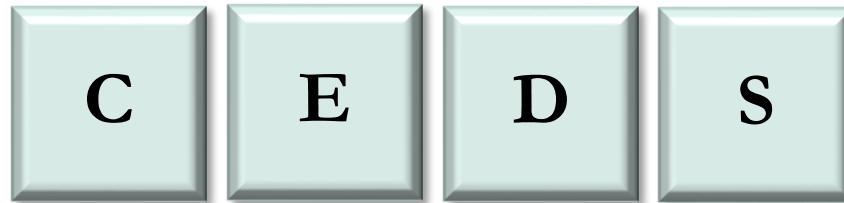


NORTH COUNTRY

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY



Regional Planning Commission and Economic Development District

Encouraging a “Smart, Safe, Clean and Cool” North Country

2018 – 2022

Annual Update 2020

Funding for this work is provided by:

The U.S. Department of Commerce, Economic Development Administration Grant ED16PHI3020013 and with help from the North Country Comprehensive Economic Development Strategy Committee, Coos Economic Development Corporation, Grafton Regional Development Corporation, Mt. Washington Valley Economic Council, UNH Cooperative Extension, and with funding in part with a Rural Business Enterprise Grant from USDA Rural Development.

Adopted by North Country Comprehensive Economic Development Strategy Committee 11/13/2020

Adopted by North Country Council Board of Directors 12/19/2019

IMPORTANT NOTE ON THE ECONOMIC DEVELOPMENT DISTRICT COMMUNITIES

Coös County – All of Coös County is considered a part of the Economic Development District and the North Country Council regional planning commission region, those municipalities and unincorporated places include:
 Atkinson and Gilmanton Academy Grant, Beans Grant, Beans Purchase, Berlin, Cambridge, Carroll, Chandlers Purchase, Clarksville, Colebrook, Columbia, Crawford’s Purchase, Cutt’s Grant, Dalton, Dix’s Grant, Dixville, Dummer, Errol, Erving’s Location, Gorham, Green’s Grant, Hadley’s Purchase, Jefferson, Killkenny, Lancaster, Low and Burbanks Grant, Martin’s Location, Milan, Millsfield, Northumberland, Odell, Pinkham’s Grant, Pittsburg, Randolph, Sargent’s Purchase, Second College Grant, Shelburne, Stark, Stewartstown, Stratford, Success, Thompson and Meserve’s Purchase, Wentworth Location, Whitefield

Grafton County – The entire county is a part of the Economic Development District while only the northern portion of Grafton County is a part of the North Country Council regional planning commission region. Those municipalities and unincorporated places included in the Economic Development District are as follows, **those in bold** are part of the RPC region:

Ashland, Alexandria, **Bath, Benton**, Bridgewater, Bristol, **Bethlehem, Campton**, Canaan, Dorchester, **Easton, Ellsworth**, Enfield, **Franconia**, Grafton, **Groton**, Hanover, **Haverhill**, Hebron, Holderness, **Landaff**, Lebanon, **Lincoln, Lisbon, Littleton, Livermore, Lyman**, Lyme, **Monroe**, Orange, Orford, Piermont, Plymouth, **Rumney, Sugar Hill, Thornton, Warren, Waterville Valley, Woodstock**

Carroll County – Only the northern portion of Carroll County is a part of the Economic Development District with those same communities also being a part of the North Country Council regional planning commission region. Those municipalities and unincorporated places include:

Albany, Bartlett, Chatham, Conway, Eaton, Hales Location, Hart’s Location, Jackson, Madison

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Collaborating Towards Regional Resiliency

RECOGNITION FOR OUR TEAM

North Country Council is sincerely grateful for the support and passion of individuals and organizations involved in the development and maintenance of the Comprehensive Economic Development Strategy (CEDS) in order to improve and preserve regional economic resiliency. The North Country Council CEDS is a living network of partnerships inclusive of entities reflective of industry across the region. This network is a working collaboration that evolves to meet the needs of the region's future.

The CEDS Committee is a passionate, dedicated group of individuals tasked with creating the **vision** and the **guiding strategy for the region's resiliency**. These individuals are the ears and eyes on the ground within the region; experiencing, hearing, and living the region's economy with this they bring back to others the perspective and connections in forming the strategy. Together, the CEDS Committee forms partnerships of local officials, private businesses, educational institutions, and non-profit representation that join together to create a strategy for the future.

VISION

The region is defined by its innovative people, unique places and regional collaboration, where resilience, diversity, natural resources and innovative technology drive economic prosperity, while maintaining rural character.

CEDS COMMITTEE		
Name		Affiliation
Ben	Amsden	New Hampshire Charitable Foundation
Doug	Arion	Bethlehem Resident
Brian	Bresnahan	Office of Annie McLane Kuster
Andrea	Brochu	Northern Community Investment Corporation
Catalina	Celentano	Eversource
Allison	Chisolm	Lebanon Resident
Mike	Clafin	AHEAD
Jac	Cuddy	Mount Washington Valley Economic Council
Rick	DeMark	North Country Resource Conservation and Development Council
Ben	Doyle	USDA Rural Development
Anne	Duncan Cooley	Grafton Regional Development Corporation
Kate	Griffin	Arts Alliance of Northern New Hampshire
Chuck	Henderson	Office of Senator Jeanne Shaheen
John	Hennessey	Littleton Coin Company
Lise	Howson	Coos Economic Development Corporation
George	Hunton	New Hampshire CDFA
Greta	Johansson	Small Business Administration
Steve	Knox	Albany Resident
Kathleen	Kopp	Whitefield Economic Development Corporation
Pam	Laflamme	City of Berlin
Benoit	Lamontagne	New Hampshire Department of Business and Economic Affairs
Beverly	Mason	USDA Rural Development
Troy	Merner	Groveton Regional Economic Action Team
Miguel	Moralez	Small Business Administration
Tamara	Roberge	White Mountains community College
Chris	Thayer	Appalachian Mountain Club
<p>Thank you and recognition goes to North Country Council staff Glenn Coppelman, Senior Economic Planner, Danica Melone, Associate Planner and Ashley Newell, Planning Technician for assistance on this update and support to the Committee.</p>		

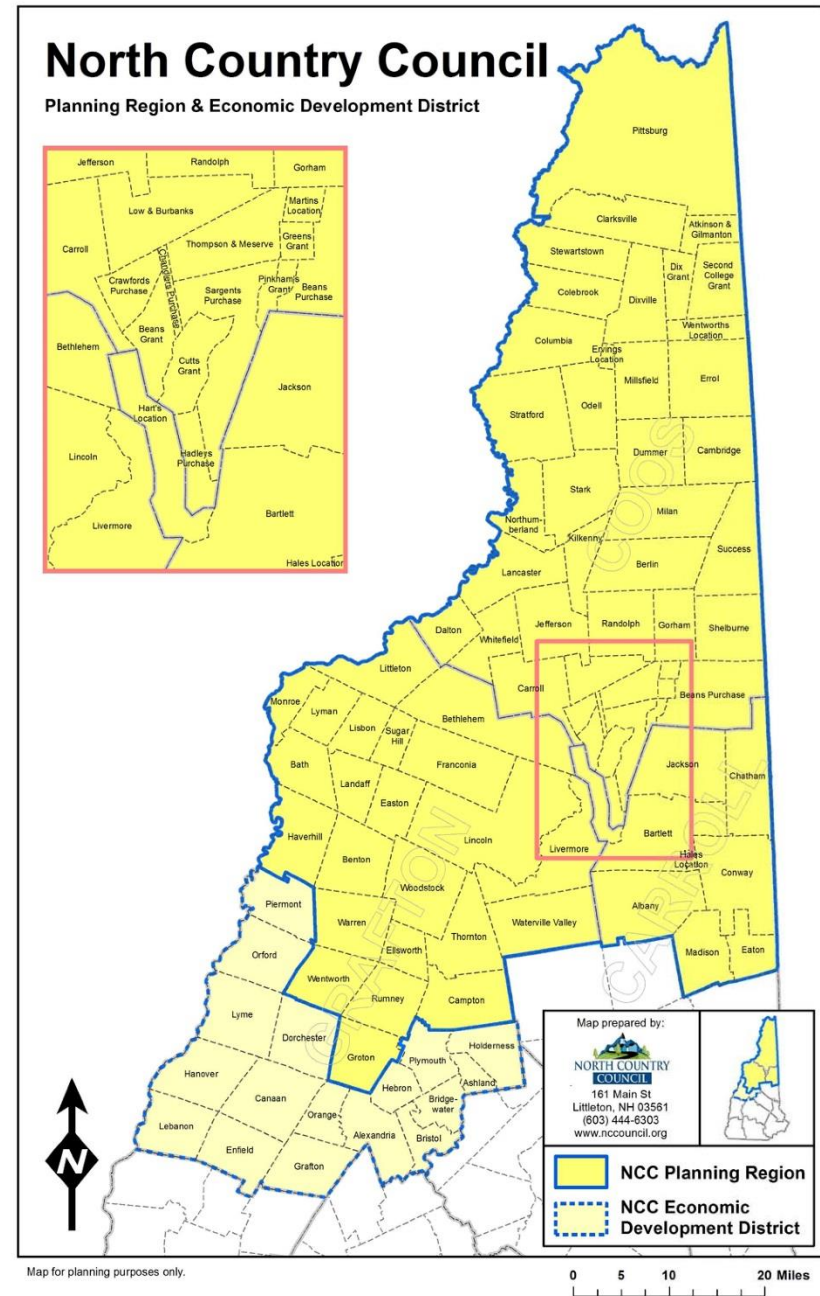
Introduction

Federally designated as an Economic Development District (EDD) in 1975 through the US Department of Commerce, Economic Development Administration, North Country Council is responsible for carrying out the various responsibilities associated with the development, maintenance, and implementation of the Comprehensive Economic Development Strategy (CEDS.) The region consists of the northern portion of Carroll County, all of Grafton County, and all of Coös County. By being a designated EDD, the region is afforded enhanced services focused on economic stimulation and resiliency via the CEDS process of various key current economic indicators.

North Country Council is one of nine New Hampshire regional planning commissions and has provided planning services since 1973. The scope of the responsibilities of the planning commission is laid out in NH RSA 36:46. The Council serves 50 municipalities and 25 unincorporated places along with various local organizations in the northern-third of the state. Regional planning commissions are advisory and do not carry out enforcement.

MISSION

North Country Council's mission is to encourage effective community and regional planning for the development of economic opportunity and the conservation of natural, cultural, and economic resources. This is accomplished by providing information, regional advocacy, technical assistance, community education, and direct service to the region, its organizations, and political subdivisions.



WHAT IS THE COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY?

The CEDS document, a shared vision that assists in building positive change, contributes to effective development in the communities of northern Carroll, Grafton, and Coös Counties through a locally-based, regionally-driven economic development planning process. Economic development planning as implemented through the CEDS is not only a cornerstone of the U.S. Economic Development Administration's (EDA) programs, but successfully serves as a means to engage community leaders, leverage the involvement of the private sector, and establish a strategic blueprint for regional collaboration.

CEDS is updated every five years to reflect current economic indicators and serves as a vehicle through which some agencies and organizations evaluate requests for grant assistance. The CEDS is both a prerequisite for designation as an EDD and is required for entities in the region to be eligible to receive Economic Development Assistance funding from the EDA. The most critical function of the CEDS is to provide framework for resilient economic development in the region.

In essence, the CEDS provides a vehicle for individuals, organizations, local governments, institutes of learning, and private industry to engage in a meaningful conversation and debate about what capacity building efforts would best serve economic development of the region.

A CEDS IS THE RESULT...

OF A REGIONALLY-OWNED PLANNING PROCESS DESIGNED TO BUILD CAPACITY AND GUIDE THE ECONOMIC PROSPERITY AND RESILIENCY IN EXISTING BUSINESSES AND COMMUNITIES WHILE SHARING A REGIONAL ECONOMIC VISION FOR THE



The CEDS document is produced in conjunction with the CEDS Committee and public involvement. CEDS Committee members are comprised of both private and public community entities, nonprofits, and other such organizations. The CEDS Committee members meet throughout the year to discuss key topics related to the CEDS and economic development.

WHY IS IT IMPORTANT TO MY COMMUNITY?

- Federal and State Funders can Identify and Prioritize Funding for Projects
- CEDS Serves as a tool for Communities to Maximize Efficiency and Effectiveness
- Helps to Take Full Advantage of Community's Strengths and Opportunities
- Gives the community a voice in regional economic development planning
- Strategies For Fostering Economic Resiliency

Background

The current economic climate of the North Country Council Economic Development District cannot be fully understood without acknowledging the background of the region, starting with a major shift in the population; as European settlers continued to make landfall, Native American populations declined due to disease and conflict. The majority of early European settlers worked diligently to put roots down in northern New Hampshire and worked tirelessly to log their land and remove the seemingly infinite amount of rocks from the soil which would become property boundaries and paddock walls in attempt to start a subsistence farm for their families. The majority of settlers who did not farm made their living by trapping animals for their pelts.



Source: *The Art of Stone Walls*, Kathie Fife, nhmagazine.com



Woodstock and Thornton Logging Railroad, n.d. Photographs, Special Collections, New Hampshire Historical Society. Museum of the White Mountains, Plymouth State University, 2018.

Eventually, these early farmers found improved ways to utilize their land, such as allowing animals to graze on the hillsides while crops were moved downhill in an effort to avoid the rocky soils. Over time, roads formed where needed to allow farmers to bring their grain to mills to be ground into flour. Settlements began to grow more frequently around rivers and in higher population densities in an effort to utilize its many benefits, such as water-powered mills. As settlers forged a unique natural resource-based economy of farmers producing raw goods and loggers bringing wood to be processed in mills, a pattern of denser development and transportation infrastructure continued to grow close to the region's rivers.

By the second half of the 1800s, the region's farming population was declining and migrating west to where soils were better suited for agriculture. However, the outmigration of farmers allowed for trees to rapidly replace the large tracts of now-bare farmland left behind. The region's economy soon shifted to a heavy focus on logging and manufacturing of wood products, which in turn put higher demand on railway infrastructure to allow for larger-scale logging. The reliance on the region's rivers continued to become increasingly integral to the economy as dams were built to provide for log drives, flood control, and hydroelectric generation.

By the late 1800s, the railroad became strongly associated with the advent of a booming tourism economy as it allowed for artists, sightseers, and recreationists to visit the Grand Hotels and the mountains which had become internationally iconic. Natural resources such as the pristine air quality was so sought after that it was even bottled and sold as a souvenir. Outdoor sports LIKE hiking became increasingly popular in the early 1900s, followed by the increase in popularity of skiing by the 1930s.

Light manufacturing companies became equally as important to the regional economy during the 1900s, making products such as shoe-trees, bobbins, and baseball gloves. The rise of communities surrounding manufacturing companies is very similar to the peopling of communities around wood-product companies. The Village of Beebe River in Campton is one such example of a dense population of persons living in a small area and working for the local manufacturing company, which in 1913

In its prime, **Beebe River** manufactured **the largest number of bobbins in the world** at 100,000 per day, and employed 235 people.

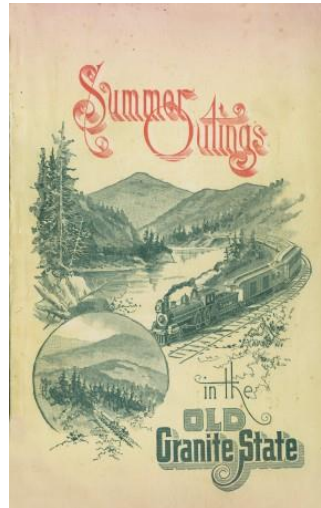
The Village of Beebe River, Town of Campton, New Hampshire Historic Site Series, Site #12, Campton Historical Society

began as Publisher's Paper Company. By 1925, the manufacturing plant shifted focus to making bobbins once it became a subsidiary of the Draper Corporation from Massachusetts who primarily made automatic looms and required an additional source of hardwood bobbins.

Prior to the turn of the century, light manufacturing companies began to decline and close their doors; from small manufacturing plants laying off several dozen employees to Beebe River manufacturing and Franconia Paper Company both closing in 1980. The wood product industry continued to be the cornerstone of the regional economy up until the early 2000s when that industry began to decline as well. Major paper mills in Berlin and Northumberland officially declared bankruptcy and closed their doors to hundreds of employees. Each paper mill closing suddenly pulled hundreds of people from their income; Groveton Paper Board Company alone employed over 220 people. With the closing of such large scale employers, a significant amount of the working population in the region found themselves jobless.

During this period of wood-product mills closing or downsizing, the manufacturing plants followed suit. Spaulding, a manufacturing plant out of Plymouth was forced to lay-off nearly 40 employees in 2005 but finally closed its doors to the remaining 26 employees in mid-2006. Hitchiner manufacturing closed its doors in 2006, resulting in a loss of an additional 26 jobs. By 2016, wood-products and light manufacturing no longer dominated the regional economy and shifted focus towards existing assets such as the presence of natural resources for outdoor recreation.

Over the last two decades the region has progressively started to transition away from being heavily reliant on a natural resource extraction-based and large scale manufacturing economy to become more diverse and resilient. The region began building upon existing assets recognized by many as natural surroundings, culture, rural character, and the communities of people who contribute to the uniqueness of the region. This economic transition largely focusses on a shared experience, such as a perceived higher quality of life. The region's overall environment offers an excellent quality of life which is both coveted by the residents and highly sought after by over 6 million tourists visiting the White Mountain National Forest (WMNF) alone.



A Guide to Pleasant Places Among the Mountains, Lakes and Valleys of New Hampshire, Issued by the Passenger Department of the Concord and Montreal Railroad, 1890, Plymouth Historical Society. Museum of the White Mountains, Plymouth State University, 2018.

