting with our EDA grant officer, SRPC made the decision to put the five-year update on hold in May 2020 and prioritize technical assistance to our municipalities responding to and recovering from the economic impacts of COVID-19.

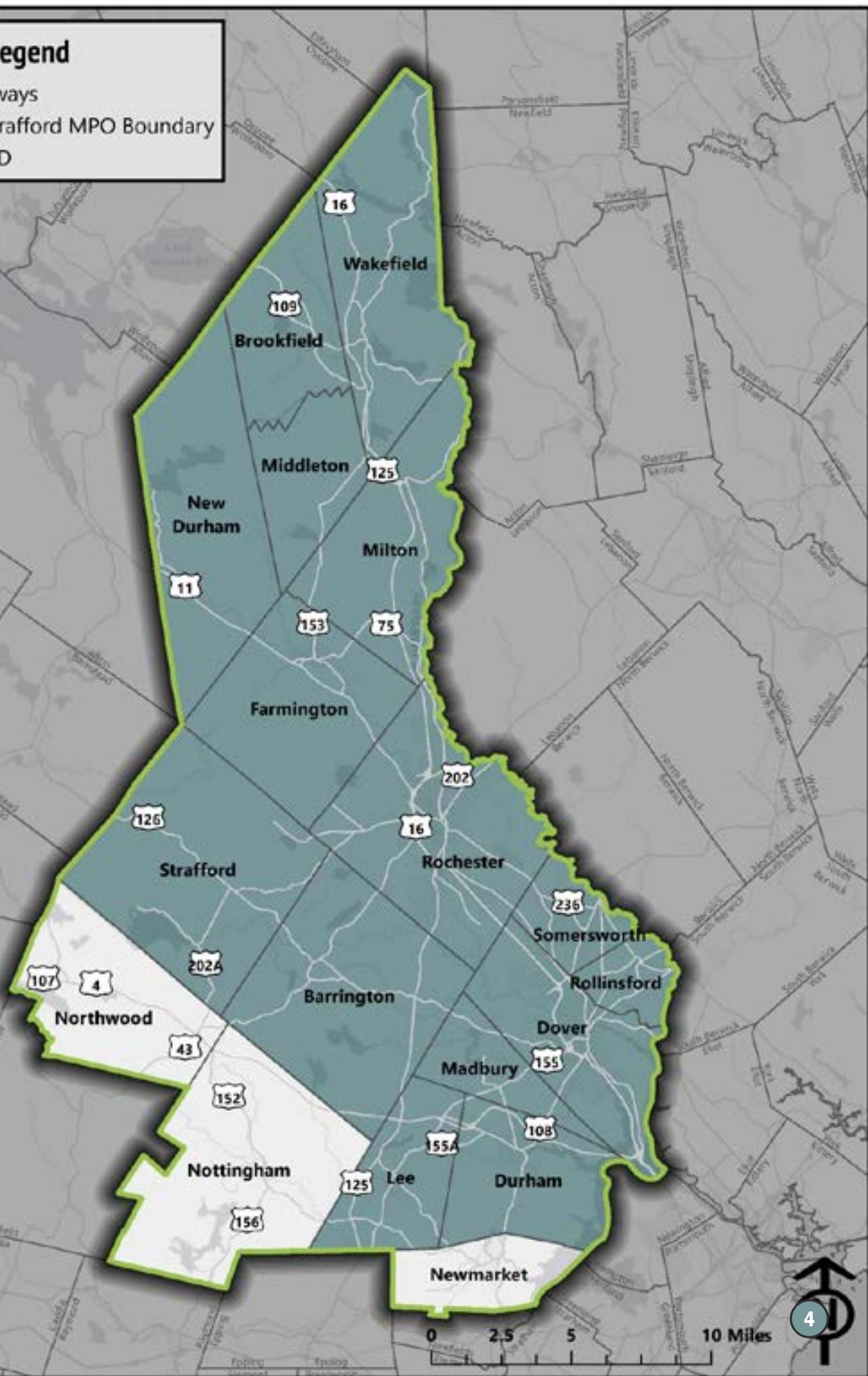
SRPC staff began convening a network of economic development stakeholders and technical experts calling itself the Seacoast Economic Development Stakeholders, centered around the Strafford EDD Strategy Committee, in April 2020 to discuss the region's economic response and share information about the latest guidance and resources for businesses. The group has continued to meet on at least a weekly basis and intends to continue regular meetings beyond the pandemic. By fall 2020 economic conditions in the Strafford EDD were sufficiently stable that SRPC staff resumed the CEDS process, leveraging the Seacoast Economic Development Stakeholder meetings for regular discussions with the Strafford EDD Strategy Committee.

Legend

Major Roadways

SRPC and Strafford MPO Boundary

Strafford EDD



SRPC staff also conducted three surveys to further guide the planning process. Attendees of the January 2020 visioning forum were presented with the chosen themes for the CEDS and asked to describe how local priorities had changed as a result of COVID-19. In December 2020 SRPC distributed a survey to all Strafford EDD businesses in good standing using an email list generated by the New Hampshire Secretary of State to ask about how COVID-19 has impacted their businesses and gauging needs for various forms of technical assistance. In February through May 2021 SRPC conducted a series of online surveys and virtual input sessions regarding age-friendliness as part of the Communities for Healthy Aging Transitions (CHAT) project that also informed ongoing CEDS planning.

SRPC Staff conducted project solicitation from February through April 2021. Notifications and project forms were sent to all municipalities in the region, as well as a variety of other public- and non-profit sector partners. The Strafford EDD Board of Directors adopted the priority project list at its April 16, 2021 meeting in anticipation of the availability of state and federal funding for infrastructure programs as part of the American Rescue Plan and other recovery and stimulus programs.

A full draft of this plan was released for public comment on June 14, 2021. Notice appeared on that date in Foster's Daily Democrat, and copies of the plan were made available to the public at the Dover, Somersworth, and Rochester public libraries and city halls. The plan was also available on the SRPC website, and comments were solicited from both the Strafford EDD Strategy Committee and Strafford EDD Board of Directors during this period. The Strafford EDD Board of Directors adopted this strategy at its July 16, 2021 meeting following the 30-day public comment and review period.

Strafford CEDS Vision and Themes

As a result of outreach, feedback, and research conducted in 2020-2021, SRPC has chosen to organize analysis in the Comprehensive Economic Development Strategy around the following themes, which collectively lay out our vision for our region's future:



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



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



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



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



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



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



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



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



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

Lenses and Perspectives

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

- **Equity and Environmental Justice** – The fair treatment and meaningful involvement of all people regardless of race, color, national origin, or income with respect to the region's economic priorities and opportunities and their resulting impacts on our communities and environment.
- **Resiliency** – Prepare for economic disruptions by 1) lessening the likelihood of their occurring, 2) mitigating the negative impacts if a disruption does occur, and 3) improving the region's ability to recover quickly and fully from disruptions. This lens includes significant discussion of our region's response to and recovery from the COVID-19 pandemic.
- **Partnership and Collaboration** – The 15 municipalities within the Strafford EDD are economically interdependent with each other and neighboring communities in NH, ME, and MA.

The Region's Demographics

Strafford Regional Planning Commission has developed a standalone 2021 Regional Data Snapshot that serves as a central collection of metrics related to regional planning. The metrics cover a wide range of topics such as demographics, economic vitality, livability and quality of life, mobility and accessibility, and resiliency, amongst many others and provide a bigger picture of regional trends. The Snapshot includes many economic indicators that are incorporated herein by reference, but it has not been included as an appendix in the CEDS to reduce duplication of information. Publishing the Snapshot as a separate document allows it to be used more broadly and present a wider, more in-depth selection of data metrics that can in turn support other SRPC plans and documents. The Regional Data Snapshot is frequently referenced in this document and readers interested in more information can find the first edition on [SRPC's website](#).¹



- **Data Snapshot Icon** – Look for the magnifying glass for a feature referencing sections of the Regional Data Snapshot that have relevant information to the theme being discussed.

The population in SEDD's service area is 134,755 and it is growing steadily at around 1 percent per year. The NH Office of Strategic Initiatives (OSI) projects that this growth will continue. Although the region consists of some of the youngest communities in the state, 14.6 percent of the population is over 64 years old, and the percentage for the population of 55 and above almost doubles. The US Census Bureau shows a steady increase of the senior population over the past decade and the NH Office of Strategic Initiatives (NHOSI) projects that the elderly population will more than double by 2045. The District's median age is 36.9 years, which is slightly less than the United States average of 38.1 years and well below the New Hampshire median age of 42.9 years.² The median age in Strafford County has stayed constant, only increasing 1.1 year over a decade. Carroll and Rockingham counties have aged significantly more at 6.1 and 4 years respectively. The large student population in Durham makes the town by far the youngest in the region with a median age of

20.8. The next youngest community is Dover at 36.1. Wakefield is the oldest community in the region with a median age of 51.8. However, about 14.42 percent of the overall population reported living with a disability, and this number is expected to increase as our population ages.

While the region is not as racially diverse and New Hampshire is in fact one of the least diverse states in the country with over 90 percent of the population being white, there is a significant Indonesian population in the tri-city area. The US Census Bureau's American Community Survey (ACS) data for Linguistically Isolated Households also reported limited English proficiency in the Dover, Durham and Somersworth communities. StatsAmerica 2019 data shows that in the region, 3.4 percent of population is Asian, 2.5 percent of the population is Hispanic or Latino, and 1 percent is Black or African American. Gender breakdowns regionally are a little bit more balanced, with 49 percent of the population male, and 51 percent female.³

In terms of educational attainment, the majority of the region's residents have at least a high school diploma or equivalent, with about 29.45 percent of people completing some college credits, and 36.07 percent of people having a 4-year college degree. Only about 6 percent of the population reported not having a high school diploma.

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



See statistics that support this discussion in the following data snapshots sections:

- **Demographics**



ECONOMIC GROWTH

Before the pandemic, our region's post 2008-2009 recession economy was experiencing consistent growth, similar to the state. While growth was slower than the national average, it was more favorable than New England's economy. Regional trends included growth in labor force participation, low unemployment rates, increased number of seasonal workers during summer months, growth in the number of workers over the age of 65, increased median household income, and a level of income inequality lower than the national average. Another major trend the region experienced was a shortage of available and skilled workforce, which may have contributed to slower growth than the national average.

Conditions Prior to COVID-19

Since 2010, New Hampshire has been experiencing a decline in unemployment, with rates remaining below 3 percent since late 2015.⁴ This trend continued up to March 2020, when the unemployment rate was 2.7 percent.⁵ Moreover, the state's unemployment rates were lower than the national February 2020 rate of 3.5 percent.⁶ Data shows that in February 2020, the unemployment rate in the Strafford EDD region was 2.81 percent.⁷ The municipalities with the highest unemployment rates were Brookfield (4.2%), Wakefield (3.5%), and Milton (3.2%). The municipalities with the lowest unemployment rates were Middleton (1.9%), New Durham (2.2%), Lee (2.4%) and Dover.⁸

Another trend seen across the state and region in past years was the workforce shortage. The state's healthy business climate, small population, aging demographics and the lack of affordable housing options, may each have contributed to making it difficult for companies to find and retain employees. The issue lies not only in the number of workers available but also in the lack of skill sets needed to fulfill the jobs available.

When looking at the income metrics prior to the pandemic, the latest 5-year estimate data available from the US Census Bureau American Community Survey (ACS) indicates a consistent increase in the median household income in Strafford, Carroll, and Rockingham Counties as well as in the state from 2014 to 2019. The median income in Strafford County is lower than New Hampshire's but is increasing at a faster rate. Simultaneously, the percent of low-income population from 2014 to 2019 declined.⁹

Income inequality measurements show that in 2019, our region had more income equality when compared to state and national averages. This is determined through the Gini Index, which is a summary measure of income inequality where its coefficient ranges from 0 to 1, with 0 representing "perfect equality" (everyone receives an equal share) and 1 representing "perfect inequality" (only one group receives all the income). In 2019, the average Gini Index for Strafford County was 0.43, and the Index for the five remaining SRPC municipalities in Carroll and Rockingham Counties ranged from 0.34 – 0.39. NH's average was 0.44, and the national average was 0.48.¹⁰ Still, when looking at overall poverty levels at the state level, it is important to note that the groups that were most negatively impacted and had higher levels of inequality were those comprised of minority populations, including Hispanic or Latino as well as African Americans.¹¹

Based on 2018 in-area labor force efficiency data for the region, 40 percent of the region's employed population lived and worked in the region, while 60 percent lived in the region but worked outside. The majority of those working outside the region commuted to work in other parts of New Hampshire (47.46%), followed by Massachusetts (7.61%), Maine (4.12%), and less than 1 percent of whom lived in the region and worked in another state.¹²

The region has also observed growth in labor force participation, including residents who are actively employed and residents who are unemployed but looking for work. In the past few years, we also saw that the overall number of people employed in our region increased as the number of unemployed people and

looking for work decreased within the labor force. In February 2020, Stafford County's total labor force consisted of 75,050 people, and the labor force in the SRPC region consisted of 89,687 people.¹³

Statewide economic trends have also reflected a reliance on seasonal employees, including college students coming home for summer break and international students taking jobs on temporary work-study visas. The percent of employed people under the age of 18 in NH and Strafford, Carroll, and Rockingham Counties for the past five years spiked in the two middle quarters (April through September), which can be attributed to this increase in young summer workers supporting many of the region's seasonal businesses. When looking at data by county, Carroll County, which is more dependent on tourism due to its proximity to the Lakes Region, shows a significantly higher spike than Rockingham and Strafford Counties.¹⁴

With New Hampshire's aging population, the number of employees ages 65 and older has been increasing across our region's three counties. From the beginning of 2015 up to the first quarter of 2020, the percentage of jobholders in this age group went from less than 6 percent in 2015 to just under 8 percent by Q1 of 2020 in Rockingham and Strafford counties. This pattern of growth was similar in Carroll County; however, the overall number of workers over 65 was higher during the same period, increasing from 8 percent to just under 11 percent by the beginning of 2020.¹⁵

Impacts of COVID-19

When COVID-19 hit our state and region, we witnessed drastic shifts in many of the trends examined above. Workplace and business closures, quarantine regulations, and distancing requirements implemented as an effort to decrease the spread of the virus and protect the health of the population all played a major role in influencing the region's economic patterns in a very sudden manner.

The pandemic led to the decline in labor force participation, which was primarily seen among women with school-aged children.¹⁶ There was also a decrease in the number of high-risk groups employed in jobs with greater exposure who were more likely to experience the detrimental health effects of the virus, such as older employees in retail or hospitality. By November 2020, the labor force at the state level had declined by roughly 40,000 workers compared to 2020.¹⁷ It is important to note that this decline is not reflected in the



Economic Growth IN ACTION

Economic recovery is closely tied to workers' ability to return to their jobs or find new employment. However, for many families and especially amongst women, the option of going back to work has been posed with serious barriers. With an overall lack of affordable childcare and challenges around staffing existing childcare services, parents have struggled to enroll their children in childcare centers. The shortage of childcare center and workers means parents are left with very limited options, such as staying at home to care for their children, and more often than not, this burden falls on women. As a result, women with school-aged children are less likely to return to in-person jobs or maintain a full-time job, therefore becoming more likely to take a pay cut or remain out of the workforce altogether. Less stable female labor force participation was a trend even prior to the pandemic, but the high-risk exposure for childcare workers, low wages and lucrative unemployment benefits exacerbated the shortness of affordable childcare services, which are often staffed by women. To help fill the gaps in the labor market, female workers will benefit from the ability to work remotely and will need assurance that their childcare providers can provide high-quality, affordable, and dependable services.

unemployment rate since it refers to the number residents over the age of 16 who are either employed or unemployed but looking for work.

The region's reliance on student workers who support seasonal businesses, especially in the municipalities that are more reliant on tourism, recreation, and hospitality, was noticeable when travel restrictions impeded seasonal workers from filling those positions. Many hotels, restaurants, and recreation facilities that were able to finally open struggled to find enough employees to support their operations. In many cases, they had to get through the peak season understaffed.

At the beginning of the pandemic, the number of jobs lost spiked drastically, going from a statewide unemployment rate of 2.7 percent in March 2020 to an average of 16 percent in April 2020¹⁸, with the number of workers employed by businesses in NH decreasing by 114,000 from mid-February to mid-April 2020¹⁹. Also, by April 2020, more than 90,000 people applied for unemployment compensation.²⁰ Statewide data for unemployment insurance claims showed that the industries with the highest number of claims were food and beverage, administrative and support services, ambulatory health care services, educational services, and social assistance.²¹

The effects of the pandemic varied greatly across industries and sociodemographic groups, with more stress put on already vulnerable populations. Service-based industries, which typically offer lower-than-average wages²², experienced the most significant number of job losses²³; in other words, low-income workers were more likely to lose employment. At the same time, many of the wages in these industries consist of tips and service fees, which plummeted during the pandemic. In addition, the fact that service industry jobs tend to be in-person activities and cannot be accomplished through telework only intensified the situation.

Another sector in which employment was highly impacted by the pandemic was the healthcare industry, as limitations put on elective surgeries and other non-emergency procedures – in addition to the challenging work conditions such as increased hours and heightened exposure to the virus – led to an increase in unemployment levels. Overall, the statewide number of unemployment claims by demographic group shows the disparity in unemployment levels across the different cohorts, with higher levels of unemployment seen for women and ethnic minority groups, while private industry workers continued to see normal wage growth.

While unemployment levels spiked, businesses were still having a hard time finding workers, which was partly attributed to the increased unemployment benefits and employees not returning to work because of fear of infection, especially during the early months of the pandemic. This was particularly seen amongst workers in lower paying industries, who in some cases earned higher compensations from unemployment benefits than they would from their jobs, while also avoiding exposure and minimizing the risk of contracting the virus.

From conversations with small businesses in our municipalities, some patterns we observed when asked how COVID-19 impacted their business operations included – the loss of customers due to safety concerns, inability to open due to restrictions, decreased capacity from having to accommodate their spaces with new safety regulations in mind, disruptions in supply chains, inability to operate for those who relied on in-person operations only, challenges with hiring employees, and an overall decline in revenues. Simultaneously, as businesses began to adapt to their strategies and adjust to the new circumstances, such as tapping into e-commerce and expanding outdoor operations, we heard from other entrepreneurs who said business was thriving.

