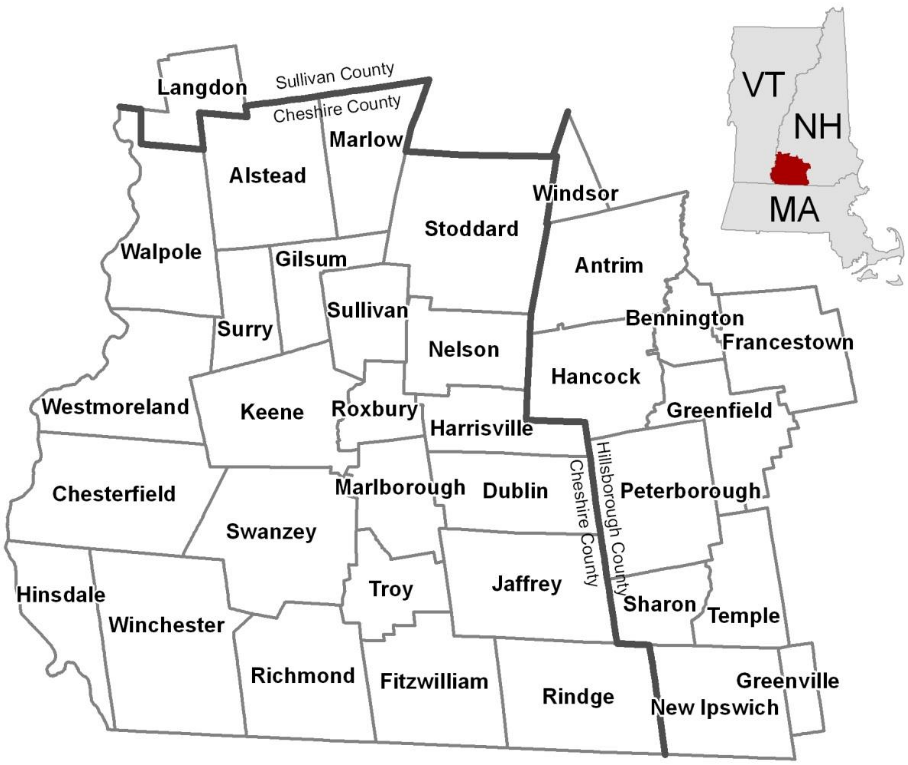
Comprehensive Economic Development Strategy

for

Southwest New Hampshire



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SWRPC

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- Economic Development Administration, US Department of Commerce
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The Southwest Region Planning Commission acknowledges the professional contributions of the members of the 2013 Economic Development Advisory Committee who served on the Comprehensive Economic Development Strategy Advisory Committee[1]:

- Bob Baker, Co-Chair - Keene State College
- Keith Thibault, Co-Chair - Southwestern Community Services
- Jack Dugan - Monadnock Economic Development Corporation
- Brian Foucher - WiValley
- H. Greg Johnson - Town of Swanzey
- Morris Klein - Town of Hinsdale
- Lisa Murray - Franklin Pierce University
- John M. Pratt - Town of Walpole
- Jen Risley - Monadnock Buy Local
- Judy Tomlinson - Town of Dublin
- Ted Whippie - Town of Winchester
- Bob Harcke - Hinsdale Industrial and Commercial Development Commission
- Glenn Coppelman, *Ex Officio* - NH Community Development Finance Authority
- Chris Wellington, *Ex Officio* - NH Department of Resources and Economic Development

[1] Since the inception of the CEDS, membership of the committee has changed. We appreciate the contributions made by both current and past committee members to this on-going effort.

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Executive Summary

Needs Determination

Severe job losses in Southwest New Hampshire since 2000 encouraged economic development stakeholders in the Region to begin discussions concerning the preparation of a regional economic development strategy. Between July 2000 and June 2004, the Region with a population of 98,538 had lost at least 1,188 jobs – an average of 297 lost jobs a year. More than half of the positions were lost in the manufacturing sector. The unemployment rate in the Region had increased from 2.9% in 2000 to 3.4% by June 2004.

The Region's economic development stakeholders viewed these trends as a need for a regional solution – a solution that can help the Region control its destiny and protect its competitive advantage in New England and the global economy.

With the active support of the New Hampshire Department of Resources and Economic Development, New Hampshire Community Development Finance Authority, Public Service of New Hampshire, Monadnock Business Ventures and Monadnock Economic Development Corporation, the Southwest Region Planning Commission (SWRPC) received economic adjustment assistance from the Economic Development Administration (EDA) to prepare a Comprehensive Economic Development Strategy (CEDS) for Southwest New Hampshire.

CEDS Process

The CEDS process began with a kick-off meeting of SWRPC's Economic Development Advisory Committee (EDAC) on January 30, 2004 when EDAC agreed to serve as the CEDS Advisory Committee. Subsequently, the Committee met eleven times to develop a Comprehensive Economic Development Strategy for Southwest New Hampshire. The Committee held two additional public meetings to inform the public about the CEDS effort and to receive input from economic development stakeholders in the Region. More than 250 invitations each were mailed for these meetings and the invitees included federal, state and local elected officials, planning board members, bankers, planning and community development staff, neighborhood organizations, social service agencies, economic development entities, housing authorities, business organizations, utility officials and interested citizens. These Committee and public meetings were supplemented by input from experts in such fields as workforce development, vocational training and housing. The Committee also conducted other public involvement activities, including press releases and presentations to various organizations, agencies and civic groups. In addition, an online survey soliciting responses regarding economic issues and various other related questions further informed the CEDS effort. The input provided by these individuals and groups created the basis for the CEDS document and its components, including the State of the Region chapter, the Evaluation of Regional Issues and the Action Plan. The final CEDS document was endorsed by the Advisory Committee on February 4, 2005 and by the Board of Directors of the Southwest Region Planning Commission on February 14, 2005. The US Economic Development Administration (EDA) approved the CEDS in April, 2005.

Since April 2005, the chief economic development activity related to the CEDS has been to build the support necessary to translate the tasks envisioned in the strategy from the printed document to the acting economy of the Region. To this end, CEDS activities have followed three primary lines of work: 1) increasing awareness of, and interest in, the CEDS process and vision, 2) composing annual Work Plans to track economic development activities in the Region, annually evaluating progress towards the goals envisioned in the CEDS, and 3) securing funding to facilitate the administrative demands of implementing and monitoring the strategy.

23State of the Region Analysis

The CEDS Advisory Committee developed the State of the Region Analysis using federal, state and local documents and data as well as through the input of various participants in the process. The State of the Region analysis initially presents a description of the region and its people, infrastructure (transportation, water, sewer, and telecommunications systems) and environmental issues. The document then summarizes the regional economy, touching on those elements necessary for a thriving marketplace – business and job opportunities, education and training, housing and transportation, citizen participation and government. In essence, the document provides a balanced approach to economic development and quality of life issues.

As documented in the minutes for the State of the Region analysis sessions, the economic strengths and opportunities of this Region include its skilled workforce in some industry sectors, its north-south highway network, its regional organizations, its citizens' involvement, its tax structure, and its tourism resources. The Region's weaknesses and threats include the loss of high-paying manufacturing jobs, as well as challenges related to affordable housing, local business control and access to investment capital, regional thinking and perspective, adequate water and sewer infrastructure, local zoning, a research institution, and the cost of doing business in the Region.

Action Plan

The CEDS Advisory Committee developed the Action Plan on the basis of the State of the Region analysis and includes the vision, goals, objectives and tasks, and projects sections. The Action Plan covers a period of five years and is broken down into short-term (one to two years), medium-term (two-five years) and long-term (5+ years) projects. The terms provide a time frame for projects that are expected to take the respective years to begin construction or implementation.

Vision

Today the Southwest Region is a prosperous, attractive place to live and work. The Region has a clear unique identity and is a cohesive community within the larger central New England "neighborhood." The Region also enjoys strong civic and economic connections with New England, the Nation and beyond. This is also the future envisioned in this CEDS.

Creativity, innovation, effectiveness, accountability, and adaptiveness will be hallmarks of both private and public enterprise in the Southwest Region. These attributes apply equally to traditional New England lifestyles—including agriculture, forest industries, and the arts—as well as to cutting-edge technologies and the global market place. Private and public activity will foster equally economic enterprise, environmental protection, and conservation of our cultural heritage—not seeking to transform the landscape, but preserve our greatest assets.

Residents will enjoy a unique, prosperous and healthful quality of life that is characterized by diverse opportunities for employment, housing, education, and civic participation.

A strong Regional community is characterized by:

- low crime rate,
- diverse housing opportunities,
- volunteerism and participation in local affairs,
- honoring cultural and historical heritage,
- vitality of downtowns and village centers,
- coordinating community development efforts,
- cultural and recreational opportunities,
- preserving open space, and
- balancing preservation, conservation and development.

A competitive Regional economy is characterized by:

- cooperation among municipalities,
- quality infrastructure,
- strong educational and vocational opportunities,
- supporting and retaining local business,
- recruiting new business,
- promoting entrepreneurism,
- diverse job opportunities, and
- environmentally friendly business practices.

Goals, Objectives and Tasks

The Comprehensive Economic Development Strategy (CEDS) for Southwest New Hampshire attains this vision by establishing eight goals and related objectives and tasks that reflect the input of the meeting participants and involved individuals and groups. The Goals, Objectives and Tasks and their respective ranks of priority, as outlined in the CEDS, are as follows:

GOALS	OBJECTIVES, TASKS (incl. Term)	Rank
Goal A: Maintain a high-quality labor force.	**Objective**: Provide workers with the skills to meet the needs of local business.	
	Task: Start an initiative to address workforce skills and to assess employer needs and provide required training. Term: Short	**13**
	Task: Strengthen programs for teaching basic technology skills to high school students. Term: Medium	**17**
	Objective: Ensure the availability of skilled workers to meet development demand.	
	Task: Recruit local youth and college students through apprenticeship and internship programs with Regional employers. Term: Medium	**23**
	Task: Recruit trained personnel in demand occupations from outside the Region. Term: Long	**26**
	Objective: Create employment opportunities that protect and raise workers' standard of living.	
Goal B: Prepare for future development	**Objective:** Ensure a healthy balance of residential, commercial, and industrial develop-	

GOALS	OBJECTIVES, TASKS (incl. Term)	Rank
	ment, agriculture, forestry, and open space ("Smart Growth").	
	Task: Assist municipalities in reviewing zoning and other regulations regarding the location of potential future development. Term: Short	**9**
	Task: Promote the NH Main Street Program, including the principles of historic preservation and context-sensitive design. Term: Medium	**24**
	Objective: Provide information to municipalities about the costs and benefits of different types of development.	
	Task: Assist municipalities in updating their impact fee schedules. Term: Medium	**35**
	Objective: Support a quality transportation system, both locally and regionally, to provide capacity for desired economic development.	
	Task: In collaboration with NHDOT and other entities, support a system of diverse transportation modes by incorporating sidewalks and bicycle lanes into street and highway design, as well as by developing a regional public transportation system. Term: Medium	**36**
	Task: In collaboration with NHDOT and other entities, improve road conditions and access management to support safe and efficient movement of people and goods. Term: Long	**37**
	Objective: Modernize and maintain public and private infrastructure, including water, sewer, communications and schools, to meet future demand.	
	Task: Assess and inventory the capacity and quality of existing municipal infrastructure and facilities. Term: Short	**32**
	Task: Promote municipal infrastructure and facility capacity expansion and improvement	**21**

GOALS	OBJECTIVES, TASKS (incl. Term)	Rank
	where necessary. Term: Medium	
	Task: Encourage the adoption of local capital improvement programs to upgrade and modernize municipal infrastructure and facilities. Term: Medium	**33**
	Task: Promote Tax Increment Financing districts as a means for improving and modernizing municipal infrastructure and facilities. Term: Medium	**34**
	Task: Encourage utility and telecommunication providers to participate in an infrastructure inventory for determining development need capacities. Term: Medium	**28**
Goal C: Balance housing opportunities with trends in income, employment and community character.	**Objective**: Provide housing for all residents, including type, location and cost.	
	Task: Assess Regional housing needs. Term: Short	**29**
	Task: Update master plans and zoning regulations to address housing needs. Term: Medium	**19**
	Task: Encourage the rehabilitation and construction of all housing types. Term: Long	**25**
	Objective: Support private and public housing development activities that provide affordable owner-occupied and renter-occupied homes and apartments.	
Goal D: Strengthen the economic base.	**Objective:** Promote diverse types of economic activities.	
	Task: Promote the virtue of engaging in business activities. Term: Short	**27**
	Task: Strengthen programs that educate entrepreneurial start-ups about business planning, market research and other sound business practices. Term: Short	**2**

GOALS	OBJECTIVES, TASKS (incl. Term)	Rank
	Task: Establish business incubators and programs to provide low-cost rent, shared services, flexible financing and other appropriate services. Term: Short	**1**
	Task: Support and retain businesses, including innovative firms in export-oriented industry sectors. Term: Medium	**10**
	Task: Recruit businesses, including export-oriented companies, from outside the Region. Term: Long	**16**
	Objective: Strengthen the tourism industry.	
	Task: Create the position of a Regional tourism coordinator. Term: Medium	**7**
	Task: Develop marketing strategies to attract visitors to the Region. Term: Medium	**11**
	Task: Enhance opportunities for outdoor recreation (e.g. kiosks, markers, trail blazing system, bike and boat rentals etc). Term: Medium	**6**
	Task: Establish Regional visitor center. Term: Long	**8**
	Objective: Encourage creativity, innovation and cooperation in business and industry.	
	Task: Strengthen those individuals, organizations and businesses that help provide a creative environment and strengthen the Regional economy. Term: Short	**4**
	Task: Create working group of such organizations as economic development corporations, chambers of commerce and UNH Cooperative Extension for coordination of activities. Term: Medium	**12**
	Task: Encourage research collaboration between the Region's institutions of higher education and employers.	**3**

GOALS	OBJECTIVES, TASKS (incl. Term)	Rank
	Term: Medium Task: Establish an institution for focusing on research activities consistent with the economic goals of the Region. Term: Long	**14**
Goal E: Support climate for helping business to create a diverse range of employment opportunities.	**Objective:** Remove unnecessary barriers for business development.	
	Task: Assist municipalities in reviewing zoning and other regulations regarding the location, required lot sizes and the diversity of business types permitted. Term: Short	**15**
	Task: Help municipalities in planning commercial and industrial development in areas with existing infrastructure (e.g. roads, water, sewer). Term: Short	**22**
	Task: Increase the number of shovel-ready industrial sites. Term: Medium	**31**
	Task: Strengthen organizations that provide business support, such as economic development corporations, chambers of commerce, Monadnock Business Incubator Network etc. Term: Long	**5**

GOALS	OBJECTIVES, TASKS (incl. Term)	Rank
Goal F: Promote the concept of Regionalism.	**Objective:** Strengthen regional organizations and promote public awareness of regional issues and solutions.	
	Task: Coordinate work of regional organizations and agencies. Term: Short	**18**
	Task: Educate the public on the benefits of regional coordination and collaboration. Term: Medium	**20**
	Task: Create a point of reference that serves as a clearing house for Regional economic development activities and resources. Term: Short	**43**
Goal G: Strengthen local governments.	**Objective:** Encourage a high level of volunteerism.	
	Task: Broaden the number of citizens involved in municipal government. Term: Short	**38**
	Task: Promote awareness among volunteers about their responsibilities. Term: Short	**41**
	Objective: Ensure responsible and effective municipal decision-making.	
	Task: Encourage municipalities to hire professional staff for particular municipal positions. Term: Medium	**44**
	Task: Provide technical training for elected officials and professional staff. Term: Medium	**30**
	Task: Promote inter-municipal resource sharing regarding staff, facilities, equipment and other municipal functions. Term: Medium	**39**

GOALS	OBJECTIVES, TASKS (incl. Term)	Rank
Goal H: Strengthen the quality of health services.	**Objective:** Ensure access to and sufficient capacity of health services to serve citizens of all income levels. Task: Support medical task forces for assessing the need for health services in the Region. Term: Short Task: Establish local branches of regional health providers, including doctors and RNs. Term: Medium	 **40** **42**

Projects

As part of the CEDS process, an inventory of projects, both underway and planned, in the SWRPC Region has been created. This inventory was developed through input provided by municipalities, non-profit development corporations and other economic development stakeholders. Projects are organized in two lists: short-term and planned - to differentiate between those for which implementation is imminent or underway, and those which are in the early planning stages of development. The listing of the CEDS projects in this manner will help separate out those projects that are more fully developed in concept from those that are currently in the more formative stages. The projects are summarized according to project name, project description, project proponent, total cost, funding sources, term, start date and the CEDS goals addressed.

These projects and others will be continually reviewed by the Southwest Region CEDS Advisory Committee for general consistency with the goals and objectives of the CEDS. Through the Annual CEDS Updates, the Advisory Committee will also summarize the changes in projects that take place from year to year and their placement on the appropriate list.

The projects identified as short-term and those identified as in the planning stages are as follows:

Short-Term Priority Projects

Project Name	Project Description	Project Proponent	Total Cost [2]	Funding Source(s)	Goals Addressed
Troy Mills Redevelopment	Renovation and development of industrial building complex in Troy, NH	Troy Redevelopment Group, Private Investors	$1,000,000 initial; $30,000,000 total projected	CDBG, TIF, Historic Tax Credit, USDA RD, Private sources	B, C, D, E
Downtown Keene Railroad Land	Mixed-use redevelopment of former rail yard.	City of Keene, MEDC	$55 million	CDBG, USDA RD, MEDC RLF, TIF, NH BFA, NH CDFA CDIP, Green Gap Loan, Brownfields Assessment Funds, Private Sources	A, B, C, D, E

[2] Total Cost values have been updated from the 2005 CEDS to reflect the most current estimates.

Short-Term Priority Projects con't

Project Name	Project Description	Project Proponent	Total Cost [3]	Funding Source(s)	Goals Addressed
Jaffrey Park Theatre	Restoration and development of downtown property	Park Theater, Town of Jaffrey, Franklin Pierce University	$1,900,000	NH CDFA Tax Credits, grant funding, private donations	A, B, D, E
Stone Arch Bridge Industrial Park water line extension	Infrastructure improvement (water)	Town of Jaffrey	$1,600,000	TIF; Possible USDA/RD and/or EDA	B
Downtown water flow improvement	Infrastructure improvement (water)	Town of Antrim	$120,000	Town Water reserves	B
Monument Road Industrial Park	Infrastructure improvement (water, sewer, roads)	Town of Hinsdale, Hinsdale EDC, MEDC	$2,000,000 total over several years	TIF, CDBG	B
Swanzey Industrial Park	Infrastructure improvement (road)	Town of Swanzey	$3,000,000; $60,592 in 2006	TIF	B
Antrim Mill (former Goodell factory)	Mixed-use development	Town of Antrim	$2-$2.5M (estimate)	Private, some support from TIFD	B, C, D, E
Jaffrey Civic Center	ADA accessibility improvements (handicap elevator)	Jaffrey Civic Center	$260,000	Private donations, Grant funding	B, D
Broadband Initiative	Effort to bring high speed internet opportunities to residential customers	Rindge Telecommunications Committee, Private Companies	To be determined Investments have been made by two Private Companies	Private Sources, *Potential* Grant Funds	B
Age Restricted Active Adult Housing Initiative	Creation of housing opportunities for seniors	Franklin Pierce University, Town of Rindge	To be determined	Private Sources, CDBG Potential	C

[3] Total Cost values have been updated from the 2005 CEDS to reflect the most current estimates.

Short-Term Priority Projects con't

Project Name	Project Description	Project Proponent	Total Cost [4]	Funding Source(s)	Goals Addressed
NH FastRoads	Broadband infrastructure expansion	UNH, Network New Hampshire Now (NNHN), NH CDFA, MEDC, WCNH.net	$5,500,000 ; part of a $44.5 million project	NNHN grant, private cash, in-kind funding, CDBG.	A, B, D, E, F
Cheshire County Courthouse Expansion	Expansion of existing courthouse	Cheshire County, City of Keene, MEDC	$10,800,000	CDIP tax credits, New Markets Tax Credits, loans from two banks and Cheshire County, and Tax Increment Financing from the City of Keene	B, D, E, F, G
Winchester Wastewater Improvements	Improvements to municipal wastewater facility	Town of Winchester/ NH DES	$4,445,500	Property Taxes/SRF Loan/ ARRA Funds	B

Project/ Program Planning List

Project Name	Project Description	Project Proponent	Total Cost	Funding Source(s)	Goals Addressed
Stormwater management system	Infrastructure improvement	Town of Peterborough	$15,000,000 (Estimate)	To be determined	B
Great Brook River Walk	Downtown enhancement	Town of Antrim	Project is on hold, no cost estimate available at this time	To be determined	B
WW Cross Building Redevelopment	Redevelopment of former Brownfield site into mixed use (commercial and residential) space	MBV, MEDC, Town of Jaffrey, Webster St. LLC, Larry & Stephen Thibeault	$1,100,000	CDIP, MBV RLF, Private Sources, with other resources to be defined	D, C
Attraction of Retail Development	Encouraging retail establishments to locate in a specified corridor	Franklin Pierce University, Town of Rindge	To be determined	Private Sources, CDBG Potential	D, E

[4] Total Cost values have been updated from the 2005 CEDS to reflect the most current estimates.

Project/ Program Planning List con't

Project Name	Project Description	Project Proponent	Total Cost	Funding Source(s)	Goals Addressed
Colonial Theatre Sustainability	Investments to support the sustainability of the Colonial Theatre.	Colonial Theatre/City of Keene/NH DRED	$5,000,000	Fundraising, membership dues, donations, theatre revenues, potential grants	B, D, E
ArtsAlive! Collaborative	Encouraging the development of an infrastructure that will sustain, promote, and expand access to arts and cultural resources in the Monadnock Region.	Collaboration of local arts and cultural groups	TBD	TBD	A, B, C, D, E, F
NH Broadband Mapping and Planning Program	Multi-year, multi-agency effort to map broadband access in NH and develop regional broadband plans	UNH, the nine Regional Planning Commissions, NH DRED	$2,400,000	National Telecommunication and Information Administration funding.	A, B, D, E, F
Hinsdale, NH Brattleboro, VT Bridge	Infrastructure improvement; replacement of 2 existing but functionally obsolete bridges over the Connecticut River with a new bridge downstream.	Towns of Hinsdale, NH and Brattleboro, VT, NH DOT, VTrans	$36.3 million	NH DOT, State of Vermont	A, B, D, E, F, H
Jaffrey Dogleg	Infrastructure improvement; reconfiguration of the US 202/NH 124 dogleg	Town of Jaffrey, NH DOT	$6,950,000	NH DOT	A, B, D, E, F,
Stoddard-Antrim-Hillsborough NH 9 ROW Purchase	Infrastructure improvement; purchase of ROW access rights and minor capacity and safety improvements on NH Rte 9.	Towns of Stoddard, Antrim, and Hillsborough, NH DOT	$2,250,000	NH DOT	A, B, D, E, F,

Evaluation

The Evaluation chapter outlines how the CEDS Advisory Committee will evaluate the Region's annual performance under the CEDS program. The Evaluation section reflects how well the CEDS Advisory Committee and the economic development stakeholders in the region have performed based upon the performance measurements established through this section. The Evaluation section describes the evaluation methodology. The areas to be evaluated on a quantitative and qualitative basis are the levels of participation, data development & dissemination, CEDS marketing and outreach, the eight goals, and the CEDS projects. This evaluation framework will enable the CEDS Committee to conduct a self-evaluation on an annual basis, identify areas that need to be improved or changed and revise the annual CEDS update accordingly.

I. Introduction

1. Purpose

A Comprehensive Economic Development Strategy (CEDS) for the Southwest Region will benefit the Region in a number of ways. The coordination of regional economic development stakeholders and municipal officials through the CEDS Advisory Committee will help promote viable economic development projects and initiatives. A broad Regional perspective is ensured through a diverse CEDS Advisory Committee representing municipalities, organizations and agencies throughout the region.

These projects and initiatives will address recent job losses by targeting business expansion and retention and, ultimately, job creation across the Region. A vibrant Regional economy relies on the strength of its businesses to contribute to the local, regional, and state economy, and to employ skilled, well-paid workers who, in turn, invest their income back into the Regional marketplace. In addition, the development of a CEDS and subsequent approval by the US Economic Development Administration (EDA) will allow EDA Public Works and Economic Development grants to flow to the Region to help fund the final design and implementation of the identified priority projects.

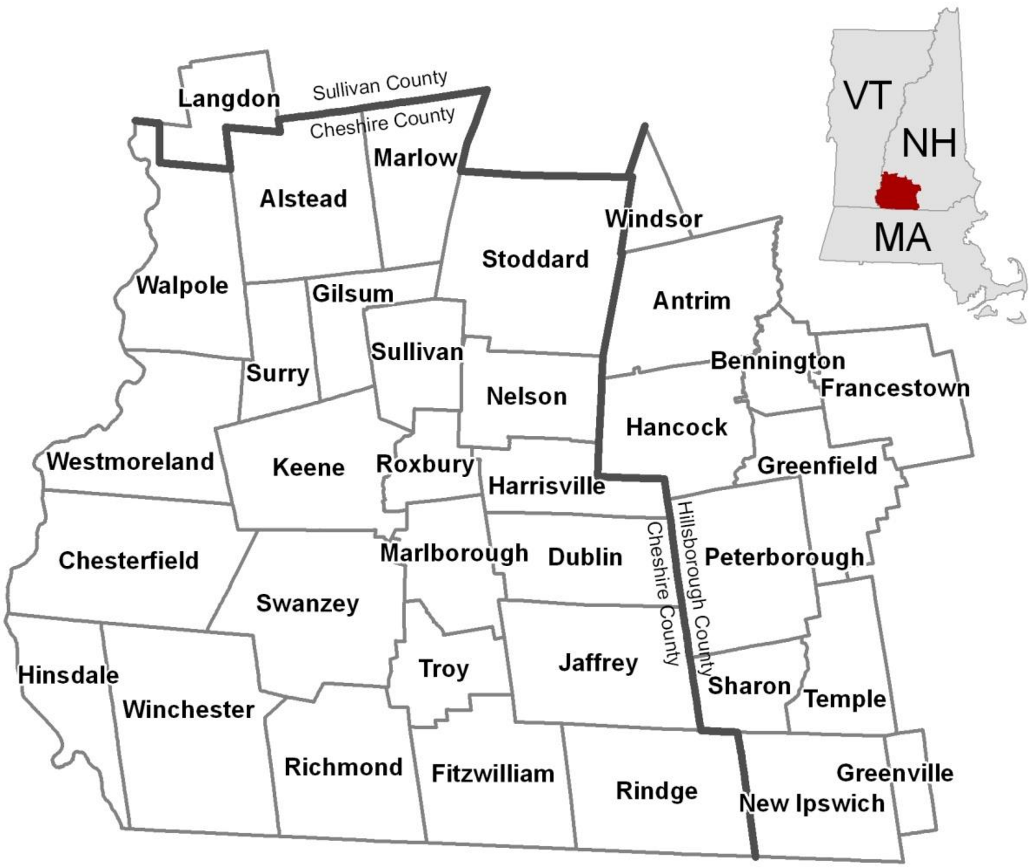
Economic development initiatives identified and prioritized by the CEDS Advisory Committee such as industrial building restoration, commercial and industrial park development, and infrastructure expansion, will help improve the Regional economy and will have a significant impact on job creation and retention. The CEDS Advisory Committee is also charged with identifying private sector investment sources as projects move towards implementation. The broad representation of stakeholders on the CEDS Advisory Committee helps in identifying private sector investment. It is anticipated that significant private sector investment will result from the network of economic development stakeholders built through the process of identifying Regional initiatives.

The development of a CEDS brings together various stakeholders to discuss issues, impacts, and opportunities for economic development in the Southwest Region. The CEDS process provides an important forum for facilitating Regional cooperation as the idea is brought forth of the "collaborative advantage" afforded to towns by working together for economic development in a Regional context.

2. Southwest Region

The project area for the development of a Comprehensive Economic Development Strategy is the Southwest Region Planning Commission's (SWRPC) planning region. It includes 35 municipalities comprising all 23 towns of Cheshire County, eleven towns of western Hillsborough County and one town in Sullivan County (*see map below*).

Figure 1: Southwest New Hampshire



II. CEDS Process

1. Advisory Committee

To prepare a Comprehensive Economic Development Strategy for the Southwest Region and to accomplish this task in a fashion consistent with the direction of EDA, the Southwest Region Planning Commission's Board of Directors established the CEDS Advisory Committee. Staff services for the CEDS Advisory Committee are provided by the Southwest Region Planning Commission.

The Advisory Committee is made up of representatives from various sectors, such as public leadership, economic and business development, employment and training, and community organizations (see member list on page 5). The current CEDS Advisory Committee membership represents the major interests of the community and reflects the demographic and socioeconomic profile of the Region's population. To ensure that viewpoints of all sectors of the community are considered in the future, efforts will be made by the Advisory Committee to further diversify the interests represented by reaching out to those groups and organizations that represent residents that are traditionally underrepresented in local decision making processes.

Each Advisory Committee member identified his or her field of interest (see member list on page 5) and provided direct input to the CEDS and reviewed the document to ensure effectiveness and feasibility of its components.

2. Work Program

To prepare the Comprehensive Economic Development Strategy for Southwest New Hampshire, the CEDS Advisory Committee developed a Work Program to guide the work of the Committee. The below outlined Work Program tasks covered the first 12-14 months of work:

Task 1: Establish CEDS Advisory Committee

- Organize stakeholders.
- Develop committee work program.

Task 2: Analyze the Region

- Collect background socio-economic, geographic, and demographic data.
- Address such issues as the state of the regional economy, external trends and forces.

Task 3: Develop Action Plan

- Develop vision statement, goals and objectives.
- Set priorities for goals and objectives.
- Prioritize projects, programs and activities.
- Identify partners and resources for projects, programs and activities.
- Develop implementation schedule.

Task 4: Evaluate CEDS Process

- Develop outline of evaluation procedure, criteria and benchmarks.

Task 5: Endorse CEDS Document

It is intended to staff the CEDS Advisory Committee beyond the one-year time frame, to update the CEDS document on an annual basis and to revise the CEDS every five years.

3. Planning Process

The CEDS process began with a kick-off meeting of SWRPC's Economic Development Advisory Committee (EDAC) on January 30, 2004 when EDAC agreed to serve as the CEDS Advisory Committee. Subsequently, the Committee met eleven times to develop a Comprehensive Economic Development Strategy for Southwest New Hampshire. During these meetings, which were facilitated by SWRPC, the members of the Advisory Committee discussed the socioeconomic character of the Region, attributes and concerns of importance, and ways to strengthen the regional economy. The Committee conducted an analysis of the strengths, weaknesses, opportunities and threats (SWOT) that may directly or indirectly impact the regional economy. The SWOT analysis was based on an in-depth analysis of the state of the region prepared by SWRPC staff. Committee meetings were supplemented by input from experts in such fields as workforce development, vocational training and housing. Through these deliberations and discussions, the Advisory Committee outlined a preliminary vision for the Region and developed preliminary goals, objectives and tasks.

In May 2004 and January 2005, the Advisory Committee held two public meetings to inform the public about the CEDS effort and to receive input from economic development stakeholders in the Region. More than 250 invitations each were mailed for these meetings and the invitees included federal, state and local elected officials, planning board members, bankers, planning and community development staff, neighborhood organizations, social service agencies, economic development entities, housing authorities, business organizations, utility officials and interested citizens. The Advisory Committee also conducted other public involvement activities, including press releases and presentations to various organizations, agencies and civic groups. In addition, an online survey soliciting responses regarding economic issues and various other related questions further informed the CEDS effort.

Both, the input provided by these individuals and groups and the work of the CEDS Advisory Committee created the basis for developing the vision for the Region and outlining and prioritizing goals, objectives and tasks. Through public outreach, the Advisory Committee also solicited proposals for projects and programs that will help in implementing the goals and objectives. As a result, various municipalities and organizations from throughout the Region identified potential projects and programs which the Advisory Committee prioritized according to project consistency with goals and objectives, local support, readiness, and other parameters. To better guide the CEDS process in the future, the Advisory Committee developed process evaluation criteria.

The final CEDS document was endorsed by the Advisory Committee on February 4, 2005. Following this action, the Advisory Committee presented its findings and recommendations to the Board of Directors of the Southwest Region Planning Commission for their consideration. The CEDS was unanimously endorsed by the Board at their February 14, 2005 meeting. The final CEDS document was submitted to the US Economic Development Administration (EDA) for their review in March 2005.

The CEDS document has been updated twice since its original adoption in 2005. In 2007 there was a maintenance project update performed to ensure the CEDS document remained both current and user-friendly. This update also included goal-evaluation revisions approved by the Committee during the prior year. [Add more on 2007 update]

In 2013 the socioeconomic and demographic data in the CEDS document was updated to reflect the 2010 Census and American Community Survey data. [Add more on 2013 update]

4. Organizational and Municipal Representation

The Comprehensive Economic Development Strategy Advisory Committee is comprised of members who represent a broad variety of organizations, agencies and municipalities from throughout Southwest New Hampshire. The Advisory Committee membership is maintained and occasionally revised to ensure representation across the 35 municipalities of the Southwest Region. Representatives of the following organizations are members of the CEDS Advisory Committee:

Table 1: CEDS Advisory Committee

Committee member:	Affiliation:	Representing the following sectors:	Interest in regional issues:
Bob Baker	Keene State College, Director of Continuing Education	Employment and training	Quality of life, Educational system, Labor force
Keith Thibault	Southwestern Community Services, Development Director	Community organization	Local government, Developable land, Housing
Glenn Coppelman, *Ex-Officio*	NH Community Development Finance Authority	Economic development	State perspective
Brian Foucher	Owner, WiValley Inc.	Economic and business development	Business development, Infrastructure development, Broadband Access and Availability
Jack Dugan	Monadnock Economic Development Corporation, President	Economic and business development	Economic base, Quality of life, Regional perspective
Bob Harcke	Hinsdale Industrial and Commercial Development Commission,	Economic and business development	Economic development
H. Greg Johnson	Town of Swanzey	Economic and business development	various
Lisa Murray	Franklin Pierce University	Employment and training	Quality of life, Educational system, Labor force
John M. Pratt	Town of Walpole, Cheshire County Commissioner	Public leadership (municipal and state governance)	Tax structure, Local government, Educational system
Chris Wellington, *Ex-Officio*	Department of Resources & Economic Development	Economic development	State perspective
Morris Klein	Town of Hinsdale	Public leadership (municipal governance)	Retail and commercial development
Ted Whippie	Town of Winchester	Public leadership (municipal governance)	Tax Structure, Senior Housing, Large Scale Retail
Ralph Wentworth	Town of Troy, Industrial Development Authority, Chairman	Economic and business development, Public leadership (municipal governance)	Economic base, Regional perspective, Tax structure
Jen Risley	Monadnock Buy Local	Economic and business development	Local business development
Judy Tomlinson	Town of Dublin	Economic and business development	various

5. Project Funding

A coalition of local, state and federal partners helped funding the CEDS effort. This diversity not only leverages more resources for the project, it also provides for a healthy momentum and balance of interest.

- US Department of Commerce, Economic Development Administration
- NH Department of Resources and Economic Development
- NH Community Development Finance Authority
- NH Office of Energy and Planning
- NH Department of Environmental Services
- Public Service of New Hampshire
- Monadnock Economic Development Corporation
- Monadnock Business Ventures
- Southwest Region Planning Commission

6. Southwest Region Planning Commission (SWRPC)

SWRPC, which provides staff services to the CEDS Advisory Committee, is one of nine regional planning commissions in New Hampshire and covers a 35-town area Southwestern New Hampshire. SWRPC's mission is "[t]o work in partnership with the communities of the Southwest Region to promote sound decision-making for the conservation and effective management of natural, cultural and economic resources." To this end, SWRPC employs a staff of full time professionals who possess a diverse range of planning related background and experience. Planning areas covered by SWRPC are community and economic development, transportation and natural resource planning, local planning assistance and geographic information systems.

III. State of the Region

1. Background

A. Historic Development Patterns

The Region is located in the southwestern part of New Hampshire and includes 35 municipalities comprising all 23 municipalities in Cheshire County, 11 municipalities in western Hillsborough County and 1 municipality in Sullivan County. In 2010, 102,313 people lived in 46,040 households in the 1,007-square-mile Region. Population density region-wide has grown from 65 persons per square mile in 1970 to 102 persons per square mile in 2010.

Historic development patterns in the Ashuelot and Contoocook river valleys - separated by the Monadnock Highlands - create a socio-economic geography of two sub-regions. One is dominated by Keene as an employment, commercial, and population center at the intersection of NH Routes 9, 10, 12, and 101, while the other is a more linear configuration of population centers in Rindge, Jaffrey and Peterborough, all of which lie along the US Route 202 corridor. The Region is as socio-economically connected with Vermont and Massachusetts as with other parts of New Hampshire. While development within the Southwest Region is effected by local regulations, services and infrastructure, it is driven by the central New England economy of the Merrimack Valley in New Hampshire and central and eastern Massachusetts.

Since the 17^{th} Century, the economy of the Southwest Region has changed from agriculture and forestry to village industry to regional manufacturing, high tech industry and business. The appearance of the landscape and the distribution of the Region's population have changed dramatically over time. Technology in transportation and communications have been major catalysts for regional economic trends. The arrival of the railroad opened new markets for the Region's farm, forest and manufacturing products in the 19^{th} Century. Soon after, the railroad opened the Midwest's vast agricultural wealth, rendering New England's agricultural production insignificant. Manufacturing disappeared from many parts of the Region during the mid-1900's, often relocating to southern states, the rust belt and foreign countries. Lately, highways, high levels of personal mobility, and telecommunications are bringing new industry and employees to the Region.

Today, the Region's economy is much more than the businesses located within individual towns: indeed, most workers do not work in the town in which they live. Many residents travel outside the Region each day for work, many to the Merrimack Valley and eastern Massachusetts. The Region's business and industry community is very diverse, including machine tooling, high-tech manufacturing and electronics, medical, publishing, insurance and warehousing/trucking. Tourism is a vital industry here in the "Currier and Ives Corner" of New Hampshire.

B. Population and Socio-Economic Conditions

Population

According to the 2010 Census, the Southwest Region[1] has a population of 102,313. Since 1980, the Region's population has grown by 56%. This is 22% less than the average for the state of New Hampshire, but consistent with the national trend. Parts of Hillsborough, Merrimack, and Rockingham and Strafford Counties accounted for most of the growth the state has experienced in the most recent decade (73% between 2000 and 2010). The Southwest Region is not part of the state's highest-growth area, accounting for 6.1% of New Hampshire's total population increase between 2000 and 2010.

The Southwest Region is rural in character. Its largest municipality is Keene with a population of 23,409 in 2010. Between 2000 and 2010, ten communities experience a decline in their total population. Communities that experienced the strongest growth were Stoddard (32.8%), New Ipswich (18.9%), Langdon (17.4%), and Nelson (15%). The Region increased in population 5.1% over the same time period (Table 2).

Table 2: Population 1970-2010

	1970	1980	1990	2000	2010	Change 1970-2010	Change 2000-2010
United States	203,302,031	226,542,199	248,709,873	281,421,906	308,745,538	52%	10%
New Hampshire	737,681	920,610	1,109,252	1,235,786	1,316,470	78%	6.5%
Cheshire County	52,364	62,116	70,121	73,825	77,117	47%	4.5%
Hillsborough County	223,941	276,608	335,838	380,841	400,721	79%	5.2%
Sullivan County	30,949	36,063	38,592	40,458	43,742	41%	8.1%
Southwest Region	65,771	78,910	91,721	97,391	102,313	56%	5.1%
Alstead	1,185	1,461	1,721	1,944	1,937	64%	-0.4%
Antrim	2,122	2,208	2,360	2,449	2,637	24%	7.7%
Bennington	639	890	1,236	1,401	1,476	131%	5.4%
Chesterfield	1,817	2,561	3,112	3,542	3,604	98%	1.8%
Dublin	837	1,303	1,474	1,476	1,597	91%	8.2%
Fitzwilliam	1,362	1,795	2,011	2,141	2,396	76%	11.9%
Francestown	525	830	1,217	1,480	1,562	198%	5.5%
Gilsum	570	652	745	777	813	43%	4.6%
Greenfield	1,058	972	1,519	1,657	1,749	65%	5.6%
Greenville	1,587	1,988	2,231	2,224	2,105	33%	-5.4%
Hancock	909	1,193	1,604	1,739	1,654	82%	-4.9%
Harrisville	584	860	981	1,075	961	65%	-10.6%
Hinsdale	3,276	3,631	3,936	4,082	4,046	24%	-0.9%
Jaffrey	3,353	4,349	5,361	5,476	5,457	63%	-0.3%
Keene	20,467	21,449	22,430	22,563	23,409	14%	3.7%
Langdon	337	437	580	586	688	104%	17.4%
Marlborough	1,671	1,846	1,927	2,009	2,063	24%	2.7%
Marlow	390	542	650	747	742	90%	-0.7%
Nelson	304	442	535	634	729	140%	15.0%
New Ipswich	1,803	2,433	4,014	4,289	5,099	183%	18.9%
Peterborough	3,807	4,895	5,239	5,883	6,284	65%	6.8%

[1] Note: Throughout this document, Southwest Region is interchangeable with Region.