A BRIEF CASE STUDY: *The Rise and Fall of the Town of Livermore*

The short-version of how a community once thrived on logging and manufacturing and then was left abandoned for over sixty years.

- **The Town of Livermore was formed when the Saunders brothers began their logging operation in the area in the 1870s.**
- The brothers constructed a mill to process wood, a railway system, and town infrastructure such as a store and school.
- Employees began moving to Livermore and brought their families with them.
- **By 1900, the Census reported a population of 200.**
- The Saunders brothers pass away and the manufacturing business and logging operations are left to an attorney.
- **By 1920, the Census reported a population of 98.**
- A fire destroys the mill in the early 1920s and by 1927 the Sawyer River floods and destroys the railroad.
- **By 1930, the Census reported a population of 23.**
- Logging and manufacturing continues to drastically decline as the amount of quality timber has now been mostly depleted.
- **By 1940, the Census reported a population of 4.**
- **By 1950, the Census reported a population of 0 and was officially disincorporated as a Town.**

Source: *You Asked, We Answered: What Happened to The People in That N.H. Ghost Town?* McCarthy, Hannay; NHPR, July 21, 2017.

POPULATION

A LOOK AT THE CURRENT POPULATION CHARACTERISTICS

According to the US Census 2016 five year estimated the population of the ED District decreased by less than 1% since the 2010 US Census five year estimates. On the county-level, Coös County reported the strongest population decline of 2.5% between 2010 and 2016. However, removing the Hanover-Lebanon population hub and just looking at the NCC-RPC region of Grafton County shows the decline is greater. The loss in population in the ED District likely helps to illustrate the outmigration of the workforce after the collapse of the wood industry and decline of large-scale manufacturing, along with impacts of an aging population. By 2010, many were still struggling to find work and were continuing to move elsewhere. The change in population between Grafton County and the NCC-RPC Region of Grafton County shows a significant difference, suggesting that the NCC-RPC Region of Grafton may be subject to increased economic strain, similar to that of the northern portion.



Source: 32nd Annual Littleton Christmas Parade, nhgrand.com

Indicator	Time Period	State of New Hampshire	Total EDD Region	Coös County	Carroll County (NCC-EDD/Region)	Grafton County	Grafton County (NCC-RPC Region)	Total NCC-RPC Region
Total Population	2012 - 2016	1,327,503	139,432	32,219	18,049	89,164	38,814	89,082
	2006 – 2010	1,316,470	140,020	33,055	17,847	89,118	39,911	90,813
	Change	↑ 0.8%	↓ 0.4%	↓ 2.5%	↑ 1.1%	↑ 0.1%	↓ 2.7%	↓ 1.9%
Population Age 65 and Older	2012 – 2016	199,953	25,146	6,620	3,503	15,163	7,148	17,271
	2006 – 2010	178,268	23,541	6,399	3,304	13,811	6,354	16,057
	Change	↑ 12.2%	↑ 6.8%	↑ 3.5%	↑ 6.0%	↑ 9.8%	↑ 12.5%	↑ 7.6%
Population Age 24 and Younger	2012 – 2016	395,159	39,609	7,524	4,797	27,288	11,521	23,554
	2006 – 2010	410,348	42,024	8,479	4,446	29,099	13,011	25,936
	Change	↓ 3.7%	↓ 5.7%	↓ 11.3%	↑ 7.9%	↓ 6.2%	↓ 11.5%	↓ 9.2%
Population Age 25 to 34	2012 – 2016	154,495	15,596	3,496	1,611	10,489	4,136	9,827
	2006 – 2010	144,472	14,384	3,209	1,727	9,448	3,645	8,581
	Change	↑ 6.9%	↑ 8.4%	↑ 8.9%	↓ 6.7%	↑ 11.0%	↑ 13.5%	↑ 14.5%
Median Age	2012 – 2016	46	49.5	50.9	49.6	47.5	50.2	50.3
	2006 – 2010	43.2	45.8	47.3	48.4	45.2	45.9	46.9
	Change	↑ 2.8 years	↑ 3.7 years	↑ 3.55 years	↑ 1.2 years	↑ 2.3 years	↑ 4.3 years	↑ 3.4 year

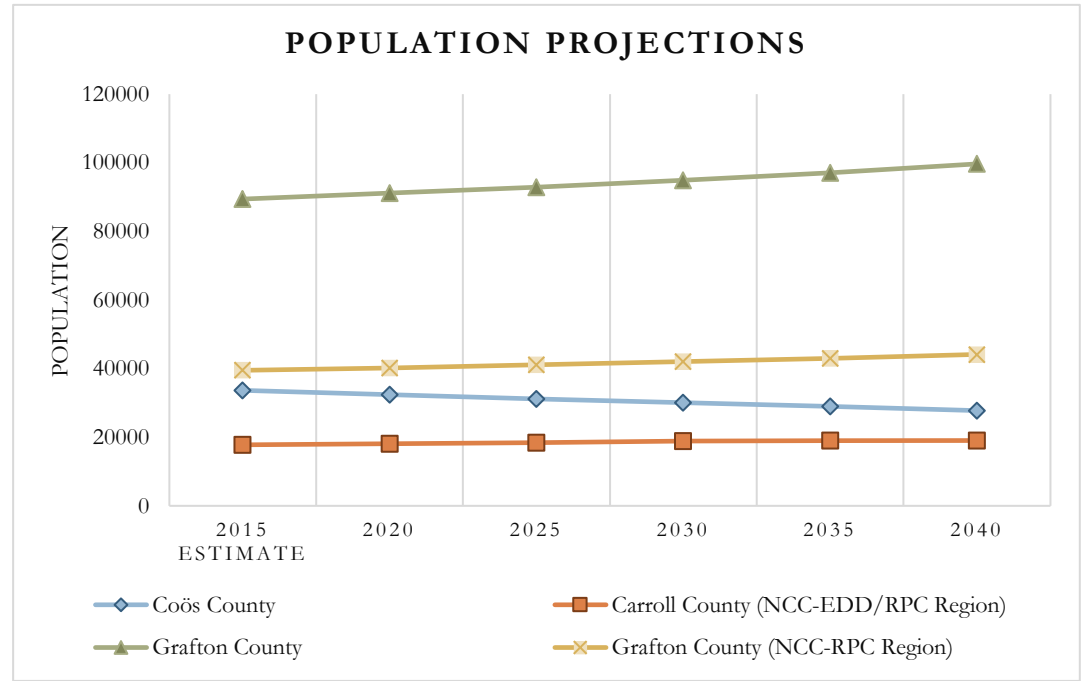
Source: U.S. Census, ACS, 5-year estimates, 2006-2010 & 2012-2016

Looking into the future, it's estimated that only Coös County will experience a population loss. The other counties, including the NCC-RPC region of Grafton County, illustrate a growing population into 2040.

RESILIENT POPULATIONS

In a 2017 survey, 80% of residents in Coös County reported that they intended on continuing to live in the area **“for the next five years,”** a statistic which has **“changed very little in over a decade.”**

Source: *Challenge and Hope in the North Country*, Carsey School of Public Policy, UNH, Brief #130; Hamilton, Lawrence, Fogg, Linda, Grimm, Curt; Fall 2017



Source: State of New Hampshire, OSI, *County Population Projections, By Municipality*,

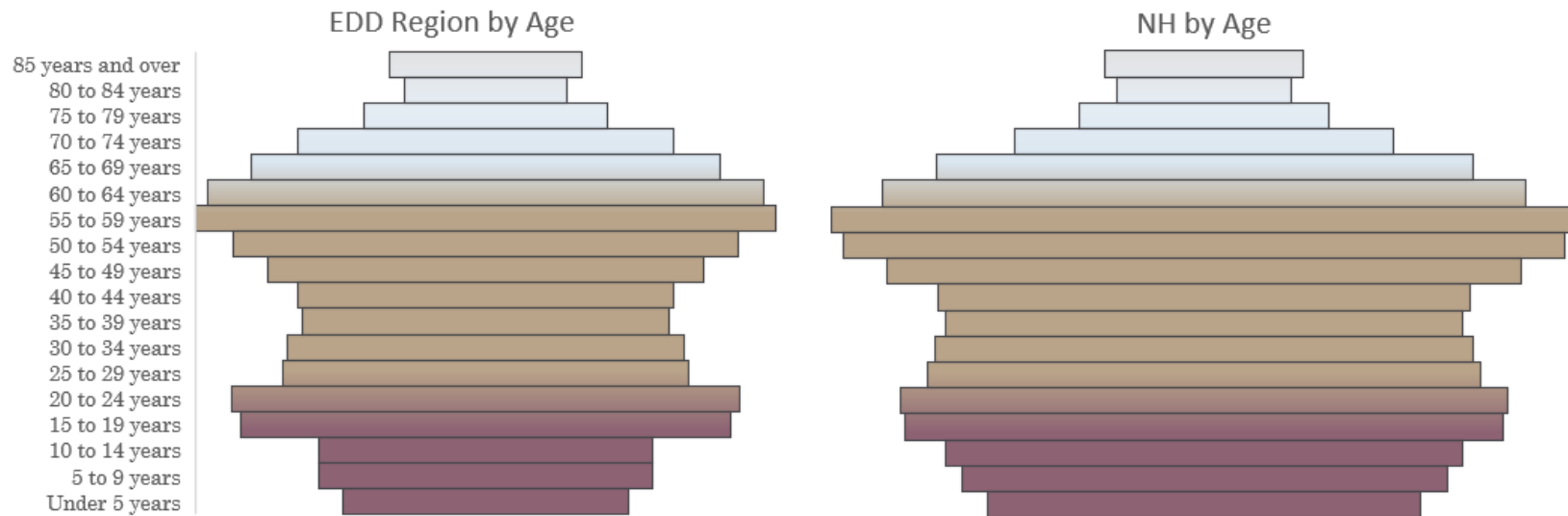
COMMUNITIES WITH AN INCREASING YOUNGER POPULATION

In the ED District, eight communities were identified as reporting a decrease of median age matched with an increase of population, suggesting that the communities are gaining younger populations over time. Recognizing what attributes these communities offer in order to have retained and increased their younger populations may be critical for the rest of the region, and even the state, which continues to report their populations are growing older.

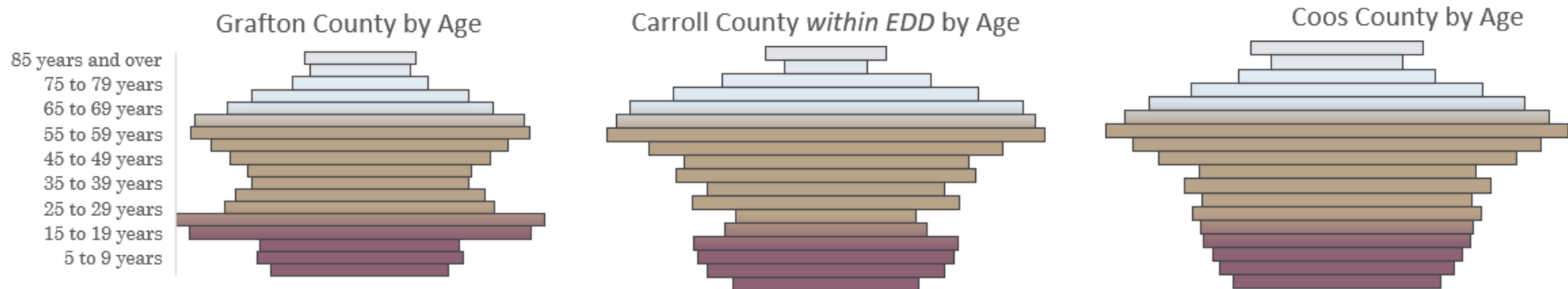
Berlin	Bethlehem	Carroll	Clarksville	Lisbon	Monroe	Lincoln	Rumney
<ul style="list-style-type: none"> • Median age decreased by 3.7 years • Population increased by over 1% 	<ul style="list-style-type: none"> • Median age decreased by 5.7 years • Population increased by 0.56% 	<ul style="list-style-type: none"> • Median age decreased by 9.2 years • Population increased by 17% 	<ul style="list-style-type: none"> • Median age decreased by 1.9 years • Population increased by nearly 8% 	<ul style="list-style-type: none"> • Median age decreased by 4.5 years • Population increased by 8% 	<ul style="list-style-type: none"> • Median age decreased by 0.3 years • Population increased by over 26% 	<ul style="list-style-type: none"> • Median age decreased by 0.8 years • Population increased by over 24% 	<ul style="list-style-type: none"> • Median age decreased by 0.3 years • Population increased by 11%

Source: U.S. Census, ACS, 5-year estimates, 2006-2010 & 2012-2016

North Country Population Trends



- The EDD is older (relative to itself) than the state. However, all of NH is experiencing a ‘graying’ of the population.
In 2018, an estimated 21% of the EDD population is over 65+ compared to 17% of the NH population.
- The population of the EDD is also not growing by natural increase (new babies born) instead future growth projected in the region is attributed to in-migration of new people moving to the area.



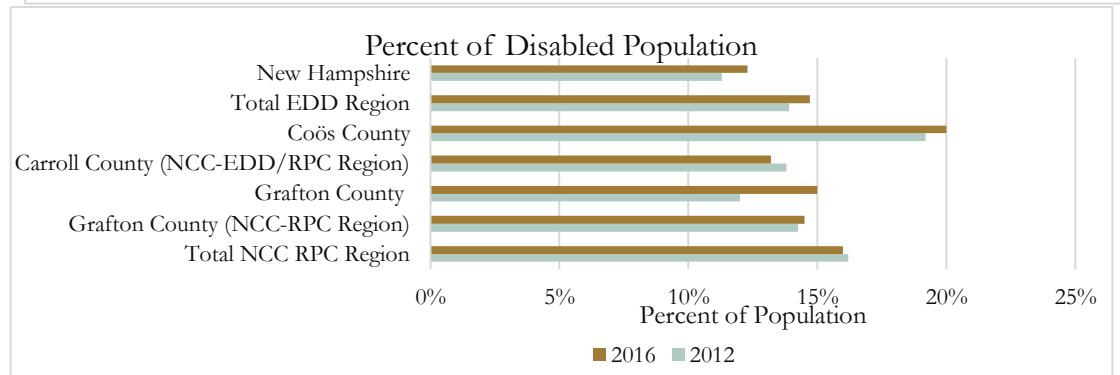
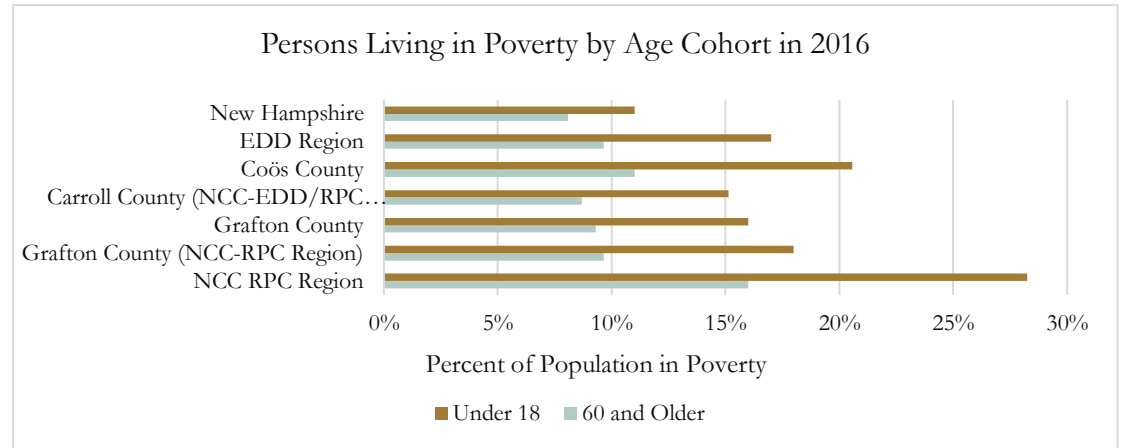
Poverty

In the ED District nearly 9% of the total ED District population, over 15,000 persons, living below poverty; surpassing the state poverty rate in 2016. Of the ED District populations in poverty, it's important to recognize that children are also affected: 17-22% of children in Coös County live in poverty, 12-17% in Grafton County, and less than 12% of children in Carroll County.¹

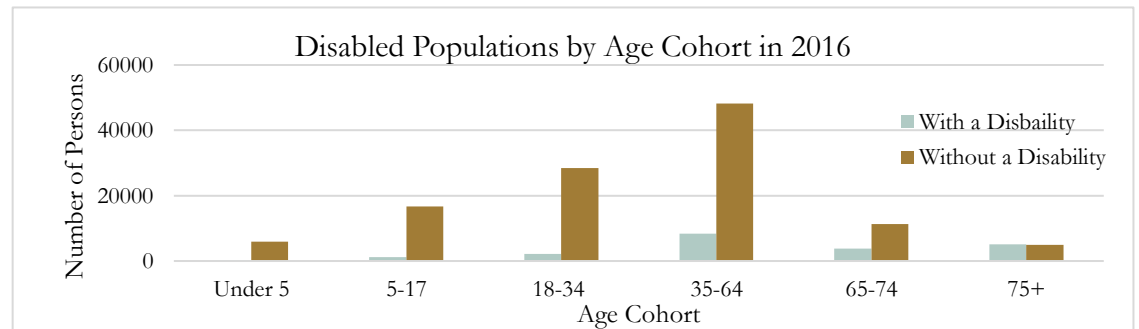
DISABILITY

The Americans with Disabilities Act (ADA) defines disabled persons as someone “who has a physical or mental impairment that substantially limits one or more major life activities, a person who has a history or record of such an impairment, or a person who is perceived by others as having such impairment.”²

Recognizing disabled populations in the ED District is critical for ensuring access to public accommodations and services including, but not limited to: handicap ramps, handicap door assistance, specialized healthcare services, ADA accessible sidewalks, handicap parking spaces and reliable public transportation.