At the peak of the pandemic, we also saw a substantial decline in consumer confidence and spending in certain sectors resulting from the uncertainty brought by the virus. Leisure and hospitality, which experienced the most significant number of job losses, were also the sectors that saw the greatest reduction in consumer spending in New Hampshire. On the other hand, the food retail industry saw an uptick in consumer spending, even higher than the pre-pandemic levels. Other consumer behaviors that shifted as a result of COVID-19 included changes in household expenses, with many having to increase spending on things such as food,

utilities, more reliable internet, among others, as a result of the transition to remote work and education. Nevertheless, other expenses were largely reduced, including the amount of money spent on gas and tolls for commuting to and from school and work and costs associated with in-person dining and entertainment.

In response to COVID-19, several policy actions and government support programs were launched to help mitigate the economic impacts caused by the pandemic and attempted to promote fair and equitable access to resources for the smallest and hardest-hit businesses and populations. Some of these included financial support to businesses, moratoriums on evictions and foreclosures, increased unemployment benefits, economic impact checks, rental assistance programs, and assistance to state and local governments, all of which played a crucial role in the recovery process of the region's economy. For example, as of mid-April, 94 percent of all second draw Paycheck Protection Program (PPP) forgivable loans went to companies with 20 or fewer employees, which shows that the program has been successful in reaching smaller, more vulnerable entities. Also as of April, the SBA had approved a total of 14,557 loans totaling \$1,100,290,380 for New Hampshire businesses.²⁴

Outlook After COVID-19

It is important to note that economic trends experienced at the time of writing, just over one year after our region's first signs of being affected by the pandemic, will likely change with time. While many of the economic indicators that were largely influenced by the pandemic have been improving, the economy is still not back to pre-pandemic levels. Overall, we can expect that as vaccines become more widely available and consumer confidence increases, trends will continue to move towards what the region was experiencing prior to the pandemic. Moreover, the safer conditions, and in many instances, the accumulation of savings that may have resulted from reduced discretionary spending and the disbursement of stimulus checks, will likely play a role in restoring consumer confidence and help promote expenditure and travel. The region's, similar to the state's, retailers are beginning to see the signs of a boom in consumer spending, with demand for hot-ticket items including anything related to outdoor activities, durable goods, construction supplies, entertainment, and more. However, this also leads to growing concerns around the cost and availability of inventory as these retailers continue to experience foreign supplier delays.

Overall, businesses are beginning to see an increase in operating revenues, number of employees, and number of hours worked by employees, but the capacity to operate has been constrained due to the lack of available workers. Given that the state and region were already facing a workforce shortage, it is safe to assume that this problem will continue even after recovery, and this has been largely witnessed in the service and hospitality industries. In one recent discussion with Congressman Chris Pappas, establishment owners in Dover, Somersworth, and Durham shared that one of the most complex challenges faced amid the continued COVID-19 uncertainty was not being able to hire enough employees, and added that they have had to turn to hiring employees with no experience to fill the positions.²⁵ In response, we are beginning to see establishments across the region raise their wages as they try to compete for workers.²⁶

This same issue is affecting other companies looking to hire laborers with specific skill sets across different industries, including accounting, engineering, health and manufacturing, with some of the leading causes of this challenge stemming from the limited housing inventory combined with the non-affordability.

While labor force participation has been recovering, data for February 2021 (LF=73,260)²⁷ shows we are still roughly 2,000 people short in Strafford County, compared to February 2020 (LF=75,050)²⁸. Moreover, National data shows that women's labor force participation has recovered less than the male labor force participation.²⁹

As travel bans continue to be lifted and vaccination rates raise, we can expect to see an increase in the number of foreign workers returning to support seasonal business operations. Recently, the travel ban that restricted J1 visa holders was lifted, however, travel has remained limited as many overseas embassies have



The Thirsty Moose in Dover utilizes a section of a parking lot for outdoor dining. (*Thirsty Moose photo*)

not yet re-opened or are falling behind on the number of visa approvals, in addition to the travel restrictions in foreign countries.

Unemployment rates at the state level are back on track to pre-pandemic levels but have still not been reached. Statewide unemployment reached 3 percent (compared to 6% for the US) in March 2021³⁰, the lowest we've seen so far since the beginning of the pandemic. However, when we look at the data by industry, we can see that lower-wage jobs have fallen behind with recovery. On the other hand, the higher-paying jobs are very close, if not already at, pre-pandemic levels. According to an April publication from the Bureau of Labor Statistics, job growth was widespread in March, led by gains in leisure and hospitality, public and private education, and construction,³¹ as many restrictions eased around the country and institutions began to resume in person learning.



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



- Promote open communication with businesses in the region to learn about how they have been impacted by COVID-19 and provide them with targeted support.
- Convene and advocate for businesses and other organizations by conducting weekly Seacoast Economic Development Stakeholders calls while promoting regional engagement.
- Network and collaborate with municipal stakeholders and agencies such as the Small Business Development Center, Center for Women and Enterprises, Chambers of Commerce, and non-profits organizations to increase capacity and technical assistance to businesses.
- Conduct research (business trends and needs) and provide data to municipalities to assist them in their decision-making.
- Engage in activities that benefit distressed communities and underserved populations, such as providing support to businesses with limited English proficiency.
- Provide technical assistance to municipalities, businesses, and non-profits in our region to support recovery efforts and lessen the economic impacts of the pandemic.
- Research and disseminate high-level information of state and federal economic relief aid programs for businesses.
- Collaborate with partners to create workshops targeted for business in our region.
- Help municipalities with economic development projects and help them identify funding sources for implementation.



See statistics that support this discussion in the following data snapshots sections:

- **Economic Vitality**
- **Regional COVID-19 Data Snapshot**



BUSINESS OPERATIONS

Industry clusters, telework, flexible scheduling, office space demands and potential shared-space arrangements have been points of discussion in recent years and have been emphasized as a result of the COVID-19 pandemic. Here we will take a look at how the pandemic has impacted some of our region's industries and how their business operations have shifted as they adapted to the evolving circumstances.

Conditions Prior to COVID-19

The most common industry in our region based on 2018 estimated employment data was the service-providing industry (making up 76% of the roughly 55,000 jobs). This encompasses the health care, social assistance, educational services, accommodation, food and retail sectors, among others (refer to Regional Data Snapshot for complete list). According to the New Hampshire Employment Security's (NHES) total estimated employment data, the industry categories across the SRPC region from largest to smallest number of jobs in 2018 included:

- **Service Providing Industry** - 42,413 jobs (Primarily made up of Healthcare and Social Assistance; Educational Services; Retail Trade; Accommodation and Food Services; and Professional, Scientific, and Technical Services – in order from largest to smallest number of jobs)
- **Goods-Producing Industry** - 7,541 jobs (Primarily made up of manufacturing, followed by construction)
- **Government** - 2,845 jobs
- **Self-Employed** - 2,759 jobs

The region's 2018 to 2028 industry projections estimated an average increase of 6.3 percent in total employment (from 55,558 to 59,178 jobs).³² The sectors expected to experience the most significant growth during that time were self-employed workers (8.3%), followed by the service-providing industry (7.29%), government (3.06%), and the goods-producing industry (2.84%).

The service providing industry, also the most predominant industry in our region, is largely dependent on in person activities, such as in retail, accommodation, and food services. However, it is also made up of sectors where teleworking is possible, such as in education, healthcare, and professional services. Nonetheless, prior to the pandemic most organizations that had the ability to operate remotely did not commonly engage in telework and with most people commuting to their jobs, the mean travel time to work in Strafford County was 26.9 minutes.³³

Also prior to the pandemic, small businesses around the region engaged in some e-commerce, there was a healthy demand for commercial and office space with some growing interest in collaborative workspaces, and outdoor seating in restaurants was limited to those who had designated patios and was only offered during the warm months.

Impacts of COVID-19

Companies and employers responded to involuntary changes inflicted by the pandemic and began to adapt their models to accommodate the evolving needs of workers and clients. Many jobs that could be performed remotely shifted to telework, which led to other changes, such as flexible scheduling. These adjustments further highlighted different needs, including the importance of reliable broadband, equipment, and alternative workspaces.

Service Providing Industries

Based on unemployment claims, the hardest-hit sectors included non-essential retail, food, and accommodation services, being the type of jobs that workers cannot perform remotely. In response, the mandatory closures of non-essential businesses left many workers without a job. Further intensifying the problem was the fact that these sectors already had some of the lowest-paying jobs, typically combined with unstable business models where wages tend to be reliant on tipping or service fees (in the case of food and lodging) and tend not to offer paid sick leave.

With the gradual re-opening of businesses, many retail and restaurant establishments adapted to the new circumstances by offering curbside pick-up and re-thinking spaces to accommodate outdoor dining, in some cases even during the winter months. This expansion of outdoor dining, which was accomplished through Emergency Order 2020-06³⁴ issued by Governor Chris Sununu allowed restaurants to serve food and alcohol in areas such as sidewalks and parking spaces and helped establishments increase their capacity, which had been largely reduced due to COVID-19 restrictions.

The lodging and hospitality industries also had to operate under minimal capacity in response to the pandemic, at one point only allowing guests who were classified as essential travelers to book stays and corporate and social events having to reschedule or cancel entirely. However, once restrictions began to loosen in the summer months, many lodging facilities who cater to tourism saw a spike in demand, mainly attributed to travelers choosing to vacation locally when the pandemic disrupted other travel plans. Event venues also adapted their business models by offering new packages such as “micro-events,” typically consisting of 10 or fewer guests. However, being another sector where wages tend to be low and telework is not a common alternative, many of these businesses struggled to find enough staff to meet the demand.

Further heightening this challenge, fear of exposure to the COVID-19 virus in addition to the increased unemployment benefits discouraged many from returning to their workplaces once these began to re-open. Hotels that catered to corporate business continued to see low occupancy rates, especially once companies began to realize they could still host meetings and conferences using online platforms such as Zoom.

Food retail stores, which were deemed essential businesses and continued to operate even throughout the peak of pandemic, saw an increase in consumer spending even higher than pre-pandemic levels. Many of these businesses also adopted the practice of curbside pick-up and online grocery shopping. Like the hospitality industry, these businesses also had a hard time hiring workers. Moreover, demand for locally grown produce increased, as farmers’ markets and farm stands were one popular alternative to avoid crowded grocery stores.

Other types of businesses that saw an increase in spending were contractors and home improvement retailers as more people engaged in improvement projects as a result of the extended amount of time spent at home engaging in day-to-day activities, such as remote work and school.



See statistics that support this discussion in the following data snapshots sections:

- **Economic Vitality**
- **Regional COVID-19 Data Snapshot**



Local cafe Teatotaler re-thought their business model and started a boba delivery service. (Teatotaler photo)

Non-profit organizations, which have been highly dependent on in-person fundraising events, were unable to host many of these live events which led to considerable losses in revenue. While many tried to adapt by hosting virtual events, some non-profits in our region have anecdotally shared their experience with this, indicating that they were not able to bring in nearly as much income as they hoped for. Others around the state, however, have shared their success stories, stating that donations surged in the last year thanks to 2020's NH Gives online event, which is run by the NH Center for Nonprofits. During this statewide event, a record of over 14,000 people donated during the 24-hour event, which led to the contribution of a total of \$3.4 million to non-profits.³⁵

Among the many industries that had to shift their operations was the education sector, with the pandemic causing everything from childcare centers to universities to rely on remote learning. Similarly impacted, the health care industry tapped into the use of online platforms for live consultations. Business closures, job losses, and the shift to remote school and work settings, in turn affected transportation providers in our region (including COAST, Wildcat Transit, and C&J) that experienced considerable declines in ridership. For context, in January 2020 COAST went from having 33,661 riders, to zero riders by April 2020 as they were forced to close during the month of March and could not re-open until May. June was their first full month operating at 50 percent, and they recorded 12,509 rides, down from an average of 35,388 for that same month in the prior 3 years.³⁶

Goods-Producing Industries

Within the goods-producing industry, some of the sectors impacted the most include construction and manufacturing, which experienced a combination of both negative and positive effects. In construction, for example, there were challenges that stemmed from disruptions in global supply chains and an increase in the cost of raw materials. At the same time, special trade contractors saw growth in demand for their services triggered by people partaking in more home improvement projects. Simultaneously, some businesses in our region have shared that one of the challenges they faced, especially during the early days of the pandemic, included loss of businesses triggered by clients not wanting people coming into their homes because of fear of exposure to the virus.



Business Operations IN ACTION

In response to the pandemic, many businesses were forced to shift operations and create innovative adaptations to their business models. In the Strafford EDD region, there were several successful examples of this. Relocated from Portsmouth to Somersworth in January 2020, York Nordic manufactures Nordic walking sticks that increase safety, confidence, health and boost motivation for people who would like to increase their engagement in outdoor activities. The heightened interest in outdoor activities during the pandemic proved beneficial for York Nordic and their sales. Thanks to their earlier relocation to a bigger warehouse, they were able to handle increased shipments. In addition, this transition allowed them to purchase new equipment which increased design capacity leading to new walking pole designs carefully constructed to effectively create balance and stability. Since the pandemic began, York Nordic formed new partnerships with nearby municipalities to provide free demos and introduction classes for beginners. The company also organized walks for people with health issues, such as those in active cancer treatments and provided a safe space for recreation and community building. Creative solutions and adaptations made in response to the pandemic have allowed businesses to speed up the recovery process.

Manufacturers also experienced challenges with supply chains, combined with an increased demand for production, and like most service-industry companies where workers had to physically be in the plant for the business to operate, they also had a difficult time hiring and retaining workers. Moreover, we heard from manufacturers in the region who were able to largely increase production by adapting their business to manufacture high-demand items, such as PPE (Personal Protective Equipment).

Across most industries, many companies also changed the way in which they hired employees by recruiting through online events such as the UNH virtual job fairs. Furthermore, e-commerce was another trend that was widely adopted. We heard from a wide range of businesses, including gyms, restaurants, merchants, group class providers, bike repair shops, breweries, and others in the region who said that adapting their models played a significant role in getting them through the hardest months of the pandemic.

Overall, the situation emphasized the importance of open dialogue, collaboration, networking, and resiliency in a workplace, which played a vital role in helping businesses quickly adapt in response to unforeseen challenges. In essence, a successful recovery will largely depend on how businesses continue to adapt and innovate their operations, while maintaining and continuing to build relationships within and beyond sectors.

Outlook After COVID-19

The pandemic forced many businesses to re-think their models, leading them to pursue changes and innovation, several of which resulted in increased efficiency, productivity, and even profit. Still, other outcomes showed that some things are not ready to be changed or replaced, driving us to expect a return to pre-pandemic practices, or perhaps a combination of both.

Open communication and consistent engagement with businesses in the region has allowed us to learn what trends are likely to remain even after recovery. One thing that is clear is that technology has proven to be an invaluable tool for businesses. The shift to online models, both in the private and public sectors, has helped reduce costs while complementing operational efficiency, as well as allowing businesses and non-profits to reach broader audiences. These shifts to technology-based solutions are also likely to drive growth in the professional and technical services sector. Moreover, with changes in consumer behavior, we can expect e-commerce to remain in retail activities. Education, on the other hand, is one sector that has proven to have better results from an in-person model. While online learning allowed teaching to continue throughout the pandemic, teachers saw a decline in the effectiveness of instruction as classes moved online, demonstrating that it was no match for in-person interactions.³⁷

In the food and beverage industry, while increased take-out and delivery might be here to stay, it is likely that food establishments will have to re-think their menus, given that profit can be significantly less compared to in-restaurant dining. On the other hand, the expansion of outdoor dining has been a large success, and we could potentially see changes in permitting and zoning ordinances that could contribute to the expansion of outdoor dining. When it comes to workforce, both the restaurant and hospitality industries are foreseeing heightened challenges around hiring employees, given that these sectors have experienced a permanent loss of workers who have switched industries as they feared this sector will not recover soon enough. This comes at a time when restaurants and hotel operators are expecting a busy season ahead, with advanced reservations already in place.

Research and data on the outcomes of remote work indicate that it will likely to be another trend that will continue. While productivity metrics have proven that telework has been effective and beneficial, we can expect that many companies will combine remote work with in-office time to maximize productivity while emphasizing collaboration.³⁸ In one discussion with human resource experts around the state, they indicated that a major consideration for workers going forward will be a company's ability to allow remote work as it reduces a worker's commute time, travel related expenses, allows for flexible scheduling, and promotes an overall higher quality of life. Therefore, adapting their operations to accommodate this will make employers more competitive as they aim to attract their desired workforce.

We can also anticipate that this will lead to the optimization of office space and changes in commercial real estate. According to commercial real estate experts in the Seacoast, the pandemic has led to several interesting changes in the market, including a high demand for industrial and manufacturing space. While they indicated that the future of office space is still unknown at this point, we might expect to see an uptick in vacancy rates which could increase as companies shift to remote and hybrid models and dividing/subleasing office space will become more popular, as it allows companies to downsize in the near future while still giving them the option to expand down the road if needed. Another trend seen has been an increase of in-person activity within smaller spaces with private offices while many of the larger office spaces with cubicle or open concepts have remained largely vacant with employees continuing to telework.

Collaborative office space owners have also shared that they expect to see more demand, as people working remotely look for periodic opportunities to get out of their homes and work from a convenient and alternative office location as vaccination rates continue to increase. Companies who have permanently shifted to remote work have also expressed interest in renting conference rooms in collaborative office spaces, according to Chris Duhaime, owner of Spark Offices, a coworking space in Manchester, NH.

Even post-recovery, we can expect that open dialogue and collaboration between stakeholders will continue. In one conversation with NH Business Review, the director of the NH Division of Travel and Tourism, Lori Harnois, said that “the silver lining of the pandemic has been the partnerships her agency and businesses in the state’s hospitality sector have made.” Within and beyond the region and across different organizations, we have seen that collaboration has led to a more cohesive and aligned regional economy, allowing the region to capitalize on opportunities that could arise through networks.