Richmond	287	518	877	1,077	1,155	302%	7.2%
Rindge	2,175	3,375	4,941	5,451	6,014	177%	10.3%
Roxbury	161	190	248	237	229	42%	-3.4%
Sharon	136	184	299	360	352	159%	-2.2%
Stoddard	242	482	622	928	1,232	409%	32.8%
Sullivan	376	585	706	746	677	80%	-9.2%
Surry	507	656	667	673	732	44%	8.8%
Swanzey	4,254	5,183	6,236	6,800	7,230	70%	6.3%
Temple	441	692	1,194	1,297	1,366	210%	5.3%
Troy	1,713	2,131	2,097	1,962	2,145	25%	9.3%
Walpole	2,966	3,188	3,210	3,594	3,734	26%	3.9%
Westmoreland	998	1,452	1,596	1,747	1,874	88%	7.3%
Winchester	2,869	3,465	4,038	4,144	4,341	51%	4.8%
Windsor	43	72	107	201	224	421%	11.4%

The most recent projections from the New Hampshire Office of Energy and Planning anticipate a 5-6% increase in population in the Southwest Region from 2010 to 2040. This is a significant departure from the last ten years of growth, which also measured about five percent. These 30-year projections indicate both dramatically lower population growth and some declining populations over the short and long terms (Table 2,

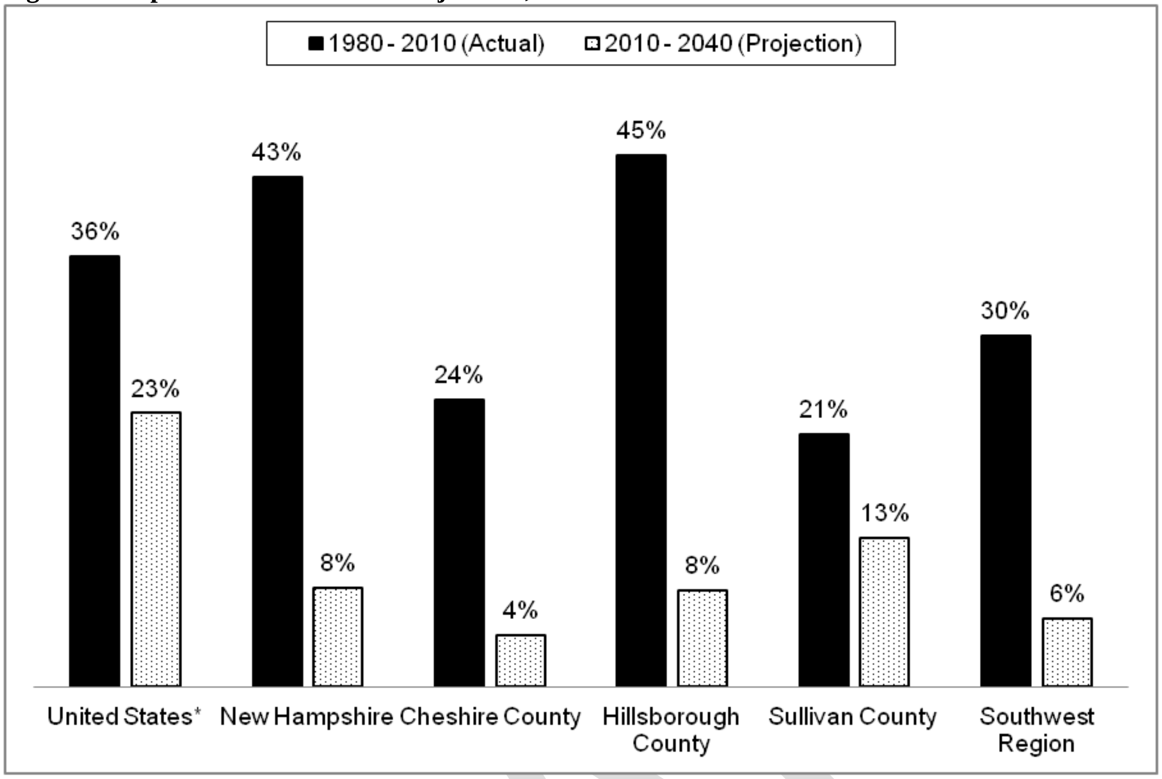
Figure 2). Fourteen municipalities, including Keene, are projected to experience a decrease in population over the short term, between 2010 and 2015. Nine municipalities are projected to experience a decrease in population over the long term, between 2010 and 2040. Population projections for municipalities within the Region range from an expected 27% increase in Stoddard to a 13% decrease in Harrisville.

Table 3: Population Projections 2010-2040

	Census	OEP Projections						Change
	2010	2015	2020	2025	2030	2035	2040	2010-2040
New Hampshire	1,316,470	1,330,834	1,359,836	1,388,884	1,412,041	1,425,357	1,427,098	8%
Cheshire County	77,117	77,128	78,052	79,085	79,861	80,381	80,471	4%
Hillsborough County	400,721	405,380	414,356	423,117	429,776	433,266	433,381	8%
Sullivan County	43,742	44,511	45,492	46,650	47,840	48,724	49,249	13%
Southwest Region	102,313	102,815	104,506	106,101	107,310	108,062	108,168	6%
Alstead	1,937	1,890	1,866	1,890	1,909	1,921	1,923	-1%
Antrim	2,637	2,698	2,789	2,848	2,893	2,916	2,917	11%
Bennington	1,476	1,494	1,528	1,560	1,585	1,598	1,598	8%
Chesterfield	3,604	3,557	3,551	3,598	3,633	3,657	3,661	2%
Dublin	1,597	1,625	1,672	1,694	1,711	1,722	1,724	8%
Fitzwilliam	2,396	2,476	2,587	2,621	2,646	2,664	2,667	11%
Francestown	1,562	1,583	1,620	1,654	1,680	1,694	1,694	8%
Gilsum	813	814	824	835	843	849	850	5%
Greenfield	1,749	1,772	1,814	1,853	1,882	1,897	1,898	8%
Greenville	2,105	2,011	1,934	1,974	2,005	2,022	2,022	-4%
Hancock	1,654	1,584	1,529	1,561	1,585	1,598	1,599	-3%
Harrisville	961	880	809	819	827	833	834	-13%
Hinsdale	4,046	3,938	3,874	3,926	3,964	3,990	3,994	-1%
Jaffrey	5,457	5,326	5,257	5,326	5,379	5,414	5,420	-1%
Keene	23,409	23,332	23,531	23,842	24,076	24,233	24,260	4%
Langdon	688	728	772	792	812	827	836	21%
Marlborough	2,063	2,045	2,052	2,079	2,100	2,113	2,116	3%
Marlow	742	723	712	722	729	733	734	-1%
Nelson	729	762	805	816	824	829	830	14%
New Ipswich	5,099	5,455	5,879	6,003	6,097	6,147	6,148	21%
Peterborough	6,284	6,405	6,595	6,734	6,840	6,896	6,898	10%
Richmond	1,155	1,170	1,199	1,215	1,227	1,235	1,237	7%
Rindge	6,014	6,175	6,411	6,496	6,559	6,602	6,609	10%
Roxbury	229	220	213	216	218	219	220	-4%
Sharon	352	343	336	343	349	352	352	0%
Stoddard	1,232	1,364	1,513	1,533	1,548	1,558	1,560	27%
Sullivan	677	626	582	589	595	599	600	-11%
Surry	732	747	770	780	788	793	794	8%
Swanzey	7,230	7,294	7,446	7,545	7,619	7,668	7,677	6%
Temple	1,366	1,383	1,414	1,444	1,466	1,478	1,479	8%
Troy	2,145	2,193	2,268	2,298	2,320	2,335	2,338	9%
Walpole	3,734	3,724	3,759	3,809	3,846	3,871	3,875	4%
Westmoreland	1,874	1,899	1,946	1,972	1,992	2,004	2,007	7%
Winchester	4,341	4,348	4,406	4,464	4,508	4,537	4,543	5%
Windsor	224	233	245	250	254	256	256	14%

Source: New Hampshire Population Projections, Fall 2013, New Hampshire Office of Energy and Planning

Figure 2: Population Growth and Projections, 1980-2010 and 2010-2040



Sources: New Hampshire Population Projections, Fall 2013, New Hampshire Office of Energy and Planning
**United States Census Bureau 2012 National Population Projections Middle Series*

Age Cohorts

According to the 2010 Census, the largest age group in the Southwest Region was the 50-59 year age group, followed by the 40-49 year and 10-19 year age groups. Age group patterns throughout the Region were very similar to those for the state of New Hampshire (Table 4).

In Keene and Rindge, the 20-29 year age groups were the largest in comparison to other municipalities, followed by the 10-19 year age groups (Table 4). The City of Keene has a relatively large number of college-age residents, some of whom attend one of three institutions of higher education: Keene State College, Antioch New England Graduate School, and River Valley Community College. Similarly, the Town of Rindge is home to 2,267 students attending Franklin Pierce University.

Table 4: 2010 Population Age Breakdown

	Total	0-9	10-19	20-29	30-39	40-49	50-59	60-69	70-
United States	308,745,538	40,550,019	42,717,537	42,687,848	40,141,741	43,599,555	41,962,930	29,253,187	16,595
New Hampshire	1,316,470	147,562	178,240	157,667	153,503	210,590	208,686	139,130	71
Cheshire County	77,117	7,895	10,802	11,152	8,037	10,867	12,001	8,585	4
Hillsborough County	400,721	49,412	54,861	48,910	51,322	65,965	60,283	37,486	18
Sullivan County	43,742	4,834	5,277	4,345	4,951	6,679	7,301	5,486	2
Southwest Region	102,313	10,711	14,427	13,556	10,613	14,832	16,355	11,455	6
% of Region	100%	10.5%	14.1%	13.2%	10.4%	14.5%	16.0%	11.2%	
Alstead	1,937	206	238	195	216	282	336	267	
Antrim	2,637	268	406	239	280	438	471	301	
Bennington	1,476	187	235	181	182	248	239	130	
Chesterfield	3,604	347	448	316	337	605	705	507	
Dublin	1,597	166	199	133	164	236	309	245	
Fitzwilliam	2,396	267	281	224	264	366	475	325	
Francestown	1,562	128	237	101	140	263	321	217	
Gilsum	813	79	95	94	91	122	163	101	
Greenfield	1,749	187	241	202	183	324	307	186	
Greenville	2,105	257	298	220	233	326	363	245	
Hancock	1,654	140	179	132	109	236	351	262	
Harrisville	961	62	95	72	66	126	236	194	
Hinsdale	4,046	444	519	417	489	642	668	498	
Jaffrey	5,457	691	734	605	579	811	826	626	
Keene	23,409	2,037	3,798	4,973	2,253	2,840	2,833	2,072	1
Langdon	688	72	91	52	75	103	112	112	
Marlborough	2,063	213	241	229	253	285	369	232	
Marlow	742	61	77	64	66	136	160	112	
Nelson	729	56	103	86	55	116	139	100	
New Ipswich	5,099	769	820	590	617	759	834	409	
Peterborough	6,284	640	838	537	549	917	975	745	
Richmond	1,155	155	152	104	109	182	225	128	
Rindge	6,014	637	1,146	1,243	521	737	814	581	
Roxbury	229	18	31	22	23	32	52	33	
Sharon	352	33	37	27	41	52	74	53	
Stoddard	1,232	143	139	74	150	199	198	172	
Sullivan	677	65	76	72	85	112	129	93	
Surry	732	80	55	59	89	107	155	102	
Swanzey	7,230	791	856	840	842	1,115	1,215	818	
Temple	1,366	115	213	102	150	247	262	181	
Troy	2,145	272	275	280	310	324	321	207	
Walpole	3,734	401	489	363	368	588	622	459	
Westmoreland	1,874	159	202	195	179	283	353	212	
Winchester	4,341	545	553	492	528	621	698	501	
Windsor	224	20	30	21	17	52	45	29	

Source: United States Census Bureau Decennial Census, 2010

Race and Ethnicity

The Southwest Region, similar to the state of New Hampshire, is significantly less diverse than the nation as a whole. According to the 2010 Census, about 97% of the people in the Region identify themselves as White, 1.32% as Hispanic or Latino (any race), 0.72% as Asian, 0.35% as Black or African and 0.26% as American Indian and Alaska Native (Table 5). The City of Keene has the highest percentage of non-white population in the Region, followed by Rindge, Stoddard, and Swanzey.

Table 5: 2010 Race and Ethnicity

	Total population	White	Black or African American	American Indian and Alaska Native	Asian	Native Hawaiian and Other Pacific Islander	Hispanic or Latino	Other Race
United States	308,745,538	223,553,265	38,929,319	2,932,248	14,674,252	540,013	50,477,594	19,107,368
New Hampshire	1,316,470	1,236,050	15,035	3,150	28,407	384	36,704	12,062
Cheshire County	77,117	74,239	390	193	921	19	1,090	275
Hillsborough County	400,721	362,153	8,298	961	12,954	140	21,241	8,276
Sullivan County	43,742	42,421	185	129	271	5	493	117
Southwest Region	102,313	98,726	495	244	1,114	29	1,453	351
% of Region	100%	97.14%	0.35%	0.26%	0.72%	0.02%	1.32%	0.25%
Alstead	1,937	1,890	2	11	6	0	16	1
Antrim	2,637	2,568	7	5	10	1	31	4
Bennington	1,476	1,438	6	1	9	0	13	6
Chesterfield	3,604	3,517	8	6	20	0	38	15
Dublin	1,597	1,549	4	4	12	1	28	7
Fitzwilliam	2,396	2,315	3	9	15	1	16	2
Francestown	1,562	1,513	4	2	8	0	17	11
Gilsum	813	796	2	1	6	0	5	1
Greenfield	1,749	1,710	8	3	11	0	16	1
Greenville	2,105	2,041	13	10	2	4	47	5
Hancock	1,654	1,611	6	1	13	0	17	4
Harrisville	961	944	5	0	3	0	6	3
Hinsdale	4,046	3,903	22	10	22	11	56	14
Jaffrey	5,457	5,248	20	9	65	2	90	18
Keene	23,409	22,314	144	42	474	1	372	109
Langdon	688	679	1	3	2	0	11	1
Marlborough	2,063	2,002	8	1	18	0	29	5
Marlow	742	727	0	4	0	0	14	3
Nelson	729	712	0	0	4	0	10	0
New Ipswich	5,099	4,990	12	9	16	4	88	7
Peterborough	6,284	6,039	46	11	112	1	86	26
Richmond	1,155	1,124	3	9	3	0	27	2
Rindge	6,014	5,747	80	9	54	0	77	27
Roxbury	229	221	0	0	2	0	3	0
Sharon	352	342	1	0	7	0	4	1
Stoddard	1,232	1,178	9	15	7	0	20	1
Sullivan	677	668	1	0	4	0	3	0
Surry	732	716	1	0	10	0	4	1
Swanzey	7,230	6,939	23	12	125	2	107	29

Temple	1,366	1,341	0	6	2	0	28	10
Troy	2,145	2,080	17	16	19	1	28	1
Walpole	3,734	3,632	10	7	19	0	50	9
Westmoreland	1,874	1,844	7	5	9	0	13	6
Winchester	4,341	4,173	21	23	24	0	78	21
Windsor	224	215	1	0	1	0	5	0

Source: United States Census Bureau Decennial Census, 2010

Income

The median household income of $62,526 in the Southwest Region in 2011 was approximately 3.3% lower than the New Hampshire average of $64,664, but higher than the national average of $52,762. According to the 2007-2011 American Community Survey 5-Year Estimates, six municipalities in the Region were below the national average of $52,762 (Gilsum, Keene, Temple, Hinsdale, Windsor, and Winchester). Median household income levels ranged from $41,298 in the Town of Winchester to $88,167 in the Town of New Ipswich (Table 6).

The per capita income of $30,020 in the Southwest Region in 2011 was about 7.2% lower than the New Hampshire average of $32,357, but higher than the national average of $27,915. Twenty-one municipalities were above the national average and 14 towns were below the national average (Table 6).

Table 6: 1990-2011* Median Household and Per-Capita Income

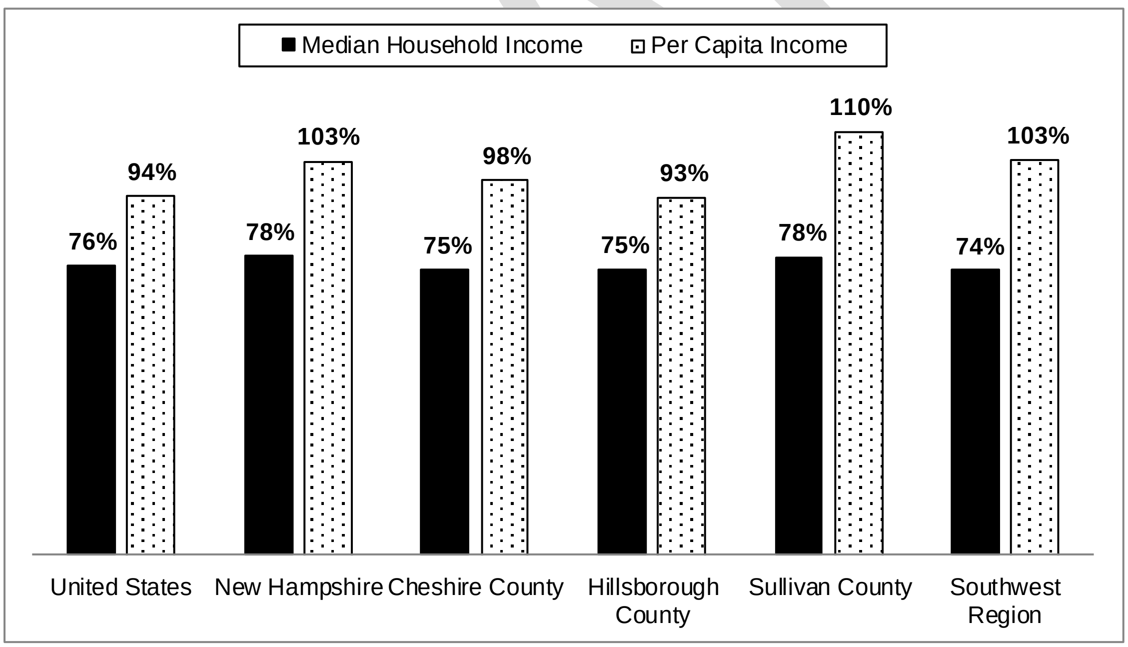
	Median Household Income 1990	Median Household Income 2000	Median Household Income 2011*	Per Capita Income 1990	Per Capita Income 2000	Per Capita Income 2011*
United States	$30,056	$41,994	$52,762	$14,420	$21,587	$27,915
New Hampshire	$36,329	$49,467	$64,664	$15,959	$23,844	$32,357
Cheshire County	$31,648	$42,382	$55,241	$13,887	$20,685	$27,459
Hillsborough County	$40,404	$53,384	$70,591	$17,404	$25,198	$33,653
Sullivan County	$29,053	$40,938	$51,678	$12,935	$21,319	$27,223
Southwest Region (Average)	$35,418	$47,623	$62,526	$14,669	$22,091	$30,020
Alstead	$30,956	$43,191	$54,500	$13,236	$20,444	$26,941
Antrim	$37,246	$45,677	$59,798	$14,197	$18,978	$27,613
Bennington	$34,375	$46,150	$60,625	$13,357	$19,675	$28,190
Chesterfield	$38,000	$51,351	$80,727	$15,412	$25,051	$40,655
Dublin	$41,917	$52,150	$60,583	$17,972	$27,028	$29,828
Fitzwilliam	$35,988	$48,125	$66,542	$14,324	$23,127	$33,416
Francestown	$46,316	$64,259	$75,938	$20,903	$28,942	$36,265
Gilsum	$34,821	$43,359	$51,447	$13,774	$20,955	$25,768
Greenfield	$40,057	$48,833	$71,667	$15,107	$19,895	$32,293
Greenville	$33,302	$39,545	$53,945	$13,925	$17,901	$22,306
Hancock	$41,318	$55,000	$71,250	$18,903	$29,445	$40,369
Harrisville	$35,000	$48,625	$57,639	$14,726	$25,397	$40,225
Hinsdale	$26,753	$36,124	$47,621	$12,127	$16,611	$23,905
Jaffrey	$32,549	$45,033	$56,333	$15,206	$21,412	$30,439
Keene	$31,235	$37,033	$48,441	$14,246	$20,544	$25,631
Langdon	$34,205	$42,083	$69,583	$13,040	$24,572	$29,222
Marlborough	$31,383	$44,904	$60,500	$14,066	$19,967	$27,903
Marlow	$32,212	$45,000	$56,917	$11,624	$18,810	$23,605
Nelson	$34,750	$41,250	$63,558	$18,079	$31,625	$33,767
New Ipswich	$40,325	$53,939	$88,167	$13,759	$20,210	$30,453

Peterborough	$40,179	$47,381	$68,469	$19,144	$26,154	$39,520
Richmond	$36,328	$49,141	$66,964	$14,753	$21,174	$29,436
Rindge	$33,538	$50,494	$65,046	$11,303	$18,495	$23,642
Roxbury	$40,500	$49,375	$58,125	$13,174	$21,124	$30,957
Sharon	$45,250	$66,250	$72,083	$20,487	$29,478	$40,988
Stoddard	$31,705	$37,639	$70,208	$12,369	$19,617	$30,624
Sullivan	$31,083	$51,058	$78,611	$12,990	$21,143	$27,938
Surry	$41,364	$56,964	$68,250	$15,972	$24,277	$36,543
Swanzey	$29,747	$44,819	$55,901	$14,458	$20,150	$27,548
Temple	$41,792	$56,500	$48,056	$14,488	$21,897	$29,377
Troy	$29,511	$41,875	$54,833	$11,638	$17,323	$25,482
Walpole	$27,679	$44,673	$61,806	$15,100	$23,295	$25,894
Westmoreland	$38,583	$55,875	$75,474	$14,734	$24,488	$30,871
Winchester	$28,196	$37,364	$41,298	$11,086	$16,012	$21,640
Windsor	$31,458	$45,750	$47,500	$13,737	$17,966	$21,447

*Source: United States Census Bureau 1990, 2000 Decennial Census, *2007-2011 American Community Survey 5-Year Estimates. Figures were not adjusted for inflation.*

Since 1990, median household income has risen slightly less in the Region compared to the national and state averages (Figure 3). Over the same period, per capita income increased the same amount as it did in New Hampshire. However it is evident that there are still significant disparities between individual municipalities.

Figure 3: Income Growth 1990-2011*



*Source: United States Census Bureau 1990 Decennial Census, *2007-2011 American Community Survey 5-Year Estimates. Figures were not adjusted for inflation.*

Poverty

According to the United States Census Bureau, in 2011, all but three municipalities in the Southwest Region were below the national poverty rate for individuals of 14.3%: Keene, Rindge, and Winchester. The average poverty rate in the Region was 6.8%, significantly less than the state figure of 8.0%. The poverty rate in the Southwest Region ranges from 1.7% in the Town of Francestown to 22.7% in the

Town of Winchester. In the City of Keene - the Region's most populous municipality - 15.5% of residents live below the poverty level. Throughout the Region, 12 municipalities are below and 23 municipalities are above the average regional poverty rate (Table 7).

Table 7: 1980-2011* Poverty Rate1 by Individual

	1980	1990	2000	2011*
United States	11.7%	12.8%	12.4%	14.3%
New Hampshire	9.5%	6.4%	6.5%	8.0%
Cheshire County	10.4%	7.0%	8.0%	9.9%
Hillsborough County	6.9%	5.9%	6.3%	7.5%
Sullivan County	10.4%	9.8%	8.5%	10.4%
Southwest Region (Average)	9.5%	6.4%	6.7%	6.8%
Alstead	13.3%	5.6%	7.9%	2.8%
Antrim	10.5%	8.1%	11.5%	4.9%
Bennington	8.3%	8.4%	7.9%	5.9%
Chesterfield	6.2%	6.2%	4.5%	1.9%
Dublin	16.3%	4.8%	10.6%	6.8%
Fitzwilliam	9.8%	5.6%	6.7%	4.2%
Francestown	9.1%	3.8%	3%	1.7%
Gilsum	9.7%	4.5%	7%	7.6%
Greenfield	11.2%	7.2%	5.4%	9.6%
Greenville	7.5%	6.9%	7.4%	11.4%
Hancock	7.7%	4.2%	3.8%	4.7%
Harrisville	10.6%	3.7%	5.7%	2.7%
Hinsdale	8.1%	8.3%	6.4%	6%
Jaffrey	6.3%	4.0%	7.8%	4.9%
Keene	10.2%	8.1%	10.7%	15.5%
Langdon	6.1%	4.2%	3.8%	5.2%
Marlborough	7.1%	5.4%	3.5%	4.7%
Marlow	8.8%	14.7%	4.1%	5.7%
Nelson	17.6%	8.5%	12.2%	10.4%
New Ipswich	9.5%	5.9%	7.1%	2.2%
Peterborough	7.2%	5.2%	9.1%	3.9%
Richmond	11.4%	3.0%	7.6%	4.8%
Rindge	8.7%	3.3%	7.6%	17.2%
Roxbury	10.1%	0.0%	0.9%	6.1%
Sharon	11.0%	7.6%	3.8%	4.7%
Stoddard	7.5%	6.4%	8.6%	4.8%
Sullivan	11.1%	6.8%	4.5%	9.9%
Surry	8.2%	5.9%	1.8%	2.8%
Swanzey	6.3%	8.2%	5.4%	4%
Temple	4.5%	6.5%	6.4%	12.4%
Troy	14.5%	5.9%	7.9%	9.7%
Walpole	8.5%	7.4%	6.1%	7.3%
Westmoreland	7.4%	4.9%	2.5%	3.8%

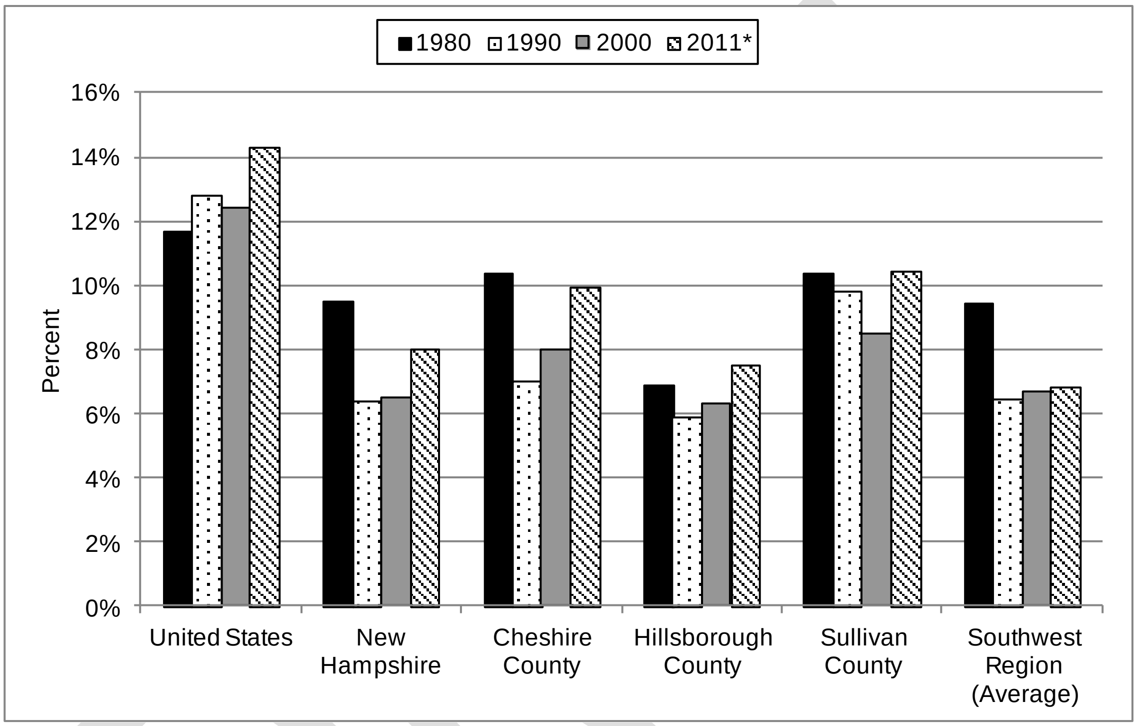
[1] To determine a person's poverty status, the Census Bureau compares the person's total family income in the last 12 months with the poverty threshold appropriate for that person's family size and composition. If the total income of that person's family is less than the threshold appropriate for that family, then the person is considered "below the poverty level," together with every member of his or her family. If a person is not living with anyone related by birth, marriage, or adoption, then the person's own income is compared with his or her poverty threshold.

Winchester	21.4%	12.7%	12%	22.7%
Windsor	0.0%	13.2%	12.3%	4.8%

*Sources: Unites States Census Bureau Decennial Census 1980, 1990, and 2000. *2007-2011 American Community Survey (ACS) 5-Year Estimates.*

When compared to 1980, the poverty rate in the Southwest Region has significantly decreased - from 9.5% down to 6.8%. However, national and statewide trends shows an increase over the last 10 and 20 year periods (Figure 4).

Figure 4: 1980-2011* Poverty Rate



*Sources: U.S. Census Bureau Decennial Census 1980, 1990, and 2000. *U.S. Census Bureau American Community Survey (ACS) 5-Year Estimates 2007-2011*

C. Education

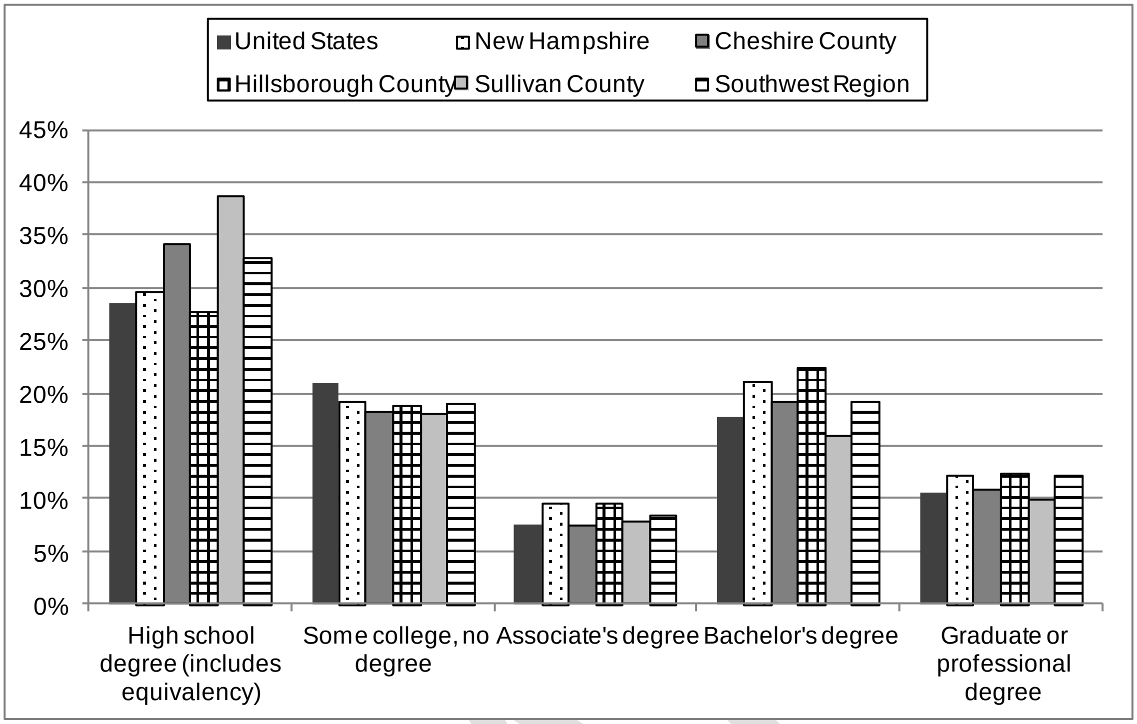
In the Southwest Region, 39.6% of adults 25 or older have an associate's degree or higher. This exceeds the national figure of 35.8%, but falls slightly below the state figure of 42.6% (Figure 5). Of persons 25 years of age or older, 32.8% possess a high school diploma or GED as their highest level of educational attainment (nationally: 28.6%), 19.2% have a Bachelor's Degree (nationally: 17.7%) and 12.0% received graduate, doctorate or professional degrees (nationally: 10.5%). Communities with lower educational attainment include Winchester, Gilsum, and Hinsdale, which have relatively high percentages of high school graduates, but relatively low percentages of graduates with higher education when compared to other Southwest Region communities (Table 8).

Table 8: 2011* Highest Level of Educational Attainment (Persons 25 Years and Older)

	Population 25 years and over	High school degree (includes equivalency)	Some college, no degree	Associate's degree	Bachelor's degree	Graduate or professional degree
United States	202,048,123	28.6%	21.0%	7.6%	17.7%	10.5%
New Hampshire	901,420	29.5%	19.1%	9.5%	21.0%	12.1%
Cheshire County	51,291	34.1%	18.3%	7.4%	19.2%	10.9%
Hillsborough County	271,021	27.6%	18.7%	9.5%	22.3%	12.3%
Sullivan County	31,324	38.6%	18.0%	7.8%	16.0%	9.8%
Southwest Region	68,676	32.8%	19.0%	8.4%	19.2%	12.0%
Alstead	1,297	32.9%	18.1%	11.7%	21.2%	11.6%
Antrim	1,904	35.8%	22.0%	9.8%	13.1%	8.3%
Bennington	882	31.9%	27.1%	7.9%	17.3%	9.1%
Chesterfield	2,599	26.5%	17.8%	7.9%	25.7%	15.1%
Dublin	1,093	34.1%	19.1%	9.9%	18.1%	13.0%
Fitzwilliam	1,848	35.0%	18.4%	8.8%	20.2%	10.3%
Francestown	1,193	19.1%	19.4%	8.8%	29.1%	18.6%
Gilsum	449	53.7%	12.2%	6.9%	12.2%	7.1%
Greenfield	1,049	27.1%	17.3%	10.3%	24.2%	10.7%
Greenville	1,587	42.7%	22.2%	6.9%	8.4%	2.3%
Hancock	1,282	20.2%	16.0%	8.2%	31.1%	21.5%
Harrisville	696	18.4%	18.8%	6.3%	33.0%	19.1%
Hinsdale	3,083	46.0%	18.6%	7.3%	6.6%	4.7%
Jaffrey	3,844	30.4%	22.1%	5.9%	23.2%	8.5%
Keene	14,188	29.3%	19.1%	6.1%	22.5%	13.2%
Langdon	499	38.5%	13.0%	9.0%	19.8%	13.4%
Marlborough	1,548	25.8%	19.0%	8.7%	15.5%	15.4%
Marlow	699	42.3%	16.2%	12.2%	12.4%	8.7%
Nelson	591	18.1%	19.3%	7.8%	32.3%	22.0%
New Ipswich	3,010	29.9%	23.6%	7.8%	18.2%	10.6%
Peterborough	4,605	17.8%	11.9%	7.2%	31.9%	25.5%
Richmond	787	32.5%	17.2%	10.4%	18.3%	13.0%
Rindge	3,151	36.8%	23.2%	9.7%	13.3%	8.9%
Roxbury	190	35.8%	24.7%	10.0%	13.7%	9.5%
Sharon	292	16.1%	27.7%	9.6%	24.7%	18.2%
Stoddard	768	36.6%	11.6%	8.5%	16.7%	16.3%
Sullivan	494	39.1%	17.0%	9.5%	15.4%	8.5%
Surry	608	24.5%	25.7%	12.2%	21.7%	10.7%
Swanzey	5,035	33.5%	16.0%	7.0%	21.2%	10.0%
Temple	983	32.9%	24.8%	6.9%	14.8%	10.9%
Troy	1,275	39.0%	18.3%	11.2%	15.2%	3.6%
Walpole	2,495	37.2%	18.4%	6.6%	23.8%	9.7%
Westmoreland	1,542	32.7%	16.9%	7.7%	19.5%	14.2%
Winchester	3,011	56.1%	10.5%	4.9%	6.3%	5.1%
Windsor	99	40.4%	20.2%	4.0%	11.1%	14.1%

*Source: *U.S. Census Bureau American Community Survey 2007-2011 5-Year Estimates*

Figure 5: 2011* Educational Attainment of Persons 25 Years and Older



*Source: *U.S. Census Bureau American Community Survey 2007-2011 5-Year Estimates Table S1501*

Eight school districts serve the Southwest Region's 35 municipalities. Those school districts are: Contoocook Valley, Fall Mountain Regional, Hillsboro-Deering Cooperative, Hinsdale, Jaffrey-Rindge Cooperative, Keene, Mascenic Regional, and Monadnock Regional. For the 2010-2011 school year, four of these school districts experienced drop-out rates were higher than the state's average of 1.19% (Table 9).

Table 9: 2010-2011 School Year Dropout Rates for Grades 9-12

	New Hampshire Annual Counts					
		Early Exit Non-Graduates				Dropouts Only
School District	**Fall 2010 Enrollment**	**Earned GED[1]**	**Enrolled in College[2]**	**Dropped Out[3]**	**Total**	**Annual Dropout %**
New Hampshire	**62,974**	**418**	**7**	**751**	**1,176**	**1.19%**
Contoocook Valley	949	0	0	6	6	0.63%
Fall Mountain Regional	600	0	0	8	8	1.34%
Hillsboro-Deering Cooperative	473	6	0	6	12	1.27%
Hinsdale	190	1	0	0	1	0.00%
Jaffrey-Rindge	515	3	0	4	7	0.77%

[1] These are students that exited high school during the 2010-2011 school year but subsequently received a GED certificate from the State of NH. Only students that voluntarily granted access to their high school transcripts have been counted on in this report. Any student who did not grant access to their transcripts or who received a GED from another state could not be verified and therefore have been counted as "Dropped Out."
[2] These are early exit students who enrolled in at least one college course. National Clearing House data, which contains enrollment verification for 92% of two and four year college students in the United States, was used to identify enrollment. College students who have been earned their GED have been counted as GED only. They are not double counted.
[3] Dropouts are early exit non-graduates that have not been identified as either receiving a GED or enrolling in college.

Cooperative						
Keene	1,599	9	0	23	32	1.43%
Mascenic Regional	402	0	0	0	0	0.00%
Monadnock Regional	610	2	0	18	20	2.92%

Source: New Hampshire Department of Education, 2012

The Region is home to four institutions of higher education: Keene State College, Antioch New England Graduate School, Franklin Pierce University, and River Valley Community College (Table 10). Vocational training and continuing education is offered by these institutions as well as the Monadnock Training Council and several school districts throughout the area.

Table 10: Regional Post-Secondary Educational Institutions

School	Type	Fall 2012 Enrollment	Degrees
Keene State College	Four-year liberal arts college	5,605	B.A., B.S., B.F.A., B.M., M.S., M.Ed.
Antioch New England Graduate School	Graduate school	1,000	M.A., M.A., Ph.D.
Franklin Pierce University	Four-year liberal arts college	2,267	B.A., B.S., M.B.S., M.S.
River Valley Community College	Two-year community college	1,094	A.A., Certificate

Source: Official School Websites

D. Health Resources

The Region has two medical centers: Cheshire Medical Center / Dartmouth-Hitchcock in Keene and Monadnock Community Hospital in Peterborough.

A member of the Dartmouth-Hitchcock Network, Cheshire Medical Center / Dartmouth-Hitchcock is a 169-bed, acute care health organization that serves as the referral center for Southwest New Hampshire, North Central Massachusetts and Southeast Vermont. Cheshire Medical Center is joined with Dartmouth-Hitchcock Keene, a multi-specialty group practice with over 60 physicians representing 25 five primary care and specialty areas. Dartmouth–Hitchcock Keene includes satellite offices in the communities of Jaffrey, Walpole and Winchester, New Hampshire.

Affiliated with the Capital Region Healthcare system in Concord, Monadnock Community Hospital serves the Greater Peterborough area with a 62-bed acute care facility. The hospital staff includes over 125 primary care and specialty care physicians. In addition to the inpatient services, a wide variety of outpatient services are available including pulmonary, cardiac and physical rehabilitation; 24-hour emergency care; a fully equipped laboratory; and, an extensive radiology department. The primary care services network provides a wide range of primary and behavioral health care services for individuals and families with offices in Peterborough, Jaffrey, New Ipswich and Antrim.

E. Housing

Between 2000 and 2011, the total number of homes of any type in the Southwest Region rose by approximately 11%. The total number of single-family homes increased at the same rate, and comprise 71% of all housing units. Mobile homes experienced a decrease in quantity by 7% in the Region. The inventory of multi-family and two-family homes each increased by 17% (Table 111). The Southwest Region experienced slower growth of single-family homes compared to the state-wide average for New Hampshire but experienced much higher growth of two-family and multi-family units (Figure 6).

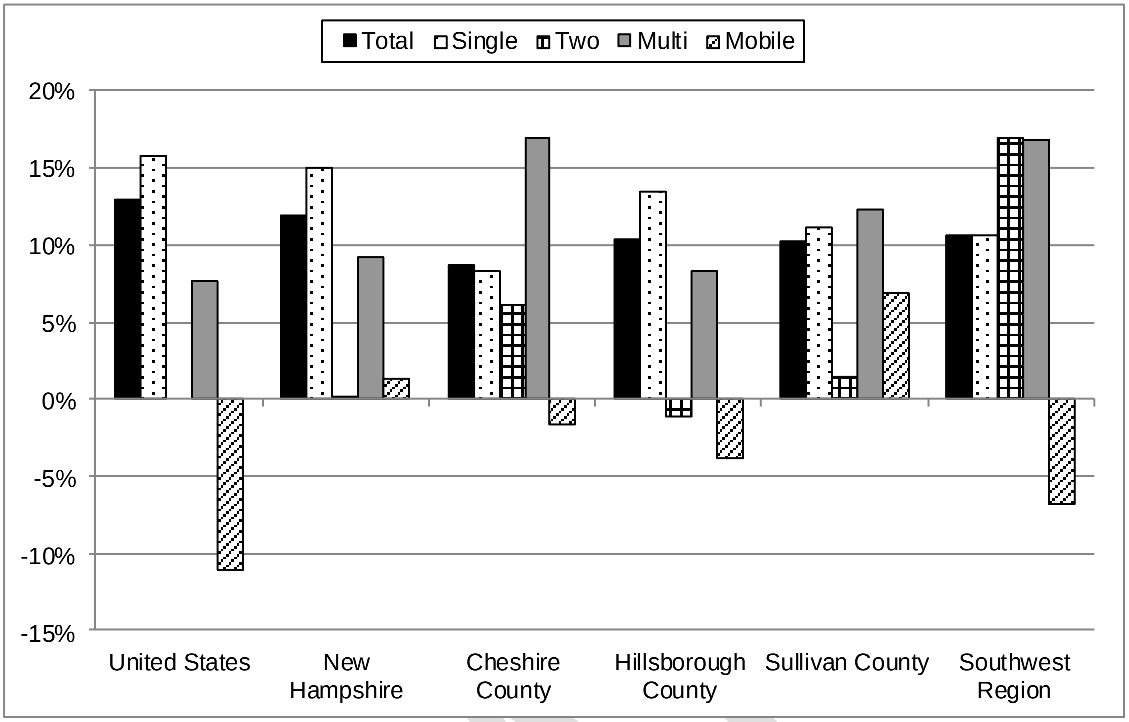
In Keene, Hinsdale, and Greenville, nearly half of the housing units are two-family, multi-family, or mobile homes, whereas the state and Southwest Region figures are around 30%. Keene, Peterborough, and Marlborough have the highest percentages of two-family or multi-family homes at 43.7%, 33.3%, and 30.4%, respectively (Table 11).