Source: U.S. Census, ACS, 5-year estimates, 2012-2016 & 2008-2012



Source: U.S. Census, ACS, 5-year estimates, 2012-2016

¹ Citation: *Mapping New England*, Amy Higgins, Federal Reserve Bank of Boston, 2016.

² Citation: *A Guide to Disability Rights Law* U.S. Department of Justice, Civil Rights Division, Disability Rights Section; July 2009.

EMPLOYMENT & WORKFORCE CHARACTERISTICS

UNEMPLOYMENT

The graph below illustrates how the ED District's trends in unemployment rates have correlated with regional and national economic events. Particularly on a regional-scale, these trends help to describe the impact of manufacturing and wood-product businesses closing and declining.

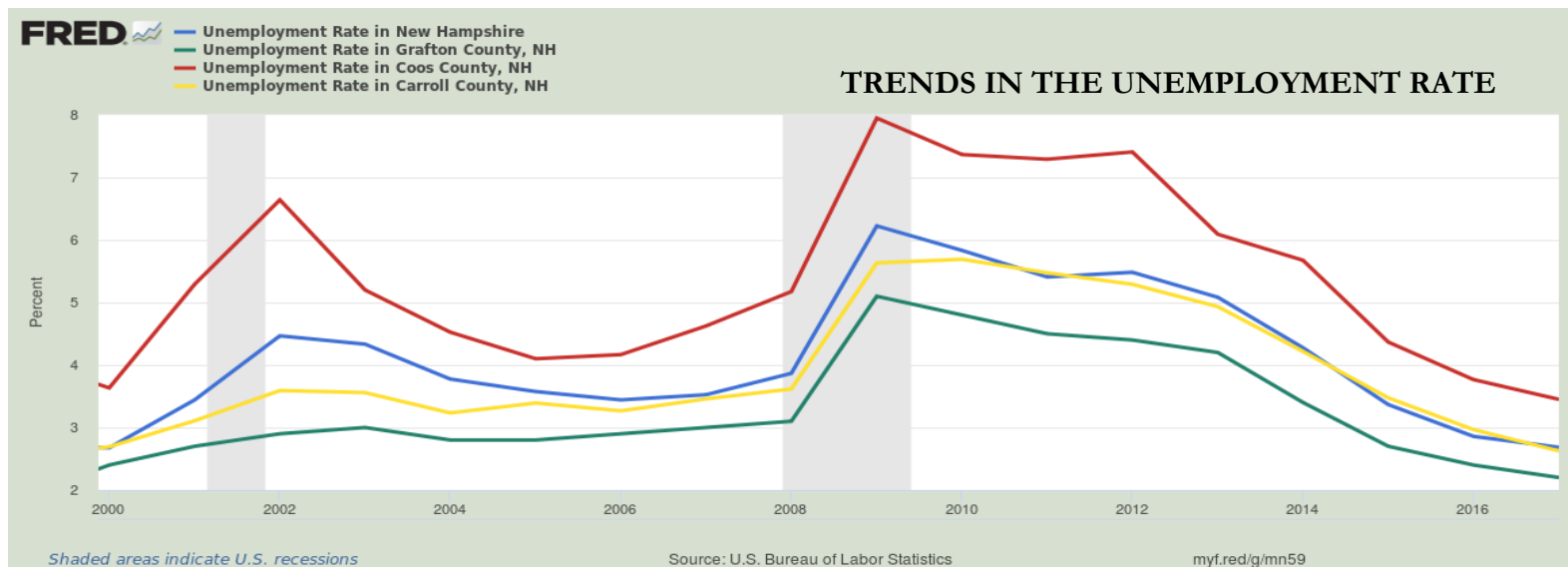
UNEMPLOYMENT RATE CHARACTERISTICS

Indicator	Time Period	State of New Hampshire	Coös County	Carroll County	Grafton County
Average Unemployment	2018	2.5%	3.2%	2.5%	2.1%
	2017	2.7%	3.5%	2.7%	2.2%

Source: 2018 & 2017 NH Local Area Unemployment Statistics - Source: New Hampshire Employment Security, Economic & Labor Market Information Bureau, www.nhes.nh.gov/elmi



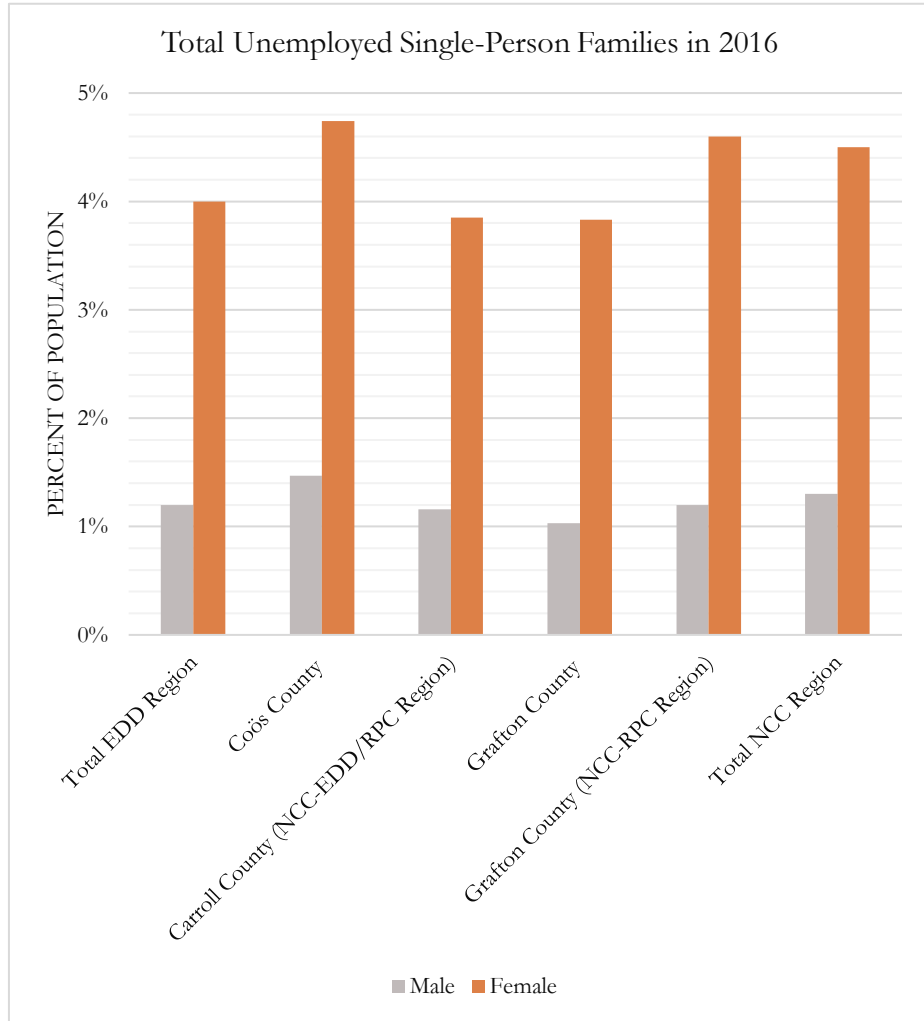
Image provided by Danica Melone



Source: Federal Reserve Bank of St. Louis, Economic Research, "Unemployment Rate of Coös County, Grafton County, Carroll County, and New Hampshire" Annual, 2000 through 2016.

UNEMPLOYMENT AMONG SINGLE-PARENT FAMILIES

While researching regional unemployment trends, one of the most significant findings illustrated is that not only is unemployment an issue among single-parent families, but unemployment is significantly higher for single-parent females than males. Among the geographic regions within the ED District, all indicated a significantly higher rate of unemployment for female single-parent families. This data highlights that the economic conditions for female-single person families is likely significantly more strained.



Source: U.S. Census, ACS, 5-year estimates, 2012-2016

Total Unemployed **Female** Single-Parent Families in New Hampshire – 3.65%

Total Unemployed **Male** Single-Parent Families in New Hampshire – 1.12%

BARRIERS FOR SINGLE-PARENTS

Barriers that unemployed single-parents face include, but are not limited to:

- * **Childcare** that:
 - Is affordable
 - Is located in proximity to work and/or home
 - Offers flexible hours of operation such as open later in the evenings or earlier in the mornings
 - Offers a wider range of age limitation for classes
- * Access to reliable **transportation**
- * **Flexible work schedules**
- * Alternative **support systems**
 - This may include, but is not limited to, friends or family willing and able to provide interim care

EDUCATIONAL ATTAINMENT OF THE WORKFORCE

The ED District experienced a 45% increase in persons attaining a graduate or professional degree. This shift in educational attainment level may be attributed to several factors; for instance, persons may seek higher educational attainment to receive a higher wage in order to meet their basic needs. It can also be attributed to a growth in job opportunities requiring higher attainment such as healthcare, teaching, and engineering. Other data supporting this shift in educational attainment levels is that the population receiving only a high school graduate degree or equivalency has decreased between 2016 and 2010.



Sources: WMSU's Mobile STEM Lab, whitemountainscience.org; other images provided by Danica Melone

PERCENT CHANGE OF EDUCATIONAL ATTAINMENT FOR PERSONS 25 AND OLDER

Indicator	Time Period	NH	EDD Region	Coös County	Carroll County (NCC Region)	Grafton County	Grafton County (NCC-RPC Region)	Total NCC RPC Region
Less than 9 th Grade	Change from '06-'10 - '12-'16	↓15%	↓22%	↓37%	↓35%	↓7%	↓2%	↓24%
9 th to 12 th Grade, no diploma	Change from '06-'10 - '12-'16	↓14%	↓20%	↓12%	↓64%	↓11%	↓18%	↓25%
High School or Equiv.	Change from '06-'10 - '12-'16	↓1%	↓5%	↓5%	↓7%	↓4%	↓9%	↓7%
Some College, no degree	Change from '06-'10 - '12-'16	↑5%	↑7%	↑12%	↑17%	↑3%	↑1%	↑8%
Associates Degree	Change from '06-'10 - '12-'16	↑7%	↑13%	↑14%	↑2%	↑17%	↑11%	↑9%
Bachelor's Degree	Change from '06-'10 - '12-'16	↑10%	↑6%	↑11%	↑6%	↑5%	0%	↑4%
Graduate or Prof. Degree	Change from '06-'10 - '12-'16	↑17%	↑45%	↑10%	↑40%	↑29%	↑56%	↑40%

Source: U.S. Census, ACS, 5-year estimates, 2012-2016 and 2006-2010

INDUSTRY

In the past half century, the ED District has reported a strong shift in its main industries and clusters in order to preserve and fortify the resiliency of the regional economy.

HIGHEST EMPLOYED INDUSTRIES IN COÖS, CARROLL, AND GRAFTON COUNTY

Industry	% Change 2012 to 2017	Earnings Per Worker in 2017
1. Healthcare and Social Services	↑4%	\$77,808
2. Government	↓2%	\$59,267
3. Retail Trade	↓5%	\$34,033
4. Accommodation and Food Service	↑8%	\$25,829
5. Educational Services	↑7%	\$72,513
6. Manufacturing	↓6%	\$70,043

Source: 3 New Hampshire Counties, Arnett Development Group, Emsi Q3 2018 Data Set, p. 16

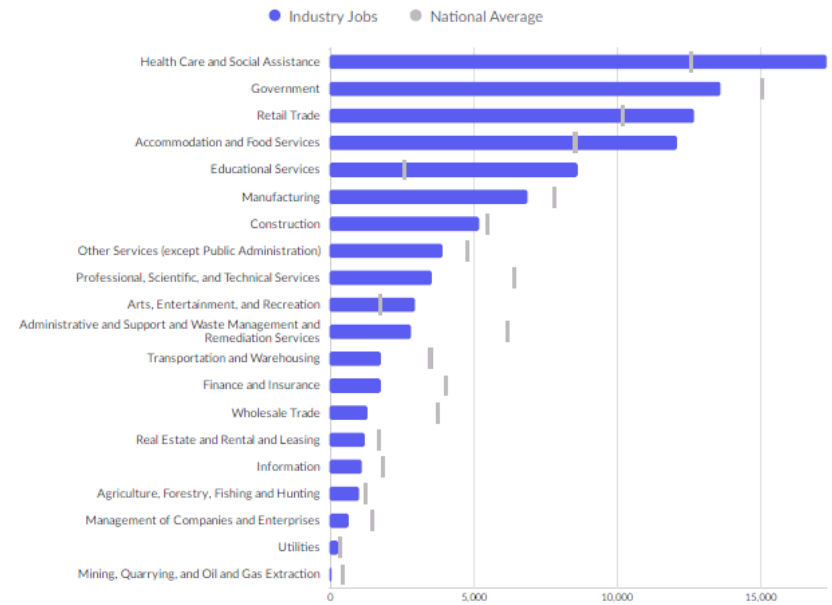
TOP REGIONAL CLUSTERS COÖS, CARROLL, AND GRAFTON COUNTY

Top 6 Identified Regional Clusters	Earnings of Cluster Industries
#1 local Health Services	Pharmacies, optical goods stores, dentist offices,
#2 Education & Knowledge Creation	Colleges / universities / professional schools, computer training,
#3 Electric Power Generation & transmission	Hydroelectric power generation, biomass electric generation
#4 Lighting & Electrical Equipment	Current-carrying wiring device manufacturing, and more
#5 Information Technology & Analytical	Transformer, capacitor, resistor, coil and other inductor manufacturing, and more
#6 Local Hospitality Establishments	Restaurants, gift / souvenir shops, sports and recreation, golf courses

Source: 3 New Hampshire Counties, Arnett Development Group, Emsi Q3 2018 Data Set, p. 16

Industry Characteristics

Largest Industries



Top Growing Industries



Source: 3 New Hampshire Counties, ESMI Economy Overview, Arnett Development Group, 2018 p 9 - 10

<i>TOP INDUSTRIES – JOB GROWTH</i>		<i>TOP INDUSTRIES – REGIONAL IMPACT</i>	
Industry	Rating	Industry	Rating
Local Healthcare	71	Local Healthcare	71
Education & Knowledge Creation	63	Education & Knowledge Creation	66
Electric Power Transmission & Generation	55	Local Government	38
Light & Electrical Equipment	52	Electric Power & Generation	37
IT & Analytical Instruments	51	Local Education & Training	35
Local Hospitality	46	Lighting & Electrical Equipment	33
Federal Government	46	IT & Analytical Equipment	30
Hospitality & Tourism	45	Metalworking Technology	28
Performing Arts	45	Hospitality & Tourism	26

CLUSTERS AND “RESCALING”

In effort to better understand the characteristics of the region’s industries, the cluster analysis a concept from the Harvard Business School Cluster Mapping project was applied.. A cluster is a regional concentration of related industries in a location and an industry cluster measures industries by comparing each other according to GDP, job growth, regional competitiveness, regional specialization, and earnings. Using the cluster analysis, industries are rated 1-100 through a process called rescaling; lowest are scored at 1 and industries performing highest are scored at 100. In this cluster analysis, industries scaled 35 or more are among the ED District’ industries with the highest potential. It is important to note that this is *not* a benchmark against other regions; it only compares the relative performance of the clusters to each other.

UNDERSTANDING MARKET LEAKAGES

Market leakages can be simply summarized as the amount of an industry being produced outside of the region rather than being produced locally, which would benefit regional resilience. For instance, a \$1 billion industry could have only 10% "leaked;" meaning 90% is produced in the region but the remaining 10% is from outside. This small percentage can cause a significant market loss and emphasizes that the industry value and leakage percent is variable. The ED District, as the Economic Trends summary indicated a significant "leakage" in Manufacturing (92%, \$2 Billion) and Finance & Insurance (65%, \$1.1Billion). The chart to the right illustrates those industry leakages.

Industry	Grafton %	Carrol %	Coös %	Orleans VT %	Region \$
Real Estate & Rental	41	70	47	46	
Financial & Insurance Services	35	33	15	23	\$1.1 B
Professional, Scientific,& Tech Services	52	41	13	22	
Manufacturing	8	8	5	12	\$2B
Retail Trade	33	34	28	27	

Source: 3 New Hampshire Counties, Arnett Development Group, Ernst Q3 2018 Data Set, p. 9 & 10

KEY FINDINGS FROM RESCALING OF CLUSTERS

KEY FINDINGS

- The two most competitive clusters are the same for either Job Growth or Regional Impact.
- There are nine industries that have above average Job Growth rates, but only two of these are also high in Regional Impact.
- Three primary requirements were identified for success (shown to the right.) These needs, unlike the past needs of the Region as it combated dying industries and excessive costs, are similar to what other areas face.

All the top industries share needs for their success. Three primary shared requirements are:



1.) Talented, smart people to be retained in, and recruited to the North Country



2.) Communications infrastructure



3.) Attractive and affordable homes in attractive and welcoming communities

A strategic response to the above requirements should:

- Project to both a local and regional markets a “brand” that incentivizes **people** to stay or come
- Demonstrates market demand for world-class **communications systems** to attract the needed private and public investment.
- Demonstrates a local supply of attractive and **compelling places to call home** and welcoming, amenity-rich hometowns

WAGES

Data gathered on average weekly wages in 2016 by household type between the state of New Hampshire and the region illustrated that households in the ED District receive an average of \$221.25 less weekly. Using data from the New Hampshire Economic and Labor Market Information Bureau, the average wage is broken down by labor market areas (LMAs).