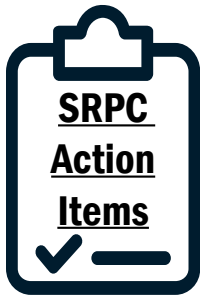
Strafford EDD also anticipates providing technical assistance directly to our region’s municipalities that will help them to be more resilient organizations in the face of any emergency circumstances, such as what we have recently experienced. Examples of requests from municipalities include digitizing municipal records to allow access to historic plans and files by the public or by staff forced to telework, analysis of temporary policies and regular zoning ordinances to keep up with changing economic conditions, and studies of infrastructure or policies necessary to support additional outdoor dining, food trucks, or other street businesses that can operate more safely in open air than enclosed spaces. These services will make our municipalities more resilient and help to support healthy communities and economies.



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



- Increase efficiency by helping workplaces create a more digitized system to be more resilient.
- Advocate for equal access to reliable broadband and technological upgrades.
- Help service industries move towards more sustainable models by advocating for paid sick leave and wages that do not mostly depend on tipping and service fees.
- Disseminate information and support businesses by connecting them to technical and financial assistance, information, and other general resources to help them increase their capacity.
- Promote education and advocacy on behalf of businesses and organizations.



- Encourage open dialogue and collaboration between municipalities, organizations, and other regions through Seacoast Economic Development Stakeholders' meetings.
- Create a platform to support networking, peer to peer communication, and a centralized place where businesses can access information (Mighty Small: <http://mightysmall.io>).
- Assist with language barriers and help ensure minority-owned businesses have equal access to resources, support, and information.



HOUSING

The availability, affordability, type, and quality of housing are significant factors for attracting and retaining a qualified workforce as well as new businesses. Housing that meets the above criteria, available both for purchase and rent, allows people to live and work in the same community, attracts skilled labor, and makes communities more resilient and competitive, all crucial to supporting a region's economy.

As defined by the US Department of Housing and Urban Development, workforce housing is “housing that is affordable to workers and close to their jobs. It is homeownership, as well as rental housing, that can be reasonably afforded by a moderate to middle income, critical workforce and located in acceptable proximity to workforce centers.” NH RSA 674:58 further defines workforce housing as that which is affordable to 3-person renter households earning 60 percent of the area median income or is affordable for purchase by a 4-person household earning 100 percent of the area median income. Affordable housing refers to housing that costs no more than 30 percent of a household's total income when all utilities, debt services, property taxes or insurance are factored into rent or the mortgage.³⁹

Conditions Prior to COVID-19

Even prior to the COVID-19 pandemic, our state and region were already experiencing a lack of housing inventory needed to support its growing population, with the limited supply and high demand affecting housing costs. In 2014, for example, the median purchase price for non-condominiums in our region was \$221,466. By 2019, the median purchase price increased to \$275,000.⁴⁰ In conjunction with the increasing prices, there has been a consistent decline in the number of active listings. The New Hampshire Housing Finance Authority's (NHHFA) Housing Market Report, published in November 2019, shows that our state's housing market was already short as many as 15,000-20,000 new units to satisfy the demand.⁴¹

The “months' supply of inventory” shows how many months it would take to sell all the existing housing stock at the current sale rate if no more units were added to the market. In a healthy market, a balanced number of months' supply of inventory would be roughly five months. In January 2020, the months' supply of inventory for the state was 2.2, meaning that it would take 2.2 months to entirely run out of inventory.⁴² This was already a significant drop from 2014 where the supply was enough to sustain the demand for 8 months.

The cost of renting has also increased over the past few years. When looking at the cost of rent over a five-year period between 2015 and 2020, Strafford County saw a 26 percent increase in median gross rent for 2-bedroom units.⁴³ At the same time, New Hampshire's one-year estimate for 2019 housing expenses showed that 47 percent of renters were “cost-burdened,” meaning that more than 30 percent of their gross income went to rental costs, which include rent plus utilities.⁴⁴

According to the NHHFA, the affordable median gross rent in for our region in 2019 was \$1,390. While the Frequency of Rental Price graph from the Data Snapshot⁴⁵ shows that many of the rental units in 2019 were below the affordable rent mark of \$1,390, when broken down by “unit type,” units with 2, 3, and 4+ bedrooms were priced well above this affordable rent mark, which can be seen in the chart below. The chart also shows 2019 data from the U.S. Department of Housing Urban development for the Fair Market Value (FMV) rental prices in the Portsmouth-Rochester Metro Area.⁴⁶

Median gross rental cost broken down by unit type in our region (2021) – Today the estimated 2021 Maximum Affordable Monthly Rent for a Family of 3 at 60 percent of the Area Median Income is \$1,440.⁴⁷ This has only slightly increased from the 2019 threshold, \$1,390. As more recent median rental cost data is not yet available, the 2019 affordability thresholds are utilized.



This home in Dover was on the market for less than a week in Jul. 2021 before it was purchased. (SRPC photo)

Number of Bedrooms	2019 Median Rental Cost in SRPC Region	HUD 2019 FMV Ports-mouth-Rochester Metro
0 Beds	\$901	\$909
1 Bed	\$975	\$916
2 Beds	\$1,396	\$1,161
3 Beds	\$1,580	\$1,595
4+ Beds	\$1,799	\$1,959

Moreover, NHHFA's 2020 NH Residential Rental Cost Survey Report shows that in Strafford County, only 22 percent of 2-bedroom units were below the County's affordable rent threshold, which was \$1,120.⁴⁸

Affordability has a direct impact on equity as it allows for access to safe and affordable dwellings that are free from pests and hazardous materials, such as asbestos and lead. Asbestos, which was first used in the early 1900s and is found in most units built between the early 1940s until 1978, was banned for causing severe and deadly respiratory diseases. Similarly, lead is a toxic metal found in many homes built before 1978 and is not easily detected since it cannot be perceived through sight or smell. With our state having some of the oldest housing stock in the country, lead paint has been the most common source of lead poisoning, which is exceptionally detrimental to the health of young children. Pests are another problem in housing units across the country but are most prevalent among lower income households and in housing units with structural problems and water leaks.

Buyers and renters looking for affordable homes have more limited options and therefore tend to end up with older units, increasing their likelihood of being exposed to these problems. Despite the state's efforts to encourage remediation, this continues to be an area of concern for our communities due to the tight market. For homebuyers who are already financially burdened, lead paint can be an obstacle to financing because



Housing IN ACTION

A Durham resident shared her experience with trying to purchase a starter home in the region for the past year. In this time, she has placed a total of 8 offers on properties in Strafford County, each of them anywhere between \$10,000 and \$30,000 above asking price, and in some occasions has even agreed to waive the contingency of a home inspection in order to make her offers more competitive. Despite these efforts, she has been outbid by other buyers putting higher offers and waiving most or all contingencies. Furthermore, as her search for a new home continues, she constantly faces the problem of a property selling within days of being listed, many of which have gone under contract even before being able to see it.

Photo credit: Sold sign in front of a house. (Photo courtesy of American Advisors Group)

remediation is expensive and makes home buying less feasible. For some renters, reporting the presence of lead paint can put them at risk of facing possible retaliation from landlords (i.e., by increasing rent) or may end up with a false sense of safety from temporary abatement measures. It is crucial to keep in mind that policies on hazardous materials could have unintended consequences on vulnerable populations if not implemented with equity in mind.

Moreover, cost of living tends to increase as household income decreases. For example, lower income families who may not be able to afford higher quality housing may face increased costs for heating. Transportation can also be a limiting factor. Jobs tend to be concentrated in urbanized communities where housing is more expensive. This may force lower income families to live farther from employment, increasing the cost of transportation.

The role that appraisals play in home buying also has an impact on equity. In a competitive market where offers are coming in above the asking price, at the time of the appraisal required by loan companies, homes are appraised for the real market value. If the offer exceeds the appraised property value, the buyer must pay the difference out of pocket. In other words, in our current market, cash buyers are more likely to win.

The low housing supply and non-affordability have also influenced homelessness, a growing area of concern for our state and region. Even before COVID-19, the number of people experiencing homelessness consistently exceeded our state's available shelter space. Data from the 2020 state of Homelessness in New Hampshire Report⁴⁹, which uses the annual Point-in-Time Count data, showed a 21 percent increase in the number of people experiencing homelessness long before the pandemic hit our state. Sadly, children, families, people with disabilities, and people of color were among the most impacted groups.

Impacts of COVID-19

The pandemic has magnified several critical pre-pandemic housing issues in our region while also leading to the development of new challenges. Overall, factors such as historically low interest rates, high rates of immigration, rising cost and limited supply of construction materials, and the shift to telework have exacerbated the current housing crisis.

The month-to-month median purchase price of housing in our state in the last year indicates just how much the pandemic affected the cost of housing. In January 2020, the median sale price for single-family homes in NH was \$285,000, which increased to \$350,000 by January 2021 – a 22.81 percent increase over one year.⁵⁰ Moreover, the median price for single-family homes in New Hampshire rose to \$362,900 by March 2021, a 16.5 percent increase compared to March 2020.⁵¹

More recent data shows that in April 2021, the biggest price increase in New Hampshire compared to April 2020 was in Carroll County (60.3% raise), where a median home sold for \$416,750. Rockingham County continued to have the highest median sale price, which is \$471,500 (13.6% raise).⁵²

	1 Year Average SRPC Region*		Month to Month Comparison - 1 Year			
			NH		Strafford Co.	
	2018	2019	Jan-20	Jan-21	Jan-20	Jan-21
Single Family Home Median Purchase Price	\$255,000	\$275,000	\$285,000	\$350,000	\$277,000	\$317,250
Percent Increase	7.84%		22.81%		14.53%	
*Non-Condominiums						

In addition to housing costs, the supply was also severely impacted by the pandemic. In NH, the number of properties available for sale in January 2021 dropped a shocking 63.1 percent compared to January 2020; from 3,271 to 1,207 homes for sale.⁵³ Also, by January 2021, the “months’ supply of inventory” had dropped to .07, meaning that it would take roughly 3 weeks for the state’s entire inventory to run out at the current pace.⁵⁴

These new market patterns have resulted in homes selling at or above the asking price and at an exceptionally fast pace. In February 2020, the percent of list price received for single-family homes sold in NH was 97.5 percent, which increased to 100.8 percent by January 2021⁵⁵, while also spending significantly fewer days on the market. In one conversation with a real estate agent representing our region, he mentioned that homes were selling at an average of 5 percent over the asking price in hot markets such as Dover.

Additionally, new practices that originated from the pandemic, such as the shift to remote work, have led to the increase in in-migration to our region from the bigger, more populated cities like Boston due to its affordability by comparison. In addition to affordability, other factors that have attracted people here include the natural environment, quality of life, employment, taxes, culture and lifestyle, the economy, and in many cases, proximity to family, according to a poll led by the University of New Hampshire.⁵⁶ The option to work from home has also led to an increase in the number of out of state residents choosing to use their second homes in New Hampshire as full-time residences. The state has also had the highest number of second home sales in the country.

Data shows that migration gains into our region were greatest among young professionals and families, many of whom are searching for housing under \$300,000. Yet, our state’s current home inventory is scarce at this price point as we see units continuously price out of this category. Current trends also show a market where millennials and baby boomers are fighting for the same housing stock.

The soar in demand has also resulted from the historically low mortgage interest rates which have played a tremendous role in encouraging home buying. As a result of the Federal Reserve lowering rates in response to COVID-19, the average mortgage interest rate dropped from 3.6 percent in January 2020 to 2.74 percent in January 2021. For comparison, the average interest rate for a 30-year loan was 4.45 percent in January 2019.⁵⁷

Average Interest Rate For a 30-Year Loan	
Jan-19	4.45%
Jan-20	3.60%
Jan-21	2.74%

Factors associated with the construction of new housing units have also impacted the current housing market. While many of the municipalities in the region have an existing demand for new units and signs such as an uptick in building permits point to an active year for new construction, we have heard of delays in building that can likely be attributed to several factors, including a limited supply of buildable lots, skilled labor shortages, and higher costs of raw materials such as lumber. The disruptions in global supply chains may have also had an effect the number of new units being built during the pandemic. In other words, while cities such as Somersworth have seen an increase in the number of housing permits, it is possible that the

pandemic might have caused a delay in the actual stages of construction. Nevertheless, we can expect that this will lead to a supply increase in the near future. Supporting this, NHHFA's Spring 2021 Housing Market Snapshot shows an uptick in permits during 2020 and a drastic increase in the cost of building materials.⁵⁸

Also, according to the NHHFA, while the number of single-family home construction permits in the state increased by 38 percent since from October 2019 to October 2020, there has been a 62 percent decline in the number of multifamily units.⁵⁹ This could likely be attributed to a more limited availability of lots allowing multifamily units. It is not clear if this decline is related to the pandemic, however it does paint a picture for what the multi-family units' stock may look like down the road.

Overall, the state has continued to see a high demand for rental units, combined with a tight supply and a low vacancy rates, making it a challenging market for renters. One of the factors that has likely contributed to this level of demand may be that younger age groups are generally less inclined to be homeowners compared to older generations, as homeownership is not a priority for many millennials. Furthermore, with the state's large aging population, seniors have begun to occupy a higher fraction of available rental units as many look to downsize into smaller living arrangements. Lastly, the scarcity of housing available for renters to buy- even if they can afford- it is putting more pressure on the rental market.

Despite the increased demand for rental properties and the hesitation to move driven in part by a sense of insecurity brought by the pandemic, vacancy rates, while still too low, have somewhat improved. NH's average 2019 vacancy rate was 0.8 percent, which increased to 1.8 percent in 2020. Consistent with the statewide trends, Strafford County's vacancy rate went from 0.8 percent in 2019 to 2.1 percent in 2020.⁶⁰ While this was an advancement compared to the previous year, it is still well below the desired rate (a balanced vacancy rate is considered to be between 4%-5% in a healthy and stable market). As a result, renters continue to have fewer options to choose from and end up paying higher prices.

Statewide Vacancy Rates	
2019	0.80%
2020	1.80%
Strafford County Vacancy Rates	
2019	0.80%
2020	2.10%

The infusion of government relief programs has played a key role in helping manage the pandemic's impacts on the housing market. These relief programs have included moratoriums on evictions and foreclosures, rental and housing assistance, and financial support through increased unemployment benefits. While these have all played a crucial role in protecting homeowners and renters, the ban on evictions has also impacted some landlords that depended on rents as a main source of income. In some cases, there have been landlords who might have not been able to access funds from the rental relief programs since this is reliant on the tenant taking action in the application process. In NH, for example, while landlords can help complete and submit the application, the tenant must be willing to sign it in addition to providing supporting documentation, such as proof of income.

The pandemic also added pressure on the issue of homelessness, especially amongst groups who were already experiencing housing insecurity. The loss of jobs, notably for those with lower-earning wages, led to many falling behind on rent. Despite protections on evictions, there was a period between when the NH Eviction Ban was lifted and the Federal Ban from the CDC (Center for Disease Control) took effect, allowing landlords to evict those who had fallen behind on payments. The sudden surge in unemployment rates and the non-affordability of units added a burden to this problem. While some of the immediate responses included “hoteling”, adding decompression emergency shelters, expanding food services, and implementing other services such as sanitation for those experiencing unsheltered homelessness, it was still hard to keep up with the new demand.

Housing and economic growth are intertwined, and when an area sees an increase in jobs, it drives the demand for housing. The constraints on workforce housing highlighted by the pandemic have contributed to employers’ inability to attract and retain workers, a trend that was already an issue in our region in prior years. Inequity between supply and demand has resulted in the shortage of housing to accommodate the needs of a much-needed labor force, and businesses in our region have been suffering from the effects of this.

Access to safe and affordable housing is unquestionably connected to many different elements of the economic vitality of a region. Affordable housing goes beyond attracting a skilled workforce, including entrepreneurs who bring talent and innovation to the region. It also allows people of all ages and backgrounds to freely make choices within their community, permitting them to have the ability to find housing that fits their needs as these intuitively shift throughout life. It enables seniors who want to downsize find a safe, affordable, high-quality place without being displaced from their communities due to lack of access and affordability, allows young professionals to live close to where they work, and promotes an increased quality of life for all.

Outlook After COVID-19

The long-term impacts of COVID-19 are uncertain but given that there was already a housing crisis before COVID, we should expect this trend to continue even post the pandemic. However, due to the uptick in building permits that many of the region’s municipalities have seen, we can anticipate that units will be added to the inventory, putting some relief on the market.

Although we have witnessed in-migration and its impacts on the housing market, it remains unclear whether or how long that will last. A recent study showed that 75 percent of Americans working from home due to the pandemic said they would prefer to continue to do so, even after their workplace reopens. Moreover 66 percent would consider moving if they had the flexibility to work from home, so the region could continue to see an increase in-migration from the larger metro areas.

Moreover, many homeowners bearing mortgages are currently in forbearance. Eventually, we might see some of these homes being brought to the market however given the strong appreciation in our region’s market, we can expect these transactions to be traditional sales. Nonetheless, with the eventual removal of government support and protections, we might expect to see an increase in short sales and foreclosures post the pandemic.

In response to homelessness, with one of the root causes of this problem being traced back to the lack of affordable housing, a key step that our communities can take to help curb homelessness is to advocate for more accessible, lower cost housing.

Existing challenges associated with equity are likely to increase due to the region’s circumstances. Also, with the extremely limited supply and rising prices, it is of crucial importance to use best practices, advocacy, and education to ensure that residents are protected from gentrification and all the consequences stemming from that as we move forward towards recovery. While it is hard to predict what the outlook after COVID

will be, how our region responds to the pandemic will set the stage for the upcoming years and have an influence on what we hope to see accomplished.



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



- Facilitate housing outreach and regional discussions with stakeholders regarding the impacts of housing on the health of the economy.
- Help municipalities incorporate housing into economic development planning through discussions with representatives of the business community – e.g., through the Seacoast Economic Development Stakeholders weekly calls.
- Support and advocate zoning reforms to ensure communities have access to more housing at affordable prices.
- Help businesses understand the overall health and impact that housing has on workplaces.
- Update the SRPC Housing Needs Assessment.
- Expand capacity to administer CDBG grants that can support new homeless services, shelter and affordable housing expansion.



See statistics that support this discussion in the following data snapshots sections:

- **Livability & Quality of Life**
- **Mobility and Accessibility**



INFRASTRUCTURE

Physical infrastructure systems are a necessary precondition for growth and development. Roads and bridges provide access to supply chains and markets. Fuel and energy distribution systems make industrial processes possible. Broadband and telecommunications equipment enable the flow of ideas, technologies, and information. Stormwater infrastructure manages both the quantity and quality of runoff produced by other types of development, mitigating the environmental impacts of other types of development.