Table 11: 2000-2011* Single-, Two-, Multi-Family and Manufactured Homes

	2000					2011*				
	Total	**Single**	**Two**	**Multi**	**Mobile**	**Total**	**Single**	**Two**	**Multi**	**Mobile**
United States (In Millions)	116	76	5	26	9	131	88	5	28	8
New Hampshire	547,024	365,532	35,664	109,499	35,544	611,916	420,455	35,690	119,618	36,034
Cheshire County	31,876	22,363	2,040	5,071	2,370	34,662	24,234	2,164	5,933	2,331
Hillsborough County	149,961	92,340	13,344	40,606	3,611	165,465	104,794	13,191	43,970	3,473
Sullivan County	20,158	13,970	1,089	3,017	2,061	22,231	15,535	1,105	3,387	2,204
Southwest Region	41,670	29,762	2,549	6,305	2,995	46,080	32,939	2,981	7,369	2,791
% of Region	100%	71%	6%	15%	7%	100%	71%	6%	16%	6%
Alstead	950	756	31	48	110	971	824	10	49	88
Antrim	1,160	907	63	134	56	1,386	1,028	157	153	48
Bennington	635	457	56	81	41	658	446	21	137	54
Chesterfield	1,632	1,472	59	60	35	1,770	1,583	15	138	34
Dublin	686	636	20	8	22	793	739	13	29	12
Fitzwilliam	1,074	877	48	29	116	1,255	1,021	17	103	114
Francestown	656	636	8	8	4	743	690	38	9	6
Gilsum	323	279	17	0	27	278	266	3	0	9
Greenfield	640	559	30	31	20	694	589	25	55	25
Greenville	918	333	118	174	293	960	456	107	158	239
Hancock	814	733	32	27	22	875	779	59	18	19
Harrisville	698	635	27	8	28	739	677	30	8	24
Hinsdale	1,714	953	81	253	427	1,955	993	163	257	542
Jaffrey	2,352	1,555	100	533	164	2,416	1,666	129	472	149
Keene	9,295	4,808	1,069	2,972	446	9,810	5,131	994	3,289	396
Langdon	266	222	2	3	39	305	264	13	0	28
Marlborough	893	634	98	126	35	1,009	645	145	162	57
Marlow	387	337	5	0	39	463	422	11	0	30
Nelson	404	390	8	4	2	493	453	14	16	10
New Ipswich	1,449	1,199	37	106	103	1,725	1,532	0	181	12
Peterborough	2,509	1,689	138	658	18	3,065	2,044	296	725	0
Richmond	432	399	6	2	25	497	482	0	4	11
Rindge	1,863	1,630	36	115	82	2,268	1,727	57	372	112
Roxbury	91	80	3	0	8	101	94	2	0	5
Sharon	160	157	3	0	0	172	169	3	0	0
Stoddard	939	906	7	2	18	1,096	1,046	0	10	40
Sullivan	294	247	13	9	25	299	266	9	0	24
Surry	302	272	5	0	20	362	340	3	9	10
Swanzey	2,818	2,060	116	377	265	3,089	2,354	124	397	214
Temple	464	406	19	12	27	717	590	98	0	29
Troy	778	509	57	112	100	834	516	50	176	92
Walpole	1,592	1,203	100	233	56	1,529	1,135	167	188	39
Westmoreland	618	606	0	4	8	747	706	13	15	13
Winchester	1,741	1,119	134	176	312	1,888	1,148	195	239	306
Windsor	123	101	3	0	2	118	118	0	0	0

*Source: U. S. Census Bureau 2000 Decennial Census, *American Community Survey (ACS) 2007-2011 5-Year Estimates*

Figure 6: 2000-2011* Growth of Housing Supply

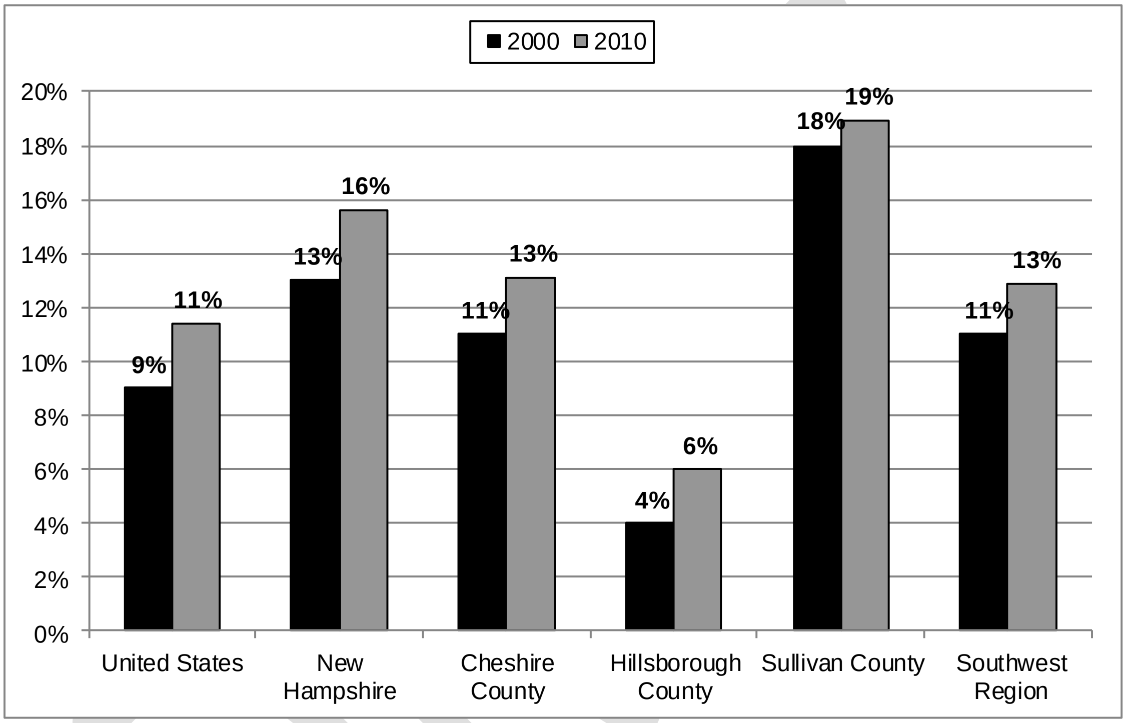


*Source: U.S. Census Bureau 2000 Decennial Census, *American Community Survey (ACS) 2007-2011 5-Year Estimates Table B25024*

Vacancy Rate

Since 2000, the vacancy rate has increased in the Southwest Region, meaning that a larger percentage of homes and housing units were unoccupied or not rented in 2010 (Figure 7, Table 12). These figures include the census categories: unoccupied rentals, for sale, sold but not occupied, seasonal, and all other vacant. The regional vacancy rate of 13% is lower than the state figure of 16% and higher than the national average (7) Shouldn't this be 11%). According to the 2010 data, the municipality with the lowest vacancy rate was Surry. Towns with some of the highest vacancy rates, likely reflecting the percentage of seasonal residences, include Harrisville, Nelson, Stoddard, and Windsor (Table 13).

Figure 7: 2000 and 2010 Housing Unit Vacancy Rates



Source: U.S. Census Bureau 2000, 2010 Decennial Census

Table 12: 2000 and 2010 Southwest Region Housing Unit Vacancy Rates

	2000	2010
Municipal High	57%	52%
Municipal Median	11%	12%
Municipal Low	1%	4%

Source: U. S. Census Bureau 2000, 2010 Decennial Census

Table 13: 2000 and 2010 Housing Unit Vacancy Rates

	Total Housing Units (2000)	Vacant (2000)	Vacancy Rate (2000)	Total Housing Units (2010)	Vacant (2010)	Vacancy Rate (2010)
United States	115,904,641	10,424,540	9%	131,704,730	14,988,438	11%
New Hampshire	547,024	72,418	13%	614,754	95,781	16%
Cheshire County	31,876	3,577	11%	34,773	4,569	13%
Hillsborough County	149,961	5,506	4%	166,053	10,587	6%
Sullivan County	20,158	3,628	18%	22,341	4,215	19%
Southwest Region	41,670	4,618	11%	46,040	5,923	13%
Alstead	950	169	18%	991	182	18%
Antrim	1,160	228	20%	1,329	274	21%
Bennington	635	83	13%	666	102	15%
Chesterfield	1,632	266	16%	1,802	343	19%
Dublin	686	126	18%	785	165	21%
Fitzwilliam	1,074	238	22%	1,257	284	23%
Francestown	656	104	16%	755	145	19%
Gilsum	323	24	7%	378	52	14%
Greenfield	640	77	12%	699	81	12%
Greenville	918	39	4%	933	72	8%
Hancock	814	108	13%	864	140	16%
Harrisville	698	249	36%	695	249	36%
Hinsdale	1,714	92	5%	1,827	146	8%
Jaffrey	2,352	232	10%	2,547	313	12%
Keene	9,295	340	4%	9,719	667	7%
Langdon	266	30	11%	306	24	8%
Marlborough	893	67	8%	946	80	9%
Marlow	387	105	27%	408	97	24%
Nelson	404	151	37%	460	157	34%
New Ipswich	1,449	99	7%	1,916	160	8%
Peterborough	2,509	163	6%	2,956	243	8%
Richmond	432	53	12%	492	75	15%
Rindge	1,863	361	19%	2,224	419	19%
Roxbury	91	1	1%	101	11	11%
Sharon	160	26	16%	164	20	12%
Stoddard	939	539	57%	1,044	542	52%
Sullivan	294	19	6%	309	35	11%
Surry	302	23	8%	324	14	4%
Swanzey	2,818	152	5%	3,205	248	8%
Temple	464	20	4%	542	39	7%
Troy	778	42	5%	932	65	7%
Walpole	1,592	102	6%	1,715	139	8%
Westmoreland	618	42	7%	680	43	6%
Winchester	1,741	184	11%	1,932	243	13%
Windsor	123	64	52%	137	54	39%

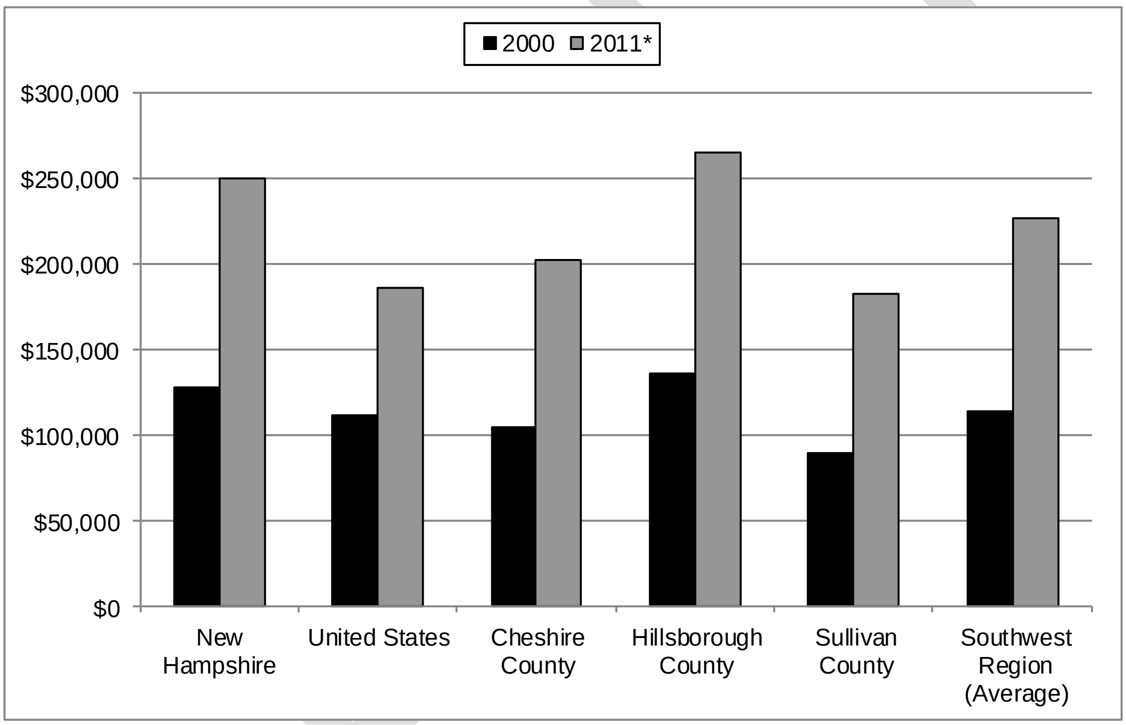
Source: U. S. Census Bureau Decennial Census 2000, 2010

Median Home Values

According to the U.S. Census Bureau, the average of the median home values increased by 100.9% between 2000 and 2011* in the Southwest Region. This is in sharp contrast to the national increase in median home values of 66.5% and comparable to the state-wide increase of 96.1% over the same time period (Figure 8, Table 144,

Table 155). Due to real estate market volatility between these sampling periods, additional data sources, including the New Hampshire Housing Finance Authority (NHHFA) should be utilized when considering current trends and trajectories. Based on sales data provided by the NHHFA, the peak in home values seen in Figure 9 is comparable to average median home value for the region identified in Table 14.

Figure 8: 2000 and 2011* Median Home Values



*Sources: U. S. Census Bureau Decennial Census 2000, *U.S. Census Bureau American Community Survey (ACS) 2007-2011 5-Year Estimates. Figures were not adjusted for inflation.*

Table 14: 2000 and 2011* Southwest Region Median Home Values

	2000	2011*
Municipal High	$168,900	$332,800
Municipal Average	$113,431	$227,291
Municipal Low	$66,300	$138,500

*Sources: U. S. Census Bureau Decennial Census 2000, *U.S. Census Bureau American Community Survey (ACS) 2007-2011 5-Year Estimates Figures were not adjusted for inflation.*

Table 15: 2000 and 2011* Median Home Values

	2000	2011*	Change 2000-2011*
New Hampshire	$127,500	$250,000	96.1%
United States	$111,800	$186,200	66.5%
Cheshire County	$104,100	$202,600	94.6%
Hillsborough County	$135,500	$265,100	95.6%
Sullivan County	$89,600	$182,700	103.9%
Southwest Region (Average)	$113,431	$227,291	100.4%
Alstead	$91,100	$196,800	116.0%
Antrim	$97,100	$198,800	104.7%
Bennington	$97,800	$177,300	81.3%
Chesterfield	$133,800	$260,000	94.3%
Dublin	$168,900	$280,600	66.1%
Fitzwilliam	$99,200	$196,000	97.6%
Francestown	$146,500	$299,700	104.6%
Gilsum	$96,300	$169,100	75.6%
Greenfield	$124,300	$240,700	93.6%
Greenville	$66,300	$160,700	142.4%
Hancock	$165,200	$299,600	81.4%
Harrisville	$131,600	$275,300	109.2%
Hinsdale	$84,300	$138,500	64.3%
Jaffrey	$105,500	$218,700	107.3%
Keene	$100,800	$197,700	96.1%
Langdon	$103,800	$222,200	114.1%
Marlborough	$92,300	$196,500	112.9%
Marlow	$91,600	$184,100	101.0%
Nelson	$120,100	$262,200	118.3%
New Ipswich	$120,700	$246,800	104.5%
Peterborough	$129,900	$250,100	92.5%
Richmond	$120,200	$215,200	79.0%
Rindge	$113,200	$239,300	111.4%
Roxbury	$119,200	$257,800	116.3%
Sharon	$156,300	$332,800	112.9%
Stoddard	$115,700	$241,500	108.7%
Sullivan	$95,500	$204,900	114.6%
Surry	$128,900	$241,800	87.6%
Swanzey	$103,400	$194,200	87.8%
Temple	$138,600	$320,600	131.3%
Troy	$89,100	$163,900	84.0%
Walpole	$118,000	$239,200	102.7%
Westmoreland	$137,800	$259,500	88.3%
Winchester	$82,100	$143,600	74.9%
Windsor	$85,000	$229,500	170.0%

*Sources: U. S. Census Bureau Decennial Census 2000, *U.S. Census Bureau Ameri-*

can Community Survey (ACS) 2007-2011 5-Year Estimates.
Figures were not adjusted for inflation.

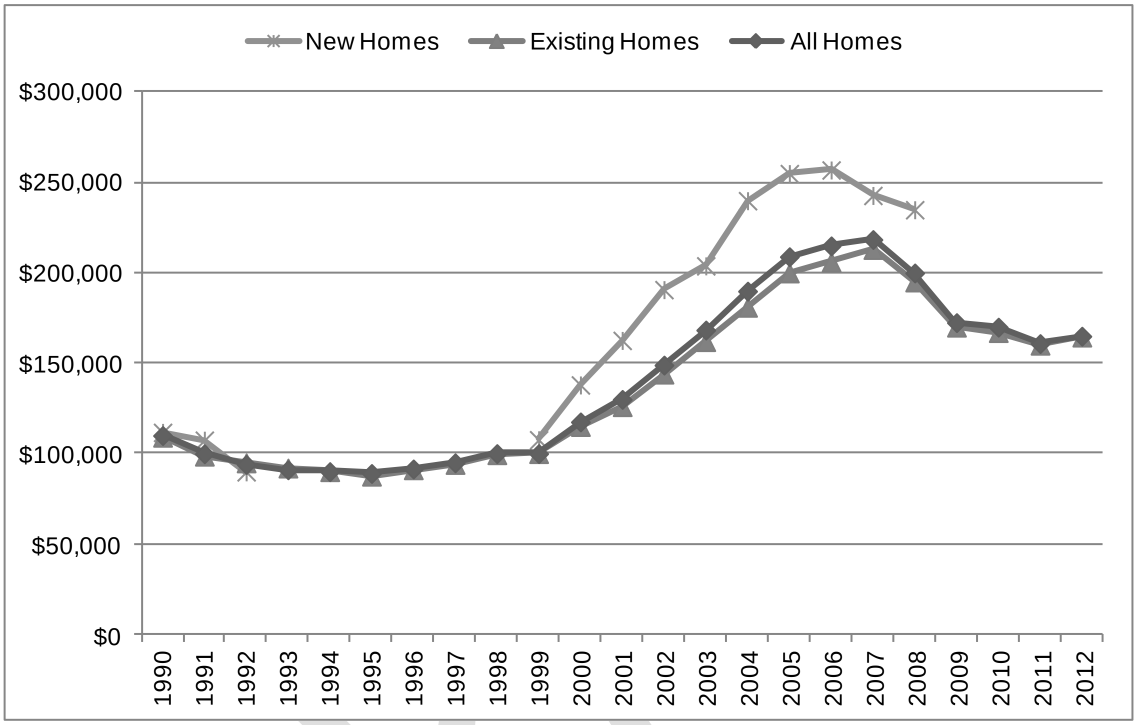
According to the New Hampshire Housing Finance Authority, the median home purchase price for all homes sold in Southwest Region in 2012 (the most recent complete year of data) was $165,000 - an increase of 2.5% over the 2011 median home purchase price. Following the national recession of the early 1990s, home purchase prices rose steadily between 1995 and 2005 in the Southwest Region. In 2007, a second recession led to an unprecedented collapse of median home values which in 2012, showed the first annual increase since 2007 (Table 16, Figure 9).

Table 16: 1990-2012 Median Home Purchase Prices for Southwest New Hampshire*

Year	All Homes		Existing Homes		New Homes		Single Family Detached		Condominiums	
	Median Purchase Price	Sample Size	Median Purchase Price	Sample Size	Median Purchase Price	Sample Size	Median Purchase Price	Sample Size	Median Purchase Price	Sample Size
2012	$165,000	813	$164,500	786	*	27	$167,500	761	$142,000	52
2011	$160,900	713	$160,000	690	*	23	$162,500	678	*	35
2010	$170,000	733	$167,000	691	*	42	$170,000	671	$165,500	62
2009	$172,500	818	$170,000	770	*	48	$175,000	766	$153,000	52
2008	$200,000	735	$195,000	659	$235,000	76	$199,933	672	$203,000	63
2007	$218,500	905	$213,000	789	$242,900	116	$224,000	818	$168,000	87
2006	$215,000	1219	$206,000	1080	$257,000	139	$221,000	1111	$158,000	108
2005	$209,000	1399	$200,000	1224	$255,000	175	$215,900	1288	$159,900	111
2004	$189,933	1417	$181,000	1214	$240,000	203	$195,000	1298	$155,000	119
2003	$168,400	1361	$162,000	1165	$203,933	196	$172,533	1242	$138,500	119
2002	$149,000	1319	$144,000	1177	$190,775	142	$154,000	1209	$100,000	110
2001	$130,000	1222	$126,000	1134	$162,650	88	$133,467	1129	$90,000	93
2000	$117,533	1352	$115,000	1254	$138,000	98	$119,900	1267	$85,000	85
1999	$100,000	1213	$100,000	1122	$107,670	91	$103,000	1128	$82,500	85
1998	$100,000	883	$99,400	835	*	48	$100,000	848	*	35
1997	$94,900	1129	$94,000	1099	*	30	$95,000	1059	$74,000	70
1996	$91,500	594	$91,056	559	*	35	$93,900	527	$84,000	67
1995	$89,000	684	$87,500	644	*	40	$89,900	600	$79,900	84
1994	$90,000	715	$90,000	677	*	38	$91,000	683	*	32
1993	$91,048	724	$92,000	691	*	33	$92,421	672	$80,000	52
1992	$94,000	584	$94,857	519	$89,905	65	$94,857	539	*	45
1991	$99,905	453	$98,571	391	$107,429	62	$99,905	422	*	31
1990	$110,000	431	$109,048	328	$111,750	103	$110,000	378	$109,048	53

Source: NH Dept. of Revenue, PA-34 Dataset, Compiled by Real Data Corp. Filtered and analyzed by New Hampshire Housing.
**Note: Calculations based on a sample size of less than 50 are highly volatile and not considered valid. Data includes only homes for primary occupancy, data does not include land, multifamily homes, seasonal or vacation property, or manufactured homes.*

Figure 9: Median Purchase Price of Primary Homes in Southwest Region, 1990-2012*



Source: Source: NH Dept. of Revenue, PA-34 Dataset, Compiled by Real Data Corp. Filtered and analyzed by New Hampshire Housing.
**Note: Calculations based on a sample size of less than 50 are highly volatile and not considered valid. Data includes only homes for primary occupancy, data does not include land, multifamily homes, seasonal or vacation property, or manufactured homes.*

Median Gross Rents

Median gross rents, which include contract rent and utility payments, increased by 47% in the Southwest Region between 2000 and 2011. This increase in the average median cost was slightly lower than the state-wide median and slightly higher than the change in the national median. The increase in median gross rent in Cheshire County, exceeded both the national and statewide trends (Table 17, Figure 10).

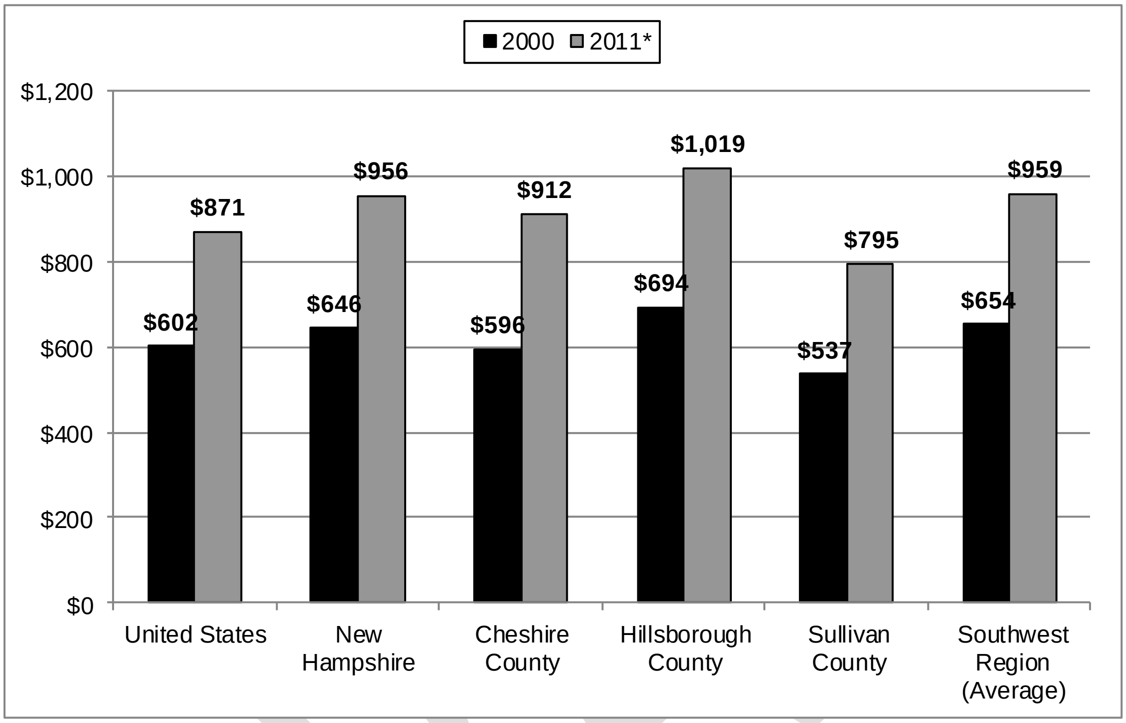
Table 17: 2000 and 2011* Median Gross Rent

	2000	2011*	Change 2000-2011*
United States	$602	$871	45%
New Hampshire	$646	$956	48%
Cheshire County	$596	$912	53%
Hillsborough County	$694	$1,019	47%
Sullivan County	$537	$795	48%
Southwest Region (Average)	$654	$959	47%
Alstead	$617	$792	28%
Antrim	$483	$904	87%
Bennington	$630	$921	46%
Chesterfield	$631	$854	35%
Dublin	$675	$1,080	60%
Fitzwilliam	$669	$951	42%
Francestown	$821	$1,016	24%
Gilsum	$668	$950	42%
Greenfield	$687	$725	6%
Greenville	$570	$591	4%
Hancock	$608	$1,159	91%
Harrisville	$760	$910	20%
Hinsdale	$496	$818	65%
Jaffrey	$542	$774	43%
Keene	$622	$962	55%
Langdon	$606	$930	53%
Marlborough	$615	$1,036	68%
Marlow	$620	$1,225	98%
Nelson	$550	$967	76%
New Ipswich	$597	$734	23%
Peterborough	$672	$929	38%
Richmond	$650	$1,182	82%
Rindge	$676	$1,105	63%
Roxbury	$975	$1,179	21%
Sharon	$900	$1,313	46%
Stoddard	$706	$973	38%
Sullivan	$659	$981	49%
Surry	$950	$1,019	7%
Swanzey	$556	$965	74%
Temple	$794	$1,184	49%
Troy	$541	$828	53%

Walpole	$504	$752	49%
Westmoreland	$679	$975	44%
Winchester	$567	$913	61%
Windsor	$580	N/A	N/A

*Source: U.S Census Bureau 2000 Decennial Census, *2007-2011 American Community Survey 5-year Estimates*

Figure 10: 2000 and 2011* Median Gross Rents



*Source: U.S Census Bureau 2000 Decennial Census, *2007-2011 American Community Survey 5-year Estimates*

Table 18: 2000 and 2011* Southwest Region Median Gross Rents

	2000	2011*
Municipal High	$975	$1,313
Municipal Average	$654	$959
Municipal Median	$631	$957
Municipal Low	$483	$591

Source: 2000 Decennial Census, 2007-2011 American Community Survey 5-year Estimates

Fair Market Rent values published by U.S. Housing and Urban Development for counties in the Southwest Region set the fair market rent for a two bedroom apartment is currently $972 in Cheshire County. Only two towns, New Ipswich and Greenville, fall in Nashua, NH HUD Metro fair market rent area (Table 199).

Table 19: Department of Housing and Urban Development 2014 Fair Market Rents

	Efficiency	One-Bedroom	Two-Bedroom	Three-Bedroom	Four-Bedroom
Cheshire County	$614	$737	$972	$1,211	$1,583
Hillsborough County	$710	$753	$907	$1,132	$1,297

Sullivan County	$660	$752	$917	$1,242	$1,263
Nashua, NH HUD Metro FMR Area	$809	$919	$1199	$1612	$1871

F. Land Use

Development of the Southwest Region prior to the 20th Century was largely driven by the distribution of natural resources which supported agriculture, lumber, and hydro-powered industry. The development patterns of village centers, widely dispersed farms and other rural housing established in those early years persist as the foundation for contemporary land use. Today, a greater density of residential development is dispersed throughout the Region. There is very little agriculture. A variety of manufacturing and businesses reside along highways and in downtowns. The development of highways and availability of cars have extended individuals' range for daily activity to more than 75 miles from home. The regional economy and high demand for access to "rural" living by professionals and laborers alike has created an increasingly suburban development pattern throughout much of the Region.

Many homes are owner-occupied, detached single-family homes on two or more acres dispersed along paved municipal roads and secondary state routes. Multi-family housing is limited primarily to areas with municipal water and sewer systems. Manufactured housing is found in all of the towns, either on individual lots, in parks, or both. Homes in Planned Unit Developments and Cluster/Open Space Developments are a very small percentage of the Region's residential development. Traditional village centers persist today only as residential enclaves while commerce, services and employment tend to be centralized near a handful of downtown areas, such as Keene, Jaffrey and Peterborough.

Strip development is a growing concern throughout the Region. It is economically attractive for commercial developers and business owners due to low construction costs, but the visual effects and the traffic generated conflict with many residents' visions for their communities. Generalized as "sprawl," this low density roadside development pattern also challenges Main Street commercial prosperity.

The total land area of the Southwest Region is about 660,000 acres. Residential, commercial, industrial, and public/semi-public uses and roads, occupy about 10% of that total. Another 13% of the total area is protected from development by deed restrictions. The natural physical conditions found on almost 60% of the total land area pose limitations or special challenges to development either by invoking environmental regulations as with wetlands or shorelines, or by physical difficulties as with floodplains, steep slopes or rock outcroppings. This leaves about 17% or 112,200 acres of the Region undeveloped and suitable for development.

Most of the Region is zoned for low density residential use (one to five acre lots) with many different provisions for businesses and small industry, by Special Exception, that vary from town to town.

Dedicated commercial use districts tend to be located adjacent to major state highways. Most existing downtowns and villages are zoned for high density residential and in many cases mixed residential and commercial use. Many of the Region's larger lakes are surrounded by high-density residential and seasonal use districts. A few towns have large lot (up to 20 acres) residential districts intended to preserve economically viable timber stands and preserve the scenic qualities of forested hilltops and ridgelines. Several towns have small isolated use districts dedicated for industry.

By using property valuation as an indicator of local land use, the data shows an uneven distribution of residential and commercial/industrial land uses in the municipalities in the Region. According to the New Hampshire Department of Revenue Administration, Keene has the highest ratio of commercial/industrial land use when compared to residential uses: 53%, followed by Peterborough with 27% and Greenville with 24%. Many other communities use little or no land for commercial and industrial purposes and nearly even municipality experienced a decline in this ratio (Table 20, Table 21, Figure 11).

Table 20: 2000 Municipal Property Valuation

	Gross valuation	Total Residential Value / Gross valuation (%)	Total Commercial + Industrial Value / Gross valuation (%)	Remaining Value / Gross valuation (%)	Ratio Commercial/ Industrial Value to Residential Value (%)
SWRPC	$4,773,972,135	79%	17%	3%	22%
Alstead	$76,061,635	93%	3%	2%	3%
Antrim	$93,631,563	86%	10%	3%	12%
Bennington	$62,201,693	82%	13%	5%	16%
Chesterfield	$245,516,672	88%	10%	1%	11%
Dublin	$136,900,040	89%	9%	1%	10%
Fitzwilliam	$125,299,100	89%	7%	3%	8%
Francestown	$92,175,609	94%	3%	1%	3%
Gilsum	$27,630,412	89%	6%	2%	7%
Greenfield	$84,895,639	89%	8%	1%	8%
Greenville	$45,884,441	68%	29%	3%	42%
Hancock	$119,449,913	95%	3%	1%	3%
Harrisville	$82,277,980	95%	3%	1%	4%
Hinsdale	$154,141,324	65%	17%	18%	26%
Jaffrey	$217,498,793	78%	19%	2%	24%
Keene	$1,033,704,100	63%	36%	2%	57%
Langdon	$30,563,506	85%	10%	2%	12%
Marlborough	$81,988,140	86%	12%	2%	13%
Marlow	$31,679,113	87%	6%	3%	6%
Nelson	$53,059,089	97%	1%	1%	1%
New Ipswich	$184,439,769	91%	6%	2%	7%
Peterborough	$350,060,847	70%	28%	1%	40%
Richmond	$53,485,594	93%	0%	4%	1%
Rindge	$255,615,783	76%	21%	2%	28%
Roxbury	$12,594,674	93%	0%	1%	0%
Sharon	$23,431,334	95%	0%	1%	0%
Stoddard	$122,496,528	97%	1%	1%	1%
Sullivan	$23,569,923	94%	1%	2%	1%
Surry	$41,208,100	95%	2%	1%	2%
Swanzey	$259,005,668	84%	14%	1%	17%
Temple	$68,831,926	95%	1%	2%	1%
Troy	$76,868,779	76%	16%	7%	21%
Walpole	$204,896,972	76%	17%	6%	23%
Westmoreland	$99,456,230	90%	7%	1%	7%
Winchester	$140,576,821	80%	16%	3%	20%
Windsor	$15,133,998	98%	0%	2%	0%

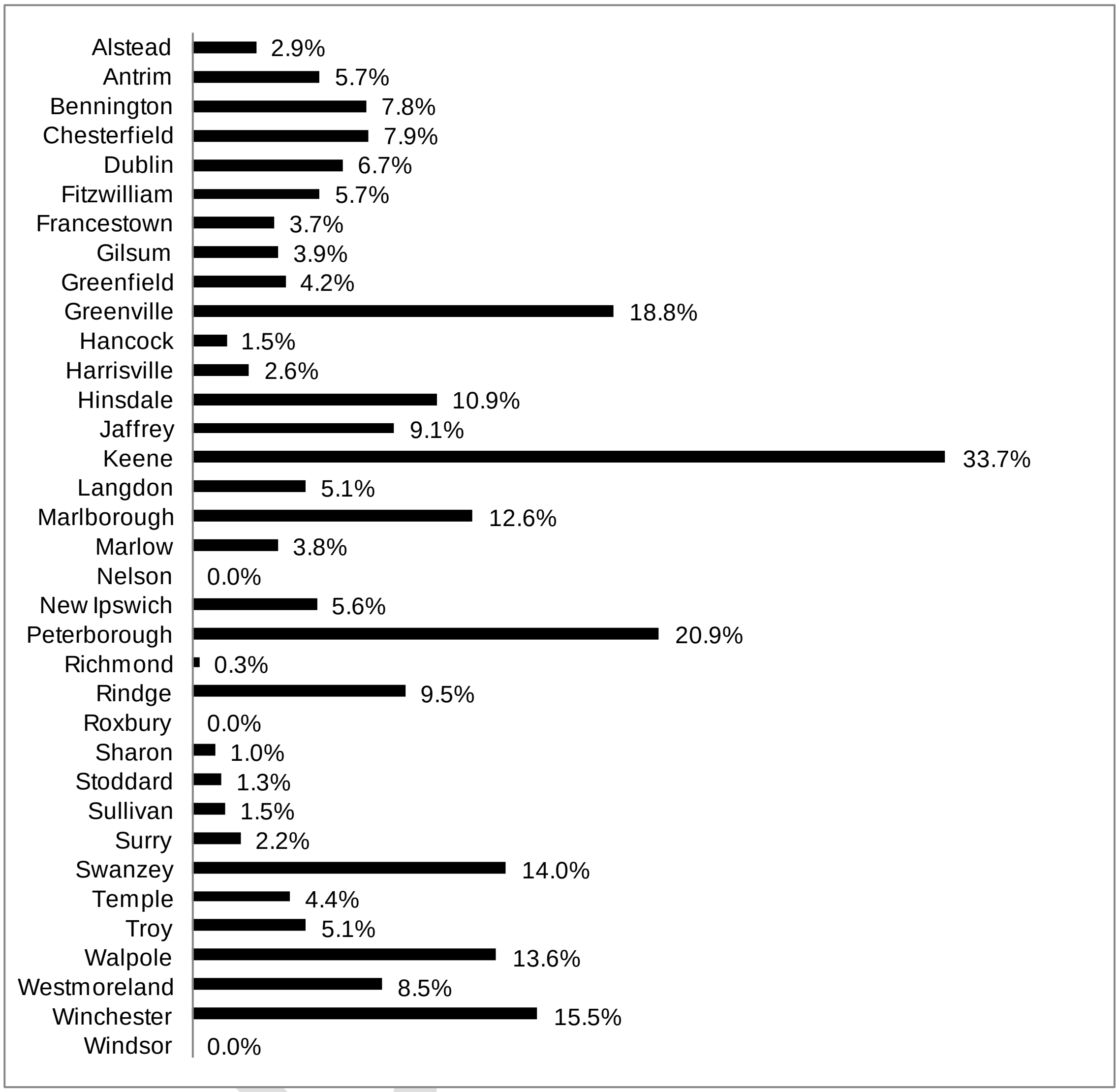
Source: NH Department of Revenue Administration

Table 21: 2010 Municipal Property Valuation

	Gross valuation	Total Residential Value / Gross valuation (%)	Total Commercial + Industrial Value / Gross valuation (%)	Remaining Value / Gross valuation (%)	Ratio Commercial/ Industrial Value to Residential Value (%)	Change Ratio Commercial/ Industrial Value to Residential Value (%): 2000-2010
SWRPC	$9,985,692,613	83%	14%	4%	16%	-6%
Alstead	$176,965,268	95%	3%	2%	3%	-19%
Antrim	$255,246,310	90%	6%	4%	6%	3%
Bennington	$113,056,850	89%	8%	3%	9%	-3%
Chesterfield	$560,747,288	91%	8%	1%	9%	-7%
Dublin	$255,915,271	91%	7%	2%	7%	-4%
Fitzwilliam	$306,683,071	82%	6%	12%	7%	-3%
Francestown	$210,624,339	94%	4%	2%	4%	-4%
Gilsum	$64,603,940	92%	4%	4%	4%	1%
Greenfield	$156,376,722	93%	4%	3%	4%	-3%
Greenville	$135,034,246	78%	19%	3%	24%	16%
Hancock	$274,326,950	96%	2%	2%	2%	-40%
Harrisville	$213,157,742	96%	3%	1%	3%	0%
Hinsdale	$349,838,366	60%	11%	29%	18%	14%
Jaffrey	$451,958,880	90%	9%	1%	10%	-16%
Keene	$1,908,045,600	64%	34%	3%	53%	29%
Langdon	$68,828,866	92%	5%	3%	6%	-51%
Marlborough	$210,043,540	85%	13%	2%	15%	3%
Marlow	$63,517,127	93%	4%	3%	4%	-9%
Nelson	$121,094,027	98%	0%	2%	0%	-6%
New Ipswich	$415,866,941	92%	6%	2%	6%	5%
Peterborough	$691,676,861	78%	21%	1%	27%	20%
Richmond	$103,664,560	95%	0%	5%	0%	-40%
Rindge	$557,162,768	89%	10%	1%	11%	10%
Roxbury	$24,961,810	96%	0%	4%	0%	-28%
Sharon	$54,253,756	96%	1%	3%	1%	1%
Stoddard	$280,483,050	96%	1%	2%	1%	1%
Sullivan	$55,930,587	94%	1%	4%	2%	1%
Surry	$81,681,108	95%	2%	2%	2%	1%
Swanzey	$582,320,064	83%	14%	3%	17%	15%
Temple	$151,796,734	93%	4%	3%	5%	-12%
Troy	$130,232,553	85%	5%	10%	6%	5%
Walpole	$443,036,384	82%	14%	5%	17%	-4%
Westmoreland	$205,334,667	88%	9%	3%	10%	-13%
Winchester	$284,244,034	80%	15%	5%	19%	12%
Windsor	$26,982,333	98%	0%	2%	0%	-20%

Source: NH Department of Revenue Administration

Figure 11: 2010 Municipal Commercial/ Industrial Property Valuation

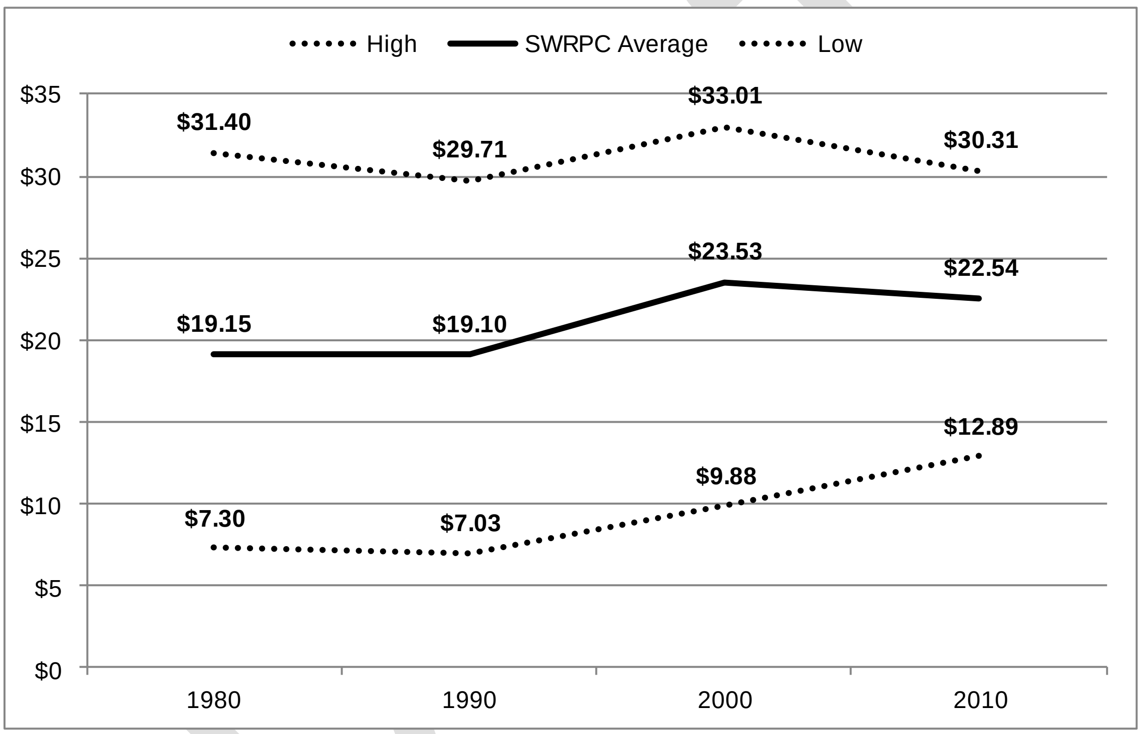


Source: NH Department of Revenue Administration
Note: Ratio to residential property valuation does not include other valuations such as rights-of-way and utilities.