Source: U.S. Census, ACS, 5-year estimates, 2012-2016

A Breakdown of the Wages for the Highest Employed Industries in the ED District Labor Market Areas				
	Entry-Level Wage	Average Wage	Experienced Wage	% of Population Employed in Industry
NORTHERN NH				
Average Wages of Top 4 Industries:	\$10.15	\$16.51	\$19.70	43.4%
Average Wages of All Industries:	\$10.51	\$20.71	\$25.82	100%
CONWAY-WOLFBORO				
Average Wages of Top 4 Industries:	\$11.43	\$19.73	\$23.88	52.6%
Average Wages of All Industries:	\$10.05	\$19.50	\$24.22	100%
LEBANON-HANOVER				
Average Wages of Top 4 Industries:	\$15.64	\$31.38	\$39.25	46.3%
Average Wages of All Industries:	\$12.76	\$29.96	\$38.55	100%
PLYMOUTH				
Average Wages of Top 4 Industries:	\$10.20	\$10.20	\$17.39	48.5%
Average Wages of All Industries:	\$10.60	\$20.85	\$25.97	100%

Source: *New Hampshire Occupational Employment & Wages – 2018*; Northern NH Area, Conway-Wolfboro Area, Lebanon-Hanover Area, Plymouth Area; October 2018

INCOME

In 2016, all of the ED District, except for Coös County, surpassed the median annual income of the state of New Hampshire. Among the three counties in the ED District, understanding the income variability is key to recognizing how clusters of industries in the southern-portion of the ED District drive median income higher; not just within the respective county the industry exists in, but also for the whole ED District.

INCOME VARIABILITY BY COUNTY

Compared to the North Country, including bordering areas of Vermont and Maine, Grafton County differs significantly by “having substantial income from non-resource, non-amenity employers such as the medical center, Dartmouth College, and some diverse industries.”

Source: *Challenge and Hope in the North Country*; Lawrence C. Hamilton, Linda M Fogg, Curt Grimm; Carsey School of Public Policy, UNH, December 5, 2017



Image provided by Danica Melone

TRENDS IN INCOME

Indicator	Time Period	State of New Hampshire	Total EDD Region	Coös County	Carroll County (NCC-EDD/RPC Region)	Grafton County	Grafton County (NCC-RPC Region)	Total NCC RPC Region
Median Household Income	2012 – 2016	\$66,087	\$55,303	\$45,682	\$58,523	\$56,597	\$53,715	\$53,715
	2006 – 2010	\$60,816	\$49,872	\$45,694	\$52,548	\$51,786	\$49,250	\$47,633
	Change	↑ 9%	↑ 11%	0%	↑ 11%	↑ 9%	↑ 9%	↑ 13%
Median Family Income	2012 – 2016	\$78,066	\$64,375	\$58,750	\$64,375	\$68,125	\$63,869	\$63,869
	2006 – 2010	\$70,833	\$59,144	\$54,887.50	\$56,250	\$61,838	\$55,417	\$55,865
	Change	↑ 10%	↑ 9%	↑ 7%	↑ 14.5%	↑ 10%	↑ 15%	↑ 14%
Average Per Capita Income	2010 – 2016	\$35,212	\$31,684	\$26,354	\$35,941	\$34,014	\$32,043	\$30,163
	2006 – 2010	\$30,471	\$26,628	\$24,617	\$28,509	\$27,425	\$25,814	\$25,703
	Change	↑ 16%	↑ 19%	↑ 7%	↑ 26%	↑ 24%	↑ 24%	↑ 17%

Source: U.S. Census, ACS, 5-year estimates, 2012-2016 & 2006-2010

REGIONAL HEALTH INDICATORS

Within the ED District, many people are challenged with access to medical care, health insurance, and lack the opportunity to improve the current state of their health. *The North Country Healthcare Community Health Needs Assessment* identified that the most critical health concerns for persons living in the North Country included “drug abuse, lack of dental insurance, cost of prescription drugs, lack of physical exercise, cost of healthy foods, [and] alcohol abuse.”³ Additionally, within the *North Country Healthcare Community Health Needs* report, the geographic region is defined as including all of Coös County and Grafton County, “as well as communities in northeastern Vermont and western Maine.”³

MENTAL HEALTH AND SUBSTANCE ABUSE

Historically, resources for substance abuse have been scarce in the region, but there has been a growing trend in regional and state initiatives focused on strengthening workforce resiliency. One such initiative, Recovery Friendly Workplaces, was piloted by Governor John Sununu in early 2018 to assist workplaces in the state with employees who are struggling with substance abuse and recovery. The mission of providing a recovery friendly workplace is to support and equip business owners with the resources needed “to foster a supportive environment that encourages success of their employees in recovery.”⁴ environment that encourages the success of their employees in recovery.”



A 2017 study illustrated a significant finding that, “the frequency of drug abuse among Coös County youth is higher than national levels, or than rural youth in general.”

Sources: *Challenge and Hope in the North Country*, Carsey School of Public Policy, UNH. Hamilton Lawrence; Fogg, Linda M.; and Grimm, Curt; Issue Brief #130, Fall 2017;

Health Indicators		
	North Country (Coös County and northern Grafton County)	New Hampshire
Diabetes Prevalence	13%	9%
Overweight Prevalence	29%	35%
Obesity Prevalence	34%	27%
Asthma Prevalence	16%	11%
Hypertension Prevalence	37%	31%
Heart Attack Prevalence	7%	4%
High Cholesterol Prevalence	44%	39%

Source: *North Country Public Health Region Community Healthy Improvement Plan*, North Country Health Consortium, 2015-2017

<p>IN RURAL AREAS OF NEW HAMPSHIRE...</p>					
	<p>Adults under age 65 are 17% more likely to be disabled</p>	<p>The average family incomes are 20% lower</p>	<p>Within the entire region, “drug abuse and overdoses are formidable and growing problems”</p>	<p>Residents are older, poorer, and are more likely to be uninsured or on Medicaid</p>	<p>Nearly a quarter if all persons in the ED District have forgone a routine dentist visit in the past year.</p>

Sources: *New Hampshire Rural Health Issue Brief*, 2014 and *North Country Healthcare 2016 Community Health Needs Assessment: Implementation Strategy*; April 1, 2016; and *Challenge and Hope in the North Country*, Carsey School of Public Policy, UNH. Hamilton Lawrence; Fogg, Linda M.; and Grimm, Curt; Issue Brief #130, Fall 2017;

Within the 2016 Community Health Needs Assessment, the highest priority health concern identified by regional communities was substance misuse, including drugs, opioids, heroin, and more.

Sources: *Challenge and Hope in the North Country*, Carsey School of Public Policy, UNH. Hamilton Lawrence; Fogg, Linda M.; and Grimm, Curt; Issue Brief #130, Fall 2017;

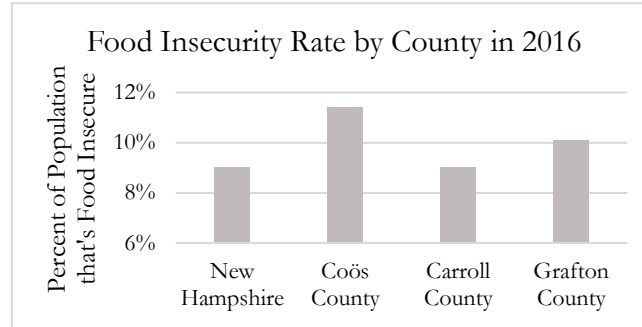
³ Citation: *North Country Healthcare 2016 Community Health Needs Assessment: Implementation Strategy*; April 1, 2016.

FOOD INSECURITY

Understanding and acknowledging food insecurity has been a growing trend for municipal officials over the past several decades. The conditions for accessing food in the ED District can be significantly challenging. Rural areas are susceptible to an increased lack of access to full-service grocery stores and “in areas of Coös County, the western portion of the state north of Hanover, and areas west of Manchester, there are no food establishments at all.”⁴ Additionally, past research on food insecurity characteristics in the state illustrated “a striking pattern” where there was “a high prevalence of illness in the northern portion of the state, the same area with the least access to full-service food outlets.”⁵

CHILD FOOD INSECURITY

The Carsey Institute recently published a study that reported food insecurity among youth (and adults) was the highest in Coös County; Carroll County had the third-highest rate of child food insecurity and Grafton County had the fifth.⁵ Food insecurity, especially among children, is more significant in “some areas of New Hampshire as a result of mill closings and the decline in manufacturing jobs.”⁶



Source: *Map the Meal Gap 2018: Overall Food Insecurity in New Hampshire by County in 2016*, 2018

HOW DO NEW HAMPSHIRITES DEAL WITH FOOD INSECURITY?

“Those accessing food assistance programs in New Hampshire:

- 60% access pantries on a regular basis;
- 71% are underemployed, making less than \$20,000 annually;
- 80% purchase ‘inexpensive/ unhealthy’ foods; and,
- 37% sold or pawned personal property to buy food.”

Source: *Hunger in America: 2014 Hunger Report*, The New Hampshire Foodbank, 2014.

Definitions

- “Food insecurity” is defined by the U.S. Department of Agriculture as not knowing where the next meal is coming from.
- “Underemployment” is defined as being the condition in which people in a labor force are employed at less than full-time or regular jobs or at jobs inadequate with respect to their training or economic needs.

Source: *In NH, Food Insecurity Persists*, NH Business Review; McCord, Michael, January 18, 2018 and Merriam-Webster, Definition of “Underemployment, Oct 2018.

KEY QUOTES

- Policy Analyst from New Hampshire Fiscal Policy Institute, Phil Sletten explained that many people living in the region **“have more than one job, and food is competing with rising [cost of] housing, childcare, and medical costs,”** and further added that **“the working poor who work in many of the low-wage jobs created during the recovery [from the 2008 recession] are among the larger number left behind.”**
- The past Energy, Elder, and Outreach Services Director of Tri-County Community Action Program, Andrea Brochu explained that in the northern region of the state **“households struggle with lack of transportation to food, few grocery stores, and a number of small stores or marts that do not focus primarily on the sale of food,”** adding that **“food insecurity is a symptom of a downward spiraling process”** where in most cases **“households [are] unable to financially meet the costs of basic needs [and] are unable to thrive and often remain in a constant state of crisis;”** Brochu defines this crisis as leading to **“drastic choices to be made among housing, heat, electricity, medication, or food.”**

Source: *In NH, Food Insecurity Persists*, NH Business Review; Michael McCord, January 18, 2018

⁴ Citation: *Access to Affordable Food in New Hampshire*, Sally K. Walker, 2018.

⁵ Citation: *The USDA Summer Food Service Program in Coös County, New Hampshire*. Jean Bessette, October 30, 2018.

INFRASTRUCTURE


TRANSPORTATION

The ED District consists of nearly half of all the land area in the state, emphasizing the rural character of the region and the necessity of access to transportation. The rural nature of the region’s transportation infrastructure exacerbates negative impacts, making repairs and maintenance more costly.




Image provided by Danica Melone


THE ED District...



Consists of nearly **half of all land** area in the state



Is home to just **13.5%** of the total population in the state



76% commute to work alone via a car, truck, or van

Source: U.S. Census, ACS, 5-year estimates, 2012-2016

A LOOK AT REGIONAL INFRASTRUCTURE

TRANSPORTATION LINKAGES

The existing transportation linkages in the region serve as a critical lifeline of the ED District economy. These linkages include networks of road, railways, and airports which allow for exporting of regionally-produced products while also being a key pillar of support to the tourism industry.

KEY HIGHWAY SYSTEMS

The ED District is home to five major highways which traverse the region. US 2 and US 302 run east to west; US 3 and NH 16 run north to south; and Interstate 93 runs north to south through the heart of the planning region.

TRANSPORTATION CHALLENGES

Transportation in the ED District is significantly challenged by severe weather events, mountain passes, and major transportation routes which pass directly through many village centers. However, what our transportation systems lack in efficiency is countered by their unparalleled scenic and aesthetic quality.

A GLANCE AT THE SCENIC BYWAY SYSTEM

Currently there are five state-designated scenic byways (Moose Path Trail, Presidential Range Trail, Woodlands Heritage Trail, River Heritage Trail and the Mountain Road in Weeks State Park) and two federally-designated byways (White Mountains Trail and Kancamagus Highway) in the North Country region. Additional state-designated byways (Lakes Region Tour and the Enfield Shaker Village Scenic Byway) traverse towns further south in Grafton County.

TRANSPORTATION TYPE

Indicator	Time Period	State of New Hampshire	Total EDD Region	Coös County	Carroll County (NCC-EDD/RPC Region)	Grafton County	Grafton County (NCC-RPC Region)	Total NCC RPC Region
Drove Alone (Car, Truck, or Van)	Change in 2012 – 2016 from 2006 – 2010	↓ 0.5%	0%	0%	↓ 3%	0%	↑ 1%	↓ 0.5%
Carpooled (Car, Truck, or Van)	Change in 2012 – 2016 from 2006 – 2010	↓ 0.5%	↓ 1%	0%	↑ 1.5%	↓ 1.5%	↓ 4%	↓ 1.5%
Walked	Change in 2012 – 2016 from 2006 – 2010	0%	↑ 0.5%	0%	↑ 0.07%	↑ 0.5%	0%	0%
Public Transportation (excluding taxicabs)	Change in 2012 – 2016 from 2006 – 2010	↓ 0.5%	↑ 0.5%	↓ 0.5%	↑ 1.5%	↑ 1%	↑ 2.5%	↑ 1%
Taxicab, Motorcycle, Bicycle, or Other Means	Change in 2012 – 2016 from 2006 – 2010	↑ 0%	↓ 0.5%	↓ 1%	↓ 1%	0%	↓ 0.5%	↓ 1%
Worked at home	Change in 2012 – 2016 from 2006 – 2010	↑ 1%	↑ 1%	↑ 2%	↑ 2%	↑ 0.5%	↑ 0.85%	↑ 1%

ADDITIONAL FINDINGS:

Data collected from the census **does not isolate persons who bike to work** and instead clusters it with other modes of transportation so we are unable to identify how many persons are also biking to work. Looking at persons who are biking and walking to work is helpful for municipalities to identify if their transportation infrastructure is adequate in terms of safety and convenience for those choosing to walk and bike.



Image provided by Danica Melone

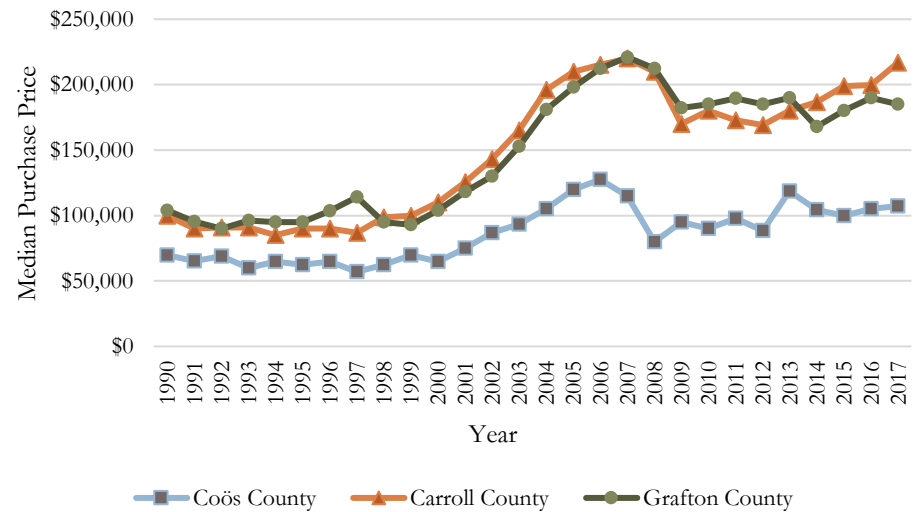
CHARACTERISTICS OF THE HOUSING MARKET

Over the years, the median purchase price of homes in the ED District have increased with Carroll County reporting the highest median purchase price in 2017 while Coös County reported a median purchase price in 2017 of just over a \$100,000. The median purchase price in Coös County has likely stayed relatively low (in comparison to the higher median purchase prices throughout the ED District) due to the increased rural character in Coös County which exacerbates conditions such as a lack of access to health care and other services, longer travel times, and increased transportation costs, to name a few.

In a 2017 survey, persons in the North Country expressed “higher levels of **concern about affordable housing**, because Grafton’s amenity development and relative affluence has tended to raise prices.”