Discussion of transportation infrastructure in this chapter will be limited. The Mobility and Accessibility chapter will focus on multi-modal transportation as it relates to community development and downtown economic development. Strafford Regional Planning Commission also serves as a Metropolitan Planning Organization (Strafford MPO). For more information about comprehensive transportation planning in the greater Strafford region, including information and projects related to highway infrastructure, please refer to the [Strafford MPO's Metropolitan Transportation Plan](#).

Conditions prior to COVID-19

New Hampshire's comparatively rural development pattern has historically lessened the need for or impact on certain types of infrastructure, while placing additional strain on other systems. These implications may be most apparent for commercial or industrial development, but they ultimately impact all types of development. For example, RSA 674:36 regarding subdivision regulations explicitly grants towns the ability to prevent "scattered or premature" development, which it defines as involving danger to health, safety, or property due to insufficient infrastructure or public services to support that development.

The New Hampshire Section of the American Society of Civil Engineers released a report card for New Hampshire's infrastructure in 2017, giving an overall grade of C- on the traditional A-F scale.⁶¹ The scale defines a C as a system that "requires attention", noting that the overall network may be adequate, but that systems are showing signs of deterioration and that these emerging deficiencies make the system more vulnerable to risk or disruption.

Water and Wastewater

Much of New Hampshire's public water and wastewater infrastructure is beyond its anticipated lifespan, meaning local municipalities are potentially facing significant costs as systems become obsolete or begin to fail.⁶² In addition to physical system failure, old systems must also contend with environmental standards for contamination levels that have changed dramatically since they were initially installed. Recent examples include the EPA Great Bay Total Nitrogen Permit,⁶³ contamination of the pudding hill aquifer,⁶⁴ and the Pease PFAS study.⁶⁵ Private residential drinking wells are more common than municipal drinking water systems in many rural communities. While this trend has historically lessened the need for significant municipal investment in this infrastructure, several droughts in recent years have negatively impacted residential wells.⁶⁶ As of May 27, 2021 the entire greater Strafford region was classified as "D0 - Abnormally Dry" according to US Drought Monitor due to low rainfall and below average snowfall and snowmelt.⁶⁷ Further discussion of water and wastewater infrastructure in the greater Strafford region can be found in the Water Infrastructure chapter of SRPC's Regional Master Plan.⁶⁸

Stormwater

Stormwater infrastructure is intended to control both the volume and water quality of runoff. As development in an area increases, additional impervious surface makes infiltration more difficult. Development also brings with it potential point-source and non-point-source pollution that could impact ground- or surface-water via

runoff. As a result, stormwater infrastructure such as catch basins, cisterns, storm sewers, and low impact development techniques are used to capture runoff, treat it for contamination, and release it appropriately into ground- or surface-water. Depending upon their context, these systems are regulated at the federal, state, and local level; as with water and wastewater infrastructure, aging stormwater infrastructure may not be consistent with current regulatory requirements or best management practices. A notable recent example applies to municipal separate storm sewer systems (MS4s). Phase II of this program expanded the number of regulated MS4s nationwide from 855 to 6,695. 46 New Hampshire municipalities are regulated under the 2017 Small MS4 General Permit, which requires these municipalities to develop, implement, and enforce stormwater management best practices to reduce discharge of pollutants.⁶⁹ New Hampshire is one of only three states and the District of Columbia to regulate its municipalities under one general permit.⁷⁰ Regulated communities within the Strafford EDD as of 2021 include Dover, Durham, Milton, Somersworth, Rochester, and Rollinsford. Additional communities may be regulated in the future if the urbanized area as designated by the US Census Bureau were to expand. Further discussion of water and wastewater infrastructure in the greater Strafford region can be found in the Water Infrastructure chapter of SRPC's Regional Master Plan.⁷¹

Utilities

Many transmission and distribution networks are above-ground. The 2018 New Hampshire Statewide Hazard Mitigation Plan rates the likelihood of future disruption to these utilities as “high”.⁷² This reflects both the age of many developments, before burying power lines was common practice, but also potential issues with the depth of bedrock and the expense of retrofitting existing above-ground utilities. Many utility operators have their own programs for improving the resilience of these systems and reducing disruptions to consumers.⁷³

Broadband

High speed internet, or “broadband”, are umbrella terms that refer to internet services that are always connected and that have significantly faster connections than dial-up internet access. In 2015, the Federal Communications Commission (FCC) determined that an average household requires a minimum download speed of 25 Mbps and a minimum upload speed of 3 Mbps to allow for multiple users to have adequate speeds. SRPC adopted a comprehensive Broadband Plan in January 2015.⁷⁴ While available data indicates that all Census blocks in the greater Strafford region are served by at least one broadband provider, rural areas often have limited choice of services or rely on slower or less reliable technologies under the “broadband” umbrella. For more recent updates to service maps, see the Mobility and Accessibility chapter of the 2021 Regional Data Snapshot (pp. 81-87).

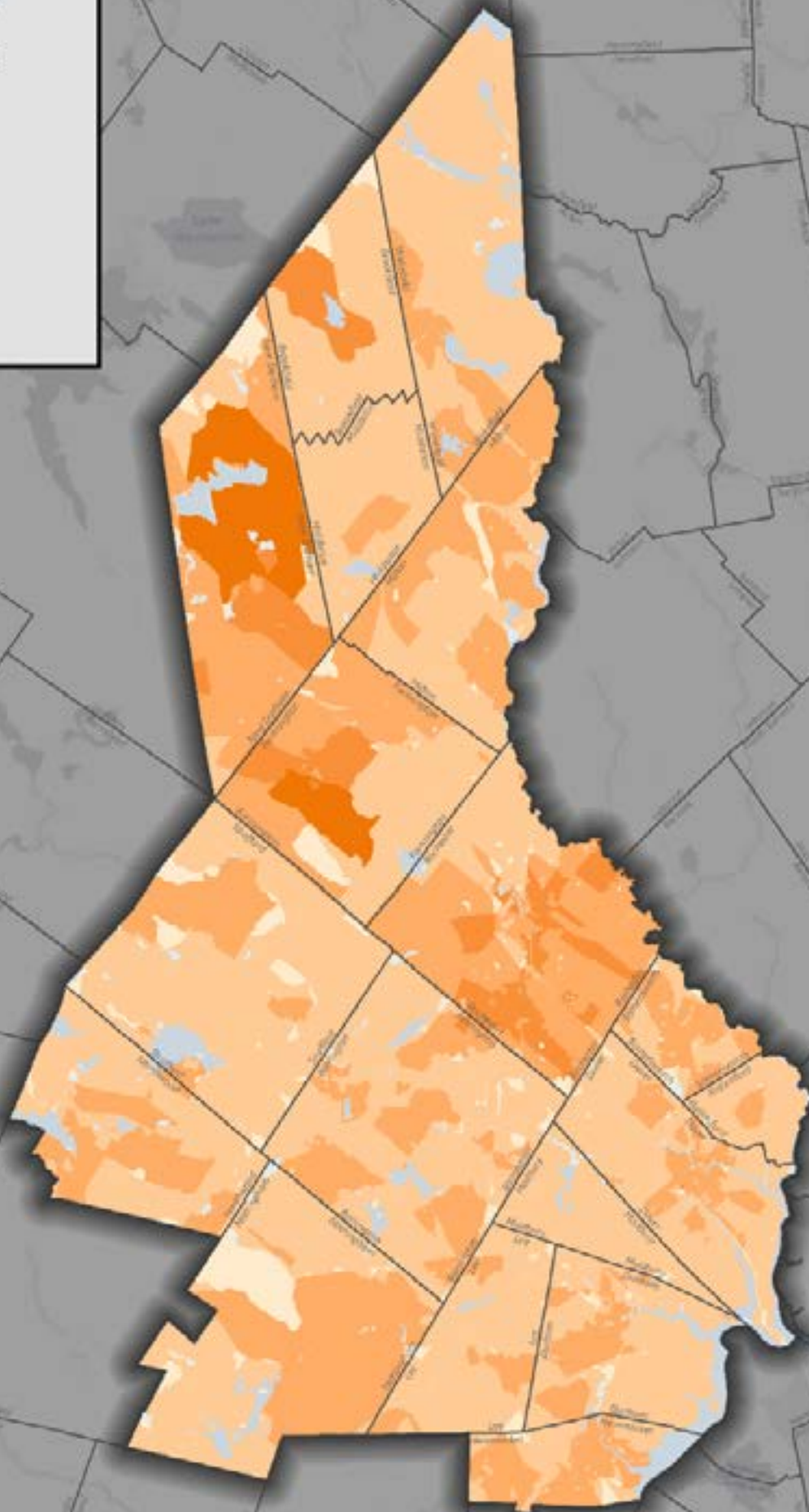
Transportation

Adequate transportation infrastructure is important for all types of development. Restaurant and retail businesses rely on local traffic and visibility to passersby to attract customers. Many of these businesses concentrate in downtown cores and particularly reliant on pedestrians, public transit, or visitors parking in one place while visiting multiple establishments. These aspects are discussed in more detail in the Community Vibrancy and Mobility and Accessibility chapters. Metrics regarding the condition and reliability of the region's transportation infrastructure are available in the Mobility and Accessibility chapter of the 2021 Regional Data Snapshot.⁷⁵

Larger manufacturing or corporate office sites are more reliant on highway and arterial street access to bring large numbers of employees to their sites, and on highway, freight rail, port, or airport facilities for moving products to market. The 2019 New Hampshire Statewide Freight Plan anticipates that freight demands on the highway and rail systems will remain generally consistent through 2040, both air freight and marine freight are projecting significant growth compared to current levels.⁷⁶ While these transportation assets have real implications for economic development, SRPC has already discussed them extensively in the Strafford MPO's Metropolitan Transportation Plan, including processes for advancing projects through the Transportation Improvement Program process and state and federal funding programs. Where transportation projects

Legend

All Broadband Providers



have particularly strong implications for economic or community development they have been added to both the Metropolitan Transportation Plan and CEDS priority project lists. Anyone seeking to leverage state or federal funding for freight or transportation projects is strongly encouraged to submit those projects for consideration in the Strafford MPO's Metropolitan Transportation Plan.

The existing road network also has strong implications for land use planning processes, including the regulatory environment for proposed development projects. For example, RSA 674:41 requires special approval from a municipality's governing body to issue a building permit on either a private or Class VI (town-owned but unmaintained) road. The preponderance of such roads in rural areas creates additional barriers to development, especially of much-needed housing.

Impacts of COVID-19

Prior to the COVID-19 pandemic, epidemic or pandemic disease may not have been considered a direct threat to physical infrastructure. However, changes to economic conditions and employment patterns have had direct impacts on supporting infrastructure. Furthermore, impacts to municipal budgets as a result of the pandemic have potential implications for planned maintenance and upgrades to infrastructure systems.⁷⁷

Water and Wastewater

Water and wastewater systems estimate demand and capacity based on the historic usage of the system. Government shutdowns and businesses that switched to remote work in 2020 led to a shift in water and wastewater demand away from existing commercial properties and increased the load on residential properties as residents were forced to work from home, quarantine, or were laid off.⁷⁸ As a result, systems with a preponderance of residential users may have seen their total capacity strained by the increased demand, while systems with a large share of commercial ratepayers may have seen a shortfall in revenues due to a rapid decline in water and wastewater usage. As government shutdowns were lifted, usage patterns gradually returned to pre-pandemic patterns.⁷⁹



Infrastructure IN ACTION

An innovative method of wastewater testing for signs of COVID-19 was implemented at the University of New Hampshire starting in Fall 2020 to detect early infections on campus from individuals that might carry the virus despite not showing any symptoms. This method was used in addition to regular nasal swabs required for all students and staff on campus every four days, while the wastewater testing occurred 3 times a week. The samples were taken from manholes on campus by environmental engineers that work at the Mouser Lab at UNH and were used to monitor the presence of virus in the human waste to reduce contamination and protect public health. The samples were tested for two biomarkers (N1 and N2) of the coronavirus and served for early detection of the virus on campus. These results were compared against the results collected from the nasal swabs to track inconsistencies. Wastewater testing is a widely used research method in the field of epidemiology and has been successful at identifying presence of other pathogenic viruses.

Utilities

As unemployment began to rise in March 2020 due to layoffs, furloughs, or workers opting into unemployment rather than risk exposure to COVID-19, Governor Sununu issued Emergency Order 3, which prohibited disconnection or discontinuance of electric, gas, water, telephone, cable, VOIP, internet, and deliverable fuel services during the state of emergency.⁸⁰ This order was in effect from March 17, 2020 until it was repealed by Emergency Order 58, effective July 15, 2020.⁸¹ The New Hampshire Public Utilities Commission issued further guidance regarding the enforcement of Emergency Order 3 while it was in effect and opened their own investigation into the pandemic's impacts on utility companies and customers.⁸²

Broadband

Many aspects of the COVID-19 pandemic have highlighted the importance of reliable online systems and connections to broadband internet. On March 15, 2020, Governor Sununu issued the first emergency order of the COVID-19 pandemic requiring all public K-12 school districts to transition to remote instruction.⁸³ Over the subsequent year both K-12 schools and post-secondary institutions came to rely on remote learning or hybrid instruction models to serve their students. Emergency orders prohibiting gatherings of 10 or more people⁸⁴ or forcing the closure of in-person services at non-essential businesses⁸⁵ led to an increase in remote work.⁸⁶ Temporary changes to public meeting procedures under RSA 91-a allowed state and local government bodies to conduct electronic meetings via teleconference technology.⁸⁷ This ubiquitous dependence on the internet for educational, professional, and government operations during the pandemic highlights equity issues related to internet access for residents who either cannot afford internet, or whose internet options are limited or unreliable due to their location.

Outlook After COVID-19

As schools and businesses return to in-person operations and other pandemic restrictions are lifted, infrastructure usage is returning to pre-pandemic patterns. In the immediate term, infrastructure systems may face financial uncertainty due to budget shortfalls or cashflow disruptions if significant numbers of ratepayers needed to arrange payment plans during the height of the pandemic. These financial concerns are partially mitigated for public agencies by federal relief programs such as the CARES Act of 2020 and the American Rescue Plan of 2021. However, elevated construction costs caused by supply chain disruptions and labor shortages are likely to strain project budgets. Additionally, many federal programs prioritize shovel-ready projects, which require a municipality to have previously invested in project feasibility studies, design, and engineering. Municipalities that are unable to budget for these up-front expenses may have difficulty taking advantage of federal funding opportunities. SRPC technical assistance could help these municipalities to develop project cost estimates and scopes that would improve their ability to leverage outside funding.



See statistics that support this discussion in the following data snapshots sections:

- **Mobility and Accessibility**



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



- Continue to operate the Seacoast Economic Development Stakeholders platform for the regular sharing of information and ideas.
- Explore opportunities to better-integrate the Seacoast Economic Development Stakeholders into existing networks or with key partner organizations at the state, regional, and local levels.⁸⁸
- Continue to work with municipalities to ensure that local hazard mitigation plans are updated regularly to improve the resilience of municipal infrastructure and encourage more resilient development patterns and techniques.
- Continue to work with SRPC's coastal municipalities to plan for the impacts of climate change and sea-level rise on their communities.
- Continue to provide technical assistance to regulated MS4 communities to update their regulations or complete planning or infrastructure projects in compliance with their MS4 permits.
- Analyze our region's broadband capabilities and plan for addressing identified weak points; specifics can include updates to the 2015 Broadband Plan, promotion of news and information related to broadband planning in New Hampshire, and direct technical assistance to municipalities seeking to improve their broadband access.
- Maintain an up-to-date Priority Project List for the purpose of supporting local infrastructure projects and advocate on behalf of priority projects to potential funders.
- Maintain an up-to-date Regional Master Plan for the purpose of providing local and regional planning data to identify infrastructure needs and potential solutions.



MOBILITY AND ACCESSIBILITY

The transportation system in New Hampshire is dominated by highways designed to accommodate personal vehicles. While this allows individuals to get places quickly, it is not sustainable and keeps people who do not have access to a vehicle, or cannot drive, from accessing critical services and participating fully in the economy. This system that prioritizes personal vehicles, while providing a certain level of comfort and convenience, can reduce economic potential of town centers and downtowns by choking the streets with congestion and pollution, and taking up valuable land for parking. Studies have also shown that long periods spent in traffic reduces physical and mental health.⁸⁹

A more multimodal system could provide more reliable, convenient, affordable, and accessible transportation and allow for greater economic benefits for the region's citizens and businesses. Increasing transportation options can strengthen the economic ties and activities in our communities and revitalize our downtowns by making them more equitable and accessible to all, while being more appealing to younger members of the workforce. Workers are increasingly prioritizing a healthier work-life balance – even forgoing higher wages for a range of benefits including shorter commutes and more family time at home.⁹⁰ More transportation options allow a wider range of people to reach more destinations and to actively participate in the community's development. The quality of life for the residents in our region should therefore not depend on their ability to own a vehicle but should rather provide them with access to safe, affordable, convenient, and efficient transportation alternatives.⁹¹

Conditions Prior to COVID-19

In general, the region's transportation infrastructure consists of roads, bike lanes, sidewalks, multi-use paths, and railroads. The region is served by fixed route transit, inter-city bus, and both passenger and freight rail. Fixed route transit is operated by two providers in the region: The Cooperative Alliance for Seacoast Transportation (COAST) and the University of New Hampshire's Wildcat Transit. The Strafford region is connected to other metropolitan areas through C&J Bus Lines' inter-city bus and Amtrak Downeaster's passenger rail.

Transit

Fixed route bus services are not available for the whole region. COAST serves six communities in New Hampshire and five in Maine. Of the six New Hampshire communities, four of them are in the SRPC region. Wildcat transit adds one additional community from the region and has connections to towns also served by COAST. In addition to fixed route bus, COAST provides demand response rides to seniors and persons with disabilities. Other transit options are available for seniors and persons with disabilities through a range of smaller transportation providers. However, more transit options that are ADA accessible are needed to help New Hampshire's rising senior population to remain safe, healthy and independent. Most people are willing to walk about 1/4 to 1/2 mile, or 5-10 mins, to a bus stop, which is considered to be a reasonable distance. However, if the public transportation stops are located further away, people are less likely to use them. As of 2019, roughly 35 percent of the region's population was served either by COAST or Wildcat with about 12 percent of residents that live below the poverty line being located within 1/4 mile and 11 percent living within 1/2 from the nearest bus stop.⁹² SRPC is currently studying the direct and indirect economic impacts of public transit in southeast New Hampshire and Maine, and we hope to share the results in the next report update.