Tax Rates

Equalization is the process by which the New Hampshire Department of Revenue Administration (DRA) makes adjustments to each municipality's locally assessed values to calculate the estimated 100% market value of the municipality, also referred to as the full value tax rate. According to the DRA, the average equalized tax rate in the Southwest Region increased by 18% between 1980 and 2010.[1] The data show a narrowing range of taxation levels between the municipalities in the Region (Table 222, Figure 12). The increase after 1990 is partially due to the introduction of a state education property tax which is assessed and collected by local municipalities.

Figure 12: 1980-2010 Municipal Equalized Tax Rates



Source: New Hampshire Department of Revenue Administration

[1] When dealing with property values statewide, varying local assessment levels between towns create an imbalance. The process to accomplish this is called "equalization," whereby adjustments are made to each municipality's locally assessed values to calculate the estimated market value.

Table 22: 1980-2010 Municipal Equalized Tax Rates (Full Value Tax Rate)

	1980	1990	2000	2010	Change 1980-2010
Cheshire County (Average)	$22.30	$20.43	$23.88	$24.32	9%
Hillsborough County (Average)	$22.00	$20.08	$21.30	$21.03	-4%
Sullivan County (Average)	$20.00	$20.74	$24.52	$20.93	5%
SWPRC (Average)	$19.15	$19.10	$23.53	$22.54	18%
Alstead	$19.30	$22.08	$26.14	$25.84	34%
Antrim	$21.00	$23.13	$24.50	$24.43	16%
Bennington	$17.90	$23.14	$27.05	$25.61	43%
Chesterfield	$14.90	$14.99	$22.18	$16.92	14%
Dublin	$15.50	$13.52	$22.31	$21.39	38%
Fitzwilliam	$14.80	$18.51	$24.22	$26.87	82%
Francestown	$17.00	$16.50	$24.22	$23.60	39%
Gilsum	$18.40	$23.14	$25.07	$26.05	42%
Greenfield	$23.70	$19.64	$22.87	$20.86	-12%
Greenville	$29.80	$29.71	$31.31	$21.99	-26%
Hancock	$15.20	$15.81	$23.65	$19.00	25%
Harrisville	$15.20	$16.21	$20.79	$14.28	-6%
Hinsdale	$20.70	$22.77	$22.10	$24.80	20%
Jaffrey	$20.30	$20.45	$23.49	$26.79	32%
Keene	$31.40	$25.55	$32.27	$30.31	-3%
Langdon	$21.20	$21.48	$24.97	$24.60	16%
Marlborough	$29.40	$24.25	$27.32	$25.53	-13%
Marlow	$23.20	$18.00	$33.01	$21.83	-6%
Nelson	$16.30	$15.33	$22.31	$19.09	17%
New Ipswich	$19.50	$23.16	$16.90	$19.87	2%
Peterborough	$17.20	$18.65	$27.63	$23.55	37%
Richmond	$10.70	$19.89	$24.04	$25.24	136%
Rindge	$16.40	$17.41	$20.52	$23.06	41%
Roxbury	$17.50	$13.63	$22.48	$20.50	17%
Sharon	$15.00	$13.13	$19.79	$21.50	43%
Stoddard	$8.30	$8.58	$11.92	$12.89	55%
Sullivan	$28.40	$25.22	$31.17	$25.46	-10%
Surry	$20.60	$14.91	$16.66	$14.86	-28%
Swanzey	$22.30	$20.48	$24.65	$24.39	9%
Temple	$22.00	$24.36	$21.40	$21.37	-3%
Troy	$22.90	$24.00	$29.21	$28.29	24%
Walpole	$14.30	$15.47	$18.91	$20.74	45%
Westmoreland	$16.70	$16.57	$20.50	$19.11	14%
Winchester	$26.10	$21.65	$28.05	$26.26	1%
Windsor	$7.30	$7.03	$9.88	$22.15	203%

Source: Department of Revenue Administration

G. Infrastructure

Transportation

State and municipal road development has followed land development. Many roads are simply “dirt roads that got paved,” and in some cases colonial log roads and dry-masonry stone bridges persist under modern pavement and steel. Major State highways serve as Main Streets for twelve of the Southwest Region’s 35 towns.

The Region’s population is highly mobile, as most residents work and shop outside their towns of residence. According to the United States Census Bureau Center for Economic Studies, about 43% of workers in Southwest Region towns worked less than 10 miles from their home (Table 23).

Table 23: 2011 Southwest Region Jobs by Distance

	Count	Share
Total Primary Jobs	41,417	100%
Less than 10 miles	17,814	43%
10 to 24 miles	11,335	27%
25 to 50 miles	6,761	16%
Greater than 50 miles	5,507	13%

Source: U.S. Census Bureau. 2013. OnTheMap Application. Longitudinal-Employer Household Dynamics Program. http://onthemap.ces.census.gov/
Notes: Unemployment Insurance Wage Record jobs only,straight line measurements do not reflect road mileage

The rate of workers commuting to another county for work decreased by 4% between 2000 and 2011, while the total number of workers who did not work at home increased by 1.8%, to 48,075 (Table 244). Overall, 76% of the labor force (16 years of age and older) that did not work at home worked within the county of residence in 2011. The numbers for the Southwest Region closely match the national average, but exceed those for the state. Nearly every municipality experienced a decrease in the percentage of workers who worked in their county of residence, indicating that many workers are taking jobs farther from home. This trend is also replicated at the state and national levels. As expected, workers living in the City of Keene and in towns immediately adjacent commute less to other counties than those who live at the periphery of the Region (Table 24).

Table 24: 2000 and 2011* Place of Work and Residence

	Total Labor Force not working at home (2000)	Worked in county of residence (2000)	% of Total (2000)	Total Labor Force not working at home (2011*)	Worked in county of residence (2011*)	% of Total (2011*)
United States	124,095,005	94,042,863	76%	133,598,438	101,187,364	73%
New Hampshire	613,258	426,058	69%	641,724	440,093	65%
Cheshire County	35,566	28,611	80%	36,482	29,978	77%
Hillsborough County	191,917	142,472	74%	197,578	140,858	67%
Sullivan County	19,150	12,578	66%	20,701	12,441	57%
Southwest Region	47,234	37,970	80%	48,075	39,383	76%
Alstead	967	777	80%	825	659	71%
Antrim	1,182	981	83%	1,310	939	69%
Bennington	776	660	85%	708	567	74%
Chesterfield	1,722	1,235	72%	1,604	1,238	67%
Dublin	658	453	69%	759	476	56%
Fitzwilliam	1,134	862	76%	1,295	952	68%
Francestown	713	623	87%	801	785	85%
Gilsum	385	340	88%	298	312	93%
Greenfield	827	740	89%	628	624	84%
Greenville	1,063	756	71%	1,136	860	69%
Hancock	788	669	85%	748	659	76%
Harrisville	547	456	83%	470	386	78%
Hinsdale	2,139	867	41%	1,921	868	44%
Jaffrey	2,652	1,866	70%	2,624	2,028	69%
Keene	10,741	9,791	91%	11,005	10,268	89%
Langdon	318	122	38%	351	143	37%
Marlborough	1,037	999	96%	1,156	1,002	84%
Marlow	383	320	84%	388	304	72%
Nelson	307	262	85%	392	365	80%
New Ipswich	1,931	1,362	71%	2,115	1,495	63%
Peterborough	2,562	2,235	87%	3,059	2,502	75%
Richmond	505	429	85%	522	411	72%
Rindge	2,327	1,452	62%	2,549	1,651	59%
Roxbury	134	123	92%	123	116	88%
Sharon	184	138	75%	166	142	70%
Stoddard	469	351	75%	479	360	68%
Sullivan	402	360	90%	371	314	78%
Surry	375	350	93%	438	406	90%
Swanzey	3,326	3,085	93%	3,759	3,473	89%
Temple	608	579	95%	482	623	95%
Troy	1,031	903	88%	968	923	88%
Walpole	1,632	1,217	75%	1,659	1,215	64%
Westmoreland	797	658	83%	943	812	81%
Winchester	1,896	1,455	77%	1,934	1,439	73%
Windsor	97	88	91%	89	66	74%

*Source: U.S. Census Bureau 2000 Decennial Census, *2007-2011 American Community Survey (ACS) 5-Year Estimates Table B08130*

Although a lower percentage of workers are employed in their county of residence, most workers throughout the Region need less than 20 minutes to commute to work. However, commuting trip lengths in 2000 and 2011 indicate that a greater percentage of workers, particularly in Cheshire County are making short and medium length trips as opposed to trips exceeding 40 minutes. This finding is contrary to the statewide trend, where the percentage of workers commuting over 40 minutes increased significantly from the 2000 level (Figure 13). About half of Southwest Region municipalities experienced a decrease in the number of workers taking these long commutes (Table 255).

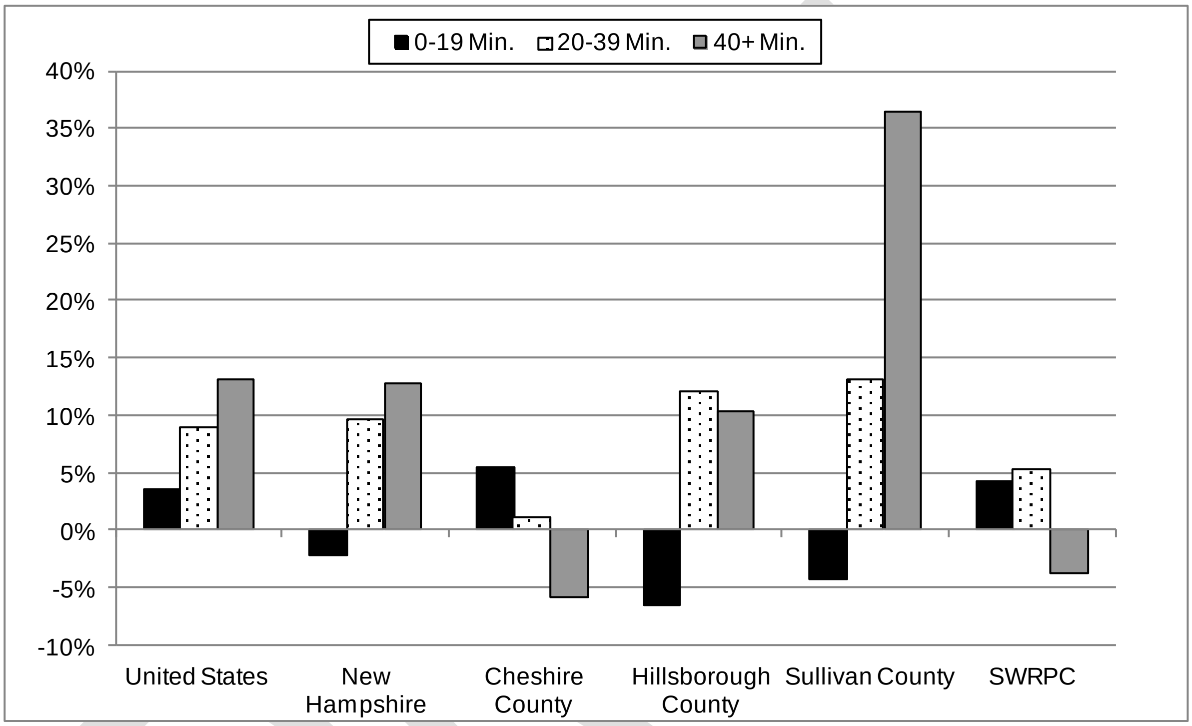
Table 25: 2000 and 2011* Travel Time to Work

	0-19 Minutes (2000)	20-39 Minutes (2000)	40 and more Minutes (2000)	0-19 Minutes (2011*)	20-39 Minutes (2011*)	40 and more Minutes (2011*)	Change in # of Workers Commuting 0-19 Minutes	Change in # of Workers Commuting 20-39 Minutes	Change in # of Workers Commuting 40+ Minutes
United States (in millions)	56	45	23	58	49	26	4%	9%	13%
New Hampshire	288,000	206,792	118,466	281,736	226,417	133,571	-2%	9%	13%
Cheshire County	19,878	10,995	4,693	20,951	11,116	4,415	5%	1%	-6%
Hillsborough County	90,329	62,951	38,637	84,438	70,511	42,629	-7%	12%	10%
Sullivan County	9,246	7,115	2,789	8,851	8,046	3,804	-4%	13%	36%
SWRPC	24,531	14,318	7,766	25,547	15,056	7,472	4%	5%	-4%
Alstead	297	521	149	200	414	211	-33%	-21%	42%
Antrim	487	409	286	501	397	412	3%	-3%	44%
Bennington	404	208	164	213	181	314	-47%	-13%	91%
Chesterfield	916	626	180	994	522	88	9%	-17%	-51%
Dublin	342	218	98	437	199	123	28%	-9%	26%
Fitzwilliam	338	569	227	269	735	291	-20%	29%	28%
Francestown	121	274	318	153	350	298	26%	28%	-6%
Gilsum	170	139	76	125	133	40	-26%	-4%	-47%
Greenfield	326	287	214	190	200	238	-42%	-30%	11%
Greenville	242	448	373	206	604	326	-15%	35%	-13%
Hancock	445	205	138	402	236	110	-10%	15%	-20%
Harrisville	171	308	68	108	283	79	-37%	-8%	16%
Hinsdale	1,139	717	283	1086	675	160	-5%	-6%	-43%
Jaffrey	1,589	626	437	1496	562	566	-6%	-10%	30%
Keene	8,035	1,736	970	8554	1710	741	6%	-1%	-24%
Langdon	154	98	66	142	153	56	-8%	56%	-15%
Marlborough	640	315	82	777	268	111	21%	-15%	35%
Marlow	70	232	81	87	187	114	24%	-19%	41%
Nelson	133	123	51	109	223	60	-18%	81%	18%
New Ipswich	563	635	733	726	865	524	29%	36%	-29%
Peterborough	1,556	488	518	1764	746	549	13%	53%	6%
Richmond	60	327	118	107	292	123	78%	-11%	4%
Rindge	1,127	667	533	1224	778	547	9%	17%	3%
Roxbury	85	32	17	71	37	15	-16%	16%	-12%
Sharon	68	69	47	95	33	38	40%	-52%	-19%
Stoddard	80	262	127	92	232	155	15%	-11%	22%
Sullivan	194	146	62	198	113	60	2%	-23%	-3%
Surry	200	146	29	277	131	30	39%	-10%	3%

Swanzey	2,158	769	399	2313	1128	318	7%	47%	-20%
Temple	229	185	194	178	144	160	-22%	-22%	-18%
Troy	377	521	133	364	470	134	-3%	-10%	1%
Walpole	746	673	213	900	603	156	21%	-10%	-27%
Westmoreland	413	284	100	432	439	72	5%	55%	-28%
Winchester	598	1,038	260	731	982	221	22%	-5%	-15%
Windsor	58	17	22	26	31	32	-55%	82%	45%

*Source: U.S. Census Bureau 2000 Decennial Census, *2007-2011 American Community Survey 5-Year Estimates*

Figure 13: 2000-2011* Travel Time to Work Increase



*Source: U.S. Census Bureau 2000 Decennial Census, *American Community Survey (ACS) 5-Year Estimates 2007-2011*

The Southwest Region Transportation Plan 2007 Update, produced by the Southwest Region Planning Commission, reports 513 miles of state roads (Classes I, II and III) and 1,349 miles of municipal roads (Classes IV and V) in the Southwest Region.

In the Southwest Region, NH 9, NH 101 and NH 12 south of Keene to the Massachusetts border are designated as part of the National Highway System and constitute approximately 85 of the 794 miles of National Highway System in New Hampshire.

The Southwest Region roadway network includes 477 bridges (structure greater than ten feet in length) of which 209 are state-owned, 262 are municipally-owned, three are owned by the US Army Corps of Engineers and three are owned by railroad companies.

Although the Southwest Region lacks high capacity arterial highways, the Region has reasonable access to Boston, Connecticut, and even New York City through nearby interstate highways. Interstates 89, 91 and 93 can be reached from most parts of the Region via Routes 9, 10, 12, 101 or 119 within an hour.

Three international airports are also within convenient driving range: Manchester International Airport (55 miles), Logan International Airport in Boston (95 miles), and Bradley International Airport in Hartford, CT (95 miles).

Public transportation in the Southwest Region consists of private bus companies, private taxi and charter transportation companies, airport shuttle services, community service shuttle providers and fixed route public bus services in the City of Keene, Hinsdale and Walpole. Of the three public transit systems in the Region, only the Hinsdale system is designed for commuting to work. Although other community service transportation options are available throughout the Region, many of these services are designed for specific human service clientele and provide very limited service.

Private transportation provider Greyhound Bus Lines offers service to White River Junction, VT and Springfield, MA where bus transfers may be made to Montreal, New York and Boston. One northbound and one southbound bus pass through the Keene Transportation Center in downtown Keene each day. There are several other transportation services that offer intra-city, inter-city, hospital and airport service from Keene for the general public, seniors and the handicapped.

Safe pedestrian sidewalk access within the region tends to be limited to village center areas in the Region. Several of the denser population centers (Antrim, Keene, Peterborough, Winchester, Hinsdale, North Walpole, Greenville and Jaffrey) have sidewalk networks. Keene has designed and constructed a pedestrian-oriented downtown where pedestrians are buffered from traffic, and traffic is restricted on side streets. Several communities have expanded their sidewalk infrastructure in the last three years including Bennington, Dublin, Keene and Winchester.

Aside for observed increases in the numbers of bicyclists in Keene during warmer months, bicycles have not been widely used for daily transportation in the Region. However, several recent strategic improvements to bicycle infrastructure, including improvements to segments of the Cheshire Rail Trail in Swanzey and Keene, as well as a new multiuse trail bridge over NH 9/10/12 and new bike lanes and sharrows in Keene, have made some parts of the Region more welcoming to bicyclists.

Most freight transportation moving in and out of the Region occurs by truck. However, the Region does have active railroad, including the New England Central Railroad that passes through Walpole as well as the Milford-Bennington Railroad that passes through Bennington and Greenfield. Two small airports, principally used for general and recreational aviation purposes, are located in the region at the Dillant-Hopkins Airport in Swanzey and the privately owned Silver Ranch Airport in Jaffrey.

Water and Sewer

The municipal water and sewer infrastructure in the Region reflects its rural nature. Parts of 17 of the 35 towns are served by municipal water suppliers. Twelve municipalities have sewer systems, ten of which also have a wastewater treatment plant (Table 26).

Electric Supplier

All but two towns, Walpole and Langdon, are served by Public Service of New Hampshire (PSNH). Other electric utility suppliers include Granite State, NE Power, NH Electric Coop, and Liberty Utilities, who operated in 5 Southwest Region municipalities (Table 26).

Communication Network

Fairpoint Communications has a presence in nearly every Southwest Region community. Smaller providers that also provide telecommunications solutions include TDS Telecom, Granite State Telephone, Sovernet, and others. Made possible by modern internet protocols, telephone service is offered through a cable or other telecommunications companies that have not traditionally offered this service. Cellular phone signals are received in 34 towns, 10 of which experience partial or limited reception. Francestown does not have cellular phone access. High speed internet access is available in every town, but depends on customer location and the provider technology serving the area. Customers can receive high speed internet service from a telephone company, cable company, fixed wireless, mobile wireless, and satellite providers (Table 26).

Table 26: 2013 Municipal Infrastructure (1/2)

Municipality	Electric Supplier	Natural Gas / Propane Supplier	Water Supplier	Sewer System	Municipal Wastewater Treatment Plant	Telephone Company	Cable Television Access	Cellular Phone Access	Business High Speed Cable Internet Service	Residential High Speed Cable Internet Service
Alstead	PSNH; Granite State; NE Power	None	Private wells	Private septic	No	Fairpoint	Yes	Yes	Limited	Limited
Antrim	PSNH	None	Antrim Water Department	Municipal	Yes	TDS Telecom	Yes	Yes	Yes	Yes
Bennington	PSNH	None	Bennington Water Department	Municipal	No	TDS Telecom	Yes	Yes	Yes	Yes
Chesterfield	PSNH	None	Private wells	Private septic	No	Fairpoint	Yes	Yes	Limited	Limited
Dublin	PSNH	None	Private wells	Private septic	No	Fairpoint	No	Yes	Limited	Limited
Fitzwilliam	PSNH	None	Fitzwilliam Village Water; private wells	Private septic	No	Fairpoint	Limited	Limited	Limited	Limited
Francestown	PSNH	None	Francestown Village Water Co.	Private septic	No	Fairpoint	Yes	No	Yes	Limited
Gilsum	PSNH	None	Private wells	Private septic	No	Fairpoint	Yes	Limited	Yes	Yes
Greenfield	PSNH	None	Private wells	Private septic	Yes	Fairpoint	No	Yes	Limited	Limited
Greenville	PSNH	None	Municipal	Municipal	Yes	Fairpoint	Yes	Yes	Yes	Yes
Hancock	PSNH	None	Hancock Water Works	Private septic	No	Fairpoint	Yes	Yes	Yes	Yes
Harrisville	PSNH	None	Private wells	Private septic	No	Fairpoint	Yes	Yes	Yes	Yes
Hinsdale	PSNH	None	Hinsdale Water Department	Municipal	Yes	Fairpoint	Yes	Yes	Yes	Yes
Jaffrey	PSNH	None	Jaffrey Water Works	Municipal	Yes	Fairpoint	Yes	Yes	Yes	Yes
Keene	PSNH	Keene Gas Corp	Keene Water Department	Municipal	Yes	Fairpoint	Yes	Yes	Yes	Yes
Langdon	Granite State; NH Electric Coop	None	Private wells	Private septic	No	Fairpoint	Limited	Yes	Yes	Limited
Marlborough	PSNH	None	Marlborough Water Works	Municipal	No	Fairpoint	Limited	Yes	Limited	Limited
Marlow	Granite State; PSNH; NH Electric Coop	None	Private wells	Private septic	No	Fairpoint	Limited	Yes	Limited	Limited

Table 26: 2013 Municipal Infrastructure (2/2)

Municipality	Electric Supplier	Natural Gas / Propane Supplier	Water Supplier	Sewer System	Municipal Wastewater Treatment Plant	Telephone Company	Cable Television Access	Cellular Phone Access	Business High Speed Cable Internet Service	Residential High Speed Cable Internet Service
Nelson	PSNH	None	Private wells	Private septic	No	Fairpoint	Yes	Yes	No	No
New Ipswich	PSNH	None	Private wells	Private septic	No	Comcast	Yes	Limited	Limited	Limited
Peterborough	PSNH	None	Peterborough Water Works	Municipal	Yes	Fairpoint	Yes	Yes	Limited	Limited
Richmond	PSNH	None	Private wells	Private septic	No	Fairpoint	Limited	Limited	Limited	Limited
Rindge	PSNH	None	Private wells	Private septic	No	Fairpoint	Limited	Limited	Limited	Limited
Roxbury	PSNH	None	Private wells & City of Keene	Private septic	No	Fairpoint	Limited	Limited	Limited	Limited
Sharon	PSNH	None	Private wells	Private septic	No	Fairpoint	No	Limited	Yes	Yes
Stoddard	PSNH	None	Private wells	Private septic	No	Fairpoint	No	Limited	Limited	Limited
Sullivan	PSNH	None	Private wells	Private septic	No	Fairpoint	Limited	Limited	Yes	Yes
Surry	PSNH; Granite State	None	Private wells; Surry Village Water	Private septic	No	Time Warner; Fairpoint	Yes	Yes	Yes	Yes
Swanzey	PSNH	None	North Swanzey Fire Precinct; West Swanzey Water Co.	Private septic & municipal	Yes	Fairpoint	Yes	Yes	Yes	Limited
Temple	PSNH	None	Private wells	Private septic	No	Fairpoint; TDS	Limited	Yes	Yes	Yes
Troy	PSNH	None	Troy Water Works	Private septic & municipal	Yes	Fairpoint	Yes	Yes	Yes	Yes
Walpole	Liberty Utilities	None	N. Walpole/Walpole Water	Private septic & municipal	No	Comcast; Fairpoint	Yes	Yes	Yes	Yes
Westmoreland	PSNH	None	Private wells	Private septic	No	Fairpoint	Yes	Yes	Yes	Yes
Winchester	PSNH	None	Winchester Water Department	Private septic & municipal	Yes	Fairpoint	Yes	Yes	Yes	Yes
Windsor	PSNH	None	Private wells	Private septic	No	Granite State	Yes	Limited	Yes	Yes

Source: NH Department of Employment Security

H. Natural Resources

The Region is characterized by a hilly terrain, a scattering of mountains, and river valleys. Most major population centers are on terraces and flood plains in the valleys of the Connecticut, Ashuelot, Contoocook and Cold Rivers.

The landscape of the Southwest Region is mostly forested with rural and suburban residential development dispersed between village centers. The vast majority of the Region's land area has one house for every ten or more acres. The bulk of the forested land is privately owned. About 15% of the Region's land area is encumbered against development through deed restrictions, conservation easements and public ownership for protection - including Mount Monadnock and New Hampshire's largest State Park, 13,000-acre Pisgah State Park.

The soils in the hilly and mountainous areas of the Region are loamy and range from gently sloping to very steep. Stones and boulders cover most areas of these soils. Some areas have been cleared for farming. The soils on the tops of high hills and mountains are often shallow or moderately deep to bedrock. The soils on lower side slopes are commonly very deep to bedrock. These soils range from poorly drained to excessively drained. The major limitations of these soils for farm and non-farm use are complex slope patterns, stones and boulders on the surface, shallow depth to bedrock, the seasonal high water table, slow permeability, and the hazard of erosion.[1]

The soils in the major stream valleys are nearly level to very steep and sandy or loamy. They range from excessively drained to very poorly drained. The soils that are nearly level or gently sloping, well drained or moderately well drained, and loamy are suited for farming.

Climate

Throughout the Southwest Region, winters are cold and summers are moderately warm with occasional hot spells. Mountains are usually cooler than the lower areas. Precipitation is well distributed throughout the year and is usually adequate for all crops. Winter snows occur frequently, occasionally as blizzards, and cover the ground most of the season. The winter average temperature is 24 degrees Fahrenheit. The average seasonal snowfall is 68 inches.

Recreation

There is a wide variety of outdoor recreation in the Region. For boating, fishing and swimming there are 194 Great Ponds in the Southwest Region, all of which allow public access for boating, and many of which have public town beaches. Six State Parks and fourteen State Forests have hiking trails, boat access and picnic areas. An extensive network of trails throughout private lands provides a full range of four-season challenge levels from a Sunday afternoon family picnic to days-long trekking by hiking, horseback riding, skiing, biking, and snowmobiling. There is an exceptional series of trails along former railroad beds crisscrossing the Region.

2. Regional Economy

A. Employment

The employed civilian population over the age of 16 increased from 50,058 to 53,287 between 2000 and 2011 (Table 27,

[1] US Department of Agriculture, Soil Conservation Service, Soil Surveys of Cheshire County (1989), Hillsborough County – Western Part (1985) and Sullivan County, New Hampshire (1983).

Table 28), an increase of approximately 6.5%. This rate exceeded the rate of population growth over a similar time period, 5.1% between 2000 and 2010 (Table 29).

Between 2000 and 2011, employment levels fluctuated in the five largest industry sectors in the Southwest Region. Total employment increased 6% or 3,229 jobs. The largest sector in 2000 remained so in 2011: educational services, health care, and social assistance increased in size from 10,907 jobs to 14,790 jobs, an increase of 36%. The second largest employer in 2000, the manufacturing sector, decreased 16% from 9,499 employees to 7,936 employees. Employment in the retail trade sector held relatively steady, decreasing from 6,816 to 6,669, or 2%. The construction sector increased employment from 3,704 to 4,259, or 15%. New as the fifth largest sector by employment, the arts, entertainment, and recreation, and accommodation and food services sector increased in size by about 35% from 2,887 to 3,906 employees (Figure 16).

Table 27: 2000 Employed Civilian Population by Industry Type (1/3)

	Total	Agriculture, forestry, fishing and hunting, and mining Industry	% of Total	Construction	% of Total	Manufacturing	% of Total	Wholesale Trade	% of Total
United States	129,721,512	2,426,053	2%	8,801,507	7%	18,286,005	14%	4,666,757	4%
New Hampshire	650,871	5,837	1%	44,269	7%	117,673	18%	23,426	4%
Cheshire County	38,065	551	1%	2,637	7%	7,181	19%	1,710	4%
Hillsborough County	202,366	840	%	12,494	6%	41,534	21%	7,820	4%
Sullivan County	20,483	365	2%	1,394	7%	5,045	25%	592	3%
Southwest Region	50,058	771	2%	3,704	7%	9,499	19%	2,074	4%
Alstead	1,068	53	5%	123	12%	210	20%	30	3%
Antrim	1,269	14	1%	107	8%	253	20%	59	5%
Bennington	804	32	4%	55	7%	191	24%	31	4%
Chesterfield	1,870	13	1%	125	7%	259	14%	134	7%
Dublin	747	23	3%	53	7%	115	15%	15	2%
Fitzwilliam	1,213	7	1%	128	11%	280	23%	60	5%
Francestown	805	25	3%	62	8%	104	13%	22	3%
Gilsum	392	5	1%	40	10%	93	24%	21	5%
Greenfield	884	15	2%	60	7%	197	22%	32	4%
Greenville	1,097	11	1%	84	8%	352	32%	53	5%
Hancock	890	18	2%	62	7%	109	12%	11	1%
Harrisville	600	5	1%	43	7%	109	18%	16	3%
Hinsdale	2,237	14	1%	91	4%	445	20%	228	10%
Jaffrey	2,803	48	2%	208	7%	723	26%	66	2%
Keene	11,408	29	%	522	5%	1,812	16%	429	4%
Langdon	339	22	6%	41	12%	69	20%	10	3%
Marlborough	1,124	23	2%	92	8%	294	26%	20	2%
Marlow	404	15	4%	35	9%	91	23%	20	5%
Nelson	349	3	1%	27	8%	56	16%	12	3%
New Ipswich	2,090	45	2%	303	14%	444	21%	62	3%
Peterborough	2,802	14	%	181	6%	428	15%	55	2%
Richmond	559	8	1%	43	8%	120	21%	31	6%
Rindge	2,546	28	1%	297	12%	548	22%	111	4%
Roxbury	134	3	2%	8	6%	27	20%	5	4%
Sharon	204	6	3%	34	17%	26	13%	0	0%
Stoddard	507	16	3%	51	10%	106	21%	13	3%
Sullivan County	437	9	2%	32	7%	100	23%	10	2%
Surry	396	5	1%	18	5%	59	15%	17	4%
Swanzey	3,516	26	1%	227	6%	650	18%	162	5%
Temple	707	16	2%	73	10%	116	16%	25	4%
Troy	1,083	5	%	53	5%	326	30%	34	3%
Walpole	1,811	136	8%	146	8%	218	12%	105	6%
Westmoreland	849	43	5%	69	8%	111	13%	46	5%
Winchester	2,012	34	2%	206	10%	429	21%	125	6%
Windsor	102	2	2%	5	5%	29	28%	4	4%

Table 27: 2000 Employed Civilian Population by Industry Type (2/3)

	Total	Retail Trade	% of Total	Transportation and warehousing, and utilities	% of Total	Information	% of Total	Finance and insurance, and real estate and rental and leasing	% of Total
United States	129,721,512	15,221,716	12%	6,740,102	5%	3,996,564	3%	8,934,972	7%
New Hampshire	650,871	89,089	14%	27,006	4%	17,478	3%	40,731	6%
Cheshire County	38,065	5,268	14%	1,461	4%	983	3%	2,519	7%
Hillsborough County	202,366	26,786	13%	9,028	4%	6,168	3%	13,645	7%
Sullivan County	20,483	2,733	13%	657	3%	328	2%	800	4%
Southwest Region	50,058	6,816	14%	1,803	4%	1,379	3%	3,028	6%
Alstead	1,068	105	10%	28	3%	40	4%	41	4%
Antrim	1,269	170	13%	41	3%	29	2%	50	4%
Bennington	804	129	16%	10	1%	31	4%	16	2%
Chesterfield	1,870	261	14%	84	4%	49	3%	128	7%
Dublin	747	76	10%	29	4%	23	3%	35	5%
Fitzwilliam	1,213	152	13%	46	4%	26	2%	72	6%
Francestown	805	92	11%	33	4%	33	4%	54	7%
Gilsum	392	38	10%	21	5%	22	6%	22	6%
Greenfield	884	96	11%	16	2%	36	4%	26	3%
Greenville	1,097	190	17%	26	2%	38	3%	21	2%
Hancock	890	111	12%	31	3%	44	5%	48	5%
Harrisville	600	81	14%	21	4%	21	4%	26	4%
Hinsdale	2,237	279	12%	127	6%	23	1%	98	4%
Jaffrey	2,803	406	14%	93	3%	107	4%	108	4%
Keene	11,408	1,862	16%	320	3%	346	3%	949	8%
Langdon	339	56	17%	9	3%	3	1%	13	4%
Marlborough	1,124	134	12%	23	2%	18	2%	61	5%
Marlow	404	57	14%	17	4%	4	1%	14	3%
Nelson	349	47	13%	11	3%	18	5%	26	7%
New Ipswich	2,090	162	8%	92	4%	39	2%	96	5%
Peterborough	2,802	436	16%	53	2%	105	4%	155	6%
Richmond	559	70	13%	30	5%	5	1%	33	6%
Rindge	2,546	280	11%	67	3%	111	4%	122	5%
Roxbury	134	18	13%	5	4%	0	0%	2	1%
Sharon	204	17	8%	0	0%	6	3%	9	4%
Stoddard	507	65	13%	9	2%	24	5%	17	3%
Sullivan County	437	56	13%	15	3%	11	3%	23	5%
Surry	396	45	11%	15	4%	4	1%	46	12%
Swanzey	3,516	510	15%	204	6%	44	1%	377	11%
Temple	707	84	12%	31	4%	30	4%	15	2%
Troy	1,083	121	11%	48	4%	7	1%	60	6%
Walpole	1,811	216	12%	133	7%	44	2%	110	6%
Westmoreland	849	99	12%	41	5%	14	2%	39	5%
Winchester	2,012	290	14%	74	4%	22	1%	110	5%
Windsor	102	5	5%	0	0%	2	2%	6	6%

Table 27: 2000 Employed Civilian Population by Industry Type (3/3)

	Total	Professional, scientific, and management, and administrative and waste management services	% of Total	Educational services, and health care and social assistance	% of Total	Arts, entertainment, and recreation, and accommodation and food services	% of Total	Other services, except public administration	% of Total	Public administration	% of Total
United States	129,721,512	12,061,865	9%	25,843,029	20%	10,210,295	8%	6,320,632	5%	6,212,015	5%
New Hampshire	650,871	57,369	9%	130,390	20%	45,001	7%	27,780	4%	24,822	4%
Cheshire County	38,065	2,221	6%	8,303	22%	2,297	6%	1,981	5%	953	3%
Hillsborough County	202,366	20,905	10%	36,503	18%	12,314	6%	8,392	4%	5,937	3%
Sullivan County	20,483	1,210	6%	4,436	22%	1,153	6%	1,048	5%	722	4%
Southwest Region	50,058	3,424	7%	10,907	22%	2,887	6%	2,488	5%	1,278	**3%**
Alstead	1,068	68	6%	262	25%	42	4%	49	5%	17	2%
Antrim	1,269	103	8%	292	23%	88	7%	38	3%	25	2%
Bennington	804	58	7%	178	22%	37	5%	20	2%	16	2%
Chesterfield	1,870	120	6%	451	24%	112	6%	78	4%	56	3%
Dublin	747	72	10%	199	27%	31	4%	62	8%	14	2%
Fitzwilliam	1,213	75	6%	227	19%	63	5%	34	3%	43	4%
Francestown	805	117	15%	168	21%	39	5%	22	3%	34	4%
Gilsum	392	21	5%	58	15%	17	4%	27	7%	7	2%
Greenfield	884	83	9%	208	24%	51	6%	41	5%	23	3%
Greenville	1,097	89	8%	139	13%	43	4%	29	3%	22	2%
Hancock	890	107	12%	232	26%	36	4%	49	6%	32	4%
Harrisville	600	47	8%	169	28%	31	5%	17	3%	14	2%
Hinsdale	2,237	97	4%	512	23%	166	7%	117	5%	40	2%
Jaffrey	2,803	159	6%	502	18%	136	5%	210	7%	37	1%
Keene	11,408	635	6%	2,743	24%	966	8%	454	4%	341	3%
Langdon	339	27	8%	60	18%	6	2%	15	4%	8	2%
Marlborough	1,124	75	7%	254	23%	41	4%	64	6%	25	2%
Marlow	404	25	6%	69	17%	12	3%	19	5%	26	6%
Nelson	349	22	6%	81	23%	22	6%	17	5%	7	2%
New Ipswich	2,090	191	9%	387	19%	115	6%	91	4%	63	3%
Peterborough	2,802	311	11%	696	25%	124	4%	170	6%	74	3%
Richmond	559	32	6%	104	19%	36	6%	24	4%	23	4%
Rindge	2,546	201	8%	497	20%	83	3%	132	5%	69	3%
Roxbury	134	5	4%	32	24%	4	3%	15	11%	10	7%
Sharon	204	24	12%	61	30%	8	4%	5	2%	8	4%
Stoddard	507	36	7%	95	19%	17	3%	40	8%	18	4%
Sullivan	437	14	3%	95	22%	29	7%	32	7%	11	3%
Surry	396	24	6%	107	27%	21	5%	22	6%	13	3%
Swanzey	3,516	209	6%	607	17%	169	5%	261	7%	70	2%
Temple	707	83	12%	149	21%	38	5%	27	4%	20	3%
Troy	1,083	54	5%	195	18%	88	8%	66	6%	26	2%
Walpole	1,811	123	7%	454	25%	89	5%	10	1%	27	1%
Westmoreland	849	59	7%	217	26%	35	4%	48	6%	28	3%
Winchester	2,012	48	2%	373	19%	87	4%	183	9%	31	2%
Windsor	102	10	10%	34	33%	5	5%	0	0%	0	0%

*Source: U.S. Census Bureau Decennial Census 2000, *American Community Survey (ACS) 5-Year Estimates 2007-2011*

Table 28: 2011* Employed Civilian Population by Industry Type (1/3)

	Total	Agriculture, forestry, fishing and hunting, and mining Industry	% of Total	Construction	% of Total	Manufacturing	% of Total	Wholesale Trade	% of Total
United States	141,832,499	2,669,572	2%	9,642,450	7%	15,281,307	11%	4,158,689	3%
New Hampshire	695,066	5,783	1%	50,944	7%	89,286	13%	21,798	3%
Cheshire County	39,983	340	1%	2,887	7%	5,906	15%	1,729	4%
Hillsborough County	213,830	1,184	1%	14,459	7%	32,574	15%	6,987	3%
Sullivan County	22,574	334	1%	1,577	7%	3,726	17%	548	2%
Southwest Region	53,287	558	1%	4,259	8%	7,936	15%	2,094	4%
Alstead	946	9	1%	156	16%	142	15%	58	6%
Antrim	1,462	21	1%	180	12%	230	16%	51	3%
Bennington	783	19	2%	72	9%	70	9%	16	2%
Chesterfield	1,915	0	0%	67	3%	227	12%	177	9%
Dublin	856	0	0%	57	7%	152	18%	17	2%
Fitzwilliam	1,407	0	0%	124	9%	337	24%	25	2%
Francestown	945	53	6%	91	10%	93	10%	16	2%
Gilsum	345	19	6%	54	16%	69	20%	13	4%
Greenfield	757	13	2%	74	10%	108	14%	20	3%
Greenville	1,254	4	0%	146	12%	359	29%	29	2%
Hancock	907	5	1%	76	8%	88	10%	36	4%
Harrisville	516	14	3%	34	7%	77	15%	11	2%
Hinsdale	1,998	25	1%	156	8%	351	18%	91	5%
Jaffrey	3,009	25	1%	314	10%	602	20%	70	2%
Keene	11,855	50	0%	559	5%	1,162	10%	537	5%
Langdon	392	8	2%	47	12%	49	13%	33	8%
Marlborough	1,206	15	1%	103	9%	239	20%	20	2%
Marlow	449	20	4%	50	11%	66	15%	18	4%
Nelson	462	10	2%	39	8%	68	15%	2	0%
New	2,448	34	1%	356	15%	430	18%	36	1%
Peterborough	3,374	20	1%	214	6%	473	14%	92	3%
Richmond	592	18	3%	51	9%	122	21%	39	7%
Rindge	2,860	15	1%	188	7%	419	15%	33	1%
Roxbury	133	0	0%	14	11%	18	14%	6	5%
Sharon	209	0	0%	32	15%	26	12%	5	2%
Stoddard	547	14	3%	46	8%	88	16%	7	1%
Sullivan	403	25	6%	27	7%	22	5%	3	1%
Surry	452	0	0%	54	12%	34	8%	8	2%
Swanzey	3,964	0	0%	192	5%	867	22%	267	7%
Temple	684	41	6%	63	9%	96	14%	27	4%
Troy	1,105	0	0%	184	17%	162	15%	37	3%
Walpole	1,948	21	1%	119	6%	300	15%	132	7%
Westmoreland	1,004	38	4%	71	7%	108	11%	47	5%
Winchester	2,011	22	1%	228	11%	274	14%	111	6%
Windsor	89	0	0%	21	24%	8	9%	4	4%