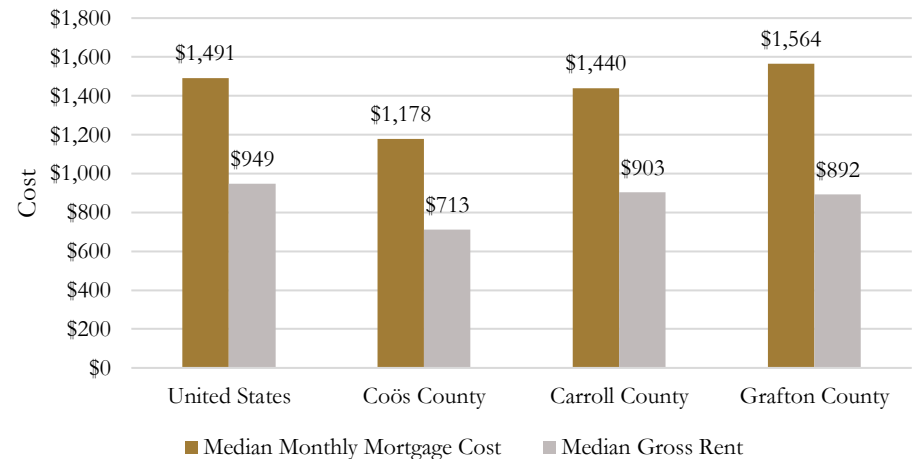
Source: *Challenge and Hope in the North Country*, Carsey School of Public Policy, UNH; Hamilton, Lawrence; Fogg, Linda; Grimm, Curt; Brief #130, Fall 2017

Median Purchase Price of All Homes by County



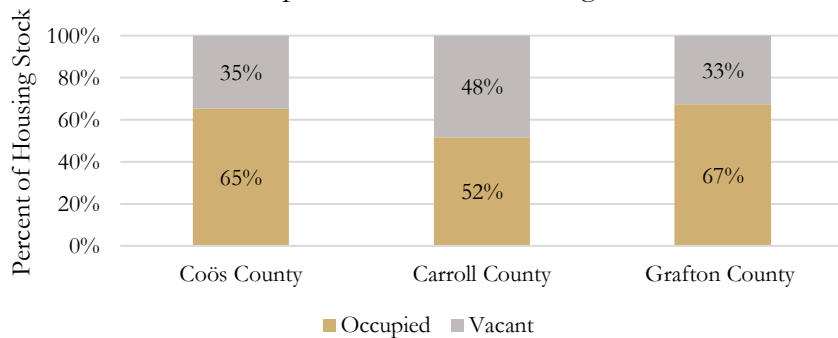
Source: New Hampshire Housing Authority National Low Income Housing Coalition, Coös County, Grafton County, Carroll County, 2018

Median Monthly Mortgage Cost and Gross Rent in 2016



Source: Headwaters Data. *A Profile of Demographics*, Carroll County, Coos County, Grafton County, 2018, p 17

Percent of Occupied and Vacant Housing Stock in 2016



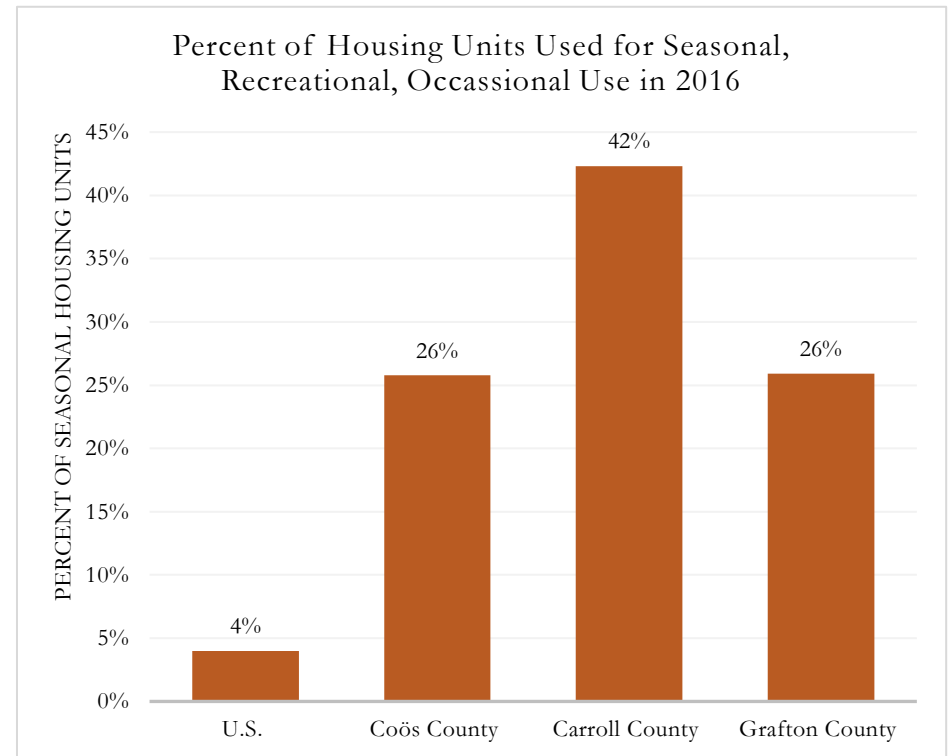
Looking at the chart to the right, the average renter makes \$15.13 per hour in the State of New Hampshire. At that wage, the renter could afford an apartment at \$787 per month. However, when comparing wages to cost of rentals in the ED District, there are clear disparities, particularly for those making minimum wage. For instance, in Coös County the average renter wage was reported as \$9.45 per hour in 2018, which would allow the renter to afford rent at \$491 per month. However, the average gross rent in Coös County is \$713 per month. To further illustrate the disparity between wages and housing costs, the 2018 New Hampshire minimum wage makes affording the average rental, anywhere in the ED District, unobtainable. If a person is making \$7.25 per hour, the maximum they could afford on rented housing would be \$377 – significantly less than the average gross rent across the ED District.

	Estimated Average Renter Wage	Monthly Income with Average Renter Wage	Rent affordable with full-time job paying min wage (\$7.25/hour)	Monthly Rent affordable with full-time job paying Average renter wage	Average Gross Rent in Area
State of New Hampshire	\$15.13	\$2,421	\$377	\$787	\$949
Carroll County	\$11.52	\$1,843	\$377	\$599	\$903
Coös County	\$9.45	\$1,512	\$377	\$491	\$713
Grafton County	\$17.80	\$2,848	\$377	\$925	\$892

Source: National Low Income Housing Coalition, 2018 & Headwaters Data, *A Profile of Demographics*, Carroll County, Coös County, Grafton County; 2018, p. 18

OCCUPANCY OF ANNUAL AND SEASONAL DWELLINGS

The ED District has unique occupancy characteristics compared to the rest of the state. The desirability to live and/or spend time in the ED District is driven by the quality of life, most often compelled by the presence of abundant natural resources.



Source: Headwaters Data. *A Profile of Demographics*, Carroll County, Coos County, Grafton County, 2018, p 17

THE RISE OF SHORT TERM RENTALS

Short term rentals (STRs) are not exclusively used by tourists, but are often used in substitute for hotels offering a more personalized experience of the community they are renting in. STRs have posed growing concerns for municipalities, particularly in the region where tourism dollars have a significant impact on the local economy. These concerns range from noise complaints, increased traffic and parking congestion, change of neighborhood character, increased strain on municipal resources such as emergency services; loss of affordable housing stock that would typically be used by workforce thereby limiting the potential growth of their community, and more. Additionally, many municipalities are unaware of how many STRs exist within their community.

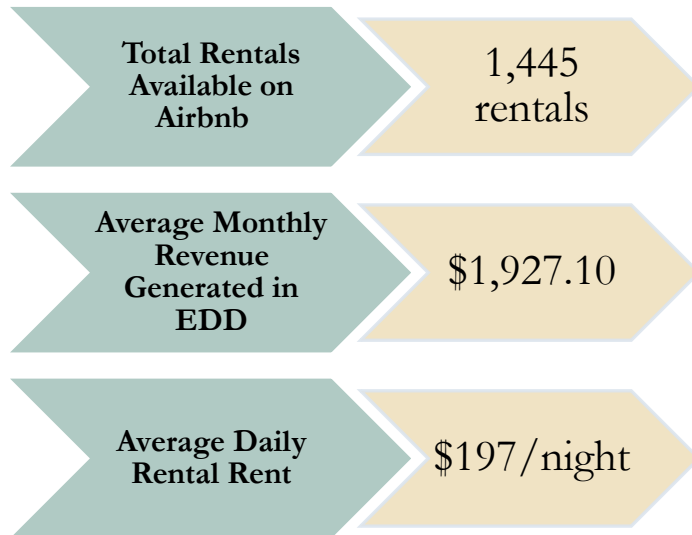
Nevertheless, the data collected on the presence of Airbnbs in the ED District illustrates a high volume of available rentals- both renting of rooms and renting of the whole dwelling. Grafton County has a significantly denser presence of Airbnb STRs which is likely related to proximity to iconic tourism activities areas such as ski areas, mountains, downtowns, and Dartmouth College. Additionally, the data collected illustrated that STR renters have the potential to make a large amount of additional income. Renters receiving an average of an additional \$1,927.10 each month is more than what the average renter's monthly income in Coös County is (\$1,512) and is more than the average weekly wage for families in 2016 (\$1,317.)

AN IMPORTANT NOTE ON

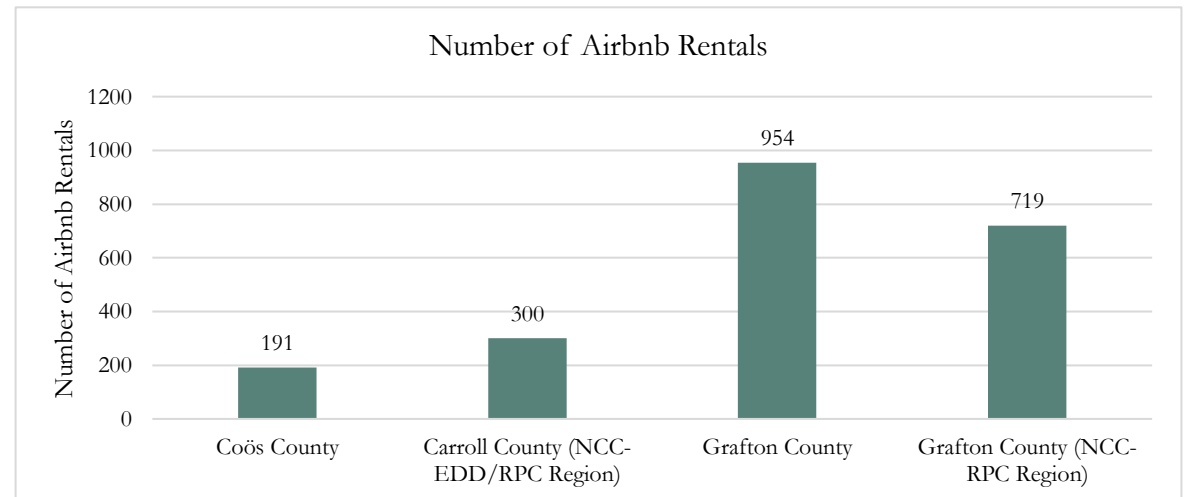
SHORT TERM RENTAL PLATFORMS (TO NAME A FEW)



Source: *Airbnb logo*, freebiesupply.com; *Homeaway*, Expdiagroup.com; weneedavacation.com; yongervacationrentals.com; *Vacasa of Boise*, boisechamber.org



Source: AIRDNA, Rental Profile for every EDD municipality and unincorporated location, Accessed Oct 2018.



Source: AIRDNA, Rental Profile for every EDD municipality and unincorporated location, Accessed Oct 2018.

BROADBAND ACCESS

The ED District, like many other rural areas in the country, lacks access to fast, reliable broadband services. Though many rural areas may offer broadband service, it's often low-speed access. Compared to the broadband availability of other Regional Planning Commissions, North Country Council's region clearly lacks coverage, specifically at higher download speeds.

The table to the right indicates that there is a severe lack of access to broadband services in the region and suggests that it's likely negatively impacting the growth of new and the resiliency of current businesses, and educational attainment - specifically for young adults wishing to take online classes.

Broadband Availability in New Hampshire's Regional Planning Commission Areas by Speed

Available to % of population	6+ Mbps down	25+ Mbps down	100+ Mbps down
State as a whole	98%	87%	72%
Central New Hampshire Regional Planning Commission	98%	90%	86%
Lakes Region Planning Commission	98%	41%	6%
Nashua Regional Planning Commission	99%	99%	98%
North Country Council	91%	86%	6%
Rockingham Planning Commission	99%	99%	99%
Southern New Hampshire Planning Commission	100%	98%	97%
Southwest Region Planning Commission	95%	87%	43%
Strafford Regional Planning Commission	98%	70%	53%
Upper Valley Lake Sunapee Regional Planning Commission	94%	86%	85%

Source: *Broadband: The Connection to New Hampshire's Future*, 2015

Survey Says...

In a 2014 Omnibus Survey led by the Pew Research Center for Internet and American Life, there was significant feedback from respondents age 18-29 that internet access **was important to their daily life or was essential for their job**. For the ED District, which has been experiencing a growing elderly population with a decreasing population under the age of 25, providing quality broadband services in the region may be integral to retaining the population.

Source: *Broadband: The Connection to New Hampshire's Future*, 2015



Carroll County Broadband (CCBroadband) initiative to assist the communities in Carroll County as they seek strategies to afford them better access to high-speed broadband. Pre-development technical assistance is critical to the early stages of this project as the Broadband initiative committee meets and plans for, what will ultimately be, affordable high-speed connectivity for residents and businesses in Carroll County.

THE CRITICAL BROADBAND NEEDS FOR BUSINESS RESILIENCY AND DEVELOPMENT

Attracting new businesses, industry, entrepreneurs, and residents has been a regional conversation for the past several decades. However, broadband availability continues to be a major barrier to economic development and resiliency. Businesses typically base their broadband needs on how many employees they have connected to the internet server and the type of usage the business would need on a daily basis. For instance, a business with several employees using the internet solely for email and internet searches would not require the same download and upload speeds compared to other businesses such as healthcare, which requires hundreds of employees to be connected, be able to communicate with regional healthcare partners, and process large medical files. **Based on the 2015 New Hampshire Broadband Report, the current state broadband availability in the ED District does not foster an environment for higher-paying businesses, industry, and entrepreneurs to put roots down in the area.**

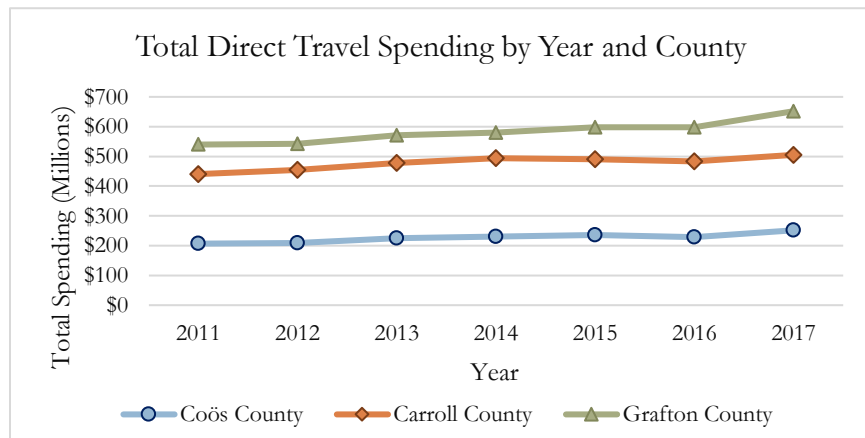
OUTDOOR RECREATION & NATURAL RESOURCES

KEY NATURAL RESOURCES

The dramatic decline of the wood-products industry and large-scale manufacturing shifted much of the region’s focus towards capitalizing on what already existed in their communities, however it did not eliminate the fact that forestry continues to be practiced by private landowners through large tracts of EDD land area. Mountains, rivers, valleys, and more became recognized as profitable natural resources if properly planned to be used for outdoor recreation. The region diversified their industries to not only offer world-class ski areas and hiking, but shifted to highlighting as many forms of outdoor recreation as possible.



Image provided by Danica Melone



Source: *New Hampshire Travel Impacts*; Coos County, Carroll County, Grafton County; DeanRunyan.com

Fishing and hunting has continued to become a major attraction in the region with areas like Pittsburg offering “trophy stretch” for anglers starting below the dam of First Connecticut Lake. Outdoor recreation businesses have built sustainability through improving on and expanding the breadth of their experiences. Activities such as zip-lining have been added to many ski mountains to encourage expanded seasons and resiliency in weather dependent business tourism dollars. The ATV and snowmobile use and access have also increased in the past decade. However, key natural resources such as the presence of iconic fall foliage, mountains, boreal forest, and wildlife such as moose, have become some of the unique attributes driving the region’s outdoor recreation. Lastly, agriculture has continued to be a pillar of local food production and recreation.

CHARACTERISTICS OF THE OUTDOOR RECREATION ECONOMY IN NEW HAMPSHIRE

<p>69% of New Hampshire residents participate in outdoor recreation each year</p>	<p>\$8.7 Billion In consumer spending annually</p>	<p>35,000 More Jobs Than the state’s second highest employer, the tech sector (44,000)</p>	<p>\$2.6 Billion In wages and salaries</p>
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Source: *New Hampshire*, Outdoor Industry Association; Accessed Nov. 27, 2018.

LAND USE

Significant portions of Coös, Carroll and Grafton County are put under current use taxation, or RSA 79-a. The tax incentive essentially encourages landowners to preserve the natural resources and/or open space of their land in return for a property tax reduction.

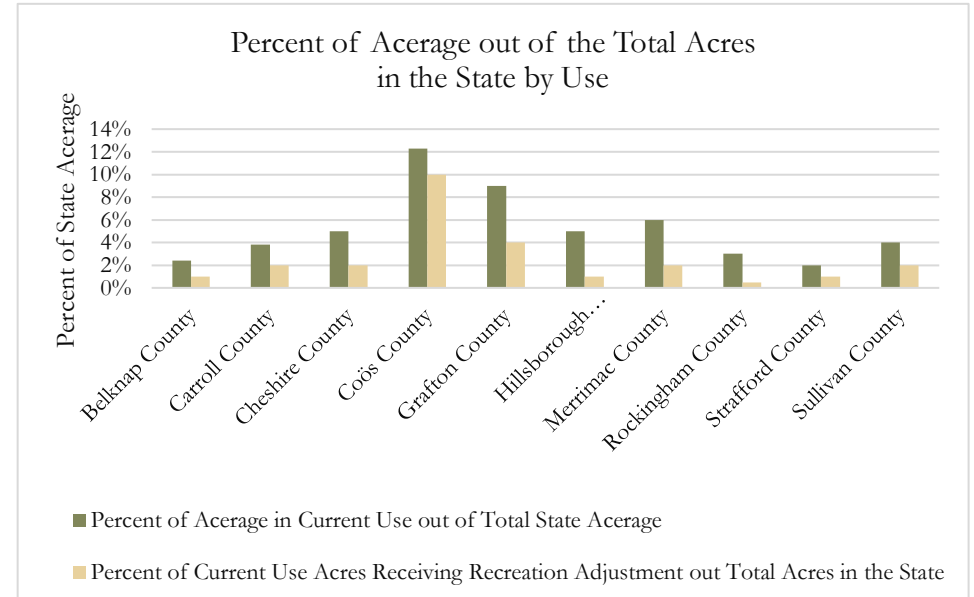
RSA 79-A AND THE RECREATION ADJUSTMENT

- “The Current Use Taxation Program, under **RSA 79-A**, was established in 1972 to:

...encourage the preservation of open space, thus providing a healthful and attractive outdoor environment for work and recreation, maintaining the character of the state’s landscape, and conserving the land, water, forest, agricultural and wildlife resources.