Longer distance inter-city bus and passenger rail services connect the region to destinations in other states. C&J Bus Lines connect NH's Dover, Portsmouth, and Seabrook with Newburyport, South Station, and Boston Logan Airport in Massachusetts. More recent data for C&J ridership is currently unavailable, but in 2015 C&J reported transporting 74,465 passengers from Dover to Boston Logan, and 56,405 passengers from Dover to South Station. The passenger rail service provided by the Amtrak Downeaster links Brunswick, ME to Boston,

MA while making stops at Dover, Durham and Exeter in New Hampshire. The total ridership combined for Dover and Durham in 2019 was 120,790 passengers, which is a slight decrease from 2018 when total annual ridership peaked at 121,624.⁹³ Passenger rail services are a popular way for people to access employment and leisure in the Boston area, however, due to the current track capacity and competition with freight rail, service frequency is limited.

Limited Vehicle Access

Almost 6 percent of the SRPC households do not own any vehicle and about 31 percent of households reported having fewer vehicles than people, which could impede accessibility and mobility if multiple people need to drive to work.⁹⁴ People who do not own a vehicle or have a limited access to one are usually seniors, people with disabilities and individuals living in low-income households and have been experiencing limited accessibility prior to the pandemic. Moreover, more than 50 percent of the population living in the region reported traveling outside of the region for employment.⁹⁵ Even though more than 50 percent of households own at least one vehicle per person, the need for improved multi-modal transportation options remains for those who do not have reliable personal transportation and need to reach services or employment within their community.⁹⁶ Enhanced transportation options could increase connectivity between communities and contribute to economic development throughout the region. While people with cars can participate in the economy with fewer limitations and businesses often perceive the need for parking spaces that will allow their customers to reach their stores more conveniently, accessibility for people without vehicles should not be hampered.

Accessibility for Non-Motorized Citizens

The major obstacles to effectively reaching destinations are not only infrequent transit schedules, but also limited ADA accessibility, lack of connectivity between the different transit options and perceived safety concerns when walking or biking. Safety is an important factor for bicycle and pedestrian connectivity. While there are very few fatal crashes involving bicyclists and pedestrians in the region each year, that is likely attributable to the lack of safe routes for walking and biking. When pedestrians or cyclists are killed it has a grave impact on the community. Creating safer and more accessible routes that connect pedestrians, cyclists, and people with disabilities to destinations is important for economic development and resiliency of the region. These amenities not only improve the accessibility and boost economic growth for the members of our communities but can also attract people from other regions who seek out recreational activities and services and contribute to the tourist economy.

As a result, improving and expanding the sidewalk and bicycle networks have been the center of many recent transportation and public health planning efforts by SRPC and the state. These include a Bicycle Level of Traffic Stress study, the SRPC Metro Plan, the NHDOT State Bicycle and Pedestrian Plan, SRPC's Communities for Healthy Aging Transitions (CHAT) project, and the 2017 Coordinated Public Transit Human Services Transportation Plan. These efforts have found that the inconsistencies and gaps in the non-motorized networks discourage people from choosing biking or walking to reach their destinations. Additional barriers to people choosing active transportation include the perceived stigma around them and long distances caused by sprawling development which make walking unfeasible. Generally, the region has many miles of quiet neighborhood streets for many types of bicyclists, but there are no safe, comfortable links between them or to other destinations. Similarly, sidewalks primarily exist in neighborhoods or within downtown areas, but often do not connect to each other. Sidewalks are less common in rural areas and as a result, pedestrian often have to walk on the road's shoulder.

Impacts of COVID-19

The COVID-19 pandemic has exposed the economic inequalities present in our communities and highlighted the need to plan for more equitable accessibility and mobility for all. While mobility has improved for a

certain portion of the population due to remote work availability, people who were not able to transition to remote work have struggled to continue their lives. Similarly, for people with cars, the mobility did not really change, there were only fewer reasons or incentives for individual trips to be made. However, for those who were experiencing accessibility difficulties in the pre-pandemic world, the options became even more scarce.

Transit

Many public transit services experienced a substantial drop in ridership and both COAST and Wildcat shut down all services in April of 2020. COAST relaunched their service in May 2020, and Wildcat began service at the end of August. Ridership returned fairly quickly for COAST but is still at only 50 percent of pre-pandemic levels.⁹⁷ Because so many people ride COAST for employment, a return to full ridership will likely be tied to employment trends. Wildcat ridership was up in early 2020 prior to the pandemic, but due to revenue impacts from the pandemic, UNH instituted a 24 percent system-wide service reduction in their weekly bus runs (and 19 percent operating cost reduction) since service resumed in the fall of 2020.⁹⁸ C&J Bus Lines experienced a 90 percent drop in ridership due to the pandemic.⁹⁹ C&J Bus Lines completely suspended their services in March of 2020 and did not resume until late August 2020. In addition, they have made COVID-related changes to their operations to protect passengers. The Downeaster's total fiscal year 2020 (Oct 2019-Sept 2020) report shows that ridership was down 51 percent from FY2019.¹⁰⁰ The future of the Downeaster is dependent on the return of steady ridership for tourism and employment that will likely change with more access to remote work.

Commutes and Remote Work

With reduced transit schedules or even a complete shutdown of transit services early in the pandemic, some essential workers struggled to get to work and maintain their jobs. The accessibility for those who did not have access to a car or public transit therefore declined even more. At the national level, Vehicle Miles Traveled (VMT) by individual drivers initially declined by over 50 percent at the onset of the pandemic as people stayed home and many others became unemployed. However, these changes were short-lived and VMT has largely returned.¹⁰¹ As a result of the state's "Safer-From-Home" provisions that directed those who could telecommute to do so, many municipalities saw building permits increase as people remodeled their homes into a more multi-use space.¹⁰² Increased access to remote work due to COVID-19 enabled some



Mobility and Accessibility **IN ACTION**

During the pandemic, restaurants implemented creative solutions in response to COVID-19. As outdoor dining became the safest and most popular option, the needs of people with disabilities were unfortunately often an after-thought in the planning process. Access Navigators, a non-profit organization that advocates for increased accessibility for people with disabilities, took the opportunity to update their restaurant accessibility database to include outdoor dining locations in Portsmouth.

Their outdoor restaurant guide provides a comprehensive list of wheelchair-friendly destinations that have smooth and wide enough sidewalks, short and direct paths to accessible restrooms, nearby parking lots with accessible spots, curb cut outs, ramps and railing for easy access, standard height tables and tents or trees overhead that provide shaded space. and continues to provide guidance and expertise to restaurant owners who strive to increase mobility and accessibility on their premises. This guide compliments those completed for Dover, Somersworth, Rochester, Durham and Newmarket in the Strafford EDD region.

people to temporarily or permanently move to more rural areas while retaining their jobs in metropolitan areas or even other regions or states. However, this trend of more diffuse development patterns adversely impacts transit services that rely on more compact communities and population densities.

Outdoor Dining

Despite many negative impacts of the pandemic on the economic vitality of our communities, the public health crisis also created opportunities for communities to grow stronger and more resilient and allowed for changes that would have otherwise not occurred. The expansion of outdoor dining and delivery services have presented businesses with alternatives that encourages more pedestrian oriented downtowns. In addition, these types of adaptations allowed them to accommodate for greater customer experience and satisfaction as well as improved operations. Similarly, many stores now have curbside delivery options, increasing accessibility for residents that live in more remote areas and must travel far to acquire food supplies. These changes make dining and shopping safer and more accessible.

Outlook after COVID-19

COVID-19 presented us with numerous challenges as well as opportunities. How we fare in the post-pandemic world will be mostly determined by our commitment to embracing adaptive and creative solutions to existing problems.

Remote Work and Access to Broadband

The option to work from home has allowed people to have more flexibility and reduced their need to commute to work. However, people that lacked efficient broadband services became even more isolated and limited in their ability to stay connected. For example, children that live in remote areas where high-speed internet is restricted or inconsistent struggled to keep up with schoolwork and continue their education. The need to expand the high-speed internet services and create digitally developed communities will be critical in their continued ability to grow. Similarly, the ability to work remotely proved feasible only for a certain part of the workforce that had the luxury of conducting their work from home.

Transit

Public transit proved critical for providing people without vehicle access with alternative modes of transportation and allowing them to reach their destination in a convenient and timely fashion. The hope being that recovery for all modes of public transportation is expected to improve as people are vaccinated and can travel again. However, it is unclear whether levels will be restored to pre-pandemic levels if telework becomes more common and a fear of greater risk of infection on buses and trains remains. However, having a more robust multi-modal transportation system would reduce existing inequity that was highlighted by the pandemic and contribute to the economic vitality and resilience of communities. Improving connections between the various modes of public transit can also increase flexibility and desirability for riders. Prioritizing new mixed-use development in urbanized areas along existing transit routes would make transit service much more efficient and cost-effective. Currently, municipalities provide nearly all matching funds for federal transit dollars, and without additional state support, it will become increasingly difficult to sustain transit services in the region.

Most recent data for traffic volumes are currently unavailable, but we are working on data collection for the next report.

Bike-ability and Walkability

Making communities more connected with bikeable and walkable streets should be priority across the

region. New connections should be created through additional crosswalks, pedestrian bridges, bike paths, sidewalks or multi-use paths, and infrastructure that is friendly to people with disabilities. Focus should be on identifying and filling major gaps in the bikeable and walkable network. There are far reaching economic impacts from making communities more bikeable and walkable including increased real estate values, lowered pollution and noise, decreased congestion and consumer cost, improved health, and creation of jobs. Bicycling and walking should therefore be seen as instrumental in creating opportunities for economic development and increased mobility.¹⁰³

Accessible Downtown Streetscape

Throughout the pandemic, the government has been supportive and tried to accommodate the needs of municipalities, businesses, and individuals alike. However, more governmental support will be needed to recover and revitalize the economy from the impacts of COVID-19. Adapting zoning laws to allow for greater flexibility and dynamic transformation could ease the lack of federal funding in the near future. Previous regulations in certain sectors of the economy such as housing or infrastructure have stiffened and restricted healthy competition and productiveness.¹⁰⁴ The pandemic has forced us to reconsider these practices and admit that flexibility in policies is needed to accommodate the needs of people and businesses. Reimagining our physical built environment to increase accessibility to outdoor spaces and recreation will be necessary in the post-pandemic world if we are to create a more equitable world. Without allowing for more flexible land-use changes, mobility and accessibility will stagnate and prevent further adaptation. Zoning that allows for long-term accessibility builds capital, creates fertile economic conditions, and attracts new residents to growing communities. Lower flexibility in mixed-use zoning and diversity of economic opportunities can seriously reduce a quality of life for the residents and prevent them from having access to resources. To a certain extent, the pandemic has exposed the strict zoning laws that prevent creative and innovative changes that are important for creating new opportunities.

The increased flexibility and improved accommodations made for restaurants by allowing them to set up outdoor dining helped to alleviate some of the negative impacts of COVID-19 such as reduced capacity and lost revenue. Many municipalities embraced and expanded outdoor dining and favor its continuation in support of their local businesses and economy. Communities had to adapt creatively to sustain local economies, and there are efforts to make some of these changes permanent, such as closing off certain chapters of the streets to cars and allowing restaurants to set up outdoor seating areas in the public right of way. Further adaptations to outdoor dining and accessibility will be needed for long-term support and development of outdoor dining. Downtown streets will need to emphasize space for people rather than cars. Accessibility solutions that would allow everybody to have an equal seat at the table include ramps, railing, curb cuts, platforms and proper spacing. The pandemic has shown that outdoor dining is popular and can be successful. It has also shown how much potential downtown areas have if re-designed for people, rather than cars. In fact, people showed a greater interest in restaurants that had outdoor dining seating, as compared to those that did not due to reduced vehicle traffic flow, which made the streets more pedestrian-friendly and safe.¹⁰⁵ These temporary modifications to our street scape and outdoor spaces helped to enhance the role of downtowns as economic drivers of communities.

In the vision for an accessible future, instead of focusing on the capacity of roads for cars, we should strive to make streets safe for all users and revitalize our downtowns with walkable and bikeable networks. Increased density of development such as housing, jobs and services located close to one another can make it easier for people to take trips by foot, bike, or transit. A return to a more traditional downtown model where people can live, work, and play creates a strong sense of community. Vibrant, walkable downtowns not only attract more people and can improve the quality of life for residents, but they also act as economic hubs that provide municipalities with substantial revenue and create jobs. The need to strengthen the role of downtowns as economic centers by making them more pedestrian-friendly, accessible, and diverse can only help us become more resilient and prepared for the future challenges.



Re-purposed parking spaces in downtown Rochester for outdoor dining (SRPC photo)



1. Increase mobility and accessibility for all users by improving the pedestrian and cyclist routes in accordance with ADA standards.
2. Improve and diversify public transit options with better connections and increased frequency for a more convenient, sustainable, and equitable future.



- Increase the role of downtowns as economic hubs by making them more walkable, bikeable, and ADA accessible.
- Increase the connectivity between communities by linking them with multi-modal infrastructure that includes public transit options and safe routes for bicycles and pedestrians.
- Promote development of walkable, bikeable infrastructure in town centers, downtowns, and commercial areas.
- Decrease transportation dependency by promoting housing development that enables workers to live near their jobs and other services.
- Increase transportation options for people without vehicle access, including seniors, people with disabilities, and low-income households, to reach essential services.
- Incentivize new mixed-use, high-density development along major corridors to increase transportation efficiency and increase transit ridership.
- Increase accessibility for people with disabilities by adding ramps, railings, curb cuts and platforms so that they can reach essential and leisure services.
- Ensure last-mile freight access to town centers and important commercial destinations.
- Improve capacity of existing passenger and freight rail.
- Improve coverage of broadband internet services where gaps currently exist.



See statistics that support this discussion in the following data snapshots sections:

- **Mobility and Accessibility**

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AGE FRIENDLINESS

Age friendliness refers to the concept that a community is welcoming, accessible, and inclusive for all its residents. Having a diverse population that participates fully in the community from shopping downtown, to walking and bicycling, using recreation areas and working in the community. Combined these livability elements are vital for a healthy economy. This implicitly includes access to affordable housing, access to employment opportunities, access to health care, and adequate transportation options.

Conditions Prior to COVID-19

Even though the region has some of the younger municipalities in the state, 14.6 percent of the population is 65-plus, and when you look at the 55-plus population, the percentage doubles. Density of those 65 and older is higher in the tri-city area (Rochester, Somersworth, and Dover), but more rural areas like Farmington, Brookfield and Wakefield have the highest concentrations of older people. We also know that about a third of the 65-plus population live with a disability, and that of those 7,094 people, 11 percent, classify as low-income.¹⁰⁶

Although Strafford County's median household income is \$72,960, (Brookfield and Wakefield's are \$93,523 and \$69,185 respectively)¹⁰⁷ a major concern for the members in our communities is housing affordability, regardless of age. For a more detailed profile on housing affordability and accessibility, please refer to the housing chapter of CEDS. Despite many seniors reaching a retirement age, there is a substantial percentage of people who are 65 and above and remain in the workforce. Whether this decision to continue working is voluntary or not, many residents have stated that housing affordability is the primary reason for leaving their communities. For older people who need support services, the cost of assisted living tends to be unaffordable for low- to middle-class seniors who are looking for a place to retire. For those that have retired, it is important to look at income categorized by social security and retirement funds. About 31 percent of all households in the region have received social security income over the past year, while 20 percent of households received retirement income in the past year.

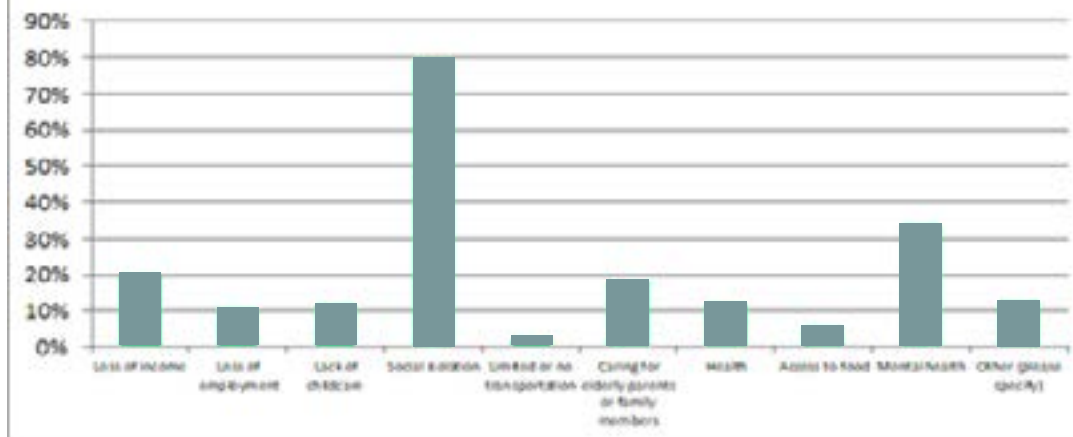
The aging population faces challenges with transportation, housing, healthcare, access, mobility, lost income, social isolation, technology, and care coordination. As a region, there are multiple resources for this population including an extensive healthcare network, Care Vans from hospitals, transportation to dialysis appointments, food delivery services and in-home caregivers. Equally, there are bountiful natural resources and social and cultural resources for elderly people who need human interaction to feel less lonely and isolated vary across the region. Public libraries, recreational facilities, senior and cultural centers that offer activities and community-building events create a sense of place, improve connections, access to resources, and increase the inclusiveness of all age groups.

Impacts of COVID-19

Without doubt, the COVID-19 pandemic impacted the entire population. As discussed in the Childcare chapter, it presented challenges for families. Without in-person school or childcare for months, parents were forced to either leave jobs or alter their schedules to manage care and schooling for children. This affected the older generation also as, in many cases, grandparents stepped in as caregivers.

In a recent regional age friendly survey conducted by Strafford Regional Planning Commission with 450 responses, social isolation was by far the greatest impact reported by respondents. About one-third of respondents live alone, many of whom did not see friends or family for a year or more. Mental health impacts and loss of income were the next greatest reported issues.