Table 28: 2011* Employed Civilian Population by Industry Type (2/3)

	Total	Retail Trade	% of Total	Transportation and warehousing, and utilities	% of Total	Information	% of Total	Finance and insurance, and real estate and rental and leasing	% of Total
United States	141,832,499	16,336,915	12%	7,171,438	5%	3,256,311	2%	9,738,275	7%
New Hampshire	695,066	91,614	13%	27,572	4%	15,579	2%	46,218	7%
Cheshire County	39,983	5,139	13%	1,634	4%	617	2%	2,213	6%
Hillsborough County	213,830	27,088	13%	9,360	4%	5,290	2%	16,260	8%
Sullivan County	22,574	2,891	13%	630	3%	423	2%	1,171	5%
Southwest Region	53,287	6,669	13%	2,024	4%	995	2%	2,792	5%
Alstead	946	105	11%	25	3%	4	0%	64	7%
Antrim	1,462	248	17%	44	3%	18	1%	25	2%
Bennington	783	97	12%	44	6%	31	4%	30	4%
Chesterfield	1,915	227	12%	169	9%	45	2%	55	3%
Dublin	856	106	12%	14	2%	24	3%	30	4%
Fitzwilliam	1,407	143	10%	38	3%	28	2%	72	5%
Francestown	945	84	9%	61	6%	20	2%	39	4%
Gilsum	345	48	14%	10	3%	7	2%	19	6%
Greenfield	757	104	14%	14	2%	26	3%	40	5%
Greenville	1,254	156	12%	64	5%	57	5%	14	1%
Hancock	907	83	9%	22	2%	45	5%	74	8%
Harrisville	516	65	13%	6	1%	12	2%	12	2%
Hinsdale	1,998	300	15%	142	7%	18	1%	35	2%
Jaffrey	3,009	266	9%	168	6%	13	0%	227	8%
Keene	11,855	1,886	16%	401	3%	279	2%	692	6%
Langdon	392	80	20%	7	2%	3	1%	0	0%
Marlborough	1,206	133	11%	29	2%	9	1%	34	3%
Marlow	449	79	18%	15	3%	14	3%	35	8%
Nelson	462	37	8%	5	1%	7	2%	42	9%
New	2,448	198	8%	17	1%	72	3%	97	4%
Peterborough	3,374	392	12%	100	3%	90	3%	217	6%
Richmond	592	51	9%	40	7%	3	1%	15	3%
Rindge	2,860	289	10%	106	4%	29	1%	97	3%
Roxbury	133	18	14%	10	8%	0	0%	15	11%
Sharon	209	26	12%	4	2%	1	0%	7	3%
Stoddard	547	19	3%	53	10%	13	2%	19	3%
Sullivan	403	66	16%	3	1%	7	2%	38	9%
Surry	452	64	14%	20	4%	18	4%	50	11%
Swanzey	3,964	493	12%	103	3%	0	0%	336	8%
Temple	684	59	9%	13	2%	11	2%	34	5%
Troy	1,105	137	12%	14	1%	12	1%	67	6%
Walpole	1,948	230	12%	78	4%	45	2%	98	5%
Westmoreland	1,004	88	9%	68	7%	6	1%	64	6%
Winchester	2,011	289	14%	117	6%	24	1%	97	5%
Windsor	89	3	3%	0	0%	4	4%	2	2%

Table 28: 2011* Employed Civilian Population by Industry Type (3/3)

	Total	Professional, scientific, and management, and administrative and waste management services	% of Total	Educational services, and health care and social assistance	% of Total	Arts, entertainment, and recreation, and accommodation and food services	% of Total	Other services, except public administration	% of Total	Public administration	% of Total
United States	141,832,499	14,942,494	11%	31,927,759	23%	12,779,583	9%	6,960,820	5%	6,966,886	5%
New Hampshire	695,066	69,684	10%	164,336	24%	55,410	8%	29,098	4%	27,744	4%
Cheshire County	39,983	2,497	6%	11,115	28%	3,222	8%	1,728	4%	956	2%
Hillsborough County	213,830	25,109	12%	45,737	21%	13,940	7%	8,914	4%	6,928	3%
Sullivan County	22,574	1,761	8%	6,128	27%	1,698		933	4%	754	3%
Southwest Region	53,287	3,740	7%	14,790	28%	3,906	7%	2,201	4%	1,323	2%
Alstead	946	57	6%	261	28%	36	4%	14	1%	15	2%
Antrim	1,462	123	8%	416	28%	31	2%	57	4%	18	1%
Bennington	783	73	9%	215	27%	41	5%	34	4%	41	5%
Chesterfield	1,915	163	9%	526	27%	156	8%	71	4%	32	2%
Dublin	856	61	7%	221	26%	92	11%	42	5%	40	5%
Fitzwilliam	1,407	100	7%	358	25%	69	5%	55	4%	58	4%
Francestown	945	162	17%	196	21%	43	5%	23	2%	64	7%
Gilsum	345	4	1%	55	16%	16	5%	24	7%	7	2%
Greenfield	757	110	15%	129	17%	49	6%	46	6%	24	3%
Greenville	1,254	52	4%	261	21%	36	3%	59	5%	17	1%
Hancock	907	89	10%	272	30%	63	7%	16	2%	38	4%
Harrisville	516	49	9%	157	30%	22	4%	49	9%	8	2%
Hinsdale	1,998	88	4%	449	22%	200	10%	123	6%	20	1%
Jaffrey	3,009	68	2%	758	25%	312	10%	156	5%	30	1%
Keene	11,855	565	5%	3,700	31%	1,235	10%	461	4%	328	3%
Langdon	392	15	4%	119	30%	18	5%	7	2%	6	2%
Marlborough	1,206	79	7%	408	34%	71	6%	44	4%	22	2%
Marlow	449	23	5%	111	25%	3	1%	6	1%	9	2%
Nelson	462	46	10%	125	27%	9	2%	66	14%	6	1%
New	2,448	223	9%	756	31%	65	3%	95	4%	69	3%
Peterborough	3,374	271	8%	1,075	32%	292	9%	76	2%	62	2%
Richmond	592	16	3%	156	26%	26	4%	20	3%	35	6%
Rindge	2,860	182	6%	1,103	39%	222	8%	101	4%	76	3%
Roxbury	133	10	8%	21	16%	7	5%	10	8%	4	3%
Sharon	209	34	16%	45	22%	15	7%	9	4%	5	2%
Stoddard	547	76	14%	157	29%	34	6%	9	2%	12	2%
Sullivan	403	14	3%	123	31%	23	6%	44	11%	8	2%
Surry	452	36	8%	101	22%	29	6%	28	6%	10	2%
Swanzey	3,964	330	8%	856	22%	264	7%	138	3%	118	3%
Temple	684	81	12%	173	25%	19	3%	44	6%	23	3%
Troy	1,105	98	9%	220	20%	110	10%	33	3%	31	3%
Walpole	1,948	233	12%	421	22%	115	6%	102	5%	54	3%
Westmoreland	1,004	80	8%	294	29%	47	5%	60	6%	33	3%
Winchester	2,011	119	6%	534	27%	124	6%	72	4%	0	0%
Windsor	89	10	11%	18	20%	12	13%	7	8%	0	0%

*Source: US Decennial Census 2000, *US Census American Community Survey 5-Year Estimates 2007-2011*

Table 29: 2000-2011* Change of Employed Population by Industry (1/2)

	Total	Agriculture, forestry, fishing and hunting, and mining Industry	Construction	Manufacturing	Wholesale Trade	Retail Trade	Transportation and warehousing, and utilities
United States	9%	10%	10%	-16%	-11%	7%	6%
New Hampshire	7%	-1%	15%	-24%	-7%	3%	2%
Cheshire County	5%	-38%	9%	-18%	1%	-2%	12%
Hillsborough County	6%	41%	16%	-22%	-11%	1%	4%
Sullivan County	10%	-8%	13%	-26%	-7%	6%	-4%
Southwest Region	6%	-28%	15%	-16%	1%	-2%	12%
Alstead	-11%	-83%	27%	-32%	93%	0%	-11%
Antrim	15%	50%	68%	-9%	-14%	46%	7%
Bennington	-3%	-41%	31%	-63%	-48%	-25%	340%
Chesterfield	2%	-100%	-46%	-12%	32%	-13%	101%
Dublin	15%	-100%	8%	32%	13%	39%	-52%
Fitzwilliam	16%	-100%	-3%	20%	-58%	-6%	-17%
Francestown	17%	112%	47%	-11%	-27%	-9%	85%
Gilsum	-12%	280%	35%	-26%	-38%	26%	-52%
Greenfield	-14%	-13%	23%	-45%	-38%	8%	-13%
Greenville	14%	-64%	74%	2%	-45%	-18%	146%
Hancock	2%	-72%	23%	-19%	227%	-25%	-29%
Harrisville	-14%	180%	-21%	-29%	-31%	-20%	-71%
Hinsdale	-11%	79%	71%	-21%	-60%	8%	12%
Jaffrey	7%	-48%	51%	-17%	6%	-34%	81%
Keene	4%	72%	7%	-36%	25%	1%	25%
Langdon	16%	-64%	15%	-29%	230%	43%	-22%
Marlborough	7%	-35%	12%	-19%	0%	-1%	26%
Marlow	11%	33%	43%	-27%	-10%	39%	-12%
Nelson	32%	233%	44%	21%	-83%	-21%	-55%
New	17%	-24%	17%	-3%	-42%	22%	-82%
Peterborough	20%	43%	18%	11%	67%	-10%	89%
Richmond	6%	125%	19%	2%	26%	-27%	33%
Rindge	12%	-46%	-37%	-24%	-70%	3%	58%
Roxbury	-1%	-100%	75%	-33%	20%	0%	100%
Sharon	2%	-100%	-6%	0%	NC	53%	NC
Stoddard	8%	-13%	-10%	-17%	-46%	-71%	489%
Sullivan	-8%	178%	-16%	-78%	-70%	18%	-80%
Surry	14%	-100%	200%	-42%	-53%	42%	33%
Swanzey	13%	-100%	-15%	33%	65%	-3%	-50%
Temple	-3%	156%	-14%	-17%	8%	-30%	-58%
Troy	2%	-100%	247%	-50%	9%	13%	-71%
Walpole	8%	-85%	-18%	38%	26%	6%	-41%
Westmoreland	18%	-12%	3%	-3%	2%	-11%	66%
Winchester	0%	-35%	11%	-36%	-11%	0%	58%
Windsor	-13%	-100%	320%	-72%	0%	-40%	NC

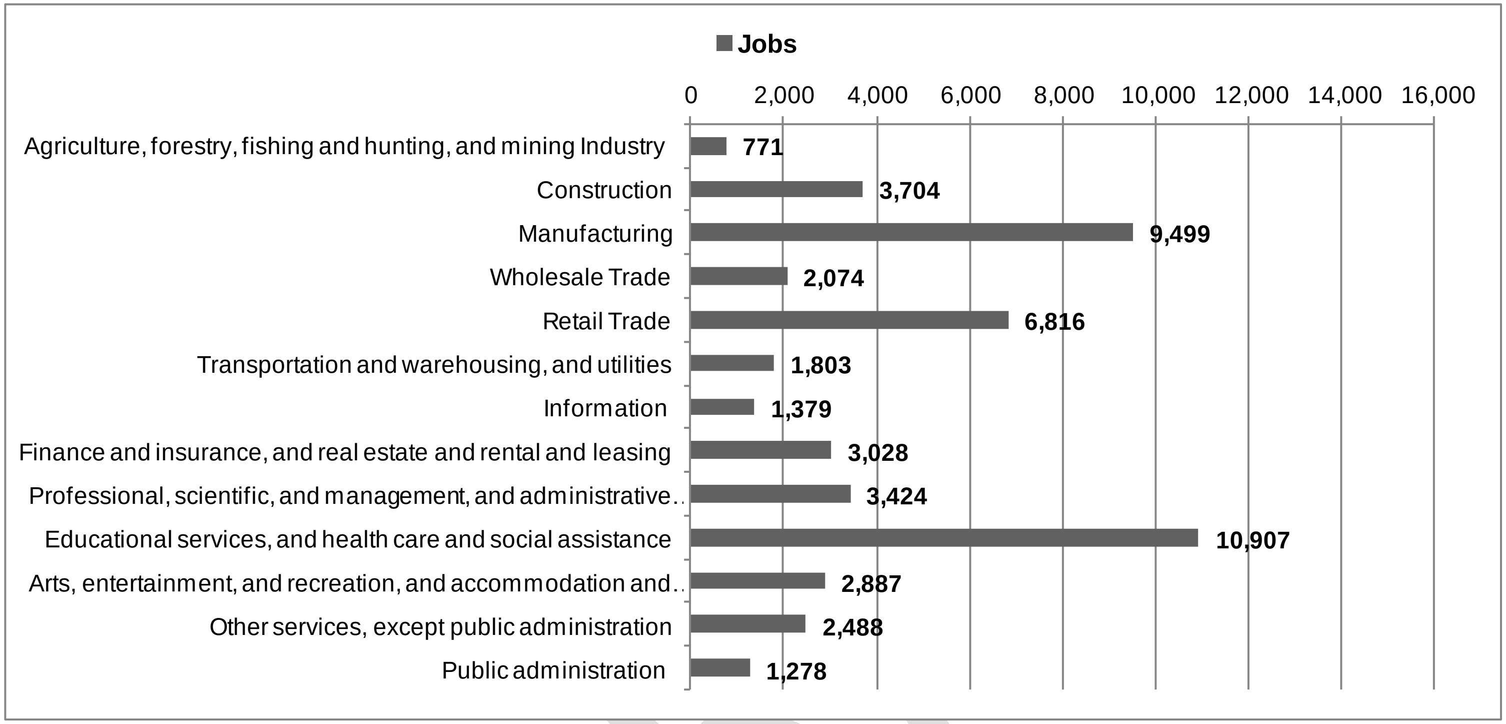
*Source: US Decennial Census 2000, *US Census American Community Survey 5-Year Estimates 2007-2011*
(NC) Not Calculable

Table 29: 2000-2011* Change of Employed Population by Industry (2/2)

	Total	Information	Finance and insurance, and real estate and rental and leasing	Professional, scientific, and management, and administrative and waste management services	Educational services, and health care and social assistance	Arts, entertainment, and recreation, and accommodation and food services	Other services, except public administration	Public administration
United States	9%	-19%	9%	24%	24%	25%	10%	12%
New Hampshire	7%	-11%	13%	21%	26%	23%	5%	12%
Cheshire County	5%	-37%	-12%	12%	34%	40%	-13%	0%
Hillsborough County	6%	-14%	19%	20%	25%	13%	6%	17%
Sullivan County	10%	29%	46%	46%	38%	47%	-11%	4%
Southwest Region	6%	-28%	-8%	9%	36%	35%	-12%	4%
Alstead	-11%	-90%	56%	-16%	0%	-14%	-71%	-12%
Antrim	15%	-38%	-50%	19%	42%	-65%	50%	-28%
Bennington	-3%	0%	88%	26%	21%	11%	70%	156%
Chesterfield	2%	-8%	-57%	36%	17%	39%	-9%	-43%
Dublin	15%	4%	-14%	-15%	11%	197%	-32%	186%
Fitzwilliam	16%	8%	0%	33%	58%	10%	62%	35%
Francestown	17%	-39%	-28%	38%	17%	10%	5%	88%
Gilsum	-12%	-68%	-14%	-81%	-5%	-6%	-11%	0%
Greenfield	-14%	-28%	54%	33%	-38%	-4%	12%	4%
Greenville	14%	50%	-33%	-42%	88%	-16%	103%	-23%
Hancock	2%	2%	54%	-17%	17%	75%	-67%	19%
Harrisville	-14%	-43%	-54%	4%	-7%	-29%	188%	-43%
Hinsdale	-11%	-22%	-64%	-9%	-12%	20%	5%	-50%
Jaffrey	7%	-88%	110%	-57%	51%	129%	-26%	-19%
Keene	4%	-19%	-27%	-11%	35%	28%	2%	-4%
Langdon	16%	0%	-100%	-44%	98%	200%	-53%	-25%
Marlborough	7%	-50%	-44%	5%	61%	73%	-31%	-12%
Marlow	11%	250%	150%	-8%	61%	-75%	-68%	-65%
Nelson	32%	-61%	62%	109%	54%	-59%	288%	-14%
New	17%	85%	1%	17%	95%	-43%	4%	10%
Peterborough	20%	-14%	40%	-13%	54%	135%	-55%	-16%
Richmond	6%	-40%	-55%	-50%	50%	-28%	-17%	52%
Rindge	12%	-74%	-20%	-9%	122%	167%	-23%	10%
Roxbury	-1%	NC	650%	100%	-34%	75%	-33%	-60%
Sharon	2%	-83%	-22%	42%	-26%	88%	80%	-38%
Stoddard	8%	-46%	12%	111%	65%	100%	-78%	-33%
Sullivan	-8%	-36%	65%	0%	29%	-21%	38%	-27%
Surry	14%	350%	9%	50%	-6%	38%	27%	-23%
Swanzey	13%	-100%	-11%	58%	41%	56%	-47%	69%
Temple	-3%	-63%	127%	-2%	16%	-50%	63%	15%
Troy	2%	71%	12%	81%	13%	25%	-50%	19%
Walpole	8%	2%	-11%	89%	-7%	29%	920%	100%
Westmoreland	18%	-57%	64%	36%	35%	34%	25%	18%
Winchester	0%	9%	-12%	148%	43%	43%	-61%	-100%
Windsor	-13%	100%	-67%	0%	-47%	140%	NC	NC

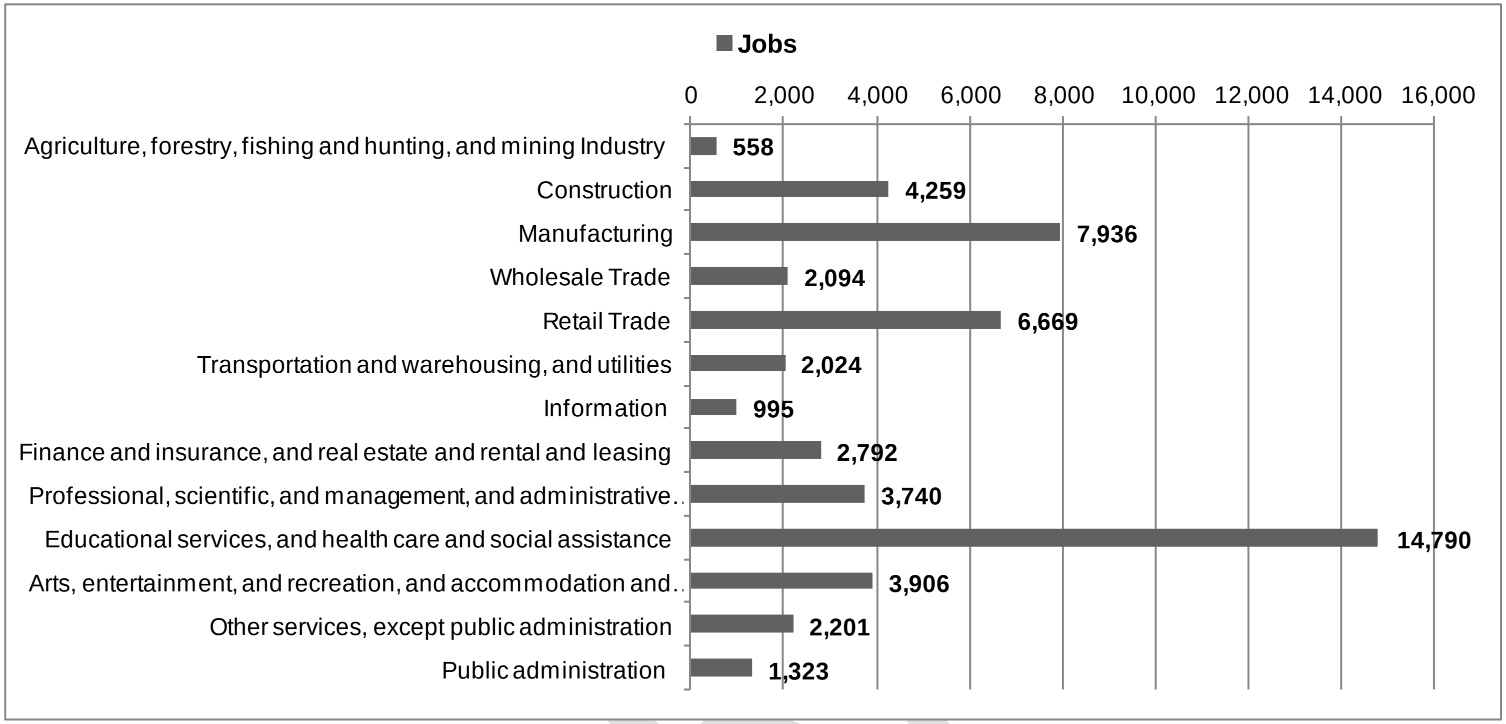
*Source: US Decennial Census 2000, *US Census American Community Survey 5-Year Estimates 2007-2011*
(NC)Not Calculable

Figure 14: 2000 Employed Civilian Population by Industry Type



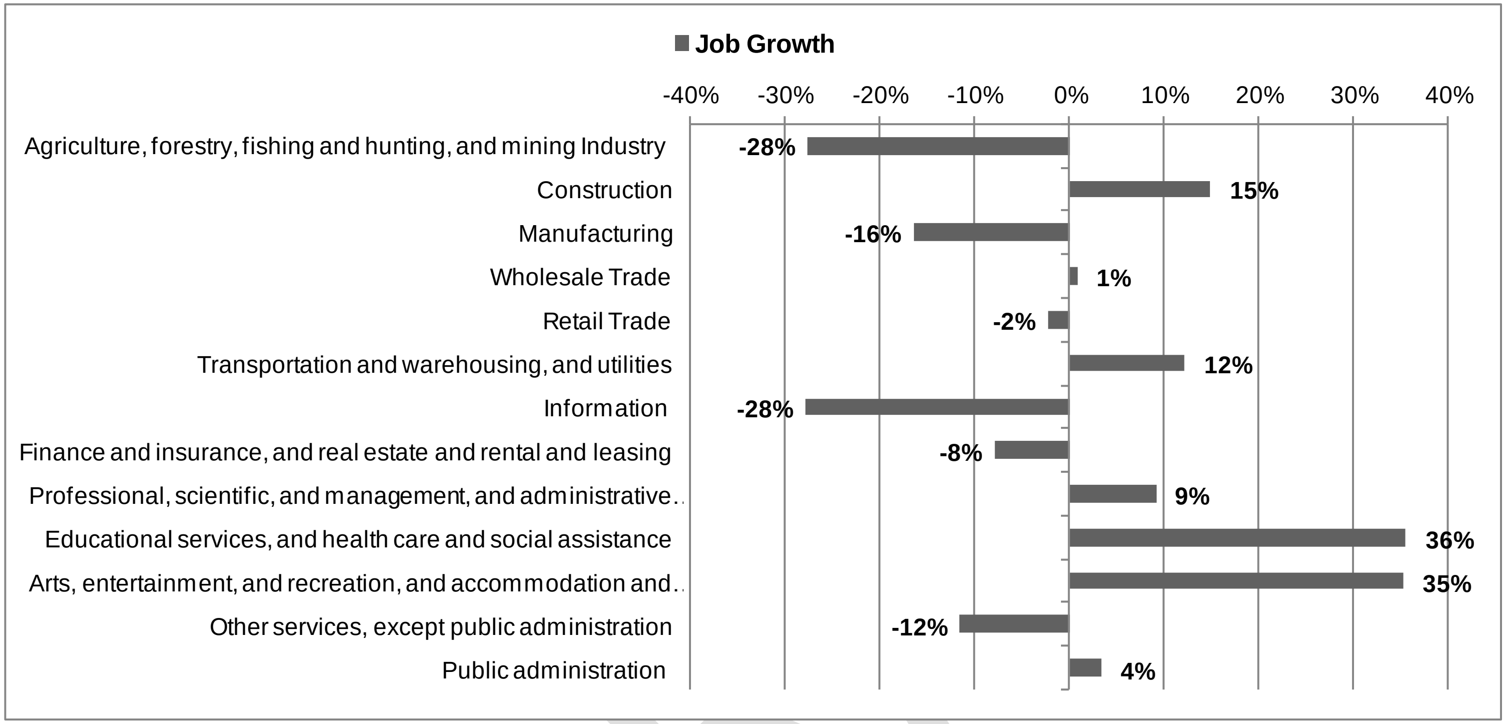
Source: U.S. Census Bureau 2000 Decennial Census
Note: Includes Employees 16 Years of Age and Over

Figure 15: 2011* Employed Civilian Population by Industry Type



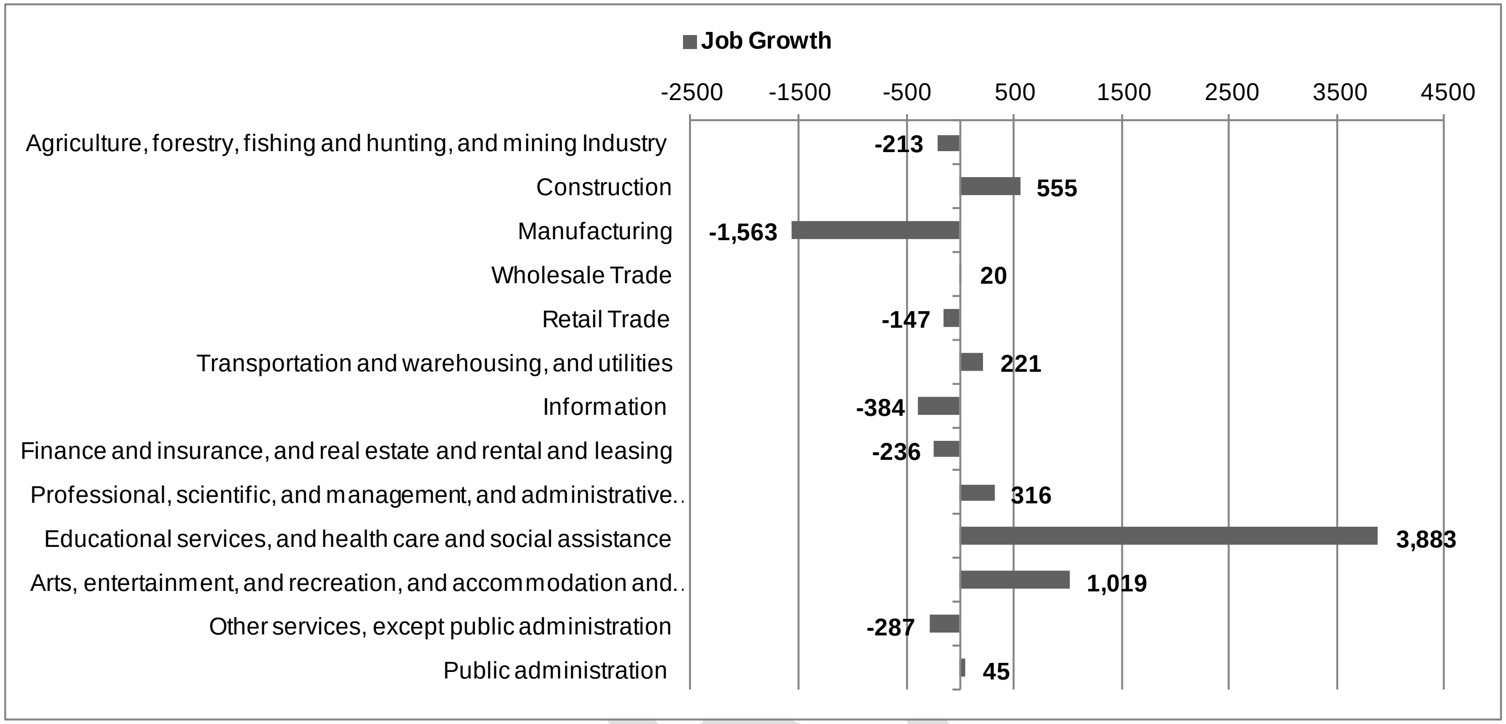
**Source: U.S. Census Bureau American Community Survey 5-Year Estimates 2007-2011*
Note: Includes Employees 16 Years of Age and Over

Figure 16: 2000-2011* Percent Change of Employed Population by Industry



*Source: U.S. Census Bureau 2000 Decennial Census, *U.S. Census Bureau American Community Survey 5-Year Estimates 2007-2011*
Note: Includes Employees 16 Years of Age and Over

Figure 17: 2000-2011* Southwest Region Job Growth



*Source: U.S. Census Bureau 2000 Decennial Census, *U.S. Census Bureau American Community Survey 5-Year Estimates 2007-2011*
Note: Includes Employees 16 Years of Age and Over

Industry Strengths: Location Quotient

One way to examine the strength of a particular industry sector is the location quotient (LQ). The location quotient measures an area's industry sector concentration by employment numbers relative to a larger area. A LQ above 1.0 indicates an industry is more concentrated in the smaller area, i.e. the Southwest Region, than in the larger area, i.e. the nation. A LQ below 1.0 indicates a weaker concentration and a LQ around 1 indicates similar concentration. An employment concentration above 1.0 may reflect a specialization or strength in that industry. An LQ below 1.0 may indicate that the industry is not meeting the local demand for goods and services in the area and therefore, they are being imported. Location quotients were calculated for Bureau of Labor Statistics supersectors[1] and NAICS sectors as follows:

$$LQ_i = \frac{e_i^t / e_T^t}{E_i^t / E_T^t}$$

e_i^t = regional employment in industry i in year t
e_T^t = total regional employment in year t
E_i^t = national employment in industry i in year t
E_i^t = total national employment in year t

When compared to the employment make-up of the United States, several trends emerge. Southwest Region Counties have high LQ for the manufacturing supersector, indicating a specialization. Education and health services, the industry of employment growing most rapidly in the Southwest Region, employs a proportion of the workforce comparable to that of the entire U.S. workforce. Location quotients were calculated to compare sector specialization to the U.S. workforce (Table 30, Figure 188) and to the state of New Hampshire workforce (Table 31, Figure 20).

During the decade between 2002 and 2012, fluctuating economic conditions affected the employment numbers for industries in the Southwest Region and the nation as a whole. Statewide, the information super-sector and the professional and businesses service sector experienced the largest change in composition over this time period when compared to U.S. employment. Similar trends appeared when making comparisons between Southwest Region counties and the State (Table 30, Figure 199).

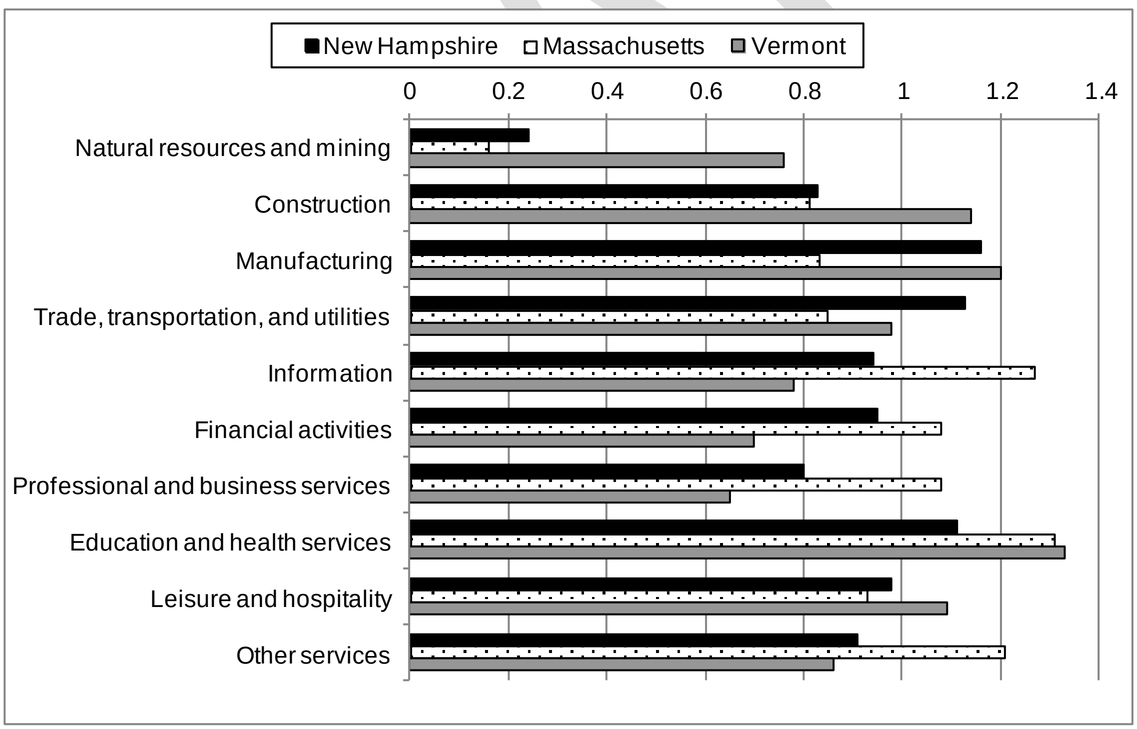
[1] For purposes of analysis, the US Economic Classification Policy Committee aggregated NAICS sectors into groupings called "Super-sectors."

Table 30: 2002 - 2012 Location Quotient (Compared to United States)

NAICS Super-sectors	New Hampshire			Massachusetts			Vermont		
	2002	2012	% Change	2002	2012	% Change	2002	2012	% Change
Natural resources and mining	0.31	0.24	-22.6%	0.19	0.16	-15.8%	0.78	0.76	-2.6%
Construction	0.86	0.83	-3.5%	0.81	0.81	0.0%	0.97	1.14	17.5%
Manufacturing	1.15	1.16	0.9%	0.88	0.83	-5.7%	1.17	1.2	2.6%
Trade, transportation, and utilities	1.13	1.13	0.0%	0.88	0.85	-3.4%	1.01	0.98	-3.0%
Information	0.79	0.94	19.0%	1.15	1.27	10.4%	ND	0.78	NC
Financial activities	0.93	0.95	2.2%	1.13	1.08	-4.4%	0.73	0.7	-4.1%
Professional and business services	0.7	0.8	14.3%	1.1	1.08	-1.8%	0.56	0.65	16.1%
Education and health ser-vices	1.14	1.11	-2.6%	1.34	1.31	-2.2%	1.33	1.33	0.0%
Leisure and hospitality	1.05	0.98	-6.7%	0.92	0.93	1.1%	1.2	1.09	-9.2%
Other services	0.93	0.91	-2.2%	1.05	1.21	15.2%	ND	0.86	NC
Unclassified	0.73	0.22	-69.9%	NC	NC	NC	NC	NC	NC

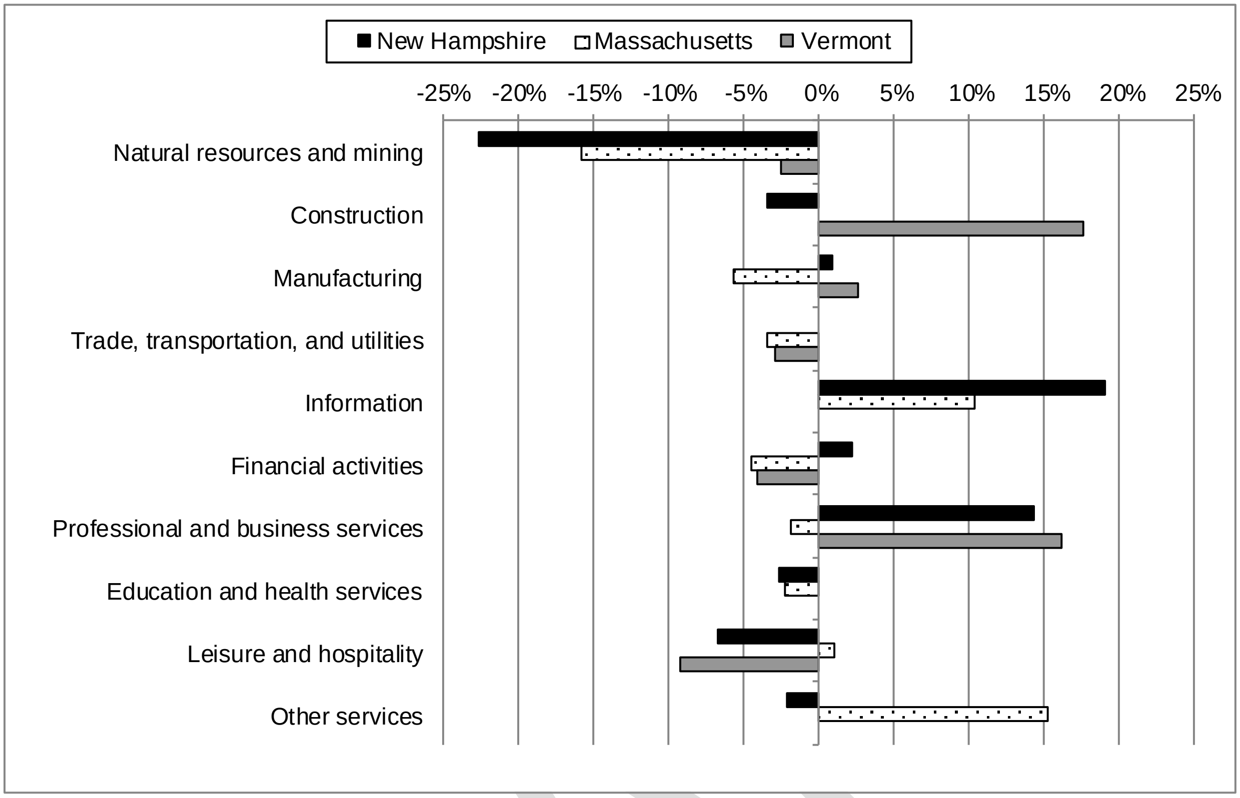
Source: United States Department of Labor Bureau of Labor Statistics Quarterly Census of Employment and Wages
(NC) Not Calculable
(ND) Not Disclosable

Figure 18: 2012 Location Quotient (Compared to United States)



Source: United States Department of Labor Bureau of Labor Statistics Quarterly Census of Employment and Wages

Figure 19: 2002-2012 Location Quotient Change (Compared to United States)



Source: United States Department of Labor Bureau of Labor Statistics Quarterly Census of Employment and Wages

When compared to the role Southwest Region counties play in the New Hampshire economy there are several other notable observations. Over the 10-year period between 2002 and 2012, the goods-producing supersector industries of natural resources and mining, construction, and manufacturing were mixed. There was a sharp decrease in natural resources and mining within Hillsborough and Sullivan counties, but not Cheshire County, which nearly retained the same composition of natural resources and mining jobs compared to the industry mix of the state. The manufacturing sector in Cheshire County, already employing a greater percentage of workers in this industry, increased from 1.54 to 1.58. The construction supersector also experience a noticeable increase in specialization compared with the state. Emerging service industries in the information and professional and business services supersectors experienced strong growth, even though they employ fewer workers, as a percentage of total workers, than the state composition (Table 31).