Under this program, parcels of land (10 acre minimum) are taxed based on their current use value as open space rather than on their potential value for development purposes.”

- “**Recreation adjustment** lowers a landowner’s tax burden by an additional 20 percent if the land is kept open to the public for traditional forms of recreation. The six traditional forms of recreation are skiing, snowshoeing, fishing, hunting, hiking, and nature observation. Access must be available year-round unless these activities are detrimental to crops on agricultural lands or active forestry operations.”



Source: *New Hampshire Outdoors, Statewide Comprehensive Outdoor Recreation Plan*, New Hampshire Office of Energy and Planning, 2007

RSA 212:34 & RSA 508:14 - DUTY OF CARE AND LANDOWNER LIABILITY LIMITED

- RSA 212:34 in summary states that landowners are not responsible for the maintenance of their premises in order for it to be used for recreation.
- RSA 508:14 in summary protects landowners from liability of personal injury of property damages.

RESILIENCY

The North Country Council envisions a future for the region where sustainable, resilient, and affordable infrastructure provide vital services that support a well-prepared economy. Municipalities currently work to reduce threats and vulnerabilities in their communities through activities such as: zoning enforcement, implantation of new standards, changes to regulations, hazard mitigation plans, local emergency operation plans, and citizen volunteer emergency support organizations. These activities are necessary and prudent, but they are not enough to make a region resilient.

Regional resilience also requires that the “built environment”, or infrastructure, maintains acceptable levels of functionality during and after events. Unfortunately, there is no one-size fits all solution to hardening infrastructure or creating more resilient systems. As a result, businesses along with communities must look at the full menu of options and decide the most effective measures for strengthening their systems and responding to or avoiding situations.

DEFINING RESILIENCY

After Super Storm Sandy hit the Northeast in 2012, the Urban Land Institute defined resiliency as the ability not only to **bounce back** but also to **bounce forward** – to recover and at the same time to enhance the capacities of the community or organization to better withstand future stressors.

Source: *Ten Principles for Building Resilience*, Urban Land Institute, 2018

CURRENT REGIONAL PERSPECTIVES OF RESILIENCY



Residents express optimism about present and future quality of life in their communities, and the prospects for young adults deciding to return home.



Views on economic development vary from county to county. Less developed places see tourism and recreation, light manufacturing, independent small businesses, and forest-based industry as important to their future.



There is a strong sense of community: people help each other, trust their neighbors, and feel that they can work together to solve problems.



In Grafton County, which has a more diverse economy, perceptions of problems and economic solutions show a different pattern, but the sense of hope and well-being is similarly high.

Source: *Challenge and Hope in the North Country*, Carsey School of Public Policy, UNH; Hamilton, Lawrence; Fogg, Linda; Grimm, Curt; Brief #130, Fall 2017

THE KEY COMPONENTS OF BUILDING RESILIENCY

First, establishing economic resilience requires the anticipation of risk, the evaluation of how that risk can impact key economic assets, and the creation of a responsive capacity.



HOW DOES RESILIENCY STABILIZE THE REGIONAL ECONOMY?

Shock or disruptions to the economic base of a region can occur in three ways:

- Downturns or significant events in the national or international economy which **impact demand for locally produced goods and consumer spending;**
- Downturns in specific **industries that are a critical component of the region’s economic activity;** and/or
- **Other external shocks** (a natural or man-made disaster, exit of a major employer, the impacts of climate change, etc.).

HOW RISKS TO RESILIENCY ARE IDENTIFIED

These recognized risks were identified by looking at several different data sources, from past events to committee-based analysis. The following chart includes, but is not limited to, sources which indicate disruptive events that put economic resiliency at risk. It’s critical to recognize that there are other risks that may impact the regional economy. However; the duration, likelihood of occurrence, and frequency is taken into consideration.

NOAA Events Database	NH State Plan	Municipality Plans	Regional Business Survey
Thunder/Wind	Flood	Snow/Ice	Fire & Hazardous Materials
Snow & Ice	Snow & Ice	High Wind	Severe Winter Storm
Hail	Radon	Flood	Hurricane
Flood	Epidemic	Wildfire	Epidemic/Pandemic
High Winds	n/a	Extreme Temp	Flooding

UNDERSTANDING THE IMPACT OF RISK

The region is subject to a variety of disruptions or impacts that can impact its long-term economic stability and success. Maintaining resiliency against these effects and creating an economic culture that is sustainable is critical for future development. For the region, we recognize that sustainability is not just an important component for resilience, but a necessary step in making the area attractive to the next generation of workers, entrepreneurs, business owners and those who live here. Thus, we see these two as interrelated and interdependent.

It is also clear to us that the risks that are presented to the region and the approaches to mitigate and/or respond to those risks operate in several dimensions:

1) The severity of the risk/event,

2) The duration of the impact of the risk/event, and,

3) The timeframe to develop and implement mitigation approaches and responses

THE IMPACT OF CLIMATE AND MOTHER NATURE

Though there is anecdotal observation, there is also data and evidence that storm frequency and intensity are increasing in northern New England, and with them greater disruptions to the regional economy. While a long, soaking rain dropping 2 inches of precipitation can be easily handled by systems in place and the natural environment, receiving that same 2 inches of rain in under an hour can create flooding, road washouts, and power outages. Additionally, data indicates greater frequency of severe weather events such as ice storms (where temperatures more often float near freezing) which can cause significant damage by taking down trees and power lines. Repairing infrastructure from natural hazards is also very costly and the bill continues to grow as the frequency of these events increases.

Understanding climate science is critical for planning for disruptive weather events. The disruptive events may include, but are not limited to: severe drought, heavy precipitation, forest fires, and tornadoes. Without planning for these disruptions, municipalities are often suddenly cobbling together resources to repair. For instance, NH Department of Transportation recognizes that many roadways (especially in the ED District) cross, abut, or are within the floodplain of rivers which often causes rapid flooding around and on roadways leading to destruction of the road surface or culvert, and has even rendered roadways inoperable.

Based on research of changes to climate in northern New Hampshire, "the amount of precipitation falling on the wettest day of the year is also rising with overall increases" which are "equivalent to about half to one inch more rain on the wettest day of the year over the past five decades."⁷ Federal funds allocated towards Presidentially Declared Disasters and Emergency Declarations has been increasing since 1999 in the New England area and have been significantly high since 2005⁶

Impacts to Outdoor Recreation Economy



Spring

NHDES reported that the maple sugaring industry is threatened by disease and habitat loss due to warm winters and pro-longed more frequent droughts in summer.



Summer

Warmer temperatures are resulting in the "loss of cold water fishing [potentially resulting in] 50-100% eradication of rainbow, brook, and brown trout fishing, a \$150 million New Hampshire industry."



Fall

"Potential, large-scale die-off of sugar maples" and other key foliage "dulling and browning" resulting in negative impact to the nearly \$300 million tourists spend annually.



Winter

"Loss of 10-20% of ski season days, representing a loss of \$42 million to \$84 million in direct and indirect spending."

Sources: *Climate Change in Northern New Hampshire: Past, Present, and Future*; Wake, Burakowski, Wilkinson, et al; The Sustainability Institute, UNH, 2014. *Global Climate Change and Its Impact on New Hampshire*, New Hampshire Department of Environmental Services, 2008

Image Sources: *Can You Take Too Much Sap from A Tree?* NorthernWoodlands.org; *Rainbow trout jumping out water*, Adobe Stock, fotoloa.com; *Vector Black and White Maple Silhouett. Vector illustration. Eps8.* 123RF.com; *Collection of Free Snow Clipart (74)*, Clipart_Library.com

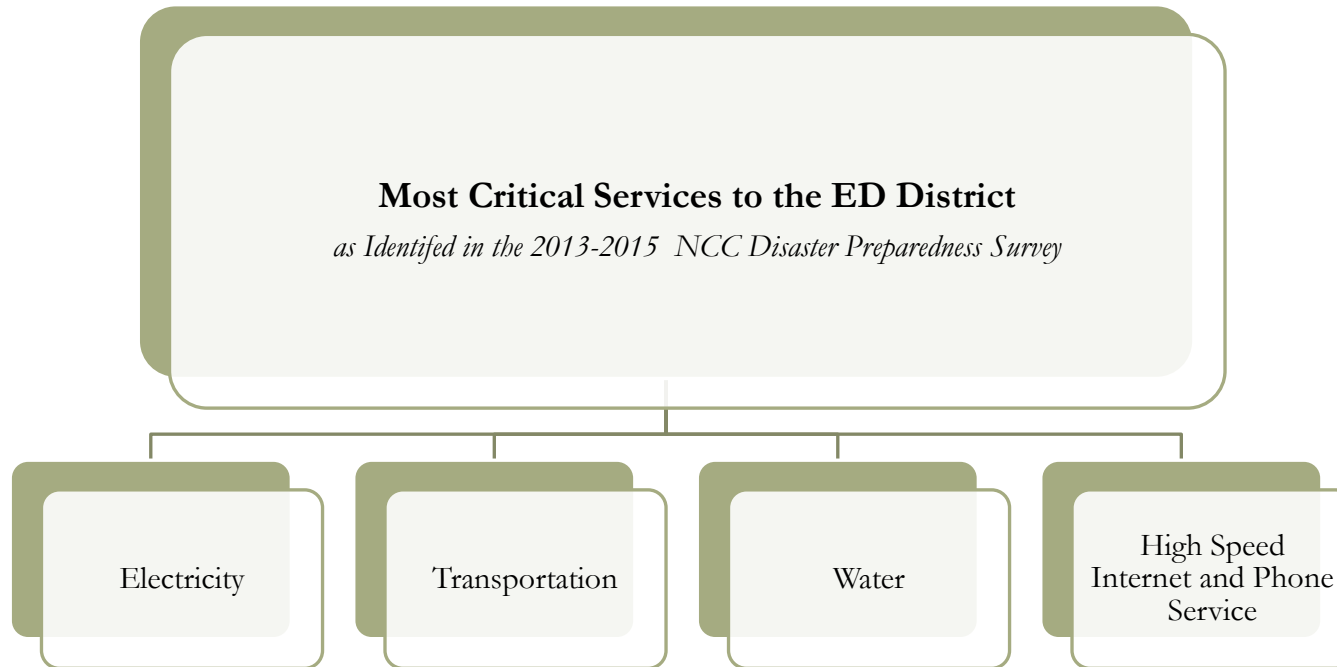
⁶ Source: *Climate Change in Northern New Hampshire: Past, Present, and Future*; Wake, Burakowski, Wilkinson, et al; The Sustainability Institute, UNH, 2014.

PLANNING RESILIENCY FOR THE REGION'S MOST CRITICAL SERVICES

North Country Council organized a survey in mid-2014 to gather regional input regarding the ED District's assets and weaknesses to help form a vision. The results of that survey identified four critical services that are crucial to maintaining and improving economic resiliency. It was also recognized that the reliability of these four services are vulnerable to disruptive events. These services are transportation infrastructure, electricity and other energy sources, water, and high speed internet service and phone service.

Disruptions to these services are considered 'immediate' concerns: resources that regional organizations see as necessary to sustain the health and growth of their business. The financial health of a community depends largely on the availability of jobs and a strong set of economic drivers; such as the built environment which is vital to attracting, retaining, and building economic opportunities and drivers. Water and power systems are used to create goods and services. Transportation is used to distribute raw materials and intermediate goods to producers and final goods to consumers. Communication networks transmit supply and demand signals across a largely spread out and rural region.

These four basic services were identified as critical functions for economic resiliency through the 2013-2015 NCC Disaster Preparedness Survey. We recognize that there are other critical needs within the region, such as increased rural character exacerbating the growth of technological advances and a heightened dependency on food from outside the region.



1. Transportation Infrastructure

Impacts to transportation infrastructure in the ED District is more significant due to the rural character, mountains, and more intense winters. Unfortunately, many of the region's infrastructure systems are reaching the expiration date of their service life or are currently operating in a degraded state. The American Society of Civil Engineers (ASCE) recently documented the national infrastructure needs via a Report Card which was issued to evaluate the condition and performance



infrastructure systems by assigning letter grades that are based on physical condition and needed investments for improvement. In 2017, the overall Grade for the nation was a D+ with New Hampshire receiving a C-. While this deteriorated state is a cause for significant concern, it is also an opportunity to develop and implement a new paradigm – regional resilience – when planning for and envisioning the future of the region.

CASE STUDY ON RESILIENT TRANSPORTATION

North Country Council recently finalized a comprehensive assessment of culverts in the Androscoggin, Ammonoosuc, and Baker River watersheds. These assessments:

- Provided data on the culvert's dimensions, type, and material
- Evaluated the condition of the culvert
- Identified negative impacts to the site such as bank erosion upstream

By providing this data, the State and municipalities can plan for replacements where needed and prepare for negative impacts such as road washout or flooding.

2. Electricity and other Energy Sources

Energy needs are impacted both by short-term events (storm damage, for example), but also long-term issues associated with the costs and delivery infrastructure for fuels such as propane and oil. Assuring that energy is available following natural disasters, and that a longer-term strategy is developed to reduce the region's dependence on the importation of fuel sources to the area is critical to the resilience of the ED District's economy. In concert with sustainability, expanding renewable energy sources, especially for backup power and protecting power distribution systems, will be key to the sustainability of the regional economy. The relative attractiveness of the area for new, next-generation workers, entrepreneurs, businesses, and residents is also tied to 'green technology', thus an approach that will improve energy self-sufficiency, which also enhances the regional environment, feeds also into economic growth beyond sustainability.



Source: Michelle Moren-Grey

3. Water

The North Country is, luckily, not an area that traditionally has a lack of access to water despite periods of drought over the last several decades. However, distribution systems for municipal water need to be maintained, and well and pump systems are dependent on consistent electricity delivery and are therefore at risk in the event of power failure. In order to improve resiliency of these water systems, current infrastructure and new development requires best management practices throughout its lifespan. With growing periods of drought and a clear, recognized need to constant a water source, the ED District may consider implement initiatives for protecting water sources such as Groundwater Protection, Wetlands, or Shoreland ordinances which help to regulate development on and in close proximity to key water resources.



Image provided by Danica Melone

4. High Speed Internet / Phone Service

One of the risks to the economic vitality of the region is the continuing development and implement of new technologies, especially related to communications. Once land lines dominated phone service but now cellular communication is the primary form of telecommunications. These issues are applicable to the current data and communications landscape, but the long-term resiliency issue associated with the creation of potential future technologies that cannot be currently envisioned, and the difficulty of building infrastructure to permit businesses and residents of rural areas to utilize these technologies must be addressed. Making high speed communication widely available will help draw next generation businesses, entrepreneurs, and workers to the area while providing a more desirable market for home and virtual businesses.

PLANNING FOR LONG-TERM IMPACTS TO THE ECONOMY

For example, if one considers the impact of changes to weather and the overall climate over time, the impact of a particular event may be large and immediate while the long-term effects can be more drastic. Long-term effects can take substantial resources to address in a systematic way. For instance, the average winter temperatures have increased significantly in the past decade compared to the thirty-year ‘normal’ average and in result during those past years of warmer winters, outdoor winter recreation areas have been negatively impacted by the lack of snow and warmer temperatures which creates icy conditions.

INNOVATION OPPORTUNITIES

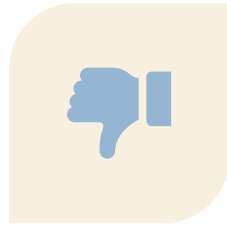
Innovation opportunities help to support long-term, economic resilience through the placement and diversity of new and current industries. As industries change, losses of jobs and weakened infrastructure often follow. With an emphasis on natural resources (biomass) research, new industries can be created. For example, while the paper and lumber industries have waned, the potential to utilize applications in renewable biomass could attract new industries, new workers, and new sources of economic development to the region.

SWOT ANALYSIS & COMMUNITY FEEDBACK



STRENGTHS

are a region's relative competitive advantages often **internal** in nature



WEAKNESSES

are a region's relative competitive disadvantages also often **internal** in nature



OPPORTUNITIES

are chances or occasions for regional improvement or progress often **external** in nature



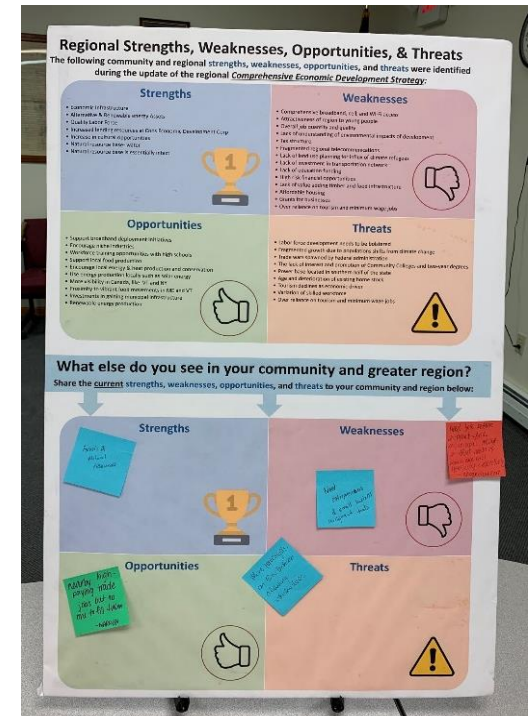
THREATS

are chances or occasions for negative impacts on the region or regional decline also often **external** in nature

WHAT IS A SWOT?