What have been the greatest challenges you or your household have faced due to COVID-19



Many businesses were forced to close or severely limit operations. The reduction, and in some instances cessation, of daily activities such as grocery shopping, gathering at church, restaurants, senior centers or libraries, volunteering, healthcare visits, work for many, economically impacted all age groups.¹⁰⁸

A shift to solely virtual means of communication presented a challenge for older populations, increasing their social isolation or contact with their communities. Particularly in the more rural parts of Strafford EDD region, internet infrastructure was not as available or reliable as in the more urban areas. This issue is highlighted by limited access to Vaccine enrollment, once it became available. “The digital divide between older and younger people isn’t new, but the pandemic has made that gap clearer than ever. They couldn’t search online for COVID-19 testing sites...the vaccine has become available to people their age—who are at higher risk of contracting the virus—many can’t figure out how to access it.”¹⁰⁹



Age Friendliness IN ACTION

Age friendliness refers to inclusiveness and livability of a community for people of all ages, but especially those that might have specific needs such as children or the elderly. The desire to stay connected and informed was even more crucial during the pandemic. In some cases, residents, especially in lower income or rural areas, struggled with limited or slow access to internet at home. Moreover, this restricted children from being able to learn remotely, reduced all person’s ability to communicate with one another, and limited access to online information and resources.

To provide internet access, municipalities including Rochester and Dover came up with creative solutions, such as setting up school buses with Wi-Fi hotspots that children could use in central locations or in neighborhoods that the municipality identified as lacking a reliable connection. The buses had a sign in their windows indicating the Wi-Fi log-in information that students could write down and use to connect to the internet at home. The Wi-Fi hotspots could reach as far as 300 feet from the bus. The test trials were successful and municipalities across the state are working to improve and replicate this model.

Transportation issues were also highlighted during the pandemic. For those who rely upon public transportation to get to work, or grocery stores or to doctor's visits, the temporary shutdown of the public transportation system presented significant challenges. Those who relied upon demand-response rides to hospital visits, or to dialysis, for example, were left with little choice, and had to rely on friends or family members to drive them or miss their appointments altogether. On a positive note, the rapid transition of health providers to extending and improving their telemedicine capabilities increased the rate of attendance for some health visits.

Another direct result of the pandemic was that many adults were put in a position of needing to care for elderly parents or family members. With many in-home care visitors or day centers halting service during the stay-at-home orders, there was no option but for family members or friends to provide care themselves. This precluded or restricted them from working during this time which has a direct impact on the economy. The associated stress impacted the mental health of caregivers according to responses to the SRPC survey.

Indoor interactions were limited to household members which resulted in an increase in the use of outdoor spaces and recreation areas for limited congregation with others. While playgrounds were shut down for several months, trails, beaches, lakes, and mountains remained open for use. The Strafford region is rich in outdoor spaces, but this situation did highlight a need for infrastructure such as sidewalks in more rural areas, or benches along walking paths for those who need a place to rest. Improved signage and directions and advertising for outdoor recreation were also suggested.

Food access and security was another consideration during the pandemic. Local organizations worked tirelessly to make sure that those who rely upon food assistance or delivery under normal circumstances were taken care of, but of course there were those who did not have access to these services or were unaware of them. Additionally, more rural residents do not universally have easy access to a grocery store, particularly if they do not drive themselves.¹¹⁰ Respondents to a state survey on aging indicated that they do not need food assistance or help paying for basic needs, nineteen percent (19%) of respondents receive some sort of food assistance, and twelve percent (12%) were unable or had difficulty paying for basic needs in the past 12 months. When focusing on respondents over the age of 75, this percentage increases to 44.7 percent.¹¹¹

Outlook After COVID-19

The concept of age-friendliness extends across all areas of economic development planning. Housing, transportation, business operations, local support, workforce, technical assistance, recreation and business promotion and support all play crucial roles in creating age friendly communities. While the impacts of COVID-19 were unavoidable, some of the impacts can be addressed to make our communities more age-friendly for all. As covered in the housing chapter of this document, affordable, workforce, and sustainable housing is a critical need in the region. New systems of outreach and communication, as well as mobilizing food distribution using school buses, have been established for food security issues and a larger population can be reached.



See statistics that support this discussion in the following data snapshots sections:

- **Demographics**

Technological innovation has rapidly improved, and a larger percent of the region's population may have more access to electronic devices and systems of information than before the pandemic. "Funding from the CARES Act was used to purchase Chromebooks and hotspots" for students.¹¹² Telemedicine options will continue to allow more people access health care services, but these services are still fairly limited in scope and may not be sufficient to meet needs of elderly people who need in-person visits and care. "Technologies, such as telephone, internet, and email were used to browse information, maintain social connections, and shop...participants said that online communication platforms (e.g., Facebook) and online videoconferencing applications (e.g., Zoom) helped them to stay connected with their family and the community amidst COVID-19."¹¹³

Employment and workforce shortages will continue to be a challenge with many industries scrambling to secure enough workers to keep operations running. This is discussed further in the workforce and education chapter.

Outdoor recreation has increased and will continue to be enjoyed by more of the population. Strafford RPC recently completed an online StoryMap¹¹⁴ detailing every recreation area in the region. This will be promoted widely and will connect residents to the region's recreation sites. Transportation issues will continue to be a challenge, particularly in more rural communities that already suffer from isolation and lack of access to resources as funding for transit is low and routes and options are limited. Transportation system improvements such as expanded public transit, increased walkability and bike-ability between important destinations, and safety improvements will support older residents and attract younger residents.

Increasing intergenerational interactions and allowing for shared experiences across age groups can help create valuable experience for all community members. Benefits of mixing of younger populations with elderly people include improved social skills and interactions, increased empathy and care and combating of loneliness and anxiety on both ends. This could be done by involving seniors in community projects that involve young people and children, from day cares to nursing homes and allowing the age groups to merge and increase mutual understanding.¹¹⁵ Creating spaces where the different age groups can interact and accommodating their various needs and interests can create thriving and welcoming communities.



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



- Support and encourage transportation projects that promote an inviting and well-served region.
- Continue and develop the Seacoast Economic Development Stakeholder collaboration to ensure we are working with economic development leaders in our communities.
- Stay involved with food security issues and research potential funding sources.
- Update our regional Housing Needs Assessment with age-friendly and equitable policies in mind.
- Share feedback from Communities for Healthy Aging Transitions (CHAT) community vitality surveys.
- Promote inclusion in AARP livable communities to our municipalities.¹¹⁶
- Share community assessments from CHAT with opportunities and concepts for age-friendliness.
- Promote outdoor recreation opportunities (POP!).



WORKFORCE AND EDUCATION

In the Strafford Region, the workforce shortage has been, and continues to present a significant challenge. According to New Hampshire Employment Security, before the COVID-19 pandemic the unemployment level was only at 2.4 percent. While part of this number may be attributed to those who are not searching for work, it still paints a stark picture in terms of those available to work relative to the number of job vacancies. Even before the pandemic there were many businesses that struggled to find employees. There are many industries that have struggled to find qualified workers, and in turn, workers who find it difficult to find a suitable or sustainable career path. Time and again, we hear from partners that finding employees is one of the greatest challenges they face. This obstacle has only been exacerbated by the COVID-19 pandemic. This chapter will discuss current challenges and ways that Strafford Economic Development District can try to help our communities.

Conditions Prior to COVID-19

Unemployment numbers in the Strafford EDD were at historic lows in 2019 and early 2020. While this may seem like an indicator of a strong economy, it is more indicative of a labor shortage. Prior to COVID-19, many industries struggled to find skilled workers and the pandemic has exacerbated that. One of the frequent things we heard was “we can’t find workers” or “we need more workers.”¹¹⁷ There are efforts being carried out that address this issue. The Great Bay Community College (CSCC) is working with employers and technical schools to make matches and create internships. The University of New Hampshire (UNH) is also exploring these relationships and making matches for students interested in different areas. Municipalities are working with their high school career technical centers and industry leaders to create connections and pipelines between students and local industries. Despite these positive partnerships, the gaps in the infrastructure to address the significant shortage of workers still exist.

Equally, while there are seemingly ample educational opportunities here in this region, for example UNH and GSCC, the rate of staying and working in the region post accreditation is concerning. Student debt can entice many to other areas with higher wages and salaries and lower costs of living.

Impacts of COVID-19

Prior to the COVID-19 pandemic, the region and the state of New Hampshire were experiencing a steady increase in the total labor force and in total employment, as well as a decreasing unemployment rate (see Economic Vitality Chapter of the Data Snapshot). The NH unemployment rate had been below 3 percent since 2015, and the February 2020 unemployment rate was 2.7 percent. The SRPC region’s unemployment rate was 2.81 percent in February 2020.



See statistics that support this discussion in the following data snapshots sections:

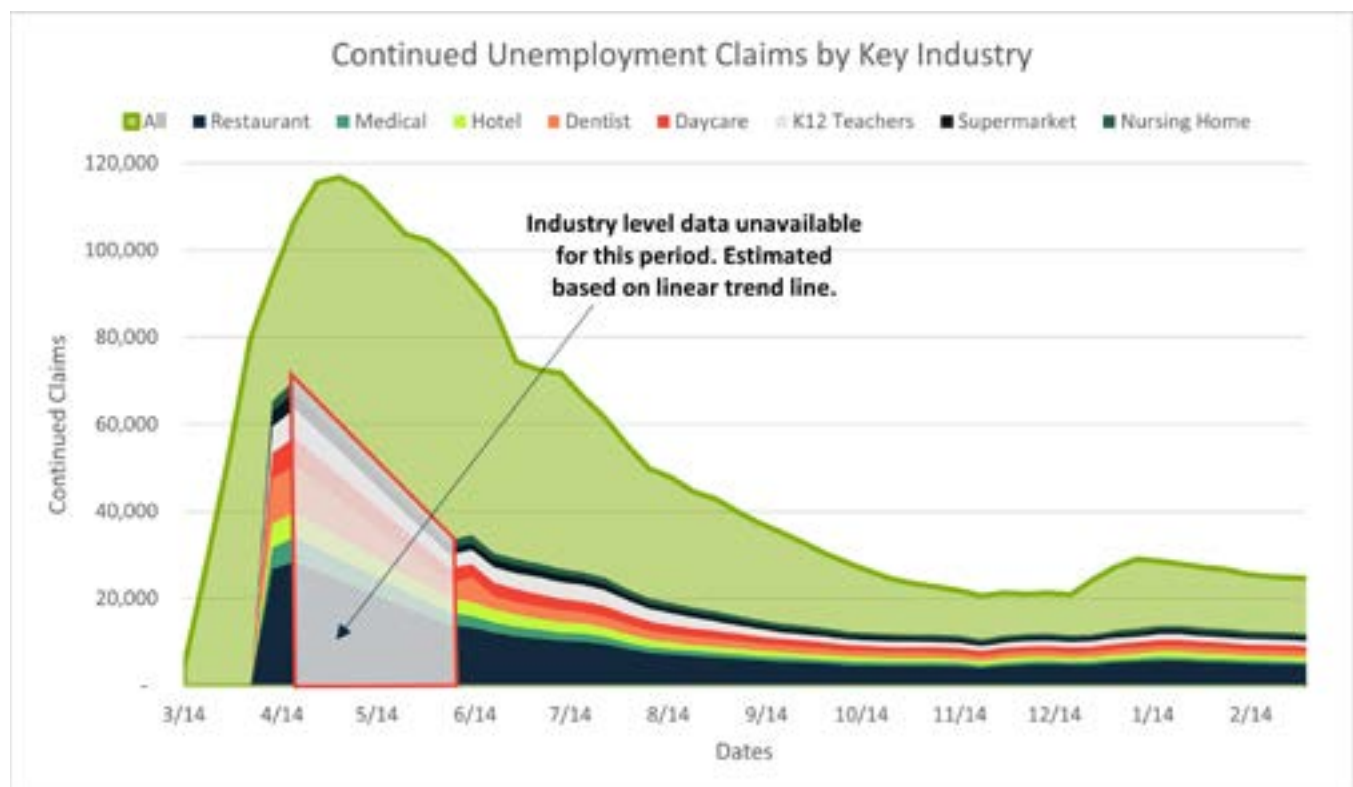
- **Demographics**
- **Economic Vitality**
- **Regional COVID-19 Data Snapshot**

When the pandemic hit and many businesses were forced to lay off staff, unemployment rates increased dramatically. By April 25, 2020 (six weeks into the pandemic), 14,818 jobs in the region had been lost. By March 13, 2021, that number had grown to 24,277, and the region's unemployment rate had come back down to 4.7 percent. There is still a long way to go to return to the pre-pandemic unemployment rates.¹¹⁸

Seasonally adjusted unemployment in New Hampshire jumped from a mere 2.4 percent (compared to the national figure of 4.4%) in March 2020 to 16.3 percent in April 2020 (well above the national figure of 14.7%). A comparison of Local Area Unemployment Statistics data for March and April 2020 shows a 20 percent decline in the number of "employed" people, both statewide and in Strafford County. For Strafford County this represents a loss of roughly 18,000 jobs. Meanwhile, New Hampshire Fiscal Policy Institute estimates that roughly 48 percent of all New Hampshire residents are "cost-burdened" by housing expenses, spending more than 30 percent of their income on housing. While Governor Sununu temporarily suspended all eviction and foreclosure proceedings on March 17, 2020, the emergency order did not relieve homeowners or residents of their obligation to pay any delinquent payments once the order was lifted. This combination of a tight housing market with large numbers of people suddenly seeing their incomes fall or disappear could severely affect the housing market once foreclosures and evictions can proceed.

New Hampshire's tax structure is heavily dependent upon property taxes and meals and rooms taxes; declines in hospitality and restaurant spending and potential declines in property values or increases in property tax delinquency are likely to severely impact state and local budgets, further straining available resources in a time of need. State tax collection for May 2020 was 22 percent below expectations. NHPR reported that this \$25 million shortfall for the month meant the state was \$100 million below projections for the current fiscal year.¹¹⁹ Meals and rooms taxes were impacted most, coming in approximately 58 percent below normal expected levels.

COVID-19 had a significant impact upon employment. While there were relief programs and systems in place to aid the unemployed, the impact has not been absorbed. There have not been opportunities for those who were previously unemployed, or those who became unemployed due to COVID-19, to re-enter or enter the workplace.



Adding to this, the Strafford Region continues to have very high housing costs, and the cost of living is not significantly less than in other areas nearby. New Hampshire continues to use the federal minimum wage which is \$7.25 an hour. Neighboring states have increased this rate, Massachusetts will raise its minimum wage to \$13.50 in 2021, Maine to \$12.15, Connecticut \$13.00, Vermont \$11.75, and Rhode Island to \$12.00. This factor could contribute to employees leaving for other states and opportunities.¹²⁰ This factor acutely highlights the combination of a tight housing market, low unemployment and creates a difficult situation in which to attract or keep a workforce. When workers can make a significantly better wage in neighboring regions or states and maintain a lower cost of living, they will choose to live and work there. If the workforce cannot afford to live here, which creates a shortage of workers, businesses cannot expand. This was especially true in the case of COVID-19, when businesses were forced to shut down, particularly those in the service industry, because there were no workers available.

“The COVID-19 crisis has been extremely difficult for employees. Several challenges loom large, including childcare and homeschooling responsibilities, mental health, and burnout. Many employees feel like they need to be “always on”—available for work at all hours of the day. And a significant number of employees are worried about layoffs, furloughs, and financial insecurity.”¹²¹

The Federal aid provided during the past year shed a very distinct light upon the minimum wage in our region. When the unemployed workforce was granted a \$600 per week allowance, it allowed for that population to keep their homes, families, and to maintain a daily life. For regional employers, this presented a challenge. While some businesses paused their operations or reduced their hours, this \$600 per week proved more than many employees made prior to the pandemic.

Equally, many workers, particularly those in the service industry sector, could not feasibly attend their workplaces due to childcare needs. This is addressed in the childcare chapter of this document. This unprecedented factor of no childcare or school exposed a long known but invisible gap in service provision.



Workforce and Education **IN ACTION**

The shortage of workers has been seen across all sectors of our economy but is most acutely present in service and hospitality industries that have not seen their employees return back to work due to enhanced unemployment benefits, changes in careers, unsustainable wage models, among many other reasons. This is especially true for those that were previously in the low-income category and were making less than \$32,000 per year.¹⁴² Although businesses were able to reopen for dine-in without social distancing measures, they have since been faced with yet another post-COVID challenge, a scantiness of reliable and interested workers. As a result, many business owners had to reassess their business models and recruitment strategies to better accommodate the new trends in the labor market and incentivize workers to re-enter the workforce and accelerate the path towards economic recovery. Employers had to be creative and find a way to set themselves apart from their competitors to attract and retain workforce. Pre-pandemic strategies proved outdated and certain business owners adopted new hiring methods such as sign-on bonuses, higher pay, increased flexibility, ability to work from home, competitive benefits and most of all, a shift in their business culture that makes their employees feel valued. As we have learned, there is no “going back to normal” and many employees in fact expect “going to better” and want to be assured that there is a potential for upward mobility. Changing the way employees are treated and valued proved to be one of the most effective ways to present a business successfully in a post-COVID marketplace.

Photo credit: A “Now Hiring” sign in a window. (Photo courtesy of Joe Readie/Getty Images)

Many businesses shut down or hibernated for part of the time and some shut down permanently. The hospitality industry was impacted most strongly due to the in-person nature of that sector.

Outlook after COVID-19

The labor shortage during COVID-19 has only become more acute. There is now an even more distinct shortage of workers in all industries. Many businesses are struggling to stay open during previously regular business hours due to a shortage of workers. While the unemployment numbers have returned to a pre-COVID similarity, this number does not reflect reality. “...as of last month, the state’s unemployment rate is way down again to 3 percent when seasonally adjusted, 3.2 percent when not seasonally adjusted. That’s half of the United States’ rate of 6 percent and 6.2 percent, respectively.¹²²” While unemployment is indeed once again low, it reflects a significant lack of workers and business’ inability to find employees to keep their businesses afloat.

There is clearly a need to strengthen existing programs that connect students to industries and create a pipeline from high schools to said industries, create apprenticeships, and alternative routes to careers. The traditional trajectory has changed, and COVID-19 has exposed and emphasized these gaps.