Table 31: 2002-2012 Location Quotient (Compared to New Hampshire)

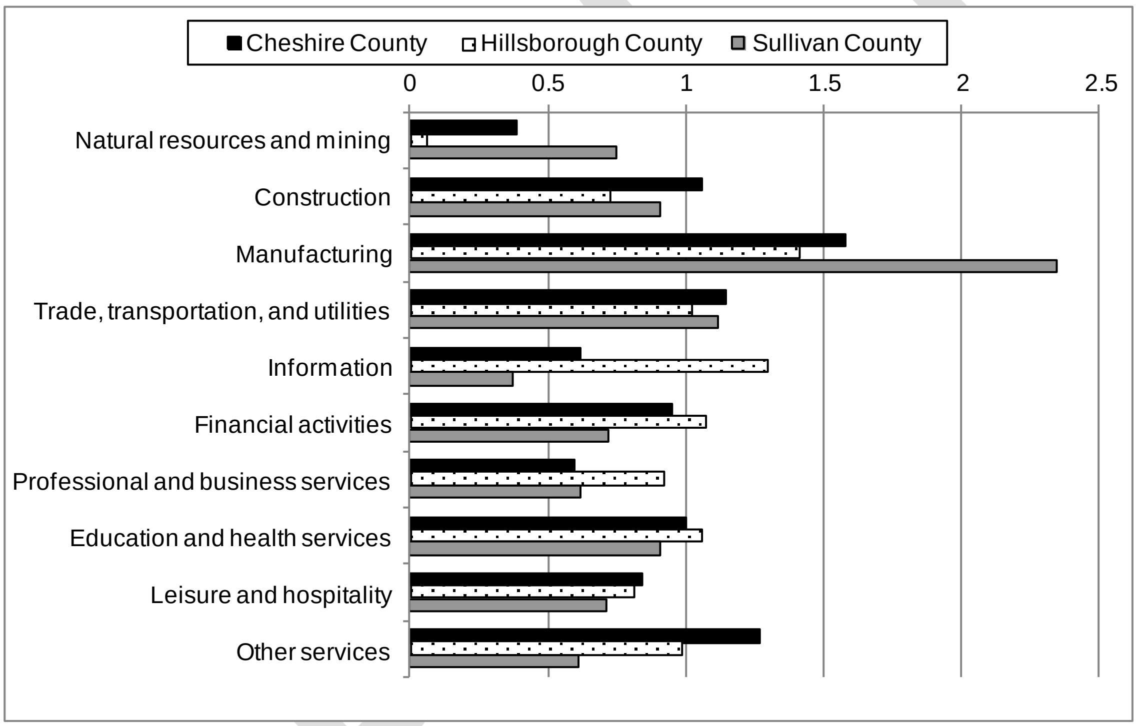
NAICS Supersectors	Cheshire County			Hillsborough County			Sullivan County		
	2002	2012	% Change	2002	2012	% Change	2002	2012	% Change
Natural resources and mining	0.41	0.39	-4.9%	0.1	0.06	-40.0%	1.41	0.75	-46.8%
Construction	0.94	1.06	12.8%	0.75	0.73	-2.7%	0.84	0.91	8.3%
Manufacturing	1.54	1.58	2.6%	1.43	1.41	-1.4%	2.28	2.35	3.1%
Trade, transportation, and utilities	1.01	1.15	13.9%	1.03	1.02	-1.0%	1.05	1.12	6.7%
Information	0.53	0.62	17.0%	1.01	1.3	28.7%	ND	0.37	NC
Financial activities	1.17	0.95	-18.8%	1.11	1.07	-3.6%	0.71	0.72	1.4%
Professional and business services	0.49	0.60	22.4%	0.76	0.92	21.1%	0.28	0.62	121.4%
Education and health services	1.10	1.00	-9.1%	1.07	1.06	-0.9%	1.11	0.91	-18.0%
Leisure and hospitality	0.94	0.84	-10.6%	0.84	0.81	-3.6%	0.61	0.71	16.4%
Other services	1.14	1.27	11.4%	0.95	0.99	4.2%	0.71	0.61	-14.1%
Unclassified	0.28	0.09	-67.9%	0.38	0.04	-89.5%	ND	0.29	NC

NAICS Sectors	Cheshire County			Hillsborough County			Sullivan County		
	2002	2012	% Change	2002	2012	% Change	2002	2012	% Change
NAICS 11 Agriculture, forestry, fishing and hunting	ND	ND	NC	0.12	0.08	-33.3%	ND	ND	NC
NAICS 21 Mining, quarrying, and oil and gas extraction	ND	ND	NC	0.06	0.04	-33.3%	ND	ND	NC
NAICS 22 Utilities	ND	0.44	NC	0.72	0.45	-37.5%	1.12	1.04	-7.1%
NAICS 23 Construction	0.94	1.06	12.8%	0.75	0.73	-2.7%	0.84	0.91	8.3%
NAICS 31-33 Manufacturing	1.54	1.58	2.6%	1.43	1.41	-1.4%	2.28	2.35	3.1%
NAICS 42 Wholesale trade	0.63	0.84	33.3%	0.9	0.85	-5.6%	0.48	0.58	20.8%
NAICS 44-45 Retail trade	1.33	1.47	10.5%	1.19	1.22	2.5%	1.46	1.53	4.8%
NAICS 54 Professional and technical services	0.37	0.34	-8.1%	0.91	0.98	7.7%	0.32	ND	NC
NAICS 55 Management of companies and enterprises	0.74	2.15	190.5%	0.7	1.05	50.0%	0.27	ND	NC
NAICS 56 Administrative and waste services	0.55	0.47	-14.5%	0.64	0.82	28.1%	0.26	0.93	257.7%
NAICS 61 Educational services	1.76	1.31	-25.6%	1.18	1.15	-2.5%	1.55	1.22	-21.3%
NAICS 62 Health care and so-	1.01	0.95	-5.9%	1.06	1.05	-0.9%	1.05	0.87	-17.1%

cial assistance									
NAICS 48-49 Transportation and warehousing	ND	0.53	NC	0.64	0.6	-6.3%	0.28	0.43	53.6%
NAICS 51 Information	0.53	0.62	17.0%	1.01	1.3	28.7%	ND	0.37	NC
NAICS 52 Finance and insurance	1.36	1.08	-20.6%	1.19	1.17	-1.7%	0.69	0.78	13.0%
NAICS 53 Real estate and rental and leasing	0.61	0.56	-8.2%	0.88	0.78	-11.4%	0.76	0.55	-27.6%
NAICS 71 Arts, entertainment, and recreation	0.97	0.62	-36.1%	0.69	0.81	17.4%	ND	0.55	NC
NAICS 72 Accommodation and food services	0.94	0.88	-6.4%	0.87	0.81	-6.9%	ND	0.73	NC
NAICS 81 Other services, except public administration	1.14	1.27	11.4%	0.95	0.99	4.2%	0.71	0.61	-14.1%
NAICS 99 Unclassified	0.28	0.09	-67.9%	0.38	0.04	-89.5%	ND	0.29	NC

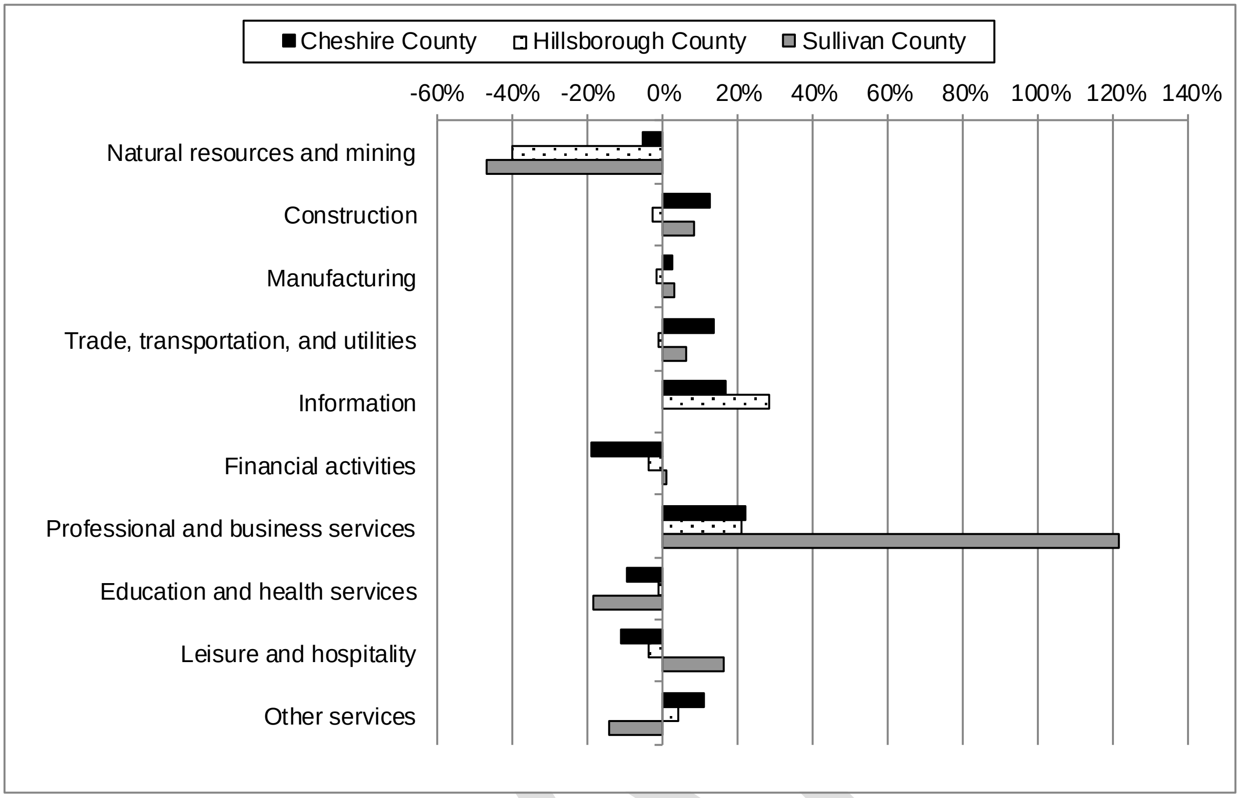
Source: United States Department of Labor Bureau of Labor Statistics Quarterly Census of Employment and Wages
(NC) Not Calculable
(ND) Not Disclosable

Figure 20: 2012 Location Quotient (Compared to New Hampshire)



Source: United States Department of Labor Bureau of Labor Statistics Quarterly Census of Employment and Wages

Figure 21: 2002-2012 Location Quotient Change (Compared to New Hampshire)



Source: United States Department of Labor Bureau of Labor Statistics Quarterly Census of Employment and Wages

Industry Strengths: Shift-Share Analysis

Another way to examine the strength of a particular industry sector is the Shift-Share Analysis. Similar to the location quotient, the shift-share analysis measures an area's industry sector concentration by employment numbers relative to a larger area. Shift-share analysis, however, determines expected job growth in an area over time, i.e. the Southwest Region between 2000 and 2011, assuming that the regional economy grows at the same rate as the economy of a larger area, i.e. the nation between 2000 and 2011.

A shift-share analysis breaks down regional employment growth into three components: 1) National Share, 2) Industry Mix, and 3) Regional Shift. The National Share component is the share of regional job growth attributable to growth of the national economy. For example, if the agriculture industry sector increased in the Southwest Region at the rate total employment did in the United States, about 9.3%, we would have experienced an increase of about 72 jobs (Table 32). The Industry Mix component describes the growth of an industry attributable to the overall composition of industries in the Southwest Region. The Industry Mix component of 5 for agriculture indicates that the Southwest Region has 5 more jobs than would be expected if the industry composition were identical to the Nation's. The Regional Shift component helps identify leading and lagging industries by quantifying the number of jobs attributable to the relative specialization of the Southwest Region industry compared to the specialization of industries at the national level. The combination of these three components equals the total change in jobs (Table 32).

The growth differential shows how expected growth compares to actual growth. It shows that during the period from 2000 to 2011 the Southwest Region retained and created 5% more jobs than expected in the Construction sector than the nation as a whole, 12% more in Educational services, and health care and social assistance, and 10% above the national average in Arts, entertainment, and recreation, and accommodation and food services.

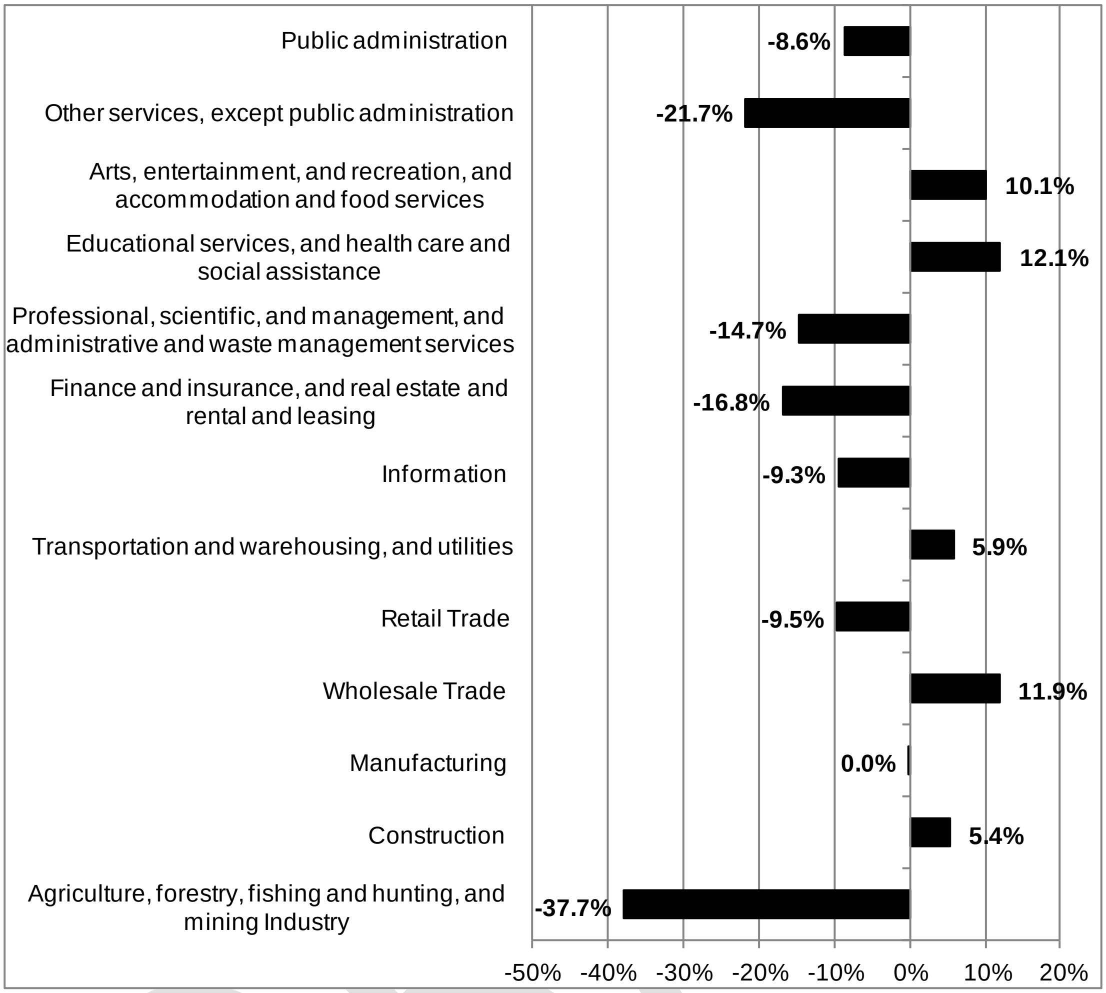
The agriculture, forestry, fishing and hunting, and mining industry sectors in the Southwest Region were 37.7% below the national trend in retaining and creating jobs in that field, and the Region was 16.8% below in finance, insurance and real estate and 14.7% below in Professional, scientific, and management, and administrative and waste management services. These growth differentials suggest that the Region could be losing jobs in these fields at a faster rate than in the rest of the country (Table 32, Figure 22).

Table 32: 2000-2011* Southwest Region Shift-Share Analysis

					Actual Growth Rate		SWRPC Growth Differential
Industry Sector	**National Share**	**Industry Mix**	**Regional Shift**	**Shift Share**	**US**	**SWRPC**	**US**
Total Labor Force	4,673	-878	-567	3,229	9.3%	6.5%	-2.9%
Agriculture, forestry, fishing and hunting, and mining Industry	72	5	-290	-213	10.0%	-27.6%	-37.7%
Construction	346	8	201	555	9.6%	15.0%	5.4%
Manufacturing	887	-2,448	-2	-1,563	-16.4%	-16.5%	0.0%
Wholesale Trade	194	-419	246	20	-10.9%	1.0%	11.9%
Retail Trade	636	-137	-646	-147	7.3%	-2.2%	-9.5%
Transportation and warehousing, and utilities	168	-53	106	221	6.4%	12.3%	5.9%
Information	129	-384	-129	-384	-18.5%	-27.8%	-9.3%
Finance and insurance, and real estate and rental and leasing	283	-10	-508	-236	9.0%	-7.8%	-16.8%
Professional, scientific, and management, and administrative and waste management services	320	498	-502	316	23.9%	9.2%	-14.7%
Educational services, and health care and social assistance	1,018	1,550	1,315	3,883	23.5%	35.6%	12.1%
Arts, entertainment, and recreation, and accommodation and food services	270	457	293	1,019	25.2%	35.3%	10.1%
Other services, except public administration	232	20	-539	-287	10.1%	-11.5%	-21.7%
Public administration	119	36	-110	45	12.2%	3.5%	-8.6%

*Sources: United States Census Bureau 2000 Decennial Census, *2007-2011 American Community Survey 5-Year Estimates*

Figure 22: 2000-2011* Southwest Region Shift-Share Analysis



*Sources: United States Census Bureau 2000 Decennial Census, *2007-2011 American Community Survey 5-Year Estimates*

An industry cluster analysis identifies those local and regional industry groupings that possess or show promise of competitive advantage.[1] According to an industry cluster analysis by Professor Ross Gittel, the five leading clusters in Cheshire County are: food establishments, health services, professional and technical services, retail stores and wholesale trade[2] (Table 33). Currently, the leading industry cluster with the most workers is food establishment, with 1,842 jobs and an average annual wage of $15,318. Employment in high-paying sectors such as high-technology and related services, although not selected as a leading industry cluster, employed 1,494 in 2012, with an average annual wage of $69,260 (Table 34).

In Hillsborough County the five leading clusters are: crafted and component part manufacturing, construction trades, food establishments, high-technology and related services, and health services (Table 35). The economy of Hillsborough County, in contrast to Cheshire County, includes 13,679 jobs in the high-technology and related services sector with an annual average wage of $82,430 (Table 35). It is employment opportunities in such sectors as computer systems design ($107,061) and software publishing ($127,498) that create high paying jobs in Hillsborough County. The manufacturing of high-technology products, part of the crafted and component part manufacturing sector, with annual average wages of $76,911 currently employs 15,239 workers in Hillsborough County.

[1] Industry clusters are concentrations of similar industries that gain performance advantages through co-location. The competitiveness of a region is based on the capacity of industries to become embedded in a geographically concentrated network of companies, institutions, customers and complementarities. Industry clusters are formed when competitive advantages entice the growth, relocation or development of similar industries into a locale. In turn, industry clusters strengthen competitiveness by increasing productivity, stimulating innovative new partnerships, even among competitors, and presenting opportunities for entrepreneurial activity.

[2] Prof. Ross Gittell of the UNH Whittemore School of Business and Economics prepared an Industry Cluster Analysis for Cheshire and Hillsborough Counties in 2004. The Analysis uses the NAICS-based industry classification system. All industry sectors that were considered in the composite ranking – using employment levels and concentration and growth, wage levels and growth, and the number of establishments and growth during 1998 and 2004 – had 1% or more of county employment.

Table 33: 2012 Cheshire County Private Sector Leading Industry Clusters

2012 NAICS Code	Industry	Employment	Location Quotient*	Avg. Annual Wage	Firms
	Wholesale Trade				
423	Merchant wholesalers, durable goods	299	0.43	$56,706	38
4244	Grocery and related product wholesalers	622	3.52	$50,917	10
	TOTAL	**921**	**1.975**	**$53,812**	**48**
	Professional & Technical Services				
5611	Office administrative services	262	2.49	$74,145	19
541	Professional and technical services	651	0.34	$71,679	169
5613	Employment services	161	0.21	$37,822	11
	TOTAL	**1,074**	**1.01**	**$61,215**	**199**
	Health Services				
6241	Individual and family services	270	0.83	$26,734	20
6231	Nursing care facilities, skilled nursing	547	1.34	$29,273	9
6216	Home health care services	305	1.05	$26,189	5
6214	Outpatient care centers	160	1.01	$30,765	11
	TOTAL	**1,282**	**1.06**	**$28,240**	**45**
	Retail Stores				
4441	Building material and supplies dealers	429	1.71	$32,086	21
4521	Department stores	918	2.47	$20,643	7
453	Miscellaneous store retailers	210	1.08	$21,237	38
448	Clothing and clothing accessories stores	130	0.38	$20,334	24
	TOTAL	**1,687**	**1.41**	**$23,575**	**90**
	Food Establishments				
722511	Full-service restaurants	1,109	0.95	$16,826	62
722513	Limited-service restaurants	733	0.82	$13,809	52
	TOTAL	**1,842**	**0.89**	**$15,318**	**114**
	Five-Cluster Totals	**6,806**		**$36,432**	**496**
	County-Wide Totals	**27,149**		**$41,277**	**1,969**
	Five Clusters as % of County Totals	**25.1%**		**88.3%**	**25.2%**

Source: United States Department of Labor, Bureau of Labor Statistics, Quarterly Census of Employment and Wages

**Compared to United States*

Table 34: 2012 Cheshire County Private Sector Selected Industries

2012 NAICS Code	Industry	Employment	Location Quotient*	Avg. Annual Wage	Firms
	High Technology & Related Services				
5112	Software publishers	ND	ND	ND	1
5511	Management of companies and enter-prises	1,057	2.15	$97,350	20
5415	Computer systems design & related ser-vices	90	0.23	$80,901	29
517	Telecommunications	62	0.3	$72,137	8
5411	Legal services	124	0.45	$58,092	24
5613	Employment services	161	0.21	$37,822	11
	TOTAL	**1,494**	**0.67**	**$69,260**	**92**
	Crafted & Component Part Manufac-turing				
3345	Measuring, medical, control instruments manufacturing	22	0.22	$54,266	3
333	Machinery manufacturing	1,755	6.52	$61,388	17
3344	Semiconductor & other electronic com-ponent manufacturing	ND	ND	ND	1
335	Electrical equipment, appliance & com-ponent manufacturing	NC	NC	NC	0
332	Fabricated metal product manufacturing	917	2.66	$46,074	23
	TOTAL	**2,694**	**3.13**	**$53,909**	**43**

Source: United States Department of Labor, Bureau of Labor Statistics, Quarterly Census of Employment and Wages

**Compared to United States*
(ND) Not Disclosable
(NC) Not Calcuable

Table 35: 2012 Hillsborough County Private Sector Leading Industry Clusters

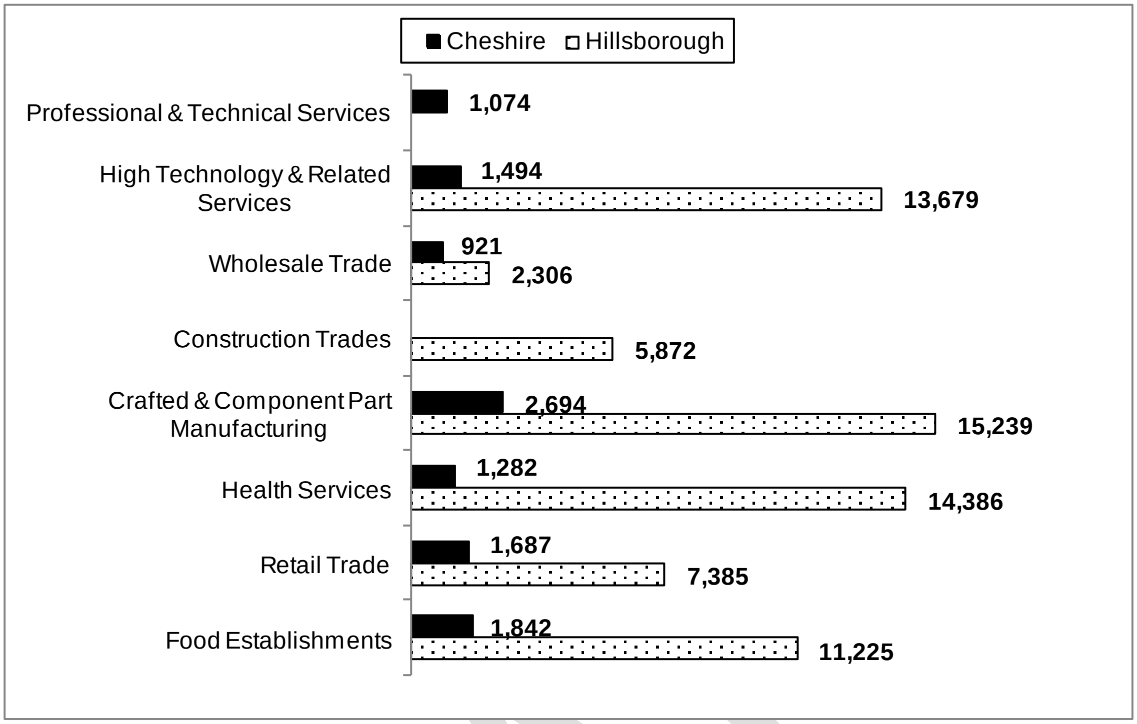
2012 NAICS Code	Industry	Employment	Location Quotient*	Avg. Annual Wage	Firms
	High Technology & Related Services				
5112	Software publishers	1,612	3.76	$127,498	49
5511	Management of companies & enterprises	3,171	1.05	$70,195	129
5415	Computer systems design & related ser-vices	3,463	1.41	$107,061	448
517	Telecommunications	1,854	1.44	$78,729	46
5411	Legal services	1,634	0.96	$82,943	265
5613	Employment services	3,557	0.75	$28,156	114
	TOTAL	**13,679**	**1.56**	**$82,430**	**1,002**
	Wholesale Trade				
4234	Commercial equip. merchant wholesal-ers	1,056	1.13	$129,420	60
424	Merchant wholesalers, nondurable goods	1,250	0.42	$52,827	89

	TOTAL	**2,306**	**0.78**	**$91,124**	**149**
	Construction Trades				
236	Construction of buildings	1,340	0.72	$54,524	263
238	Specialty trade contractors	4,532	0.86	$50,981	719
	TOTAL	**5,872**	**0.79**	**$52,753**	**982**
	Crafted & Component Part Manufac-turing				
3345	Electronic instrument manufacturing	5,965	9.87	$100,386	41
333	Machinery manufacturing	1,214	0.73	$89,529	51
3344	Semiconductor and electronic compo-nent mfg.	3,393	5.87	$66,063	69
335	Electrical equipment and appliance mfg.	1,569	2.79	$73,983	21
332	Fabricated metal product manufacturing	3,098	1.46	$54,595	117
	TOTAL	**15,239**	**4.14**	**$76,911**	**299**
	Health Services				
6211	Offices of physicians	4,241	1.17	$94,578	259
6221	General medical and surgical hospitals	7,590	1.14	$50,949	5
6231	Nursing care facilities	2,555	1.02	$31,568	27
	TOTAL	**14,386**	**1.11**	**$59,032**	**291**
	Retail Trade				
444	Building material and garden supply stores	2,038	1.16	$34,187	119
4521	Department stores	2,694	1.18	$18,943	24
448	Clothing & clothing accessories stores	2,653	1.26	$17,879	210
	TOTAL	**7,385**	**1.20**	**$23,670**	**353**
	Food Establishments				
722511	Full-service restaurants	6870	0.96	$18,576	311
722513	Limited-service eating places	4355	0.79	$13,657	328
	TOTAL	**11,225**	**0.88**	**$16,117**	**639**
	Seven-Cluster Totals	70,092		$57,434	3,715
	County-Wide Totals	**167,116**		**$53,862**	**11,644**
	Five Clusters as % of County Totals	**41.9%**		**106.6%**	**31.9%**

Source: United States Department of Labor, Bureau of Labor Statistics, Quarterly Census of Employment and Wages

**Compared to United States*

Figure 23: 2012 Cheshire and Hillsborough Counties Leading Industry Clusters by Employment

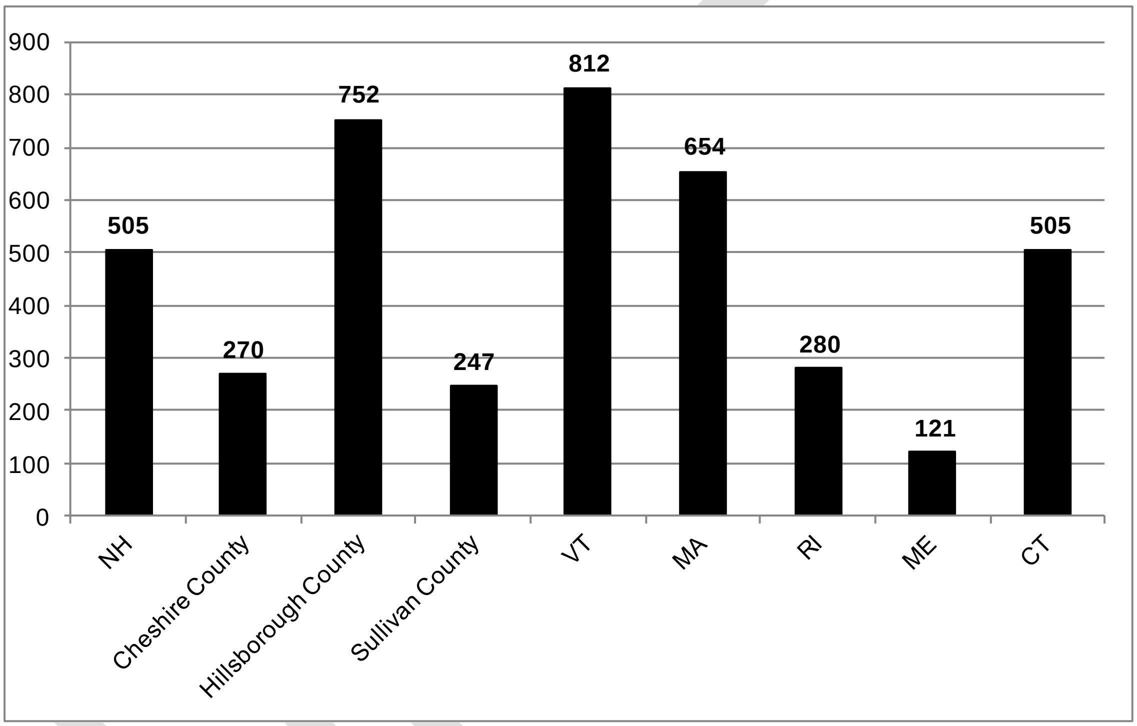


Source: Table 33, Table 34, Table 35
Note: Leading industry clusters do not always share the same subsectors

B. Innovative Strengths

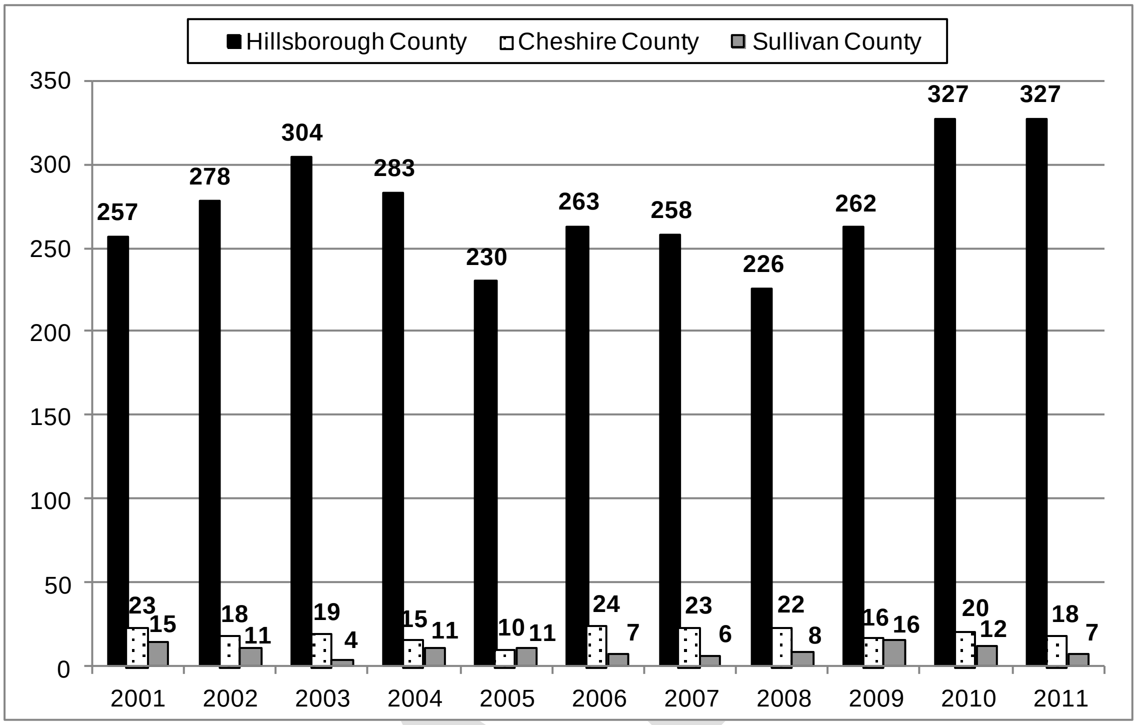
Another way to determine the economic strength of a region is to identify the areas of innovation. The degree of innovation can be expressed in the number of issued utility patents, also known as "patents for inventions," issued to individuals and organizations, and account of 90 percent of patent documents in recent years. As defined by the United States Patent and Trademark Office, these patents are issued for the invention of a new and useful process, machine, manufacture, or composition of matter, or a new and useful improvement thereof, it generally permits its owner to exclude others from making, using, or selling the invention for a period of up to twenty years. Cheshire and Sullivan counties each were awarded fewer patents per 100,000 residents, than the third Southwest Region county of Hillsborough (Figure 24, Figure 25).

Figure 24: 2001-2011 New England Utility Patents per 100,000 Residents in 2010



Source: US Patent and Trademark Office and 2010 U.S. Census
Note: Patent origin is determined by the residence of the first-named inventor.

Figure 25: 2001-2011 Southwest Region Number of Patents per Year

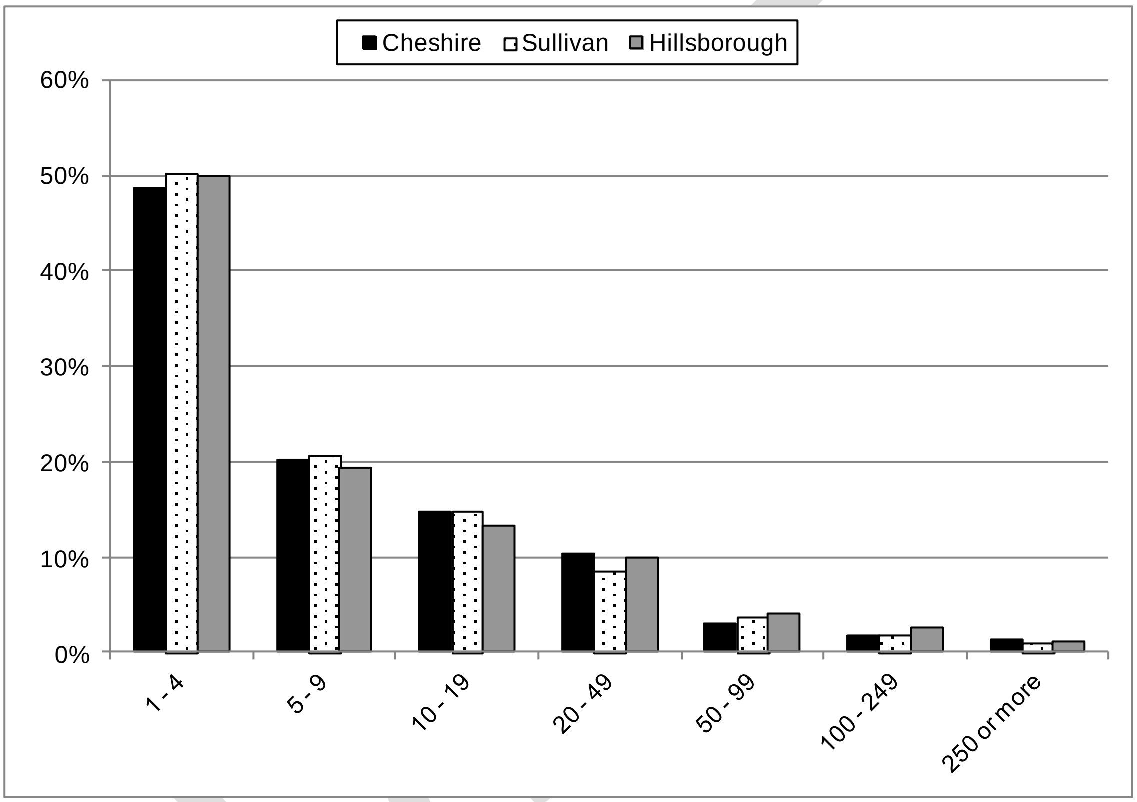


Source: US Patent and Trademark Office and 2010 U.S. Census

C. Employers

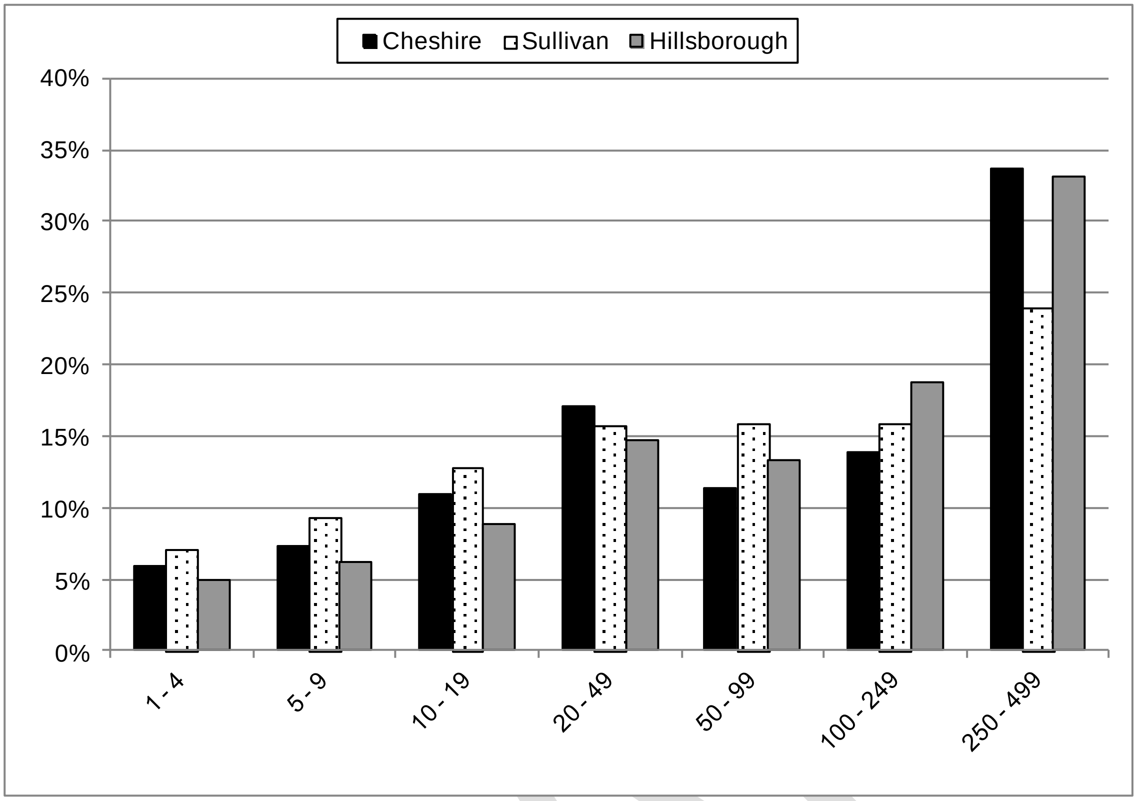
As of the first quarter of 2013, 41.1% of Cheshire County employment was in a firm with fewer than 50 employees. In Sullivan County, 45.5% of employment was in a firm with fewer than 50 employees. In Hillsborough County, which has a number of very larger employers, 34.7% of workers were employed at a firm with fewer than 50 employees. Despite differences in total employment, the three counties in the Southwest Region have a similar composition of business sizes. About half of the businesses in each county have between 1 and 4 employees, 20% have 5 to 9 employees, and 15% have between 10 and 19 employees, et cetera (Figure 26). However, firms over 100 employees in size employ about half of all employees, in Cheshire, Sullivan, and Hillsborough counties (Figure 27).

Figure 26: 2013 Southwest Region Firm Size Distribution



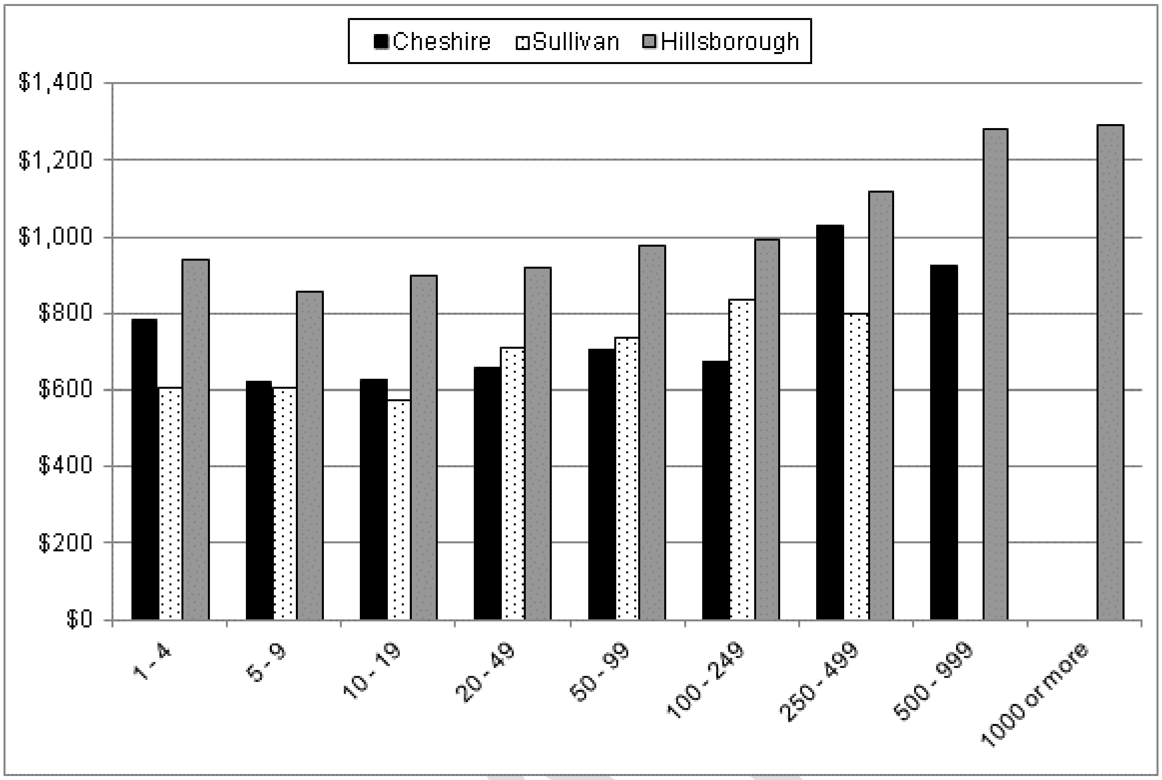
Source: 2013 January Employment, Economic and Labor Market Information Bureau, New Hampshire Employment Security (includes private plus government)

Figure 27: 2013 Southwest Region Total Employment (Percent) by Business Size



Source: 2013 January Employment, Economic and Labor Market Information Bureau, New Hampshire Employment Security (includes private plus government)

Figure 28: Southwest Region Total Employment by Average Weekly Wage



Source: 2013 First Quarter Employment, Economic and Labor Market Information Bureau, New Hampshire Employment Security (includes private plus government)

Despite recent losses in the manufacturing sector in the Southwest Region, 5 of the 20 largest employers were manufacturing companies. New businesses to the largest employers include Education and Health-related industries (Table 366). Nine of the top 20 largest employers are located in Keene, three Peterborough, and three were in Jaffrey.