A SWOT analysis is a strategic planning tool used by many organizations to help determine their best path to success and to defend against set – backs or impacts. This SWOT effort- being part of a future-looking Comprehensive Economic Development Strategy – paid extra attention to future Opportunities and gaining awareness of future Threats. The ED District has often conducted internal assessments, which can become redundant and overly long is which mainly identify deficiencies. As an example, the 2013-2018 CEDS lists 80 items, of which the largest category are Weaknesses.

A strategy presumes that the entity is in a competitive situation, with others seeking the ends. It lists ways that the entity can “win” that competition. **The CEDS is the region's strategy to win – to preserve and develop core economic, cultural, environmental, and human attributes – that define an authentic reflection of the region's values and aspirations.** For the region, that competition is real and by developing a SWOT, strategy will guide the region out of conflict. The ED District's challenges now are no longer unique, such as paper industry contractions and high unemployment. Currently, the SWOT factors reflect those being experienced by the populated areas of the state, and elsewhere. These factors – both as Threats and as Opportunities, are identified based upon the market research, and are described herein.



A poster board from the 2019 CEDS Open House Series asking participants to comment on “what else” should be included in the SWOT analysis done in 2018

THE SWOT RESEARCH LOOKED AT:

1.) **Demographics**, including extensive workforce, skills education, and wage information

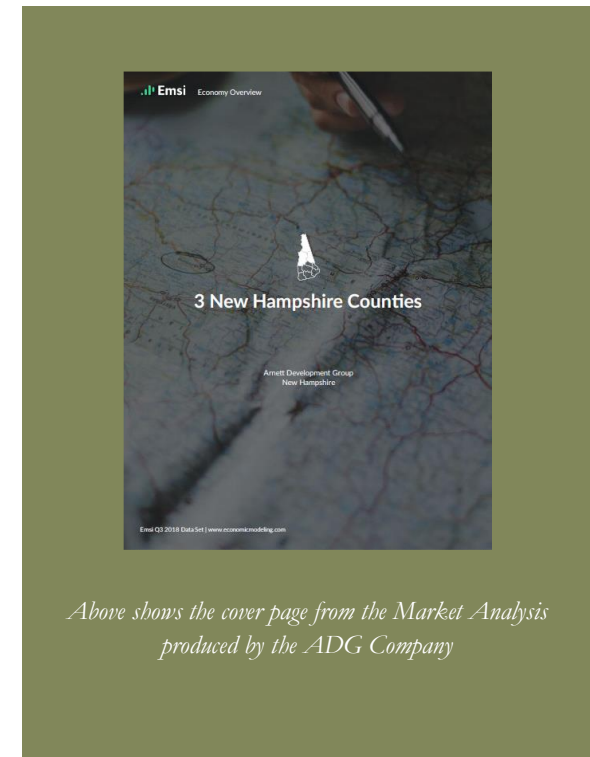
2.) Regional Economic Cluster comparisons, specifically which (3 digit-level) NAICS code industries were more competitive within the region from the perspective of the **Regional Economic Impact** and **Job Growth**

3.) The region's reliance on out-of-region goods and services (market "leakages") was analyzed and reported, and areas that had significant demand in dollars-total were met by a significant demand coming from out-of-region, and could be supplied by industries with any strategic history of potential in the ED District, as they offer the potential for local growth based upon existing demand

COMMUNITY SWOT INPUT

To prepare for the next economic period, the SWOT was conducted by the ADG Solutions, a Concord based business that is pledged to providing “smart planning and development solutions.” The research and analysis included reviewing and updating the 80 items on the 2013-2018 CEDS and working with the CEDS Committee and willing Regional Commissioners to indicate which of these factors had **decreased, stayed the same, or increased** in their impact or situation since the last compiled SWOT in 2012. This allows for the CEDS Committee to see where they could see the heightened Opportunities or Threats, without jettisoning any of the other, but still legitimate, factors. The three counties were then subject to an extensive market research analysis utilizing a national data source. While the three counties do not exactly line up with the ED District, the differences are insignificant. For comparison, the adjacent Vermont county of Orleans was also analyzed.

In 2020, ADG Solutions again assisted in the development of an updated SWOT as represented below.



Above shows the cover page from the Market Analysis produced by the ADG Company

ADDITIONAL COMMUNITY ENGAGEMENT

In the fall of 2019, further outreach was conducted in the form of a CEDS Open House series, aimed at gathering an array of input from across the ED District. The Open Houses were a five-part series held at locations around the ED District and was designed to be an easy, informal opportunity for community members to “drop-in” at any time during the Open House hours to provide feedback.

Activities at these Open House events included:

- 1) Gathering additional comments of “what else” should be added to the SWOT conducted by the ADG Solutions in 2018;
- 2) Gathering feedback on the goals and objectives for encouraging a “Smart, Safe, Clean, and Cool” North Country;
- 3) Asking participants why did/should I/you/they come to stay in, and invest in the North Country, and,
- 4) A drawing activity for all ages asking “what do you love about your town?”



The left-hand picture shows the set-up at the Summer 2019 CEDS Open House series; the right-hand picture shows participants giving feedback at the Warren 2019 CEDS Open House

SWOT

(SORTED USING THE ADG APPROACH OF MONEY MARKET PEOPLE PLACE & LAND USE)

MONEY	
Strengths	Weaknesses
<ul style="list-style-type: none"> • (NEW) Newcomers bring new disposable income, ideas, and investment • (NEW) Social Impact investing and tools including crowd-funding continue to grow, as investors with a local community interest seek both a reasonable return and support new or surviving local enterprises. • Economic Infrastructure which captures expenditures from the tourist and local business community • Increased lending resources at Coos Economic Development Corp. 	<ul style="list-style-type: none"> • (NEW) North County governments are small, and may lack internal capacity to respond to new and accelerated changes. Governments will need to find new ways to affordably implement changes and seize new opportunities. • Tax structure; dependence on property taxes to fund schools • Need for investment in programming for students seeking careers in trades • Lack of investment in transportation network • Lack of education funding • High risk financial opportunities • Unaffordable housing for many local residents • Lack of availability and visibility of grants and tools available for entrepreneurs and small businesses
Opportunities	Threats
<ul style="list-style-type: none"> • (NEW) Historically high levels of federal funding for recovery will grow the significance of private-public partnerships • (NEW) Flight from capital markets has produced large amounts of Capital Gains for individual investors. Qualified Opportunity Funds (QOF) in Opportunity Zones can capture investment into local real estate redevelopment and small-business equity investment • Support Broadband deployment initiatives 	<ul style="list-style-type: none"> • (NEW) Property tax assessments will change, and tax payments revenues will vary, retail, hospitality and office spaces may decline in value where flex-space, warehouse and residential property may increase • (NEW) Newcomers bring new and increased demand for public services. • (NEW) US SBA emergency recovery loans to local businesses will affect local lending to these businesses and could make them less willing to incur additional debt. • The lack of investment in Community College

MARKET

Strengths	Weaknesses
<ul style="list-style-type: none">• (NEW) Willingness to seek and pay a premium for locally sourced food has been accelerated. Local farming is growing in popularity as interruptions to national and global supply chains is interrupted.• (NEW) Perceptions of relative safety, and increased “stay-cations” will increase desirability of smaller in-town retail areas that offer authentic local experience and products	<ul style="list-style-type: none">• (NEW) Reliability and security of internet connectivity for services like tele-medicine, remote mental health counseling, virtual public hearings, remote education and remote work. Low levels of high-speed connection in parts of the region may limit access.• (NEW) Lack of quality accessible child-care will continue to strain families as pandemic public health measures limit capacity and daily operation.• Lack of value-added timber and food infrastructure• Over-reliance on tourism and minimum wage jobs
Opportunities	Threats
<ul style="list-style-type: none">• (NEW) If adequate broadband infrastructure is successfully deployed, smaller-rural communities can improve access to world-class services and resources regardless of their physical location. New broadband funding (and the ability for municipalities to bond) will require more active advocacy by municipalities and access to specialized skills• (NEW) Interest in outdoor, open-air gatherings like Home Days, and outdoor dining will increase• (NEW) Manufacturing jobs will return as in-shoring trends rise due to COVID-19 and prior concerns regarding the environment, increased costs abroad and Intellectual-Property issues. Workforce training and retention will be critical in manufacturing site location decisions• (NEW) Support broadband deployment initiatives• (NEW) Encourage niche industries• Support local food production• More Visibility in Canada (like VT and ME)• Proximity of vibrant food movements in ME and VT	<ul style="list-style-type: none">• (NEW) Major sporting events, indoor concerts, and festivals will be delayed as restrictions on group gathering sizes are in place.• (NEW) Large retail spaces will be challenged as consumers move to more online shopping and home delivery options. Productive reuse of closing retail spaces for housing, warehousing, and manufacturing will be essential.• (NEW) Increases in home-delivery of goods, including groceries and meals, coupled with a decline in off-shore buying of recyclables will mean more recycling materials (especially cardboard) will need to be retained and disposed of (or re-used) locally. The capacity and content of local landfills will become a concern.• Tourism declines as economic driver• Employment hub is declining (Berlin)

PEOPLE

Strengths	Weaknesses
<ul style="list-style-type: none"> • Quality labor force • Increase in cultural opportunities • Strong, close-knit communities • Established non-profits with varying capacities 	<ul style="list-style-type: none"> • Attractiveness of the place to young people • Lack of accessible, reliable child care
Opportunities	Threats
<ul style="list-style-type: none"> • (NEW) As remote work increases in popularity local commuting will be reduced and new remote workers from outside the region will increase the local population. • (NEW) Due to lay-offs and workers desire for reduced virus exposure will increase the number of “unintentional entrepreneurs” small business assistance and retraining program will be needed. • Workforce training opportunities with high schools • Higher paying jobs are available but difficult to fill • Support municipal leaders and staff with training and resources • Proximity of higher education; White Mountain Community College, Dartmouth College, Plymouth State University 	<ul style="list-style-type: none"> • Power based is located in southern half of the state • Variation of skilled workforce • Population shifts due to climate changes • Labor force development needs to be developed

PLACE

Strengths	Weaknesses
<ul style="list-style-type: none"> • (NEW) Areas with large numbers of vacation or seasonal dwellings will see an increase in full-time residency conversions, bring new investment but also need demand for education and local municipal services. • Alternative and renewable energy assets • Natural Resources base is essentially intact • Abundance of natural aesthetic places 	<ul style="list-style-type: none"> • (NEW) Building and life-safety code can present barriers to new trends such as mixed-use buildings. Municipalities will need to seek affordable ways to encourage in-town redevelopment and upgrading of older housing stock. • Lack of understanding of environment impacts of development • Lack of land use planning for influx of climate refugees
Opportunities	Threats
<ul style="list-style-type: none"> • (NEW) As remote work increases in popularity local commuting will be reduced and new remote workers from outside the region will increase the local population. • (NEW) Distributed workspaces may be needed to reduce crowding in larger office settings. Increased acceptance of home-based /remote work may make less expensive mill buildings, including upper floors, more attractive for individual office users at satellite facilities for larger businesses or for independent co-working spaces • (NEW) Underutilized office spaces could be converted into housing opportunities as an alternative use that addresses a pressing need in the region for a more diverse and affordable housing supply 	<ul style="list-style-type: none"> • (NEW) Demand for local housing may intensify as fewer young people migrate out, and more outsiders immigrate in. New housing construction remains below the units needed for existing housing replacement and to meet new demand. Building materials costs are experiences significant increases. • (NEW) Public buildings will need to invest in new safety features, improvements to air-filtration systems, and distance controlled waiting areas to be full accessible to the public. • Poor long-term planning for outdoor recreation resulting in increasing public impacts • Potential impact of over and/or improper utilization of natural recreation areas

LAND USE

Strengths	Weaknesses
<ul style="list-style-type: none"> • (NEW) Use of public spaces, including roadways, parking spaces, and public sidewalks will be used frequently for small, and pop-up events such as outdoor dining, outdoor art exhibits, etc. Local village and downtown infrastructure and historic development patterns will provide a ready-made canvas for such changes. • (NEW) Parking space requirements will continue to be reduced from outdated standards as capacity of businesses are reduced and reuse of outdoor spaces become more common and attractive. 	<ul style="list-style-type: none"> • Comprehensive Broadband, cell, and wi-fi access • Fragmented telecommunications
Opportunities	Threats
<ul style="list-style-type: none"> • (NEW) As more people live and work in the same place, single-use zoning will be challenged. The new diversity of uses at a site will require adjustments to local zoning ordinances to continue to promote economic health. • Encourage local energy and heat production and conservation • Use energy production locally such as solar energy • Investments in gaining municipal infrastructure 	<ul style="list-style-type: none"> • (NEW) Natural resources, access points and travel ways must be protected from the impacts of overuse. • Age and deterioration of existing housing stock

STRATEGIC ACTION PLAN & EVALUATION

RECOMMENDED STRATEGIC DIRECTIONS

<p>Industry Driven Strategy, such as: Wood Products Tourism</p>	<p>Strategies that look at specific leading industries. However, they do not apply equally to all of the communities in the ED District and may take attention and resources away from other industries that are also important.</p>
<p>Asset Driven Strategy Housing Healthcare Industrial Parks</p>	<p>Asset driven-strategies look at the region from the perspective of a balance sheet. Looking at what are the productive assets and what assets need more investment. A regional asset-based strategy should focus on assets that cut across individual industry or municipality differences, such as the universal need for people, housing and modern communication assets.</p>
<p>Issue Driven Strategy Workforce Training Demographics Poverty – Incomes</p>	<p>Issue driven strategies look at what is the current issue “du jour”, and how it applies. It is important to not just look at what has been an issue, but what may come next, be it an Opportunity or a Threat.</p>
<p>A New Way – Place Centered</p>	<p>The recommended Strategic Direction for this CEDS includes aspects from each of these perspectives, but emphasizes the perspective of a unified, coordinated ED District that is a coherent economic entity. This Place-Centered strategy will require the ED District communities to identify how competitive they each are for people, housing and communication infrastructure, as well as how they knit together with the other communities to form a relevant and attractive larger, regional community.</p>

The strategy needs to answer the core question: *“Why should I come to, stay in, and invest in the Region?”*

Shown below are pictures of feedback collected at the 2019 CEDS Open House series where participants were asked the strategic, core question.

Shared Community

Great area
& the better of the
STAR to Expansion
to live

good tech. college

Getting
away from traffic
& over population

close knit
communities

strong sense of community

Quality of Life as I define it.

scenic mountains
AT a abundance
of recreation

Family,
community feel,
and country
living.

WHY did you should they
COME TO STAY IN, AND INVEST IN THE NORTH COUNTRY?
I → this is finishing!
To meet locals, visit Heritage centers, start small Business. Visit schools, libraries, Town Halls

Scale Supports active community engagement

I had to finish the 4000 Footers - discovered lands north of Natches - couldn't not buy a second home - and had to retire here!

Natural resources

WHY did you should they
COME TO STAY IN, AND INVEST IN THE NORTH COUNTRY?
I moved up here from TX because I love it here. The beauty of nature in my backyard, the peace + tranquility I have now is awesome! I love the fact that it's not "the city" life. The only way I have is the "city technology" trying to come here and change things - if it's just for - how is not no. I love the feeling of leaving the city life behind (since Green Glass Band)
Opportunity to make an impact in small towns
good education

Spectacular Scenery - for outdoor enjoyment - bike, hike, ski kayak

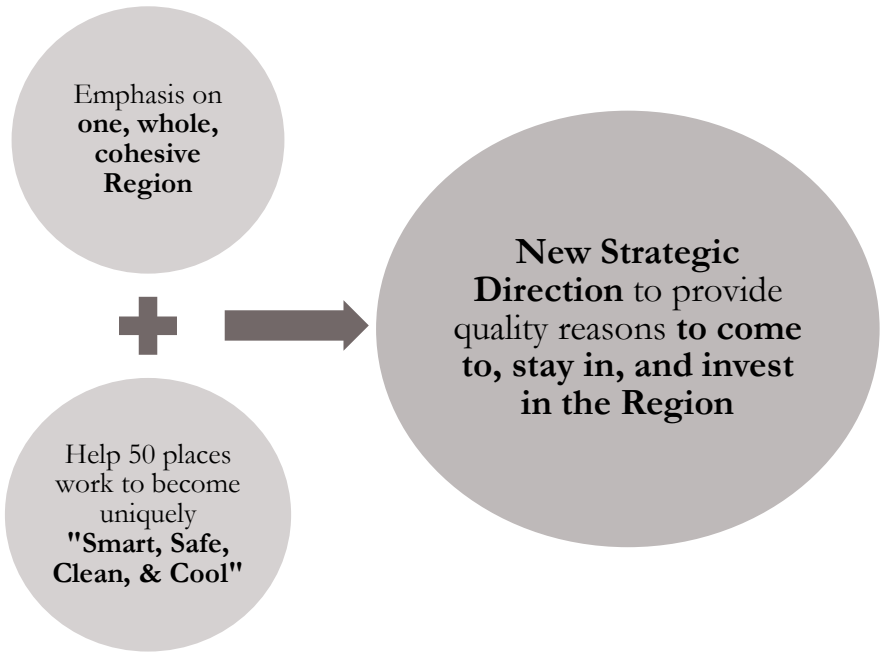
NEW STRATEGIC DIRECTION: ENCOURAGING A “SMART, SAFE, CLEAN, & COOL” NORTH COUNTRY

Through a Closer Lens: Strategic Questions at the Community-Level				
1. What is our vision of <u>our</u> unique better future?	2. What would make our community a uniquely cool place ?	3. What is our strategy?	4. How do we get the capacity to implement our strategy?	5. What is our vision of <u>how we fit in</u> within the region's better future?