1. Strive to remain a positive connection between all the actors in this sector including housing, employers, educational institutions, industry partners and municipalities that must all be connected and “in the loop” with each other.
2. Continue to develop and strengthen relationships and partnerships that will support a healthy regional workforce.



- Update our housing needs assessment, remain in contact with local agencies and organizations to maintain updated housing data.
- Maintain and promote work with our Economic Recovery Coordinator to help with business operations updates and efficiency.
- Work with the Seacoast Economic Development Stakeholders to explore and develop workforce pipelines.
- Work with municipalities to determine needs, gaps, and opportunities.
- Convene employers and chambers and potential employees.
- Share information.
- Research-potentially monthly or quarterly dispatches on needs, gaps etc.
- Partner with UNH and educational institutions to create relationships.



COMMUNITY VIBRANCY

Various characteristics of the region's municipalities make them attractive to businesses, residents, and visitors. Depending on the community, this can encompass the urban built environment, scenic beauty, tourism and recreation, or rural character. Because of the region's location and proximity to the seacoast, it benefits from a wide variety of natural resources as well as vibrant downtowns that contribute to its economic vitality and promote a sense of community. Respondents to a regional survey indicated that they value its rural character, walkable downtowns, proximity to natural resources, and the abundance of outdoor activities, among other things when asked to share the reason they chose to move or stay here.

Conditions Prior to COVID-19

Natural Resources

The region is home to numerous natural resources, including lakes, parks, trails, and the Gulf of Maine coastline which are not only a big draw for tourism and recreation but are also an essential source of employment for resource-based industries, especially in some of the more rural communities. Other major natural resources in the region include the four state designated rivers (Oyster, Isinglass, Cocheco, and Lamprey Rivers)¹²³ as well as its extensive 184,919 acres of forested areas and 10,944 acres of agricultural land. There is also an abundance of recreation sites, including a total of 268 sites across the 15 municipalities that make up SRPC's Economic Development District (EDD).¹²⁴

Another important asset to our community is the Great Bay estuary, which is located in Strafford and Rockingham counties. Tributaries to Great Bay include the Bellamy, Oyster, Lamprey, Squamscott, and Winnicut Rivers. The estuary reaches 15 miles inland and altogether, its coastal river watersheds include 10 percent of NH's land area, and at least one third of the state's populations and businesses, in addition to providing countless opportunities for recreation.¹²⁵

The Piscataqua River basin and its watershed are another key characteristic of our region, as they provide water resources to numerous communities within the Seacoast region in addition to supporting important plant and wildlife habitats. Population growth, which has led to increased shoreline development, has resulted in greater demand for drinking water supplies and has added to non-point sources of pollution. There are several institutions in place that help manage estuary resources through research, protection, outreach, and education in an effort to help control and mitigate any adverse impacts of development.

The region's economic vitality and vibrancy are also characterized by the availability of agricultural lands, which allow for access to production and sales of cash crops. Moreover, the University of New Hampshire in Durham is home to several farms and forested lands that are of significant value to the region, particularly for educational and research purposes. In 2017, there were a total of 310 farms in Strafford County, which combined covered over 23,186 total acres of farmland.¹²⁶

Travel and Tourism

Travel and tourism are large contributors to New Hampshire's local economies and increased recreational usage can help strengthen downtown economic activity while contributing to main street vibrancy. Neighboring communities in Rockingham and Carroll Counties account for a greater percentage of the Rooms and Meals Tax receipts and have more tourist attractions that draw out-of-state residents due to their proximity to the coast and White Mountains. However, our region's unique downtowns and cultural experiences, in addition to its many natural resources continue to entice countless local residents. Popular cultural amenities include the Farm Museum in Milton, the Children's Museum in Dover, and Flag Hill Distillery and Winery in Lee, the



The NH Farm Museum (*Photo courtesy of the NH Farm Museum*)

largest winery in the state. Moreover, several establishments across NH, and within the SRPC region, were nominated for the 2021 *Condé Nast Traveler* Readers' Choice Awards, an annual survey from a national consumer travel publication that celebrates the best tourist destinations across the country. Included in this list of nominees was the Three Chimneys Inn in Durham.¹²⁷

In the northern part of the Strafford Region, grassroots organization Explore Moose Mountains (EMM) promotes the scenic, historic, agricultural, recreational, and cultural resources in what its defined as the Moose Mountains Region. Via its social media presence, *The Moose, NH*, EMM markets tourism in Brookfield, Farmington, Middleton, Milton, New Durham, Wakefield and Wolfeboro.

Explore Moose Mountains has an average yearly reach of over 120,000 individuals over the last two years, with a large, combined following of over 7,000 on Instagram and Facebook. In the same period, EMM has also promoted over 450 unique local businesses, organizations, community events, natural resources, and recreation sites via its social media. All of EMM efforts encourage residents to support and explore local, as well as, for visitors to add the Moose Mountains Region to their travel destinations.

Cultural Amenities

When it comes to art and cultural amenities, communities in our region have led efforts to encourage richness and diversity. Somersworth, for example, is now home to the nation's first "Little Indonesia", having roughly 2,000 residents of Indonesian descent. The region's communities have also worked to promote public art through several ongoing efforts. Some examples of this include the city "art walks" in Dover and Rochester, as well as the establishment of the Rochester Museum of Fine Arts located in the City's Community Building, the Art Center located in the Washington Street Mill building in Dover, and artistic structures such as the infamous whale's tale sculpture, "Marti", located at the top of the Children's Museum.

While increased recreational usage attracts residents, businesses, and visitors, it also highlights the importance of conserving our regions many valuable resources. Organization such as the Land and Community Heritage Investment Program (LCHIP), have been working to support the protection of natural, historic, and cultural resources in NH, including in every single one of the EDD's 15 municipalities. One of the many examples of this has been through their effort to preserve the Calef Property in Barrington, which protects more than two miles of the Isinglass River, a source of drinking water for the City of Dover.

Historic Downtowns

Many of the communities in the Strafford region are also known for their unique and historic downtowns, built upon major rivers, and characterized by industrial brick mill buildings. These historic downtowns are home to cultural centers and host festivals and events that attract people to the region. Businesses, residents, and visitors value these vibrant town and city centers, which encourage people to gather, enhance economic activity, and promote a sense of community. Trends show that when thinking about location, businesses are attracted to lively downtowns where people have the option to live, work, and play.¹²⁸ The historic establishment of industry centered upon the region's environmental assets helped build networks between entrepreneurs and natural resources. Local restaurants are another major attractor for the region's downtowns, which draw people in and encourage spending at other main street businesses.

Efforts such as master planning, historic preservation, adaptive reuse, and revitalization, have allowed our communities to shape and enhance their downtown economic activity. Dover's Community Trail, for example, connects Dover's more rural neighborhoods to the north with the City's urban core and to the suburban locations to the south. This effort was initiated through recommendations of the City's Master Plan and connects the downtown (including the City's Transportation Center, Middle and High school campuses, and the Bellamy Park) to natural resources (such as the Cocheco and Bellamy Rivers), and even to major employers of the area (such as Liberty Mutual, Measured Progress, and others in the Enterprise Park area).

Another important example of this is the redevelopment of brownfield sites, including the preservation and

repurposing of a 150-year-old former school building which has been turned into residential apartments and commercial spaces in Somersworth.

Whether a community is characterized by its rural character or its lively main streets, one thing is certain: people are attracted to our region because of its sense of community and quality of place. In order to maintain and enhance community vibrancy, it is important to promote safety, accessibility, walkability, and a “sense of place” for people of all ages and backgrounds.

Impacts of COVID-19

One of the biggest impacts of COVID-19 was the increased use of outdoor recreation natural resource amenities, which highlighted the importance of their value and conservation. The pandemic encouraged people to spend more time outdoors, leading to the enhanced usage and exploration of the many trails and recreation sites in the region, and expanded the use of campsites, trails, athletic fields, bike lanes, dog parks, and water resources.

The pandemic also led to sudden main street business and restaurant closures, causing substantial impacts to community downtowns. In response, many scrambled to adapt to the situation through resiliency efforts that helped many bounce back. Also, partly thanks to the support of different organizations and partnerships that acted quickly to respond to the situation, the small business community and others were able to navigate relief funds, implement safe operation protocols, tap into e-commerce, add curbside pick-up, expand outdoor dining, among other efforts. Prior to the pandemic, there was discussion around e-commerce threatening the livelihood of main street businesses, however, we saw that the increase in e-commerce didn't actually replace the experience of visiting downtowns, its local restaurants, or engaging in in-person shopping at local mom-and-pop shops. Instead, there was evidence of e-commerce threatening malls and large box retailers.

Another major impact of COVID-19 was the increase of tactical urbanism, such as outdoor seating at restaurant establishments which expanded to parking spaces, sidewalks, and other public areas. Many factors came into play as a result, with establishments having to figure out how to navigate traffic patterns, right of way concerns, and safety issues. This important change was accomplished through collaboration



Community Vibrancy IN ACTION

To increase outdoor recreation and provide people with healthy and safe alternatives to socialize during COVID-19, Strafford Regional Planning Commission has launched its interactive online tool called POP!, which stands for Promoting Outdoor Play. The website offers a compiled list of all public recreation sites in our region and strives to increase outdoor interaction and use of these publicly available resources. The information gathered at each site included pictures, site characteristics such as seating, restroom access, handicap parking signs, drinking water and other amenities to make planning for the outdoor trip more convenient and allow the program to be more user-friendly. Residents and visitors can choose from a variety of different sites based on the season or their preferred type of activity and search anything from playgrounds to trails, sports field, beaches, pools, ice skating rinks and sledding areas. To help publicize the program and encourage people to explore the recreational areas in their area, SRPC launched a trail passport activity which will allow families with children to collect stamps for each site they visit.

Photo credit: Trail at Doe Farm in Durham. (SRPC Photo)

between municipal stakeholders and private businesses who worked towards the enhancement of community atmospheres and created new user experiences, which were widely welcomed by the public.

Other trends that were highlighted as a direct result of the pandemic included the shift in populations leaving large city centers to live, either permanently or temporarily, in smaller cities and towns,¹²⁹ which increased the need for residential density. This underlined the value and sparked an added interest in mixed-use development in downtown centers, partly in response to the tight housing market in the region.

Outlook After COVID-19

The pandemic encouraged us to rethink the priorities of our communities and downtowns and highlighted the importance of leveraging natural resources with the urban built environment to promote economic development.

With the exacerbated demand for natural resources, one of the challenges we face is how to maintain the quality of our recreational amenities and spaces. Education will be crucial for users to understand their roles and responsibilities in protecting these resources and minimizing the impact of increased use. In response to the uptick in outdoor engagement, we can expect communities' heightened interest to promote the preservation of the existing natural base and the expansion of trail networks, paths, and greenways, as well as interest in using outdoor recreation to promote health and wellness through programs in schools, health centers, and employers.

In downtowns, with the success of outdoor dining, we might expect to see permanent or long-term changes that will enhance community character, including the addition of temporary barriers, planters, and murals to help define spaces and enhance aesthetic appeal. The success of outdoor dining is also one example that has led to ongoing efforts by state, local, and federal stakeholders to promote and support policy changes that allow for the expansion of this popular trend even after recovery, which has and will continue to greatly shape our main streets.

As vaccines continue to roll out, the return of community events and festivals are expected to bring people together and enhance the vibrancy of our towns, cities, and continued use of natural resources. Isolation inflicted by the pandemic highlighted the importance of having places for people to gather and interact with one another, and we can therefore expect that people will return to gathering in small businesses, restaurants, downtowns, natural assets, leading to long term recovery of the region.



1. Maintain and promote community vibrancy in municipalities across the region, whether this encompasses the enhancement of downtowns, rural areas, cultural assets, or natural resources.



See statistics that support this discussion in the following data snapshots sections:

- **Demographics**
- **Economic Vitality**
- **Regional COVID-19 Data Snapshot**



- Promote recreation sites through projects such as the Promoting Outdoor Play project (POP!).
- Advocate for policies that support the expansion of outdoor dining and retail.
- Encourage conversation between organizations and economic development stakeholders.
- Support main street businesses by helping them gain access to financial resources and technical support to enhance their operations.
- Assist with initiatives that support affordable housing and mixed-use development to create inclusive opportunities in our communities, such as the Brownfields program.
- Leverage SRPC's Brownfields Program to increase opportunities for facility rehabilitation, development and land acquisition and maintenance to strengthen and promote vibrant communities.



CHILDCARE

Adequate childcare services are an essential part of a healthy economy and community. The workforce is significantly made up of parents of young children and ensuring that childcare needs are met is crucial. Lack of sufficient childcare adds impediments to the social and economic value of a major part of the community and economy. In Strafford County, two worker households make up 35 percent of all households.¹³⁰

There are few federal or state support mechanisms for the childcare industry. It falls upon individual communities to create or uphold their own, mostly private, frameworks. This is no different in the Strafford region than nationally. Particularly in more rural communities, there is a lack of an established childcare system, relying upon an informal network of friends, family, and unlicensed providers to care for young children. “Half of Americans live in a childcare desert, where access to formal quality care is essentially absent. For parents living in a remote place, working nonstandard hours or having multiple young children, options are even more limited.”¹³¹

Childcare is an essential service to support a healthy workforce and economy. Widespread accessible care would mobilize a large untapped workforce that could potentially fill many unmet needs in our economy. This is discussed further in the workforce chapter of this document. If we are to promote the region as a healthy, inclusive, and thriving place for all to live, childcare provision must be addressed. Children and youth are a vital and important part of the fabric of every community and fostering that strength is important. The structures must be in place to support and encourage a younger demographic to either stay or move to the region and take part in the economic and community systems here.

Conditions Prior to COVID-19

Even before the COVID-19 pandemic, childcare represented a significant challenge to the workforce in the Strafford region. It is expensive, often prohibitively so. “For full-time programs, the mean weekly rates by ages of children were: 0-12 months (\$237.47, up 5% since 2016); 13-24 months (\$221.03, up 3.6%); 25-35 months (\$215.84), 36-59 months (\$197, up 4.7%), and 60-71 months (\$180.33, up 0.7%). Rates increased



Childcare IN ACTION

Despite most schools closing and transitioning to online learning during the pandemic, some teachers and students were able to come up with their own creative and outdoor classroom designs. Schools that were able to accomplish this saw an increase in engagement and interest from their peers in classroom participation and overall productivity. In some cases, students would meet in outdoor areas where they had the ability to set up their own open-air classroom with chalkboards, hammocks and even firepits. Other education centers that had the capacity started offering flexible nature-based programs where students could come learn on a farm while still having a few hours of remote learning. This type of hybrid learning allowed students to keep up with their academic learning while gaining the valuable and enriching experiences of being exposed to nature and learning new skills in a fun and safe way. Being outside allowed students to remain healthy and learn in a non-traditional model.

in all categories. Overall, rates in the Southern and Eastern regions were highest for all age ranges. ¹³² “For many mothers, the costs of childcare can affect the ability to hold a job. If childcare expenses are greater than the take-home pay from a job, it may not be financially viable to remain employed.”¹³³ Childcare expenses often prevent one or both parents from working. Pressuring the situation, there are not enough spaces for all the children that require care in the region. Parents are often forced to choose part-time or partial care because of space and expense, in turn limiting their employment opportunities and choices. Equally, travel distance for those in more rural communities to childcare providers presents another barrier to work. If it takes an extra hour or more to transport children to a care center, complicates adherence with a traditional work schedule.

Equally, childcare is a labor-intensive field, requiring many staff to care for children at required child-to-staff ratios, but the wages of individual workers are low. In NH in 2015, and 2017 respectively, the hourly wage for childcare workers was \$10.77 and \$10.79.¹³⁴ Most programs cannot afford to pay living wages, and benefits are scarce, despite the need for highly credentialed staff. This shortfall creates a system that relies heavily upon volunteers and unpaid interns.

Impacts of COVID-19

The childcare shortfall has been felt even more acutely during the period since March 2020. With many or all childcare centers and mechanisms shutting down temporarily, and some permanently, the stress on the system and on parents, the workforce, is undeniable. “In the Granite State, 50 childcare programs shut their doors permanently, which constitutes about 6 percent of the programs in operation before the pandemic, according to the state’s Child Care Licensing Unit.”¹³⁵ Clearly, this is a national issue and not unique to the Strafford region, but it has been felt equally here, and has exposed gaps within the system drastically. “The public health crisis of COVID-19 has had a devastating effect on the childcare industry. In the spring of 2020, many childcare providers closed their programs to follow public health guidance, leading to lost revenue for weeks and months at a time.”¹³⁶

The most significant effect of this childcare pressure has been felt by working families. COVID-19 has left many families struggling to care for and even educate their children as childcare centers and in-person schools closed. The bulk of these responsibilities have fallen to women.¹³⁷ Consequently, when women are forced to remove themselves or have less participation in the workforce, the whole economy suffers.

While some parents and caregivers were fortunate enough to be able to telecommute during this crisis, it must be noted that bearing the weight of working, daily routines and additionally caring for and educating their children simultaneously has had substantial effect. For those not able to work remotely, many had to leave jobs or reduce their hours to provide childcare. This affected those in the service industry and retail most significantly. In turn, these industries are currently facing a labor shortage and those families are facing a real income decrease.

There is also a generational impact with many family members and grandparents being recruited to assist with childcare in this unprecedented circumstance. This has had a knock-on effect to the economy with those people no longer being able to participate in the workforce.

In terms of childcare operations, there is a limited capacity as already noted with low funding and assistance and support to access federal and state aid programs. “With no income tax or broad-based sales tax, the Granite State’s options for funding childcare are limited.”¹³⁸ There is often a lack of knowledge or ability to apply for relief programs which may have impacted this industry disproportionately. With already low staffing levels and stretched capability at all levels, actors in this sector may have not been able to access relief to keep operating.

Outlook After COVID-19

“Though many of the childcare industry’s problems long predate the pandemic, educators, officials and advocates say the crisis has exacerbated existing gaps.”¹³⁹ Many centers were forced to close during the Pandemic, creating an even more acute squeeze on parents looking for spaces for their children. There is also an increased labor shortage which is unlikely to change rapidly.



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



- Provide assistance to businesses around operations. Our economic recovery coordinator can help to find ways to modify operations to be more viable.
- Collect regional data on the childcare system.
- Connect providers to funding resources from state and federal opportunities.
- Promote collaboration and information sharing systems.