Table 36: 2012 Southwest Region Largest Employers

# Employees	Industry	Business	Town
1000 +	Health care services	Cheshire Medical Center/Dartmouth Hitchcock Clinic-Keene	Keene
500 - 999	Wholesale foods	C & S Wholesale Grocers	Keene
500 - 999	Brain injury rehabilitation center	Crotched Mountain	Greenfield
500 - 999	Education	Keene State College	Keene
500 - 999	Education	Keene School District	Keene
500 - 999	Industrial filters	Millpore Corporation	Jaffrey
500 - 999	Health care services	Monadnock Community Hospital	Peterborough
500 - 999	Hospital supplies	Smith Industrial Medical Systems	Keene
500 - 999	Precision Bearings	NH Ball Bearings	Peterborough
500 - 999	Insurance services	Liberty Mutual/Peerless Insurance Company	Keene
250 - 499	Industrial marking equipment	Imaje Corporation	Keene
250 - 499	Education	Monadnock Regional School District	Swanzey
250 - 499	Insurance services	National Grange Mutual Insurance	Keene
250 - 499	Mini & precision bearings	TimKen Super Precision	Keene
250 - 499	Medical tubing	TFX Medical Inc.	Jaffrey
250 - 499	Food warehouse	United Natural Foods	Chesterfield
250 - 499	Education	Franklin Pierce University (Rindge campus)	Rindge

250 - 499	Supermarket	Market Basket	Rindge
250 - 499	Education	Peterborough Public School System	Peterborough
250 - 499	Education	Jaffrey-Ringe School District	Jaffrey

Source: New Hampshire Employment Security

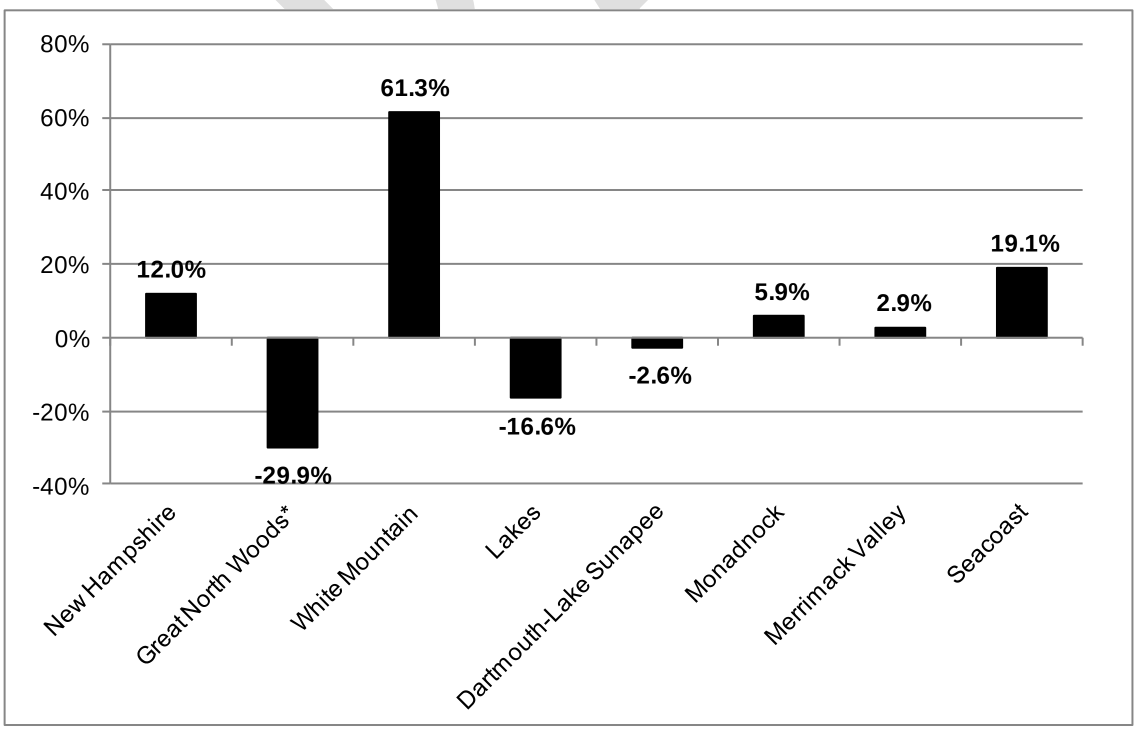
D. Tourism

According to the Institute for NH Studies (INHS) at Plymouth State College, during fiscal year (FY) 2012, 34.2 million travelers and tourists visited New Hampshire and spent $4.42 billion (Table **37**). According to the same report, this estimated direct traveler spending supported additional sales of $2.1 billion in supply industries (indirect spending by travelers). Earnings of the workers in the tourism industry and its supply industries supported additional sales of $7.3 billion (induced spending by travelers). In sum, the total contribution to the state's economy of the traveler spending (direct, indirect and induced) was $13.8 billion.

The direct spending of $4.42 billion is an increase of 12.0 percent over the FY 2010 level, due to a slow but steady economic recovery from the recent recession during FY 2010. The direct spending by travelers was 6.9 percent of gross state product, up from 6.6 percent in FY 2010. According to Dr. Daniel S. Lee, INHS, this spending indicates that the travel and tourism industry increased at slightly faster rate than the rest of the state's economy between FY 2010 and FY 2012. The Monadnock Region ranked 5th in total traveler spending, visitor trip, and overnight visitor trips, and 6th for traveler spending on lodging (Table **37**, Table 38, Table 39, Table 40).

In contrast to these findings, the Monadnock Region ranks first in terms of off-season (non-summer) lodging occupancy (Table 41). The Region achieves about 88% of its summer paid lodging figure in the fall, 61% of that figure in the spring, and 66% of that figure in the winter. The overall average off-season capacity utilization is about 78% of the summer high.

Figure 29: FY 2010 and FY 2012 Changes in Traveler Spending by Region



Source: The Institute for NH Studies, Plymouth State University of the University System of New Hampshire

** The estimate for Great North Woods in FY 10 does not include sales of BALSAMS since it was estimated by a new model that reflects new information including the closure of BALSAMS. Thus, the true percent change for the region is worse than the reported figure by as much as the loss of the Grand Resort.*
Note: Fiscal Year: July 1 to June 30

Table 37: FY 2010 and FY 2012 Traveler Spending by Travel Region (in Millions)

	FY 2010	FY 2012	% Change	FY 2012 Rank
New Hampshire	$3,943	$4,417	12.0%	
Great North Woods*	$118	$83	-29.9%	7
White Mountain	$687	$1,108	61.3%	2
Lakes	$630	$526	-16.6%	4
Dartmouth-Lake Sunapee	$212	$206	-2.6%	6
Monadnock	$232	$246	5.9%	5
Merrimack Valley	$1,288	$1,325	2.9%	1
Seacoast	$775	$923	19.1%	3

Source: The Institute for NH Studies, Plymouth State University of the University System of New Hampshire
** The estimate for Great North Woods in FY 10 does not include sales of BALSAMS since it was estimated by a new model that reflects new information including the closure of BALSAMS. Thus, the true percent change for the region is worse than the reported figure by as much as the loss of the Grand Resort.*
Note: Fiscal Year: July 1 to June 30

Table 38: 2011/2012 Estimated Traveler Spending by NH Travel Region and Season (in Millions)

	Summer 2011	Fall 2011	Winter 11-12	Spring 2012	Total	Percent	Rank
New Hampshire	1,768.9	1,042.8	825.4	779.8	4,416.8	100.0%	
Great North Woods	35.8	19.3	17.7	10.2	83.0	1.9%	7
White Mountain	426.1	286.1	244.8	151.2	1,108.3	25.1%	2
Lakes	245.9	122.3	82.7	75.5	526.5	11.9%	4
Dartmouth-Lake Sunapee	75.9	49.9	46.1	34.1	206.1	4.7%	6
Monadnock	92.5	57.3	46.1	49.9	245.8	5.6%	5
Merrimack Valley	493.6	305.8	244.1	281.1	1,324.6	30.0%	1
Seacoast	399.1	202.0	143.9	177.7	922.6	20.9%	3
Percent	40.1%	23.6%	18.7%	17.7%	100.0%		

Source: The Institute for NH Studies, Plymouth State University of the University System of New Hampshire

Table 39: 2011/2012 Visitor Trips and Overnight Visitor Trips by Region (in Millions)

	Visitor Trips	Rank	Overnight Visitor Trips	Rank
New Hampshire	34.22		9.19	
Great North Woods	0.32	7	0.2	7
White Mountain	4.82	3	2.92	1
Lakes	3.19	4	1.46	4
Dartmouth-Lake Sunapee	1.2	6	0.46	6
Monadnock	2.5	5	0.47	5
Merrimack Valley	12.95	1	2.07	2
Seacoast	9.24	2	1.61	3

Source: The Institute for NH Studies, Plymouth State University of the University System of New Hampshire

Table 40: 2011/2012 Traveler Spending for Lodging by Region and Season (in Millions)

	Summer 2011	Fall 2011	Winter 11-12	Spring 2012	Total	Percent	Rank
New Hampshire	241.4	152.4	109.4	96.8	600.1	100.0%	
Great North Woods	7.5	4.3	4.2	2.4	18.4	3.1%	7
White Mountain	79.1	49.4	39.7	25.9	194	32.3%	1
Lakes	38.2	17.1	10.3	9.5	75	12.5%	4
Dartmouth-Lake Sunapee	11.1	7.1	5.7	4.4	28.4	4.7%	5
Monadnock	8.9	7.8	5.4	5.9	27.9	4.6%	6
Merrimack Valley	50.2	40.3	30.6	30.5	151.6	25.3%	2
Seacoast	46.4	26.5	13.6	18.2	104.7	17.5%	3
Percent	40.2%	25.4%	18.2%	16.1%	100.0%		

Source: The Institute for NH Studies, Plymouth State University of the University System of New Hampshire

Table 41: 2011/2012 Paid Lodging Utilization by NH Travel Region

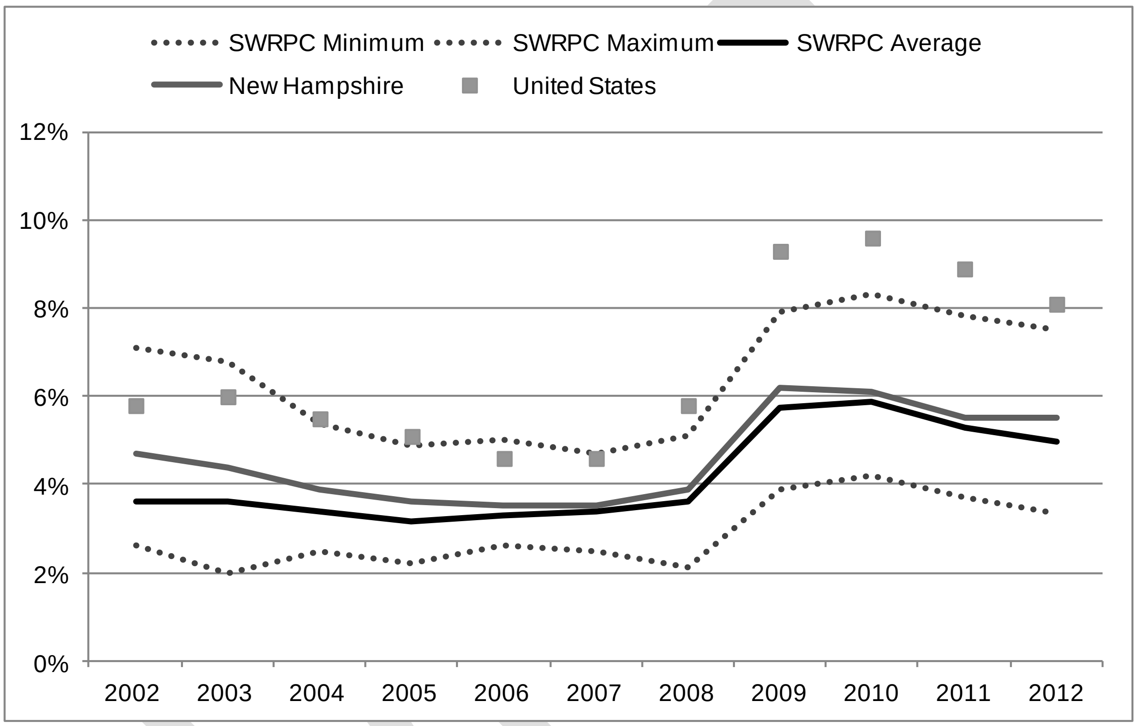
	Summer 2011	Fall 2011	Winter 11-12	Spring 2012	Average	Rank
Great North Woods	100%	56.8%	55.8%	31.2%	61.0%	5
White Mountain	100%	62.5%	50.2%	32.8%	61.4%	4
Lakes	100%	44.7%	26.9%	24.9%	49.1%	7
Dartmouth-Lake Sunapee	100%	64.1%	51.6%	39.9%	63.9%	3
Monadnock	100%	87.6%	60.5%	66.3%	78.6%	1
Merrimack Valley	100%	80.1%	60.9%	60.7%	75.4%	2
Seacoast	100%	57.2%	29.2%	39.2%	56.4%	6
Average	100%	64.9%	47.0%	41.8%	63.4%	

Source: The Institute for NH Studies, Plymouth State University of the University System of New Hampshire

E. Unemployment

The unemployment rate refers to the percentage of the labor force (persons 16 and over) that is jobless, but looking for work. Simply put, if a person is not employed or looking, they are not part of the workforce, and not part of an unemployment rate calculation. In the Southwest Region, the average unemployment rate from 2002 to 2012 was 4.2%, with a high of 5.9% in 2010 and a low of 3.2% in 2005. For the same time period, a lower percentage of people in the Region were unemployed compared to the average unemployment rate for the State (Figure 30, Table 42). In 2012, Sharon had the lowest unemployment rate, and Greenville had the highest. The City of Keene - a regional economic center - averaged 3.9% unemployment. Despite the overall positive picture when compared to state-wide numbers, individual municipal unemployment rates varied throughout the Region (Figure 30, Table 42).

Figure 30: 2002-2012 Southwest Region Annual Unemployment Rates



Sources: United States Bureau of Labor Statistics, New Hampshire Employment Security Economic and Labor Market Information Bureau

Table 42: 2002-2012 Unemployment Rates

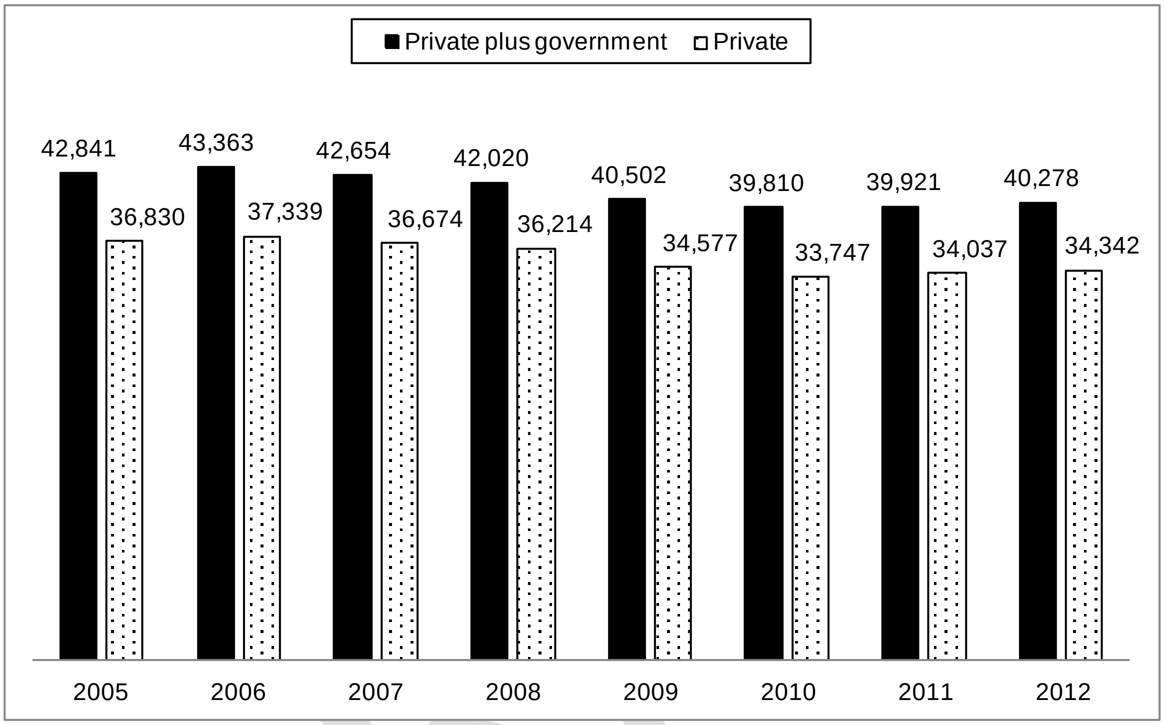
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	Average
United States	5.8%	6.0%	5.5%	5.1%	4.6%	4.6%	5.8%	9.3%	9.6%	8.9%	8.1%	6.7%
New Hampshire	4.7%	4.4%	3.9%	3.6%	3.5%	3.5%	3.9%	6.2%	6.1%	5.5%	5.5%	4.6%
Southwest Region	3.7%	3.7%	3.5%	3.3%	3.3%	3.5%	3.7%	5.8%	6.0%	5.3%	5.3%	4.2%
Alstead	4.3%	4.2%	2.9%	3.4%	3.1%	3.2%	3.4%	4.7%	5.6%	4.8%	4.9%	4.0%
Antrim	3.7%	3.2%	3.2%	3.2%	3.1%	3.3%	4.2%	7.0%	6.6%	5.2%	5.7%	4.4%
Bennington	3.4%	2.9%	3.5%	3.1%	3.3%	2.9%	3.8%	6.4%	6.7%	5.6%	5.1%	4.2%
Chesterfield	2.7%	3.2%	3.1%	2.9%	3.1%	3.1%	3.0%	5.3%	5.3%	4.7%	4.7%	3.7%
Dublin	3.1%	2.9%	3.3%	3.4%	3.3%	3.5%	4.0%	6.3%	5.7%	5.1%	4.5%	4.1%
Fitzwilliam	4.6%	3.8%	3.6%	3.9%	3.9%	4.1%	4.1%	6.1%	5.9%	5.9%	4.9%	4.6%
Francestown	4.0%	3.9%	4.0%	3.4%	3.4%	3.3%	3.8%	5.0%	5.6%	5.5%	5.1%	4.3%
Gilsum	4.4%	3.6%	3.5%	3.0%	3.4%	2.5%	3.2%	6.5%	8.0%	5.9%	5.3%	4.5%
Greenfield	3.9%	3.5%	2.9%	2.7%	3.0%	3.0%	3.4%	6.1%	5.6%	5.1%	5.2%	4.0%
Greenville	7.1%	6.8%	5.4%	4.8%	4.7%	4.7%	5.1%	7.9%	8.3%	7.8%	7.5%	6.4%
Hancock	3.3%	3.8%	3.6%	2.8%	3.0%	2.8%	3.1%	4.5%	5.1%	4.6%	4.0%	3.7%
Harrisville	2.6%	2.8%	2.9%	2.3%	3.0%	3.0%	2.8%	4.0%	4.4%	4.7%	4.7%	3.4%
Hinsdale	3.4%	3.7%	4.2%	2.8%	2.6%	4.2%	4.3%	6.9%	8.0%	6.5%	6.4%	4.8%
Jaffrey	4.4%	4.6%	4.1%	3.8%	3.8%	4.1%	4.5%	6.8%	7.2%	5.5%	5.9%	5.0%
Keene	3.3%	3.4%	3.1%	3.0%	3.1%	3.2%	3.4%	5.3%	5.3%	5.0%	5.0%	3.9%
Langdon	2.6%	3.0%	3.1%	2.9%	2.6%	3.0%	3.4%	4.8%	4.8%	4.3%	3.7%	3.5%
Marlborough	3.7%	3.7%	2.8%	2.7%	3.0%	3.2%	3.2%	5.7%	4.9%	4.1%	4.3%	3.8%
Marlow	2.7%	3.0%	3.2%	2.9%	3.6%	4.1%	3.5%	5.7%	5.7%	7.1%	5.1%	4.2%
Nelson	2.7%	2.2%	2.7%	2.4%	3.1%	2.9%	3.1%	4.4%	4.4%	3.7%	3.9%	3.2%
New Ipswich	4.7%	4.5%	3.9%	4.0%	3.9%	3.9%	4.2%	6.7%	6.5%	7.0%	6.1%	5.0%
Peterborough	3.9%	4.5%	3.7%	3.6%	3.5%	3.6%	3.9%	5.8%	5.9%	5.0%	5.1%	4.4%
Richmond	2.6%	2.6%	3.2%	3.1%	3.8%	3.4%	3.8%	5.4%	5.2%	4.6%	5.6%	3.9%
Rindge	4.6%	5.1%	4.7%	4.9%	5.0%	4.7%	5.1%	6.7%	7.1%	7.0%	6.8%	5.6%
Roxbury	2.8%	2.9%	2.8%	2.8%	3.4%	3.3%	2.7%	4.7%	4.5%	6.7%	4.3%	3.7%
Sharon	2.9%	2.0%	3.0%	3.0%	3.4%	2.5%	4.0%	5.9%	4.2%	3.7%	3.3%	3.4%
Stoddard	2.6%	2.2%	3.0%	2.8%	2.7%	3.1%	3.1%	3.9%	4.9%	4.1%	4.2%	3.3%
Sullivan	3.8%	3.3%	2.6%	3.2%	2.7%	2.8%	2.7%	5.6%	7.1%	5.4%	4.6%	4.0%
Surry	3.1%	2.7%	2.7%	2.2%	2.8%	2.8%	2.1%	4.9%	4.7%	4.1%	4.4%	3.3%
Swanzey	3.4%	3.5%	3.2%	2.9%	3.0%	3.6%	3.5%	5.8%	6.2%	5.0%	5.0%	4.1%
Temple	3.8%	4.5%	3.3%	2.7%	2.7%	2.8%	3.2%	5.1%	6.1%	4.8%	5.2%	4.0%
Troy	4.3%	4.6%	3.3%	3.7%	3.6%	3.7%	4.5%	7.3%	6.4%	5.1%	5.0%	4.7%
Walpole	2.8%	2.9%	3.1%	3.0%	3.1%	2.9%	3.3%	5.1%	5.9%	4.6%	4.3%	3.7%
Westmoreland	3.2%	3.0%	2.5%	2.9%	2.9%	3.1%	2.8%	3.9%	4.4%	3.7%	4.0%	3.3%
Winchester	4.6%	4.5%	4.7%	4.3%	4.1%	4.5%	4.6%	7.2%	7.5%	6.4%	6.2%	5.3%
Windsor	2.8%	5.6%	3.4%	2.6%	3.4%	3.5%	4.4%	6.9%	5.6%	6.4%	4.9%	4.5%

Source: New Hampshire Employment Security Economic and Labor Market Information Bureau

F. Major Layoffs and Plant Closures

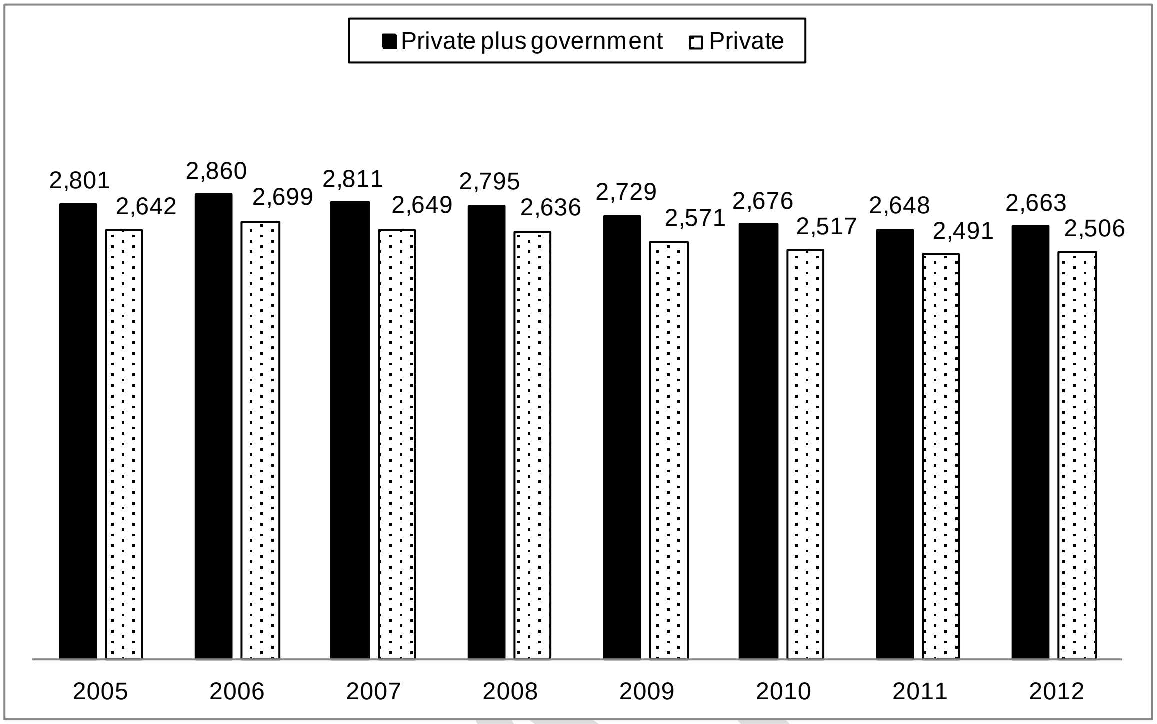
Following a recent recession, private sector employment in the Southwest Region dropped abruptly. From 2006 through 2010, both annual employment and number of work sites or firms dropped each year. 2011 marked the first full year of increased employment.

Figure 31: Covered Employment and Wages Employment (2005-2012)



Source: Economic and Labor Market Information Bureau, NH Employment Security

Figure 32: Covered Employment and Wages Work Sites (2005-2012)



Source: Economic and Labor Market Information Bureau, NH Employment Security

G. Regional Economy Conclusions

The five largest industry sectors of employment for residents of the Southwest Region, including non-private sector industries, were: 1) educational services, and health care and social assistance (14,790, 28% total), 2) manufacturing (7,936, 15% total), 3) retail trade (6,669, 13% total), 4) construction (4,259, 8% total), and 5) Arts, entertainment, and recreation, and accommodation and food services (3,906, 7% total). Together, the top five employment sectors total 71% of jobs in the Southwest Region. Since the 2000 Census, losses in the manufacturing sector were offset by strong growth in the educational services, and health care and social assistance sector, which added 3,833 jobs, more than all other sectors combined. The two smallest sectors of employment, including agriculture, forestry, fishing and hunting, and mining and information, both experienced losses of about 30% since the 2000 Census. During the recent recession, employment rates rose sharply in 2008, from 3.7% to a high of 6.0% in 2010. Historically, the Southwest Region has maintained higher labor participation than the state figures, if only slightly.

An analysis of 2012 Bureau of Labor Statistics annual wage data indicate a strong specialization in manufacturing when compared to the industry distribution of jobs by sector both nationally and statewide.

When compared to the United States, Southwest Region employment in Construction, Wholesale Trade, Transportation and Warehousing, Educational Services, and Arts, Accommodations and Food Services all exceeded national growth rates considerably (Table 32). When compared to the total economy of New Hampshire, Cheshire, Hillsborough and Sullivan counties continued to demonstrate their relative specialization in manufacturing. More specifically, both the machinery manufacturing and fabricated metal product manufacturing subsectors showed the strongest specialty, accounting for over 2,500 jobs and 40 firms in Cheshire County.

Between 2000 and 2011, the total labor force grew more slowly than did the national labor force (6.5% versus 9.3%). However, the Southwest Region's population also grew more slowly (5.1% versus 10% between 2000 and 2010). Educational services, health care, and social assistance emerged as the highest growth sector (35.6%) and the sector adding the largest number of jobs between 2000 and 2011 (3,883), exceeding the national industry growth rate by 12.1%. Growing at nearly the same rate (35.3%), Arts, entertainment, and recreation, and accommodation and food services added 1,019 jobs between 2000 and 2011, primarily in accommodations and food services, which also exceeded growth at the national level. Construction was another industry with strong growth that contributed 555 new jobs and exceeded national growth by 5.4%.

Despite the continued loss of jobs, 1,563 between 2000 and 2011, manufacturing is still an important export-oriented industry sector in the Southwest Region. Furthermore, jobs in this sector declined at the same rate as was observed for the nation (about 16.5%). Over the same time period, employment in educational services, health care and social assistance surpassed the combined growth of all other categories, adding 3,883 jobs between 2000 and 2011. Although the composition of Southwest Region industry employment is constantly in flux, it is of utmost importance to further strengthen export-oriented businesses in the Region, in particular highly innovative export-oriented businesses. The three businesses that are among the twenty largest companies and the most innovative firms in the Region are Millipore Corporation, Smith Industrial Medical Systems, and New Hampshire Ball Bearings. These and other export-oriented businesses support the Region's economic base by importing additional wealth from consumers outside the Region. In addition, workers employed in these export-oriented firms generally earn more than workers in similar firms that are less export-oriented.

The majority of workers in the Southwest Region, however, do not work in the export-oriented sectors of the Regional economy. In fact, an industry cluster analysis shows that most employment opportunities in the Southwest Region are lower-paying professional and customer service jobs and that high-technology jobs are relatively rare when compared to the high-growth centers of Hillsborough County located outside the Southwest Region.

In the Southwest Region, 6 of the 20 largest employers are manufacturing companies, 6 are school districts or institutions. Just ten years ago, there were ten manufacturing companies, and school districts or institutions. Three of the top seven firms provide health care services: Cheshire Medical Center, Crotched Mountain, and Peterborough Community Hospital. Although these larger firms (greater than 250 employees) employ a third of all workers, the vast majority of businesses (70%) employed fewer than 10 workers in 2013.

Tourism is an important industry sector in the Southwest Region. Statewide, the Institute for New Hampshire Studies determined that about 34.2 travelers and tourists visited New Hampshire and spent $4.42 billion in fiscal year 2012. Of that, $241.7 million was spent in the Southwest Region, the majority on rooms and meals. Although not the largest tourism market area in the state, the occupancy rates for the Region's hotels, motels and inns are more consistent throughout the year than observed in other parts of New Hampshire. There are still opportunities for attracting larger numbers of tourists to the Region, thereby strengthening the Region's economic base.

3. Evaluation of Regional Issues

During recent decades, the Southwest Region has witnessed changes in population, economic activity and income. Projections indicate that the Region's population will change further over the next two decades. The challenge for the Region is to balance demographic pressures with demands for economic and community development, housing, transportation, infrastructure, and the protection of natural resources. In sum, the task that lies before the Southwest Region is to preserve the level of quality of life that the Region has enjoyed in recent years. The following section, by focusing on strengths, weaknesses, opportunities and threats (SWOT), addresses the Region's ability to cope with present and future demands.

A. Strengths and Opportunities

1) A skilled workforce is important for our regional economic strength.

The Region is fortunate to have a highly skilled workforce for most of its industry sectors. The workforce's education and skills, however, need to be improved to sustain current and future economic trends. The high quality of life throughout the Region attracts new workers to our municipalities. More housing construction would further guarantee the level of workforce quality and quantity currently enjoyed by the Region.

2) The Region has access to larger transportation networks.

The Region is well-connected to major urban areas through the federal highway system, in particular through I-91. East-west traffic, however, relies heavily on lower-classification highways. National and International airports are located within 100 miles. Direct access to the railroad network is not available.

3) Regional economic development is the focus of several organizations.

There are at least five organizations in our Region directly involved in regional economic development. The following agencies have developed numerous programs to this end: Monadnock Economic Development Corporation, Southwestern Community Services, Southern New Hampshire Services and Southwest Region Planning Commission. Many of their programs benefit businesses by giving planning assistance, financing advice, managerial and logistical support. Strengthening those programs will further develop opportunities for business retention and attraction.

4) A high level of public involvement in local governance and planning.

Volunteers are the backbone of local government throughout the Region. A strong sense of community is a major factor in inspiring residents to participate in local affairs. Efforts should be made to broaden the number of citizens involved in municipal government and to educate them about their responsibilities.

5) New Hampshire is a state of small government and low taxes.

Compared to other states, New Hampshire state and county governments are smaller in terms of the number of civil servants and have fewer rights to tax their citizens. The absence of sales and state income taxes is advantageous for consumers. This fact needs to be more publicized in other parts of the country to replenish our pool of qualified workers.

6) Tourism as a source of revenue has not been used to its fullest extent.

Our Region is blessed with an abundance of natural beauty and recreational opportunities. Nevertheless, tourism is often underestimated as a source of local income. This is in part due to the fact that our Region is in close proximity to high-volume tourism areas in New Hampshire and Vermont that seemingly possess more noticeable landmarks, such as the White Mountains or Green Mountains. We should consider overcoming this perception by marketing our Region from a tourism perspective.

B. Weaknesses and Threats

1) The Region is losing high-paying manufacturing jobs.

During the four years prior to the original drafting of this document, the Southwest Region lost at least 903 manufacturing jobs, or 8% of its manufacturing work force. Replacing those jobs with similar high-paying jobs has become a challenge. Moreover, because of a nation-wide decline in the manufacturing sector, the economic composition of the Region will most likely continue to change. The retention, extension and attraction of businesses providing higher-paying jobs in other sectors will help to diversify the Regional economy.

2) There is a loss of local business control.

In recent years, the number of locally owned businesses has declined. Many local businesses are now managed from offices outside the Region. Furthermore, many locally owned businesses are suppliers to larger, out-of-region companies.

3) Doing business has become more expensive and difficult.

In recent years, businesses benefited from relatively low costs for labor and land and low taxes. This may change once the amount of cheap and strategically located land decreases due to ongoing development. Because of rising public expenditures, property and corporate taxes may also increase. If not replenished, the pool of skilled local workers will dry up soon. Soaring utility costs will put additional pressure on local businesses.

4) There is a growing housing shortage.

When compared to Boston and other parts of eastern and southern New England, housing prices and rents are relatively low throughout the Region. The housing market, however, is very tight. This is due to a gradual increase in population and to insufficient home construction, which affects residents from all income groups. A reflection of this situation is the low vacancy rate for both owner-occupied and renter-occupied homes. This housing shortage might prevent the growth of the labor force needed to accommodate development demands.

5) Access to investment capital has become more difficult.

Because of mergers, financial institutions have lost their local character. As a consequence, the traditionally close relationship between local banks and businesses has weakened. Information about financing options has also become more difficult to obtain.

6) Land zoned for commercial and industrial use and reuse is often unsuitably located.

Although there are a sufficient number of parcels zoned for commercial and industrial uses in most towns, they are often located in areas without access to major transportation routes and isolated from each other in separate pockets.

7) Infrastructure in many towns needs to be improved.

The condition of infrastructure (roads, sewer and water) in many towns is unsatisfactory, due in part to public resistance to increased expenditures for maintenance and upgrades. This situation is not conducive for sustaining or expanding economic development activities. Investments in telecommunication infrastructure (e.g. broad-band internet access) should also be made to keep pace with other markets.

8) The lack of a research institution weakens economic development efforts.

Despite a number of colleges in the Region, the lack of a research institution is an obstacle to innovation and specialization. For example, the close relationship between Dartmouth-Hitchcock Medical Center and local companies has been crucial for establishing the Hanover-Lebanon area as an important bio-technology center. Geographic proximity of academic research and industrial activity is essential for accelerating economic development and successfully competing with other regions.

9) Local governance and planning is often unconcerned about regional needs.

Regional considerations frequently take a backseat to political and budgetary pressures at the local level. Consequently, many municipalities pursue goals that are not coordinated with neighboring communities.

Table 43: Summary of Regional Issues

Regional Issue		Strength	Weakness	Opportunity	Threat
Labor force	Education/ Skills	x	x	x	
	Availability	x			x
	Wages	x			
Transportation	Highways	x	x		
	Air	x			
	Rail		x		
Local infrastructure	Improvements & upgrades		x	x	
Housing	Availability		x	x	
	Prices	x			x
	Rents		x	x	
Educational system	Quality	x	x	x	
Economic base	Local control/ ownership		x	x	
	Business support/ retention	x	x	x	
	Financing sources		x	x	
	Diversification	x		x	
	Creative economy	x		x	
	Tourism potential		x	x	
Employment	Availability		x	x	
	Diversity		x	x	
	Income		x	x	
Tax structure	Sales and income	x	x	x	
	Property and corporate		x		x
Utilities	Costs		x		
Developable land	Suitability		x	x	
	Availability	x			x
	Zoning		x	x	
	Development fees		x		x
	Tax Increment Financing	x		x	
Quality of life		x			x
Research institution	Potential		x	x	
Regional perspective	Regional Organizations	x			
	Public awareness		x	x	
Local government	Volunteerism	x		x	x
	Resources		x	x	
Health services	Access	x			
	Capacity	x			
Source: CEDS Advisory Committee SWOT Analysis					

C. Community Survey

A community survey was developed to better understand public attitudes with regard to economic development.[1] The survey used the issues of importance identified during the SWOT exercise as a starting point to develop questions and receive feedback from the public at large. Most respondents Quality of Life, the Educational System and Labor Force as the three most important issues, whereas Transportation, Tax Structure and Housing were on the bottom of the scale. A majority of respondents chose the Natural Environment, Historic/Rural Character and Cultural Activities as the main reasons to live in the Southwest Region of New Hampshire. When asked about the future, of highest concern were Transportation, Housing, and Tax Structure – issues also responsible for the majority of suggestions for improvements. When asked to identify critical issues affecting the Region on their own, most respondents listed Labor Force, Tax Structure, Smart Growth and Historic Preservation.

D. External Forces

The largest influence on the Southwest Region's economy is the larger U.S. economy. With the ongoing decline in manufacturing jobs, this Region's former pay-rate advantage is declining. Future concerns include the types of jobs being created and the rates of pay for these jobs.

Another issue impacting the Region is the high cost of energy, particularly electricity, gasoline and home heating oil. These costs place companies at a disadvantage in this Region because of high winter heating costs, generally long commute times of workers, and distance from more concentrated urban markets. Given the ongoing activities in the Middle East and the current lack of local, renewable energy alternatives, energy costs are likely to be of increasing concern in years to come.

A lack of housing puts this Region at a competitive disadvantage with other parts of New England by preventing the in-migration of well-trained and high-skilled workers. High housing costs in the economic centers of the Region also increase travel-to-work times for those in low-paying jobs and force them to pay more for gasoline. Once the Region starts to address the lack of housing, it will help address other, related problems.

E. Future Economic Development

According to New Hampshire Employment Security projections, the highest increases will come from the health care and construction industries by 2010 (Table 44, Figure 33). The healthcare and social assistance sector includes Standard Occupational Classification (SOC) major groups like Healthcare Practitioners and Technical Occupations (18% growth), Healthcare Support Occupations (19.5% growth), and Community and Social Services Occupations (14.9% growth) (Table 45).

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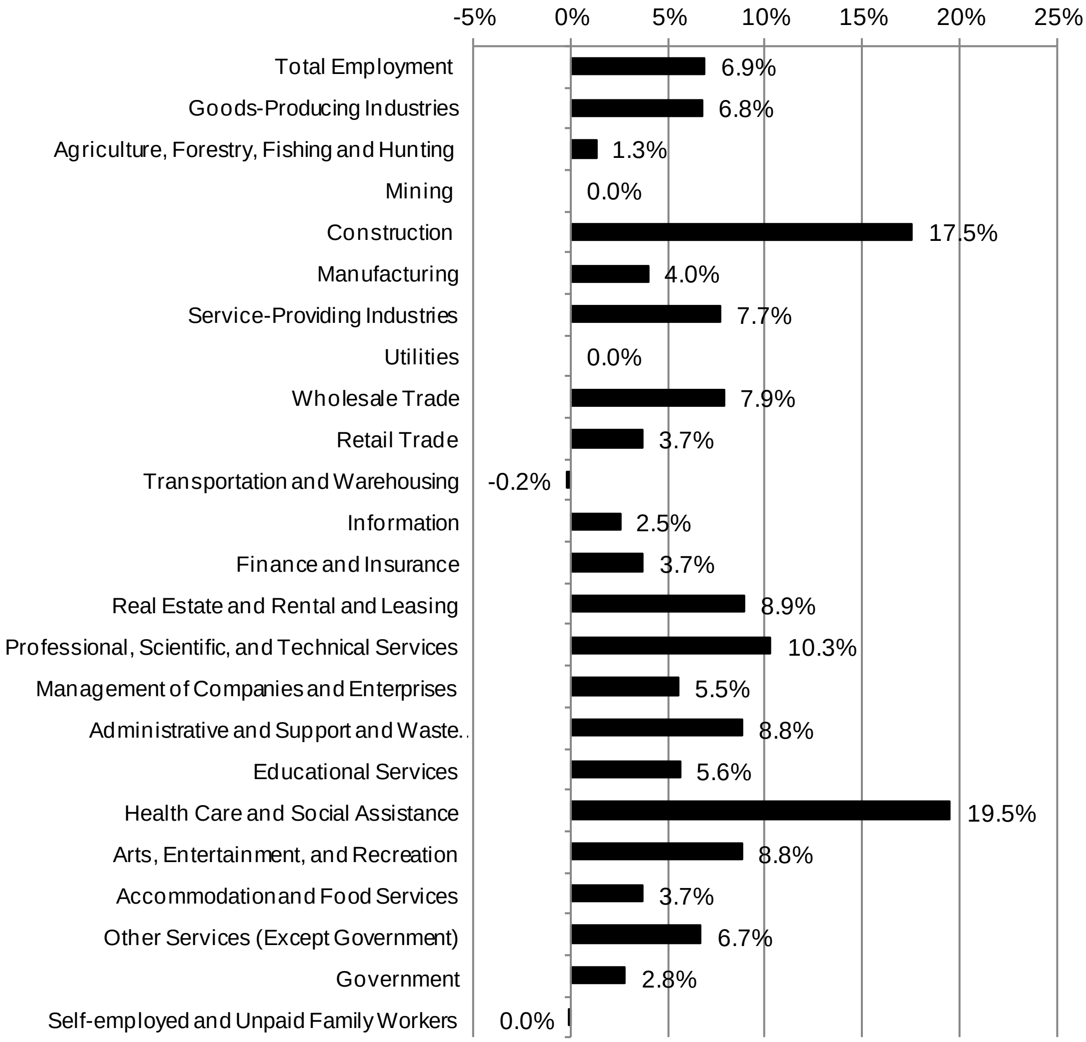
1 The questionnaire contained four substantive questions and several questions on the background of the respondents. The questionnaire was available online at the SWRPC website for 16 weeks and received 67 responses. The majority of the respondents lived in Keene and Harrisville (68%), was between the ages of 46 and 85, had been living in the Region for more than 11 years and did not have children in school. While the responses give some insight to opinions in the Region, due to the rate of response the information should be used only as a supplement to other findings.