Goals for the Region Encouraging a "smart, safe, clean, and cool" Region

- 1. People: Attract, retain, and retrain
- 2. Robust Infrastructure
- 3. Variety of creative housing options that are safe, diverse and desirable.
- 4. Connectivity and corporation of communities into a greater whole.
- 5. Focus and strengthen trailing edge communities.

Formula for the New Strategic Direction



CATEGORY: Goal - Objective - Action Item	Performance Measure
CROSS CUTTING STRATEGIES: <ul style="list-style-type: none"> ➤ Focus on Strengthening Trailing Edge Communities ➤ Protect and improve Quality of Life for the North Country ➤ Strengthen resilience of people, places, and systems ➤ Consider all economic development initiatives through the lens of sustainability 	
1. Workforce & Talent	
<ul style="list-style-type: none"> ➤ GOAL :Support and assist the region with efforts to attract new residents, retain the existing population, and retrain the local workforce with the skills necessary to grow local industry, encourage entrepreneurship and innovation. 	
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▪ Support regional partnerships to move the region’s economic goals forward 	Number of partnerships created
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▪ Increase awareness and connections of available resources to serve existing and new businesses and non-profits. (What kind of resources are we talking about – business owner educational resources like SBA programs; workforce resources such as local university, college, community college, and trades skills training programs) 	Number of workshops, meetings or outreach events where resources can be promoted
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▪ Connect and support education and workforce development programs to enhance the region’s workforce and meet employer needs (Work with existing education and workforce development programs to expand their offerings to best match growing/leading industry sectors, support entrepreneurship, and strengthen job placement for new graduates)(Leading industry sectors include: Local Healthcare, Education & Knowledge Creation, Electric Power Transmission & Generation, Light & Electrical Equipment, IT & Analytical Instruments, Local Hospitality, Federal Government, Hospitality & Tourism, Performing Arts) 	Number of programs available
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▪ Support new positions and opportunities for year-round work within the outdoor recreation economy 	Opportunities to support new positions and growth
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▪ Expand access to education and training program in distressed markets, or areas where industry and major employers are changing. 	
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▪ Expand educational programs in K-12 education regarding entrepreneurship and innovation. 	
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▪ Explore opportunities to increase wage rates and reduce market leakages within industry sectors with traditionally low wage-rates including tourism, hospitality, outdoor recreation, and childcare 	
2. Hard Infrastructure	
<ul style="list-style-type: none"> ➤ GOAL: To aid municipalities, businesses, and organizations with access or improved access to state of the art communication networks and infrastructure, reliable, diverse transportation options, and adequate water and wastewater systems. 	
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▪ Support regional and statewide initiatives to bring high speed broadband to areas in need of access or improved access to service 	Number of initiatives; number of opportunities to promote or educate
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▪ Coordinate with local, state, and federal transportation initiatives to promote targeted investments in the movement of goods and people to promote a competitive economy. 	
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▪ Support water and wastewater districts in expansion and improvement of existing systems through access to funding resources and capital planning efforts. 	

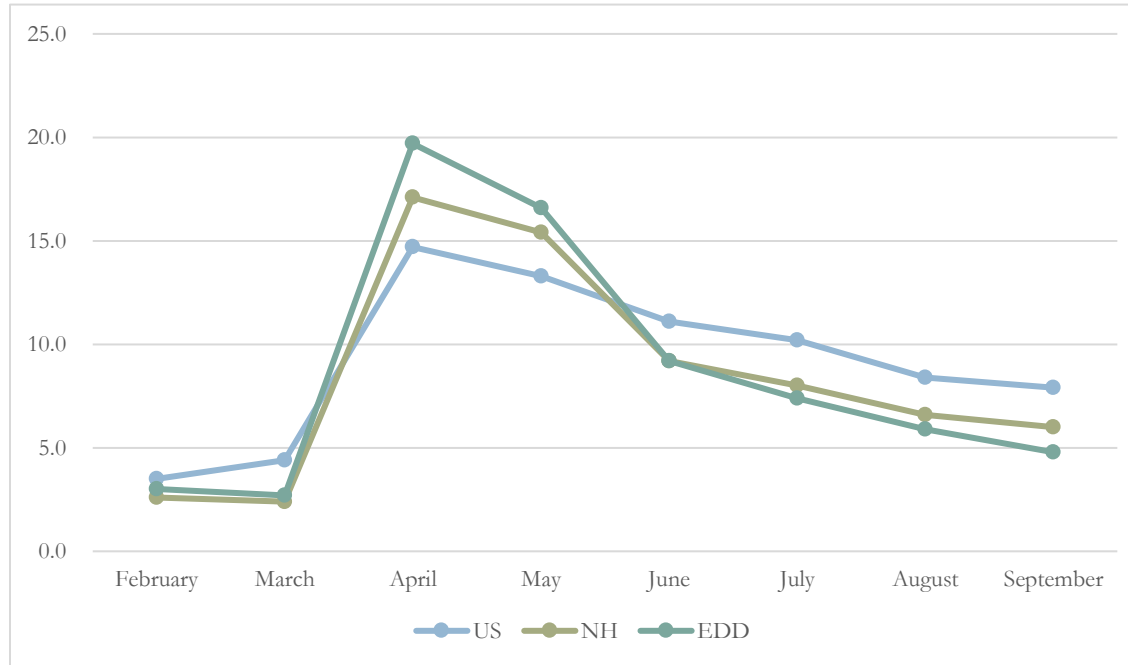
3. Soft Infrastructure		
➤ GOAL: To improve the human systems that strengthen our regional economy by promoting: creative housing options that are safe, diverse and desirable, high-quality affordable childcare, and accessible healthcare systems.		
▪ Continue to analyze regional housing needs through the Housing Needs Assessment		Implementation and adoption of successive copies
▪ Foster regional discussion of current and future housing needs		
▪ Support initiatives that assist in providing well-planned and desirable housing for current and future residents		Number of correlating initiatives and/or planning legislature available; number of opportunities to promote materials and concepts
▪ Provide and/or connect municipalities to land use law related to housing and provide technical assistance		Number of times technical assistance provided
▪ Support existing childcare networks and encourage greater partnership, information sharing, and use of funding programs to strengthen existing childcare providers and promote new opportunities		Number of childcare network contacts made
4. Civic, Social & Government Systems		
➤ GOAL: TO provide relevant information, education, and networking opportunities which foster connectivity and cooperation of communities, civic leaders, and government systems		
▪ Host workshops highlighting resources, best management practices, and success stories – creating sense of place		Number of workshops/outreach events conducted
▪ Participate in local regional, state, and national meetings to raise awareness of local issues and gain knowledge to deliver to communities regarding economic prosperity, hard and soft infrastructure needs, and market opportunities		Number of meetings attended
▪ Provide technical assistance for data development, code enforcement, and studies		Number of technical assistance opportunities
▪ Encourage municipal connection and participation in the region’s natural resources and outdoor recreation assets		
▪ Establish municipal mentorship programs to strengthen relationships and peer-based knowledge transfer		
▪ Ensure outreach and communications of available technical assistance and resources		
▪ Assist with the maintenance and preparation of key municipal publications on disaster preparedness and recovery		
▪ Provide follow-up outreach to ensure communication of each community’s needs		
▪ Increase the amount of public private investment in the region through technical assistance and project development for known and emerging economic development funding streams		
5. Business Climate & Regional Competitiveness		
➤ GOAL: To foster existing business retention, expansion, and transition to new markets as well as the start-up of new businesses, industries, and innovation centers		
▪ Work with regional businesses and entrepreneurs to identify gaps, barriers, and opportunities and connect with resources		Number of resources available
▪ Maintain partnerships with existing and new resources to provide business training and promote innovation		Number of partnerships made; number of training opportunities offered
▪ Increase awareness of local, state, and federal business and non-profit resources		Number of opportunities to promote resources
▪ Reduce barriers to small and minority owned businesses and entrepreneurship growth		

<ul style="list-style-type: none">▪ Highlight the unique natural resources and character of the region as a competitive advantage for businesses and talent	
<ul style="list-style-type: none">▪ Assess regulatory procedures across local municipalities and work collaboratively to aid businesses in navigating permitting processes, grant applications, and infrastructure assessments.	

Covid-19 Impacts & Trends: 2020

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Unemployment Rates During Pandemic:



In April of 2020 – **35** North Country communities experienced unemployment over 20%



Communities with the highest and lowest pandemic unemployment rates

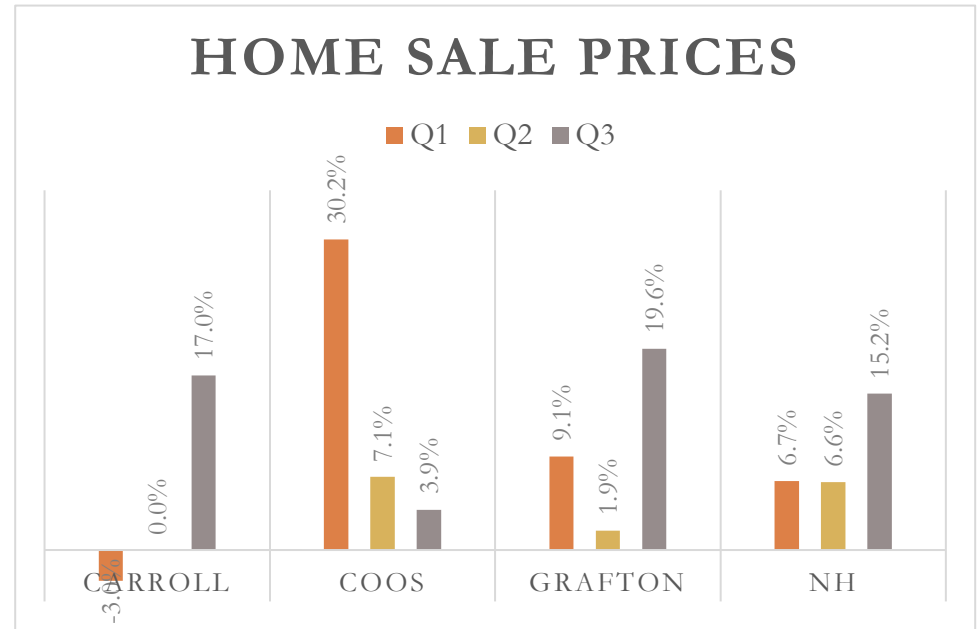
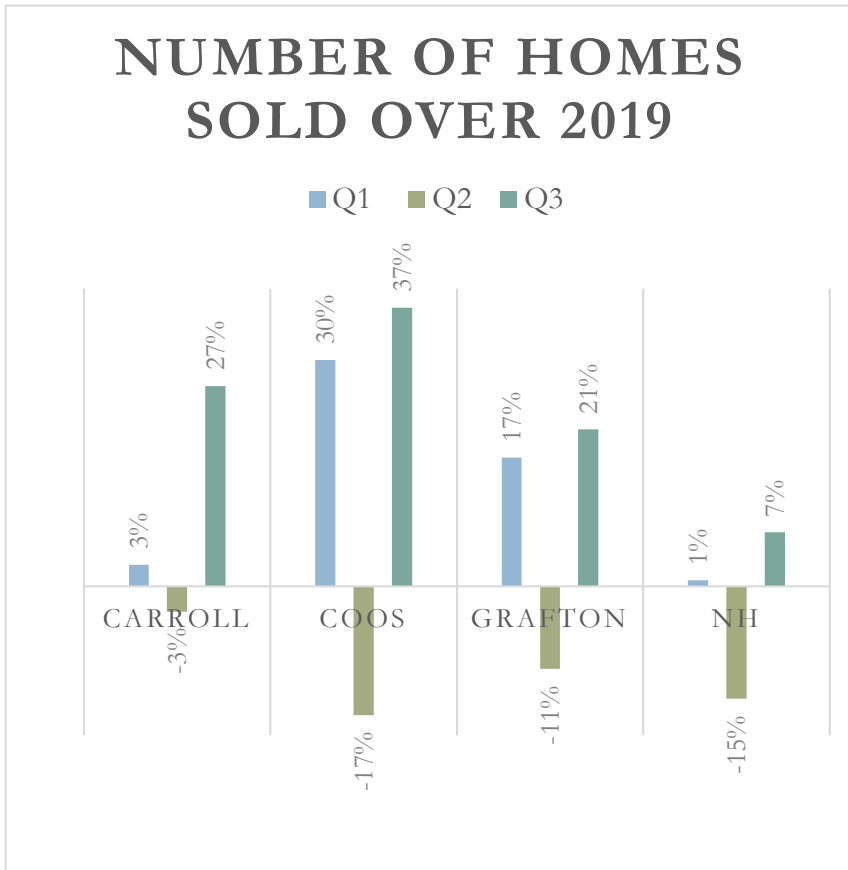


While unemployment rates have declined significantly from their pandemic highs in April & May

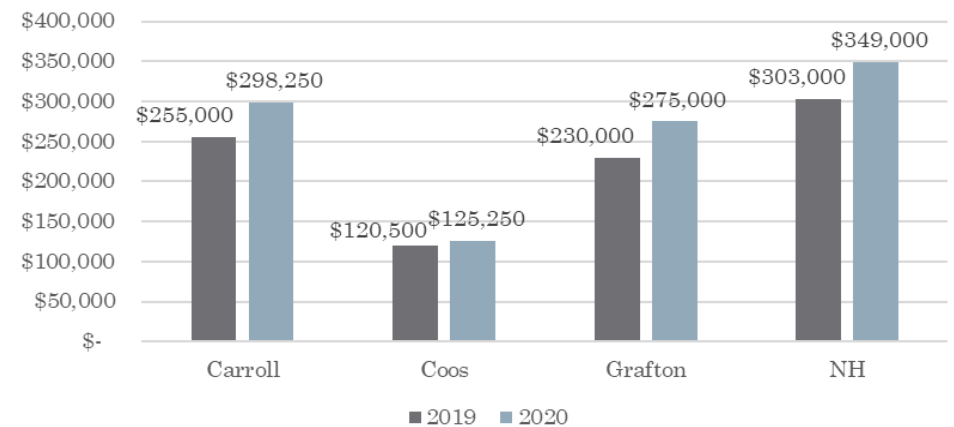
The areas above continue to experience rates more than twice the level experienced before the pandemic.

Covid-19 Impacts & Trends: 2020

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Median Sales Price (Q3)



While Q2 (Mar – June) saw a decline in the number of homes sold – the lifting of travel bans and increased economic activity of Q3 saw significant rises in the number of homes sold & the average sales prices over 2019.

Covid-19 Impacts & Trends: 2020

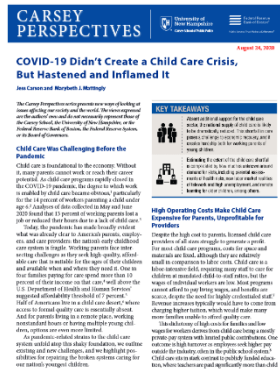
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CHILDCARE

“COVID-19 didn’t create a childcare crisis, but hastened and inflamed it,” finds an August 24th report issued by the Carsey School at UNH.

Key Takeaways of the Report:

- Absent additional support for the childcare sector, the supply of child care is likely to be dramatically reduced. This shortfall in care poses a challenge to economic recovery, and creates hardship both for working parents of young children
- The extent of the shortfall is unknown and complicated by families’ assessment of health risks, new labor market changes (telework & high unemployment) and remote learning of older children



	Possible Effect on Demand for Formal Child Care
Parents Unemployed	↓
Parents Re-employed	↑
Increased telework & flexibility	↓
Reduced reliance on at-risk informal caregivers	↑
School-age children out of school	↑
Domino effect of remote learning	↓
Concerns about socioemotional development	↑
Preference for in-home care	↓
Health concerns	↓
Family economic constraints	↓

Covid-19 Impacts & Trends: 2020

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Tourism & Outdoor Recreation

- Following the initial closure of service industries, and formal tourism businesses in the spring
- The north country experienced an increased presence of visitors during the summer and fall tourism seasons as travelers viewed the region as a ‘safe’ travel destination due to lower virus rates and the presence of outdoor recreation amenities like trails and water bodies.
- The increased tourism activity and trail use resulted in challenges to the industry related to crowding (both at parking facilities and on trail), litter and waste management, emergency response, and environmental impact as new visitors explored our natural resources.
- Looking ahead to winter, ski areas face challenges related to lodge use, cafeteria and restaurant operations, and crowding.



Photo Credit: COVID19 Summit Photo: Society for the Protection of NH Forests

COVID Expenditures (GOFERR website)

[Connecting New Hampshire – Emergency Broadband Expansion Program](#)

[First Responder Stipend Program](#)

[Healthcare System Relief Fund](#)

[Higher Education COVID-19 Response Fund](#)

[Invest In the Future](#)

[Live Venue Relief Program](#)

[Long Term Care Stabilization Program](#)

[Main Street Relief Fund](#)

[Mental Health and Substance Use Disorder \(SUD\) Support and Relief Fund For Adults](#)

[Municipal & County Payments](#)

[New Hampshire Volunteers COVID-19 Response Fund](#)

[NH Agriculture Grants](#)

[NH Childcare Relief](#)

[NH Food Bank Grant](#)

[NH Frontline Protective Worker Stipend](#)

[NH Higher Education System Grants](#)

[NH Housing Relief Program](#)

[NH Nonprofit Grants](#)

[New Hampshire GAP Fund](#)

[Veterans Relief and Support Fund](#)

THE CARES ACT, SUPPORT RESOURCES & FUNDING

- State, local, and federal governments, non-profits and lending institutions, and community members have worked collaboratively to prop-up and plan for the future needs of a variety of businesses, basic needs and social services.
- The table to the left includes clickable links to read about 20 different pandemic expenditures as provided by the Governors Office for Economic Relief and Recovery.

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