CEDS PRIORITY PROJECT LIST

The priority project list is a key component of the CEDS. These projects are submitted by municipalities and other partner organizations as projects that most reflect their economic development, infrastructure, and resiliency needs. Solicitation for projects occurred in February and March 2021. In order to be included on the Strafford EDD priority project list, a project must meet two criteria:

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

Inclusion on the priority project list is a requirement to be eligible for certain EDA funding opportunities. Additionally, inclusion in a regional plan frequently makes projects more competitive for other state and federal programs even if not required for eligibility. Unlike the Metropolitan Transportation Plan, the CEDS is not fiscally constrained and does not have a dedicated funding pool that projects will be entered into. Its purpose is to help the Strafford EDD connect municipalities and other partner organizations to resources and advocate on behalf of projects that advance our region's economic priorities.

Project ID	Title	Sponsor	Timeline	Project Cost*
BAR1	Barrington's first sidewalks	Barrington	2023-2025	\$1,253,514
BRK1	Public Arts Initiative	Governor Wentworth Arts Council	2021-2022	\$7,500
COAST1	COAST Administration, Operations, and Maintenance Facility	COAST	2023-2025	\$12,632,500
CWE1	Community Classrooms: Support for New, Existing, and Aspiring Women Entrepreneurs	Center for Women & Enterprise	2023-2025	\$20,000
DOV1	Redevelopment of environmentally stressed plating plant and grounds on Broadway in downtown Dover	Dover	2021-2022	\$2,500,000
DOV2	Public Infrastructure Investment to Assist with Private Development	Dover	2021-2022	\$1,000,000
DOV3	Public Infrastructure Investment to Assist with Pedestrian and Vehicular flow	Dover	2023-2025	\$12,000,000
DOV4	Community Trail connection and expansion to Knox Marsh Rd	Dover	2021-2022	\$800,000

Project ID	Title	Sponsor	Timeline	Project Cost*
DOV5	Central Avenue Reconstruction	Dover	2021-2022	\$3,000,000
DOV6	Whittier Street Sidewalk	Dover	2021-2022	\$650,000
DOV7	Downtown Waterfront Shoreline Stabilization/Riverwalk	Dover	2021-2022	\$3,500,000
DOV8	Chestnut Street Bridge Repair	Dover	2021-2022	\$800,000
DOV9	Henry Law Avenue and River Street Reconstruction	Dover	2021-2022	\$2,400,000
DOV10	Neighborhood Street Reconstruction	Dover	2021-2022	\$2,400,000
DOV11	Public Safety Fire/Police Training Structure	Dover	2021-2022	\$1,500,000
DUR1	Madbury Rd Improvements	Durham	2021-2022	\$1,100,000
DUR2	Fire Station Renovation and Overflow	Durham	2021-2022	\$520,000
DUR3	Critical Facilities Backup Generators	Durham	2021-2022	\$580,000
DUR4	66 Main Street Parking	Durham	2021-2022	\$2,245,000
DUR5	Beech Hill Tank Mixing System	Durham	2021-2022	\$275,000
DUR6	Southern Strafford County Communications System	Durham	2021-2022	\$2,500,000
DUR7	Wastewater Treatment Plant Odor Control System	Durham	2021-2022	\$750,000
DUR8	Bickford-Chesley House Preservation	Durham	2021-2022	\$437,475
DUR9	Durham Old Town Hall Preservation	Durham	2021-2022	\$366,270
DUR10	Oyster River Dam	Durham	2021-2022	\$4,063,000

Project ID	Title	Sponsor	Timeline	Project Cost*
FAR1	Sidewalk Network Expansion	Farmington	2021-2022	\$990,160
FAR2	Re-Development of the Old Fire Department Lot	Farmington	2023-2025	\$0
MIL1	Pedestrian & Utilities Upgrades	Milton	2023-2025	\$2,600,000
MIL2	Mending Fences and Developing Water Solutions	NH Farm Museum	2021-2022	\$45,000
ROC1	Portland St Sidewalk extension	Rochester	2021-2022	\$900,000
ROC2	Route 11 Safety and Capacity Improvements	Rochester	2021-2022	\$5,200,000
ROC3	Union Street Parking lot	Rochester	2021-2022	\$0
ROC4	Cocheco Well Upgrades	Rochester	2021-2022	\$5,000,000
ROC5	Round Pond Reservoir Capacity	Rochester	2021-2022	\$6,000,000
ROC6	Wastewater Phosphorus Upgrades	Rochester	2021-2022	\$15,000,000
ROC7	Re-line drinking water pipeline	Rochester	2021-2022	\$2,000,000
ROC8	Rebuild Portland Street Bridge	Rochester	2021-2022	\$1,000,000
ROC9	Lead Service Line Replacements	Rochester	2021-2022	\$0
ROC10	North Main Street/Chestnut Hill Road Connector	Rochester	2021-2022	\$0
ROC11	Additional Facility adjacent to Recovery Transitional House for Women	Hope on Haven Hill	2021-2022	\$2,200,000
SBDC1	NH SBDC Inclusivity Project	NH Small Business Development Center	2021-2022	\$0
SEDC1	Revolving Loan Fund	Strafford Economic Development Corporation	2021-2022	\$1,500,000

Project ID	Title	Sponsor	Timeline	Project Cost*
SOM1	Library Accessibility Improvements	Somersworth	2021-2022	\$500,000
SOM2	National Guard Readiness Center Reuse	Somersworth	2023-2025	\$0
SOM3	Fire Station Training Tower and Equipment	Somersworth	2021-2022	\$336,000
SOM4	Constitutional Way Complete Streets	Somersworth	2021-2022	\$1,086,000
SOM5	Main Street Complete Streets	Somersworth	2021-2022	\$6,400,000
SOM6	Fire Pumper Engine 2	Somersworth	2021-2022	\$650,000
SOM7	Millennium Field Improvements	Somersworth	2021-2022	\$200,000
SRPC1	Arts and Culture Inventory and On-line Guide	Strafford Regional Planning Commission	2021-2022	\$40,000
SRPC2	Brownfields Assessment Program	Strafford Regional Planning Commission	2023-2025	\$300,000
SRPC3	Regional Housing Needs Assessment	Strafford Regional Planning Commission	2021-2022	\$40,000
STRC01	Strafford County P25 Radio System	Strafford County	2021-2022	\$3,400,000
UNH1	Immersive Learning for Workforce Development	University of New Hampshire	2021-2022	\$1,914,333
UNH2	Economic Recovery and Resilience Resource Hub	University of New Hampshire	2021-2022	\$420,000
UNH3	UNH Research Park	University of New Hampshire	2023-2025	\$20,000,000
UNH4	Economic resilience through enhanced capacity to monitor future threats and mobilize resources to combat future disease outbreaks	University of New Hampshire	2021-2022	\$20,000,000

Project ID	Title	Sponsor	Timeline	Project Cost*
UNH5	Expansion of UNH's Jackson Estuarine Laboratory in support of a resilient NH coastal economy	University of New Hampshire	2021-2022	\$3,000,000
UNH6	A STEM-Focused Outdoor Walking Museum at the Living Bridge	University of New Hampshire	2021-2022	\$750,000
UNH7	Sources and Fate of PFAS in New Hampshire Community Wastewater Systems	University of New Hampshire	2021-2022	\$900,000
UNH8	South Drive Infrastructure Improvements	University of New Hampshire	2021-2023	\$3,250,000
WAK1	Wakefield Sewer Project	Wakefield	2021-2022	\$800,000
WAK2	Sanbornville Precinct water system upgrades	Sanbornville Precinct	2023-2025	\$5,000,000
WAK3	Gafney Library Expansion	Gafney Library	2021-2022	\$1,450,000
WEDC01	Intersection Improvement-Cotton Valley Rail Trail & Rte. 16	Wentworth Economic Development Corporation	2021-2022	\$0
WEDC02	Explore Moose Mountains Region	Wentworth Economic Development Corporation	2021-2022	\$63,100
WEDC03	Moose Mountains Scenic Byway	Wentworth Economic Development Corporation	2023-2025	\$0
Total Projects	67	21 Partner Organizations		\$170,234,852
*Projects for which no cost estimate was available are entered as \$0; where projects provide a range, the highest cost estimate was used for this table.				

ACTION PLAN AND EVALUATION

CEDS Performance Measures

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

Performance Measure	2021 Performance
Number of local governments explicitly invited to participate in project solicitation.	17 – all 15 Strafford EDD municipalities, plus Strafford County and the Sanbornville Water Precinct
Number of local governments to submit priority projects.	10 – 8 member municipalities, plus Strafford County and the Sanbornville Water Precinct
Total local government projects submitted for inclusion in the CEDS.	45
SRPC Projects submitted for inclusion in the CEDS.	3
Other partner organizations to submit priority projects for inclusion in the CEDS.	10
Total projects submitted by other partner organizations for inclusion in the CEDS.	19
Total projects included in the CEDS.	67
Total cost of proposed CEDS projects.	\$170,234,852
Number of organizations with a project included in the CEDS.	21
Number of CEDS priority projects to receive outside funding.	N/A – all CEDS projects were solicited or updated in 2021 as part of the five-year update and are therefore in progress.
Total value of outside funds received for implementing CEDS projects.	N/A – all CEDS projects were solicited or updated in 2021 as part of the five-year update and are therefore in progress.
Number of CEDS priority projects to be fully implemented.	N/A – all CEDS projects were solicited or updated in 2021 as part of the five-year update and are therefore in progress.
Number of Strategy Committee meetings at which CEDS planning was discussed.	SRPC staff to tally once adoption has occurred.
Number of Strategy Committee meetings at which CEDS implementation was discussed.	N/A – discussion of implementation will begin after adoption of the CEDS.
Total attendees at Strategy Committee meetings.	SRPC staff to tally once adoption has occurred.
Unique attendees at Strategy Committee meetings.	SRPC staff to tally once adoption has occurred.
Number of Board of Directors meetings at which CEDS planning was discussed.	SRPC staff to tally once adoption has occurred.
Number of Board of Directors meetings at which CEDS implementation was discussed.	N/A – discussion of implementation will begin after adoption of the CEDS
Total attendees at Board of Directors meetings.	SRPC staff to tally once adoption has occurred.

Performance Measure	2021 Performance
Unique attendees at Board of Directors meetings.	SRPC staff to tally once adoption has occurred.
Thirty-day public comment period prior to adoption? (yes/no)	Yes
Economic indicators in the SRPC Regional Data Snapshot were updated to include the latest available data as part of the annual CEDS update? (yes/no)	Yes – The 2021-2025 CEDS corresponds with the release of SRPC’s inaugural Regional Data Snapshot. That document includes protocols to update indicators as data sources release new data.
Total SRPC action items identified for implementing CEDS goals.	XX - See the total list below or see each chapter for actions related to individual themes.
Total number of action items completed within the five-year cycle.	N/A – discussion of implementation will begin after adoption of the CEDS.
Number of action items with significant progress towards completion, or ongoing action items that were addressed within the period covered by this update.	N/A – discussion of implementation will begin after adoption of the CEDS.



SRPC Action Plan

The following is a compiled list of all SRPC action items identified in the CEDS. SRPC will begin tracking progress towards these action items after adoption of the CEDS in 2021, and future CEDS updates will provide status updates for each action item.



Economic Growth

- Promote open communication with businesses in the region to learn about how they have been impacted by COVID-19 and provide them with targeted support.
- Convene and advocate for businesses and other organizations by conducting weekly Seacoast Economic Development Stakeholders calls while promoting regional engagement.
- Network and collaborate with municipal stakeholders and agencies such as the Small Business Development Center, Center for Women and Enterprises, Chambers of Commerce, and non-profits organizations to increase capacity and technical assistance to businesses.
- Conduct research (business trends and needs) and provide data to municipalities to assist them in their decision-making.
- Engage in activities that benefit distressed communities and underserved populations, such as providing support to businesses with limited English proficiency.
- Provide technical assistance to municipalities, businesses, and non-profits in our region to support recovery efforts and lessen the economic impacts of the pandemic.
- Research and disseminate high-level information of state and federal economic relief aid

programs for businesses.

- Collaborate with partners to create workshops targeted for business in our region.
- Help municipalities with economic development projects and help them identify funding sources for implementation.



Business Operations

- Increase efficiency by helping workplaces create a more digitized system to be more resilient.
- Advocate for equal access to reliable broadband and technological upgrades.
- Help service industries move towards more sustainable models by advocating for paid sick leave and wages that do not mostly depend on tipping and service fees.
- Disseminate information and support businesses by connecting them to technical and financial assistance, information, and other general resources to help them increase their capacity.
- Promote education and advocacy on behalf of businesses and organizations.
- Encourage open dialogue and collaboration between municipalities, organizations, and other regions through Seacoast Economic Development Stakeholders' meetings.
- Create a platform to support networking, peer to peer communication, and a centralized place where businesses can access information (Mighty Small: <http://mightysmall.io>).
- Assist with language barriers and help ensure minority-owned businesses have equal access to resources, support, and information.



Housing

- Facilitate housing outreach and regional discussions with stakeholders regarding the impacts of housing on the health of the economy.
- Help municipalities incorporate housing into economic development planning through discussions with representatives of the business community – e.g., through the Seacoast Economic Development Stakeholders weekly calls.
- Support and advocate zoning reforms to ensure communities have access to more housing at affordable prices.
- Help businesses understand the overall health and impact that housing has on workplaces.
- Update the SRPC Housing Needs Assessment.



Infrastructure

- Continue to operate the Seacoast Economic Development Stakeholders platform for the regular sharing of information and ideas.
- Explore opportunities to better-integrate the Seacoast Economic Development Stakeholders into existing networks or with key partner organizations at the state, regional, and local levels.¹⁴⁰
- Continue to work with municipalities to ensure that local hazard mitigation plans are updated regularly to improve the resilience of municipal infrastructure and encourage more resilient development patterns and techniques.
- Continue to work with SRPC's coastal municipalities to plan for the impacts of climate change and sea-level rise on their communities.
- Continue to provide technical assistance to regulated MS4 communities to update their regulations or complete planning or infrastructure projects in compliance with their MS4 permits.

- Analyze our region's broadband capabilities and plan for addressing identified weak points; specifics can include updates to the 2015 Broadband Plan, promotion of news and information related to broadband planning in New Hampshire, and direct technical assistance to municipalities seeking to improve their broadband access.
- Maintain an up-to-date Priority Project List for the purpose of supporting local infrastructure projects and advocate on behalf of priority projects to potential funders.
- Maintain an up-to-date Regional Master Plan for the purpose of providing local and regional planning data to identify infrastructure needs and potential solutions.



Mobility and Accessibility

- Increase the role of downtowns as economic hubs by making them more walkable, bikeable, and ADA accessible.
- Increase the connectivity between communities by linking them with multi-modal infrastructure that includes public transit options and safe routes for bicycles and pedestrians.
- Promote development of walkable, bikeable infrastructure in town centers, downtowns, and commercial areas.
- Decrease transportation dependency by promoting housing development that enables workers to live near their jobs and other services.
- Increase transportation options for people without vehicle access, including seniors, people with disabilities, and low-income households, to reach essential services.
- Incentivize new mixed-use, high-density development along major corridors to increase transportation efficiency and increase transit ridership.
- Increase accessibility for people with disabilities by adding ramps, railings, curb cuts and platforms so that they can reach essential and leisure services.
- Ensure last-mile freight access to town centers and important commercial destinations.
- Improve capacity of existing passenger and freight rail.
- Improve coverage of broadband internet services where gaps currently exist.



Age Friendliness

- Support and encourage transportation projects that promote an inviting and well-served region.
- Continue and develop the Seacoast Economic Development Stakeholder collaboration to ensure we are working with economic development leaders in our communities.
- Stay involved with food security issues and research potential funding sources.
- Update our regional Housing Needs Assessment with age-friendly and equitable policies in mind.
- Share feedback from Communities for Healthy Aging Transitions (CHAT) community vitality surveys.
- Promote inclusion in AARP livable communities to our municipalities.¹⁴¹
- Share community assessments from CHAT with opportunities and concepts for age-friendliness.
- Promote outdoor recreation opportunities (POP!).



Workforce and Education

- Update our housing needs assessment, remain in contact with local agencies and organizations to maintain updated housing data.

- Maintain and promote work with our Economic Recovery Coordinator to help with business operations updates and efficiency.
- Work with the Seacoast Economic Development Stakeholders to explore and develop workforce pipelines.
- Work with municipalities to determine needs, gaps, and opportunities.
- Convene employers and chambers and potential employees.
- Share information.
- Research-potentially monthly or quarterly dispatches on needs, gaps etc.
- Partner with UNH and educational institutions to create relationships.



Community Vibrancy

- Promote recreation sites through projects such as the Promoting Outdoor Play project (POP!).
- Advocate for policies that support the expansion of outdoor dining and retail.
- Encourage conversation between organizations and economic development stakeholders.
- Support main street businesses by helping them gain access to financial resources and technical support to enhance their operations.
- Assist with initiatives that support affordable housing and mixed-use development to create inclusive opportunities in our communities, such as the Brownfields program.
- Leverage SRPC's Brownfields Program to increase opportunities for facility rehabilitation, development and land acquisition and maintenance to strengthen and promote vibrant communities.



Childcare

- Provide assistance to businesses around operations. Our economic recovery coordinator can help to find ways to modify operations to be more viable.
- Collect regional data on the childcare system.
- Connect providers to funding resources from state and federal opportunities.
- Promote collaboration and information sharing systems

ENDNOTES

- 1 http://straftord.org/cmsAdmin/uploads/datasnapshot_may2021_fulldoc.pdf
- 2 <data.census.gov>
- 3 http://straftord.org/cmsAdmin/uploads/datasnapshot_may2021_fulldoc.pdf, pg.18-19
- 4 https://data.bls.gov/timeseries/LASST330000000000003?amp%253bdata_tool=XG_____table&output_view=data&include_graphs=true
- 5 <https://www.nhes.nh.gov/elmi/products/chartroom/documents/chart01.pdf>
- 6 Ibid.
- 7 <http://straftord.org/cmsAdmin/uploads/regionaldatasnapshotcovid2021.pdf>
- 8 Ibid.
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APPENDIX A – PROJECT FORMS

Project forms are available in the online version posted on www.Strafford.org