Figure 33: Industry Projections 2010-2020 Southwest Planning Region (North American Industrial Classification System)



Source: New Hampshire Employment Security, Industry Projections by Planning Region 2010 -2020 (January 2013)

Table 44: Industry Projections 2010-2020 Southwest Planning Region (North American Industrial Classification System)

	Industry	Estimated	Projected	2010-2020 Change	
		2010	2020	Numeric	Percent
Code	Total Employment	44,803	47,891	3,088	6.9%
101000	Goods-Producing Industries	8,879	9,479	600	6.8%
11	Agriculture, Forestry, Fishing and Hunting	1,006	1,019	13	1.3%
21	Mining	11	11	0	0.0%
23	Construction	2,028	2,383	355	17.5%
31-33	Manufacturing	5,834	6,066	232	4.0%
102000	Service-Providing Industries	32,373	34,862	2,489	7.7%
22	Utilities	*n*	*n*	*n*	*n*
42	Wholesale Trade	1,309	1,412	103	7.9%
44-45	Retail Trade	5,765	5,978	213	3.7%
48-49	Transportation and Warehousing	893	891	-2	-0.2%
51	Information	672	689	17	2.5%
52	Finance and Insurance	1,714	1,778	64	3.7%
53	Real Estate and Rental and Leasing	314	342	28	8.9%
54	Professional, Scientific, and Technical Services	808	891	83	10.3%
55	Management of Companies and Enterprises	1,028	1,085	57	5.5%
56	Administrative and Support and Waste Management Services	1,089	1,185	96	8.8%
61	Educational Services	4,983	5,263	280	5.6%
62	Health Care and Social Assistance	6,208	7,417	1,209	19.5%
71	Arts, Entertainment, and Recreation	512	557	45	8.8%
72	Accommodation and Food Services	2,864	2,970	106	3.7%
81	Other Services (Except Government)	2,013	2,148	135	6.7%
	Government	2,129	2,189	60	2.8%
	Self-employed and Unpaid Family Workers	3,551	3,550	-1	0.0%

Source: New Hampshire Employment Security, Industry Projections by Planning Region 2010 -2020 (January 2013)

Table 45: Occupational Projections 2010-2020 Southwest Planning Region (Standard Occupational Classification)

	Occupational Group	2010 Employment	2020 Projected	Numeric Change	Percent Change	Average Annual Openings		
						Growth	Replacement	Total
Major Group	Total Employment	44,803	47,891	3,088	6.9%	344	1,052	1,396
11-0000	Management Occupations	3,444	3,515	71	2.1%	11	72	83
13-0000	Business and Financial Operations Occupations	1,572	1,704	132	8.4%	13	34	47
15-0000	Computer and Mathematical Occupations	687	796	109	15.9%	11	15	26
17-0000	Architecture and Engineering Occupations	451	471	20	4.4%	2	11	13
19-0000	Life, Physical, and Social Science Occupations	149	160	11	7.4%	0	4	4
21-0000	Community and Social Services Occupations	891	1,024	133	14.9%	13	18	31
23-0000	Legal Occupations	162	167	5	3.1%	0	3	3
25-0000	Education, Training, and Library Occupations	3,744	3,989	245	6.5%	26	80	106
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	929	940	11	1.2%	3	25	28
29-0000	Healthcare Practitioners and Technical Occupations	2,525	2,979	454	18.0%	45	51	96
31-0000	Healthcare Support Occupations	1,300	1,553	253	19.5%	25	18	43
33-0000	Protective Service Occupations	547	578	31	5.7%	3	15	18
35-0000	Food Preparation and Serving Related Occupations	3,195	3,340	145	4.5%	17	114	131
37-0000	Building and Grounds Cleaning and Maintenance Occupations	1,678	1,760	82	4.9%	8	30	38
39-0000	Personal Care and Service Occupations	1,487	1,745	258	17.4%	25	31	56
41-0000	Sales and Related Occupations	5,025	5,265	240	4.8%	25	163	188
43-0000	Office and Administrative Support Occupations	7,053	7,189	136	1.9%	30	153	183
45-0000	Farming, Fishing, and Forestry Occupations	262	272	10	3.8%	1	8	9
47-0000	Construction and Extraction Occupations	2,453	2,724	271	11.0%	28	52	80
49-0000	Installation, Maintenance, and Repair Occupations	1,474	1,602	128	8.7%	15	34	49
51-0000	Production Occupations	3,929	4,113	184	4.7%	26	78	104
53-0000	Transportation and Material Moving Occupations	1,846	2,005	159	8.6%	17	43	60

Source: New Hampshire Employment Security, Occupational Projections by Planning Region 2010 -2020 (January 2013)

F. Partners and Resources for Economic Development

The implementation of the CEDS will depend to a large extent on the partnerships fostered between economic development stakeholders in the Region, and on the willingness of federal and state partners to supplement the limited resources available at the regional and local levels. This Region has an extensive history in making public/private partnerships work. On many occasions, federal and state dollars have been combined with private, non-profit and local funds to move projects forward.

Who are the economic development stakeholders in the Region that will implement the CEDS? What federal or state agencies will these economic development stakeholders be appealing to? To a large extent the implementation of the CEDS will build upon the long-established relationships in the Region between the regional economic development stakeholders and their financial and programmatic partners at the federal and state levels. The following tables identify the major players at the Regional and local, federal and state levels that will be involved in the implementation of the CEDS. Ideally, we will be striving to encourage other economic development stakeholders to participate in the process and to play a role in helping the Region attain its goals through funding provided by federal and state agencies new to the region. This listing of partners and resources for economic development is not a complete list, but, rather, a summary of the various partners.

Table 46: Partners and Resources by Issue

Housing
Cheshire Housing Trust Contoocook Housing Trust Heading For Home Keene Housing Authority Southern NH Services Southwestern Community Services
Economic Development (commercial and industrial)
Antrim Chamber of Commerce Better Business Bureau Greater Keene Chamber of Commerce Greater Peterborough Chamber of Commerce Hannah Grimes Center Hannah Grimes Marketplace Jaffrey Chamber of Commerce Monadnock Economic Development Corporation Municipal Economic Development Advisory Committees NH Business and Industry Association NH Department of Resources and Economic Development Rindge Chamber of Commerce SCORE—Counselors to America’s Small Businesses US Department of Commerce, Economic Development Administration US Housing and Urban Development US Small Business Development Center

Education & Training
Antioch New England Graduate School Franklin Pierce University Keene State College River Valley Community College School Administrative Units (SAU)
Community Development
NH Community Development Finance Authority NH Department of Transportation NH Main Street Center NH Office of Energy and Planning Southwest Region Planning Commission UNH Cooperative Extension
Transportation, Utilities & Infrastructure
City Express (HCS) Monadnock Connect NH Department of Transportation Pathways for Keene Public Service of NH
Travel & Tourism
Antrim Chamber of Commerce Connecticut River Joint Commission Greater Keene Chamber of Commerce Greater Peterborough Chamber of Commerce Jaffrey Chamber of Commerce Monadnock Travel Council NH DRED Division of Parks and Recreation Rindge Chamber of Commerce
Environment
Harris Center for Conservation Education Monadnock Conservancy NH Department of Environmental Services NH Department of Resource and Economic Development Society for the Preservation of NH Forests US Environmental Protection Agency

Arts & Heritage
Apple Hill Center for Chamber Music ArtsAlive! Collaborative Colonial Theater Historical Societies/ Heritage Commissions MacDowell Colony Monadnock Folklore Society NH Association of Conservation Commissions NH Department of Cultural Resources NH Preservation Alliance Park Theater Corporation Peterborough Players Sharon Arts Center The Moving Company Thorne-Sagendorf Gallery of Keene State College
Social Services
Dartmouth Hitchcock Medical Center—Keene Monadnock Area Psychotherapy and Spirituality Services Monadnock Collaborative Monadnock Developmental Services Monadnock Family Services Southwestern Community Services
Private Grantmakers & Foundations
New Hampshire Charitable Foundation Monadnock Region NH Charitable Foundation NH Community Loan Fund NH Endowment for Health Putnam Foundation
Private Lenders
Bank of America Bank of New Hampshire Charter One Bank Citizens Bank Connecticut River Bank GFA Federal Credit Union Lake Sunapee Bank Ocean National Bank Savings Bank of Walpole TD Bank

Government, Public Grantmakers & Lenders
MicroCredit New Hampshire NH Community Development Finance Authority NH Housing Finance Authority NH Business Finance Authority NH Land and Community Heritage Investment Program NH Business and Industry Association US Department of Commerce, Economic Development Administration USDA Rural Development US Department of Housing and Urban Development US Department of Health and Human Services US Environmental Protection Agency
Communications
3G Wireless Argent Communications Armarium Press Bauhan Publishing Beaver Wood Association Business NH Magazine Carl Olson Enterprises Cheshire Net Accounting Cheshire Network Service CK Jensen Communications Cobblestone Publishing Comcast Connell Communications Inc. Consensus Technology Country Press CTC Communications Corporation David R Godine Publisher Equine Journal Fairpoint Communications Fall Mountain Internet Service G4 Communications Gurney Publishing Service Helmers Publishing Inc. Homes & Land Magazine Interval Shop Keene Sentinel Kennedy Information, LLC Laurin Publishing LocalNet Corporation Monadnock Ledger Monadnock Radio Group Monadnock Shopper News

Motorola Inc.
Musicplayer
National Building News
New Hampshire FastRoads
Old Colony Sound Lab
Peterborough Transcript
Radius North Communications
S Lapalme Designs
Sensors Buyers Guide
Systems & Communications Sciences
Tactics Group Intl
TDS
Time Warner
US Cellular, Inc.
Verizon
Web Ryders
WHDQ
WiValley
WKNE
World Path Internet Service
WSSH
WYRY
WZBK
WZSH

IV. Vision, Goals, Objectives and Tasks

1. Vision Statement

Today the Southwest Region is a prosperous, attractive place to live and work. The Region has a clear, unique identity and cohesive community within the larger central New England neighborhood. At the same time, the Region enjoys strong civic and economic connections with New England, the Nation and the rest of the globe. This is also the future envisioned in the CEDS.

Creativity, innovation, effectiveness, accountability, and adaptiveness will be hallmarks of both private and public enterprise in the Southwest Region. These attributes apply equally to cutting-edge technologies, the global market place and traditional New England lifestyles, including agriculture, forest industries and the arts. Private and public activity will foster equally economic enterprise, environmental protection, and conservation of our cultural heritage, seeking not to transform the landscape, but preserve our greatest assets.

Residents will enjoy a unique, prosperous and healthful quality of life characterized by diverse opportunities for employment, housing, education, and civic participation.

A strong Regional community is characterized by:

- low crime rate,
- diverse housing opportunities,
- volunteerism and participation in local affairs,
- honoring cultural and historical heritage,
- vitality of downtowns and village centers,
- coordinating community development efforts,
- cultural and recreational opportunities,
- preserving open space, and
- balancing preservation, conservation and development.

A competitive Regional economy is characterized by:

- cooperation among municipalities,
- quality infrastructure,
- strong educational and vocational opportunities,
- supporting and retaining local business,
- recruiting new business,
- promoting entrepreneurism,
- diverse job opportunities, and
- environmentally friendly business practices.

2. Goals, Objectives and Tasks

The Comprehensive Economic Development Strategy (CEDS) for the Southwest Region will accomplish this Vision by establishing eight goals—as well as related objectives and tasks—reflecting the results of the strength, weaknesses, opportunities and threats analysis conducted by the CEDS Advisory Committee and additional public input. The goals, objectives and tasks are as follows:

Goal A: Maintain a high-quality labor force.

Objective: Provide workers with the skills to meet the needs of local business.

Task: Start an initiative to address workforce skills and to assess employer needs and provide required training.
Term: Short

Task: Strengthen programs for teaching basic technology skills to high school students.
Term: Medium

Objective: Ensure the availability of skilled workers to meet development demand.

Task: Recruit local youth and college students through apprenticeship and internship programs with Regional employers.
Term: Medium

Task: Recruit trained personnel in demand occupations from outside the Region.
Term: Long

Objective: Create employment opportunities that protect and raise workers' standard of living.

Goal B: Prepare for future development.

Objective: Ensure a healthy balance of residential, commercial, and industrial development, agriculture, forestry, and open space ("Smart Growth").

Task: Assist municipalities in reviewing zoning and other regulations regarding the location of potential future development.
Term: Short

Task: Promote the NH Main Street Program, including the principles of historic preservation and context-sensitive design.
Term: Medium

Objective: Provide information to municipalities about the costs and benefits of different types of development.

Task: Assist municipalities in updating their impact fee schedules.
Term: Medium

Objective: Support a quality transportation system, both locally and regionally, to provide capacity for desired economic development.

Task: In collaboration with NHDOT and other entities, support a system of diverse transportation modes by incorporating sidewalks and bicycle lanes into street and highway design, as well as by developing a regional public transportation system.
Term: Medium

Task: In collaboration with NHDOT and other entities, improve road conditions and access management to support safe and efficient movement of people and goods.
Term: Long

Objective: Modernize and maintain public and private infrastructure, including water, sewer, communications and schools, to meet future demand.

Task: Assess and inventory the capacity and quality of existing municipal infrastructure and facilities.
Term: Short

Task: Promote municipal infrastructure and facility capacity expansion and improvement where necessary.
Term: Medium

Task: Encourage the adoption of local capital improvement programs to upgrade and modernize municipal infrastructure and facilities.
Term: Medium

Task: Promote Tax Increment Financing districts as a means for improving and modernizing municipal infrastructure and facilities.
Term: Medium

Task: Encourage utility and telecommunication providers to participate in an infrastructure inventory for determining development need capacities.
Term: Medium

Goal C: Balance housing opportunities with trends in income, employment and community character.

Objective: Provide housing for all residents, considering type, location and cost.

Task: Assess Regional housing needs.
Term: Short

Task: Update master plans and zoning regulations to address housing needs.
Term: Medium

Task: Encourage the rehabilitation and construction of all housing types.
Term: Long

Objective: Support private and public housing development activities that provide affordable owner-occupied and renter-occupied homes and apartments.

Goal D: Strengthen the economic base.

Objective: Promote diverse types of economic activities.

Task: Promote the virtue of engaging in business activities.
Term: Short

Task: Strengthen programs that educate entrepreneurial start-ups about business planning, market research and other sound business practices.
Term: Short

Task: Establish business incubators and programs to provide low-cost rent, shared services, flexible financing and other appropriate services.
Term: Short

Task: Support and retain businesses, including innovative firms in export-oriented industry sectors.
Term: Medium

Task: Recruit businesses, including export-oriented companies, from outside the Region.
Term: Long

Objective: Strengthen the tourism industry.

Task: Create the position of a Regional tourism coordinator.
Term: Medium

Task: Develop marketing strategies to attract visitors to the Region.
Term: Medium

Task: Enhance opportunities for outdoor recreation (e.g. kiosks, markers, trail blazing system, bike and boat rentals etc).
Term: Medium

Task: Establish Regional visitor center.
Term: Long

Objective: Encourage creativity, innovation and cooperation in business and industry.

Task: Strengthen those individuals, organizations and businesses that help provide a creative environment and strengthen the Regional economy.
Term: Short

Task: Create working group of organizations such as economic development corporations, chambers of commerce and UNH Cooperative Extension for coordination of activities.
Term: Medium

Task: Encourage research collaboration between the Region's institutions of higher education and employers.
Term: Medium

Task: Establish an institution for focusing on research activities consistent with the economic goals of the Region.
Term: Long

Goal E: Support climate for helping business to create a diverse range of employment opportunities.

Objective: Remove unnecessary barriers for business development.

Task: Assist municipalities in reviewing zoning and other regulations regarding the location, required lot sizes and the diversity of business types permitted.
Term: Short

Task: Help municipalities in planning commercial and industrial development in areas with existing infrastructure (e.g. roads, water, sewer).
Term: Short

Task: Increase the number of shovel-ready industrial sites.
Term: Medium

Task: Strengthen organizations that provide business support, such as economic development corporations, chambers of commerce, Monadnock Business Incubator Network etc.
Term: Long

Goal F: Promote the concept of Regionalism.

Objective: Strengthen regional organizations and promote public awareness of regional issues and solutions.

Task: Coordinate work of regional organizations and agencies.
Term: Short

Task: Educate the public on the benefits of regional coordination and collaboration.
Term: Medium

Task: Create a point of reference that serves as a clearing house for Regional economic development activities and resources.
Term: Short

Goal G: Strengthen local governments.

Objective: Encourage a high level of volunteerism.

Task: Broaden the number of citizens involved in municipal government.
Term: Short

Task: Promote awareness among volunteers about their responsibilities.
Term: Short

Objective: Ensure responsible and effective municipal decision-making.

Task: Encourage municipalities to hire professional staff for particular municipal positions.

Term: Medium

Task: Provide technical training for elected officials and professional staff.
Term: Medium

Task: Promote inter-municipal resource sharing regarding staff, facilities, equipment and other municipal functions.
Term: Medium

Goal H: Strengthen the quality of health services.

Objective: Ensure access to and sufficient capacity of health services to serve citizens of all income levels.

Task: Support medical task forces for assessing the need for health services in the Region.
Term: Short

Task: Establish local branches of regional health providers, including doctors and registered nurses.
Term: Medium

V. Action Plan

The Action Plan has been developed on the basis of the CEDS Advisory Committee's analysis of the Southwest Region's strengths, weaknesses, opportunities and threats; the Committee's regional vision developing work; and the Committee's identification of goals, objectives and tasks. The Action Plan covers a period of five years wherein the goals are broken down into Short-Term, Medium-Term and Long-Term objectives and tasks. SWRPC solicited projects from communities and economic development stakeholders and reviewed the submitted projects based upon the criteria developed by the Advisory Committee. These projects were determined to contribute to the economic growth of the Region and to meet at least one of the goals identified. The aspiration is to receive project funding from a variety of federal, state, local, non-profit and private resources in order to move this Region toward accomplishing its vision.

The Action Plan describes the Task Ranking Criteria, the Project Ranking Criteria and includes the Project list.

1. Tasks Ranking

The members of the CEDS Advisory Committee conducted a task ranking exercise. The results of that exercise are presented in the following two tables. The first table "Task Ranked by Goal" presents the tasks and the total score for each task. The second table "Tasks Ranked by Priority" presents Tasks in the numeric order of the scores, with the highest score being ranked the highest priority.[16]

[16] Methodology: Goals, Objectives and Tasks were printed on posters. In a first round, the CEDS Committee members attached up to ten "sticky dots" to those goals, objectives and tasks that they considered important. In a second round, the CEDS committee members attached up to ten additional "sticky dots" to those tasks that they considered instrumental for accomplishing the Vision.

The score for each task is the total number of "dots" allotted to the goal, objective and task. For example, hypothetically, if Goal A received four dots, the first Objective under Goal A received one dot, and Task 1 under that Objective received 10 dots and Task 2 under that Objective received 5 dots, the score for Task 1.would be 4+1+10=15 and Task 2 would be 4+1+5=10.

Table 47: Tasks Ranked by Goal

Goal	Objective	Task		Points
A	1	1	Start an initiative to address workforce skills and to assess employer needs and provide required training.	16
		2	Strengthen programs for teaching basic technology skills to high school students.	13
	2	3	Recruit local youth and college students through apprenticeship and internship programs with Regional employers.	11
		4	Recruit trained personnel in demand occupations from outside the Region.	10
B	1	1	Assist municipalities in reviewing zoning and other regulations regarding the location of potential future development.	17
		2	Promote the NH Main Street Program, including the principles of historic preservation and context-sensitive design.	11
	2	4	Assist municipalities in updating their impact fee schedules.	7
		5	In collaboration with NHDOT and other entities, support a system of diverse transportation modes by incorporating sidewalks and bicycle lanes into street and highway design, as well as by developing a regional public transportation system.	6
	3	6	In collaboration with NHDOT and other entities, improve road conditions and access management to support safe and efficient movement of people and goods.	5
		7	Assess and inventory the capacity and quality of existing municipal infrastructure and facilities.	7
	4	8	Promote municipal infrastructure and facility capacity expansion and improvement where necessary.	12
		9	Encourage the adoption of local capital improvement programs to upgrade and modernize municipal infrastructure and facilities.	7
		10	Promote Tax Increment Financing districts as a means for improving and modernizing municipal infrastructure and facilities.	7
		11	Encourage utility and telecommunication providers to participate in an infrastructure inventory for determining development need capacities.	8
		1	Assess Regional housing needs.	8
C	1	2	Update master plans and zoning regulations to address housing needs.	13
		3	Encourage the rehabilitation and construction of all housing types.	10
		1	Promote the virtue of engaging in business activities.	9

Goal	Objective	Task		Points
D	1	2	Strengthen programs that educate entrepreneurial start-ups about business planning, market research and other sound business practices.	21
		3	Establish business incubators and programs to provide low-cost rent, shared services, flexible financing and other appropriate services.	23
		4	Support and retain businesses, including innovative firms in export-oriented industry sectors.	17
		5	Recruit businesses, including export-oriented companies, from outside the Region.	14
		6	Create the position of a Regional tourism coordinator.	18
	2	7	Establish Regional visitor center.	18
		8	Develop marketing strategies to attract visitors to the Region.	18
		9	Enhance opportunities for outdoor recreation (e.g. kiosks, markers, trail maintenance, bike and boat rentals etc).	17
		10	Strengthen those individuals, organizations and businesses that help provide a creative environment and strengthen the Regional economy.	20
	3	11	Create working group of such organizations as economic development corporations, chambers of commerce and UNH Cooperative Extension for coordination of activities.	17
		12	Encourage research collaboration between the Region's institutions of higher education and employers.	21
		13	Establish an institution for focusing on research activities consistent with the economic goals of the Region.	15
		1	Assist municipalities in reviewing zoning and other regulations regarding the location, required lot sizes and the diversity of business types permitted.	14
E	1	2	Help municipalities in planning commercial and industrial development in areas with existing infrastructure (e.g. roads, water, sewer).	11
		3	Increase the number of shovel-ready industrial sites.	8
		4	Strengthen organizations that provide business support, such as economic development corporations, chambers of commerce, Monadnock Business Incubator Network etc.	19
		1	Coordinate work of regional organizations and agencies.	13
F	1	2	Educate the public on the benefits of regional coordination and collaboration.	13
		3	Create a point of reference that serves as a clearing house for Regional economic development activities and resources.	8

Goal	Objective	Task		Points
		1	Broaden the number of citizens involved in municipal government.	4
G	1	2	Promote awareness among volunteers about their responsibilities.	2
		3	Hire professional staff for particular positions.	2
	2	4	Provide technical training for elected officials and professional staff.	7
		5	Promote inter-municipal resource sharing regarding staff, facilities and equipment.	2
		1	Support medical task forces for assessing the need for health services in the Region.	2
H	1	2	Establish local branches of regional health providers, including doctors and RNs.	1

Table 48: Tasks Ranked by Priority

Rank	Goal	Objective	Task	Term
1	D	1	Establish business incubators and programs to provide low-cost rent, shared services, flexible financing and other appropriate services.	Short
2	D	1	Strengthen programs that educate entrepreneurial start-ups about business planning, market research and other sound business practices.	Short
3	D	3	Encourage research collaboration between the Region's institutions of higher education and employers.	Medium
4	D	3	Strengthen those individuals, organizations and businesses that help provide a creative environment and strengthen the Regional economy.	Short
5	E	1	Strengthen organizations that provide business support, such as economic development corporations, chambers of commerce etc.	Long
6	D	2	Enhance opportunities for outdoor recreation (e.g. kiosks, markers, trail maintenance, bike and boat rentals etc).	Medium
7	D	2	Create the position of a Regional tourism coordinator.	Medium
8	D	2	Establish Regional visitor center.	Long
9	B	1	Assist municipalities in reviewing zoning and other regulations regarding the location of potential future development.	Short
10	D	1	Support and retain businesses, including innovative firms in export-oriented industry sectors.	Medium
11	D	2	Develop marketing strategies to attract visitors to the Region.	Medium
12	D	3	Create working group of such organizations as economic development corporations, chambers of commerce and UNH Cooperative Extension for coordination of activities.	Medium
13	A	1	Start an initiative to address workforce skills and to assess employer needs and provide required training.	Short

Rank	Goal	Objective	Task	Term
14	D	3	Establish an institution for focusing on research activities consistent with the economic goals of the Region.	Long
15	E	1	Assist municipalities in reviewing zoning and other regulations regarding the location, required lot sizes and the diversity of business types permitted.	Short
16	D	1	Recruit businesses, including export-oriented companies, from outside the Region.	Long
17	A	1	Strengthen programs for teaching basic technology skills to high school students.	Medium
18	F	1	Coordinate work of regional organizations and agencies.	Short
19	C	1	Update master plans and zoning regulations to address housing needs.	Medium
20	F	1	Educate the public on the benefits of regional coordination and collaboration.	Medium
21	B	4	Promote municipal infrastructure and facility capacity expansion and improvement where necessary.	Medium
22	E	1	Help municipalities in planning commercial and industrial development in areas with existing infrastructure (e.g. roads, water, sewer).	Short
23	A	2	Recruit local youth and college students through apprenticeship and internship programs with Regional employers.	Medium
24	B	1	Promote the NH Main Street Program, including the principles of historic preservation and context-sensitive design.	Medium
25	C	1	Encourage the rehabilitation and construction of all housing types.	Long
26	A	2	Recruit trained personnel in demand occupations from outside the Region.	Long
27	D	1	Promote the virtue of engaging in business activities.	Short
28	B	4	Encourage utility and telecommunication providers to participate in an infrastructure inventory for determining development need capacities.	Medium
29	C	1	Assess Regional housing needs.	Short
30	G	2	Provide technical training for elected officials and professional staff.	Medium
31	E	1	Increase the number of shovel-ready industrial sites.	Medium
32	B	4	Assess and inventory the capacity and quality of existing municipal infrastructure and facilities.	Short
33	B	4	Encourage the adoption of local capital improvement programs to upgrade and modernize municipal infrastructure and facilities.	Medium
34	B	4	Promote Tax Increment Financing districts as a means for improving and modernizing municipal infrastructure and facilities.	Medium
35	B	2	Assist municipalities in updating their impact fee schedules.	Medium
36	B	3	In collaboration with NHDOT and other entities, support a system of diverse transportation modes by incorporating sidewalks and bicycle lanes into street and highway design, as well as by developing a regional public transportation system.	Medium
37	B	3	In collaboration with NHDOT and other entities, improve road conditions and access management to support safe and efficient movement of people and goods.	Long
38	G	1	Broaden the number of citizens involved in municipal government.	Short
39	G	2	Promote inter-municipal resource sharing regarding staff, facilities and equipment.	Medium
40	H	1	Support medical task forces for assessing the need for health services in the Region.	Short
41	G	1	Promote awareness among volunteers about their responsibilities.	Short

Rank	Goal	Objective	Task	Term
42	H	1	Establish local branches of regional health providers, including doctors and RNs.	Medium
43	F	1	Create a point of reference that serves as a clearing house for Regional economic development activities and resources.	Short
44	G	2	Hire professional staff for particular positions.	Medium

2. Project Ranking Criteria

The criteria were established by the CEDS Advisory Committee based upon the EDA Investment Policy Guidelines and additional criteria important to development in this Region. The additional criteria will help to develop as comprehensive a list as possible to address the eight goals and to support those projects that will be funded through sources other than EDA.

The EDA Investment Policy Guidelines form the larger framework for evaluating CEDS projects, particularly those seeking EDA funding. The guidelines are included in the CEDS Advisory Committee deliberations. The 2013 EDA Investment Guidelines are as follows:

1. Collaborative Regional Innovation

Initiatives that support the development and growth of innovation clusters based on existing regional competitive strengths.

2. Public/Private Partnerships

Investments that use both public- and private-sector resources and leverage complementary investments by other government/public entities and/or nonprofits.

3. National Strategic Priorities

Initiatives that encourage job growth and business expansion related to advanced manufacturing; information technology (e.g., broadband, smart grid) infrastructure; communities severely impacted by automotive industry restructuring; urban waters; natural disaster mitigation and resiliency; access to capital for small, medium-sized, and ethnically diverse enterprises; and innovations in science and health care.

4. Global Competitiveness

Initiatives that support high-growth businesses and innovation-based entrepreneurs to expand and compete in global markets, especially investments that expand U.S. exports, encourage foreign direct investment, and promote the repatriation of jobs back to the U.S.

5. Environmentally-Sustainable Development

Investments that promote job creation and economic prosperity through projects that enhance environmental quality and develop and implement green products, processes, places, and buildings as part of the green economy. This includes support for energy-efficient green technologies.

6. Economically Distressed and Underserved Communities

Investments that strengthen diverse communities that have suffered disproportionate economic job losses and/or are rebuilding to become more competitive in the global economy.

All projects will be evaluated by using the Project Ranking Criteria and will be categorized based upon the expected timeframe to complete the specific project:

Short-Term (up to 24 months)
Short-term projects are those economic development projects that are expected to be implemented within the next two years. Under this time frame, all project ranking criteria have to be met.

Medium-Term (2-4 years)
Medium-term projects are those economic development projects that are expected to take 2-4 years to begin construction or implementation. Under this time frame, compliance with Regional Goals has to be established.

Long-Term (5+ years)
Long-Term projects are those economic development projects that are expected to take 5 years to begin construction or implementation. These projects may be in the formation stages today and, due to limited resources or the amount of time until the project can be implemented, are not expected to begin for five years.

The CEDS Advisory Committee established the following project ranking criteria found in Table 49 on the following page.

Table 49: Project Ranking Criteria

MINIMUM CRITERIA FOR ELIGIBILITY

[ ] 1. Project is clearly defined.
[ ] 2. Project will create or retain jobs upon completion.
[ ] 3. Project has received favorable public response.
[ ] 4. Project has support of municipal officials. *(If project is submitted by an entity other than the town where it is located, a letter from the town must be attached indicating town support.)*
[ ] 5. Project is consistent with CEDS vision, goals and objectives.
[ ] 6. Project does have quantifiable public benefit.
[ ] 7. Project requires some form of public funding.

REGIONAL GOALS		
Project Criteria	***Score***	***Guidelines***
1. Project is consistent with regional goals and objectives as outlined in the CEDS document.	1 2 3	Meets one goal Meets 2-4 goals Meets more than 4 goals
		(Maximum points for this criteria is 3)
2. Project is identified in local Master Plan or other similar plan.	0 3	Project is not mentioned in any plans or identified in kind Part of local Master Plan or similar plan
		(Maximum points for this criteria is 3)
3. Project is consistent with local land use regulations.	0 1 2	Not consistent or requires zoning changes Appears to meet zoning, requires special permit Consistent with local zoning
		(Maximum points for this criteria is 2)
4. Project minimizes new demands on the use of existing water, sewer and transportation infrastructure.	0 1 2 3	Requires development of new infrastructure Creates unnecessary and unplanned infrastructure Provides necessary infrastructure Minimizes new demands on existing infrastructure
		(Maximum points for this criteria is 3)
5. Project promotes the State of New Hampshire Office of Energy and Planning's Smart Growth Principles.	0 1 3 5	Project meets zero NH Smart Growth Principles Project meets some (1-2) NH Smart Growth Principles Projects meets several (3-4) NH Smart Growth Principles Project meets a majority (5+) of the NH Smart Growth Principles
		(Maximum points for this criteria is 5)
Score for this Section		***(Maximum points for this section is 16)***

PROJECT IMPACT		
Project Criteria	***Score***	***Guidelines***
1. Project will create or retain jobs.	2 3 4 5	Project is estimated to create/retain fewer than 5 jobs Project is estimated to create/retain 6 to 10 jobs Project is estimated to create/retain 11 to 50 jobs Project is estimated to create/retain more than 50 jobs
		(Maximum points for this criteria is 5)

PROJECT IMPACT con't		
2. Project demonstrates ability to impact distressed populations, such as provision of jobs, improving jobs skills, or providing higher wage jobs.	0 1 2	Does not impact Demonstrates some direct or indirect impact Demonstrates significant direct impact
		(Maximum points for this criteria is 2)
3. Time frame for when this project is expected to reach its total estimated job retention or creation?	1 2 3	To occur after 5 years To occur between 2 and 5 years To occur within 2 years
		(Maximum points for this criteria is 3)
4. Primarily occupations requiring skilled or educated workers, and offering commensurate wages ("Job Quality").	1 3 5	Primarily requiring unskilled or entry level workers Primarily requiring some skills or education, or moderate level of job training Primarily requiring advanced training, or highly skilled workers
		(Maximum points for this criteria is 5)
5. Level of economic distress. *[More than one may apply]*	3 3 3	Census tract per capita income is 80% or less of national level Labor Market Area unemployment rate for past 2 years above national rate Significant economic event causing distress in the town, such as plant closing, restructuring, tax base decline etc.
		(Maximum points for this criteria is 9)
6. Project will leverage future private investment.	0 1 2 3 5	Project will not leverage private investment Project will leverage private investment that is less than 5% of the total project cost Project will leverage private investment that is 5-24% of the total project cost Project will leverage private investment that is 25-49% of the total project cost Project will leverage private investment that is greater than 50% of the total project cost
		(Maximum points for this criteria is 5)
7. Project avoids or mitigates environmental impacts that can erode environmental quality **on-site**, particularly regarding resources and resource values associated with water quality, air quality, wild plant and animal communities, outdoor lighting, noise, historic and other cultural resources, pedestrian access, and visual community character.	0 1 2 3	Project does not satisfy any of the guidelines below Project will create new on-site impacts and/or exacerbate pre-existing on-site impacts and mitigate new or pre-existing impacts Project will not create new on-site impacts or exacerbate pre-existing on-site impacts Project will not create new on-site impacts or exacerbate pre-existing on-site impacts and will mitigate pre-existing on-site impacts
		(Maximum points for this criteria is 3)

PROJECT IMPACT con't		
8. Project avoids or mitigates environmental impacts that can erode environmental quality **in the vicinity** of the project, particularly regarding resources and resource values associated with water quality, air quality, wild plant and animal communities, outdoor lighting, noise, historic and other cultural resources, pedestrian access, and visual community character.	0 1 2 3	Project does not satisfy any of the guidelines below Project will create new off-site impacts and/or exacerbate pre-existing off-site impacts and mitigate new and pre-existing impacts Project will not create new off-site impacts or exacerbate pre-existing off-site impacts Project will not create new off-site impacts or exacerbate pre-existing off-site impacts and will mitigate pre-existing off-site impacts
		(Maximum points for this criteria is 3)
Score for this Section		***(Maximum points for this section is 35)***

READINESS TO PROCEED		
Project Criteria	***Score***	***Guidelines***
1. Feasibility. *[More than one may apply]*	0 1 3 3	Market analysis has not been done Letters of interest obtained from potential and/or existing tenants Market analysis study completed with favorable results Business plan prepared with favorable results
		(Maximum points for this criteria is 7)
2. Project Status.	0 1 3 5	Early planning stages Feasibility or planning study completed Preliminary engineering and costs completed Final engineering plans, costs, specifications and permitting completed
		(Maximum points for this criteria is 5)
3. Site control.	1 3 5	No site is identified Site is identified for project Site is acquired or option secured
		(Maximum points for this criteria is 5)
4. Availability of secure match for funding.	0 1 2	No commitment to match funds Match sources identified Applications made for match
		(Maximum points for this criteria is 2)
5. Total committed match funding.	1 2 3 4 5	0-20% Match funding committed 20-40% Match funding committed 40-60% Match funding committed 60-80% Match funding committed 80-100% Match funding committed
		(Maximum points for this criteria is 5)

READINESS TO PROCEED con't		
6. Project is consistent with local, state and federal regulations.	0 1 3 5	Not clear what plans are made for permits Necessary permits identified Permits are in process Permits are in hand
		(Maximum points for this criteria is 5)
Score for this Section		***(Maximum points for this section is 29)***

MANAGEMENT CAPACITY		
Project Criteria	***Score***	***Guidelines***
1. What organization is responsible for developing or managing this project.	1 2 3	Unclear who will develop or manage project Project developer has been identified Identified project developer has successful experience in implementing type of project proposed
		(Maximum points for this criteria is 3)
2. Clear plan for implementation.	1 3 5	Project is just a concept Plan for development is clear Organization in place to implement development plan
		(Maximum points for this criteria is 5)
3. Clear marketing plan upon completion.	0 2 3	No marketing plan Plan for marketing is clear Market plan in place and organization identified to conduct marketing
		(Maximum points for this criteria is 3)
4. Project Proponent has capacity to manage economic development projects.	1 2 3	Has completed at least 1 other similar project Has completed 2-3 other similar projects Has completed more than 3 other similar projects
		(Maximum points for this criteria is 3)
Score for this Section		***(Maximum points for this section is 14)***

COMMUNITY PRIORITY (Used only to break a tie)		
Project Criteria	***Score***	***Guidelines***
1. Project priority according to the community.	5 4 3 2 1	Number 1 priority Number 2 priority Number 3 priority Number 4 priority Number 5 priority or greater
Score for this Section		***(Maximum points for this section is 5)***

SCORING SUMMARY FOR EACH SECTION			
	Actual Score	Maximum Score	
1. Regional Goals		*16*	
2. Project Impacts		*35*	
3. Readiness to Proceed		*29*	
4. Management Capacity		*14*	
TOTAL SCORE		***94***	
5. In the event of a tie, Community Priority		*5*	
FINAL SCORE		***99***	

3. Priority Project List and Implementation Schedule

As part of the CEDS process, an inventory of projects, both underway and planned, in the Region has been created. This inventory was developed through input provided by municipalities, non-profit development corporations and other economic development stakeholders. Projects are organized in two lists: short-term and planned – to differentiate between projects for which implementation is imminent or underway, and those which are in early stages of planning or conceptual design. The projects are summarized according to project name, project description, project proponent, total cost, funding sources, term, start date and the CEDS goals addressed.

These projects and others will be continually reviewed by the Southwest Region CEDS Advisory Committee for general consistency with the goals and objectives of the CEDS. Through the Annual CEDS Updates, the Advisory Committee will also summarize the changes in projects that take place from year to year and their placement on the appropriate list.

The projects identified as short-term are shown in Table 50 and those identified as in the planning stages are shown in Table 51.

Table 50: Priority Project Short-Term List

Project Name	**Project Description**	**Project Proponent**	**Total Cost** [17]	**Funding Source(s)**	**Goals Addressed**
Troy Mills Redevelop-ment	Renovation and development of industrial build-ing complex in Troy, NH	Troy Rede-velopment Group, Pri-vate Inves-tors	$1,000,000 initial; $30,000,000 total pro-jected	CDBG, TIF, Historic Tax Credit, USDA RD, Private sources	B, C, D, E
Downtown Keene Rail-road Land	Mixed-use re-development of former rail yard.	City of Keene, MEDC	$55 million	CDBG, USDA RD, MEDC RLF, TIF, NH BFA, NH CDFA CDIP, Green Gap Loan, Brownfields Assessment Funds, Private Sources	A, B, C, D, E

[17] Total Cost values have been updated from the 2005 CEDS to reflect the most current estimates.

Priority Project Short-Term List *continued*

Project Name	Project Description	Project Proponent	Total Cost [18]	Funding Source(s)	Goals Addressed
Downtown Keene Rail-road Land	Mixed-use re-development of former rail yard	City of Keene, MEDC	$25,000,000	CDBG, rural develop-ment IRP, MEDC RLF, TIF, NH Business Fi-nance Authority Guar-antee, Brownfields As-sessment Funds, Private Sources	A, B, C, D, E
Jaffrey Park Theatre	Restoration and development of downtown prop-erty	Park Theater, Town of Jaf-frey, Franklin Pierce Uni-versity	$1,900,000	NH CDFA Tax Cred-its, grant funding, private donations	A, B, D, E
Stone Arch Bridge In-dustrial Park water line extension	Infrastructure improvement (water)	Town of Jaf-frey	$1,600,000	TIF; Possible USDA/RD and/or EDA	B
Downtown water flow improve-ment	Infrastructure improvement (water)	Town of An-trim	$120,000	Town Water reserves	B
Monument Road Indus-trial Park	Infrastructure improvement (water, sewer, roads)	Town of Hinsdale, Hinsdale EDC, MEDC	$2,000,000 total over several years	TIF, CDBG	B
Swanzey In-dustrial Park	Infrastructure improvement (road)	Town of Swanzey	$3,000,000 ; $60,592 in 2006	TIF	B
Antrim Mill (former Goodell fac-tory)	Mixed-use devel-opment	Town of An-trim	$2-$2.5M (estimate)	Private, some support from TIFD	B, C, D, E
Historic Harrisville	Basic repairs; Enhancements and historic Cheshire Mill	MEDC, Cheshire County. Town of Har-risville	Project cost to date: $4,060,689	CDFA, LCHIP, pri-vate donations.	A, B, D, E
Jaffrey Civic Center	ADA accessibil-ity improvements (handicap eleva-tor)	Jaffrey Civic Center	$260,000	Private donations, Grant funding	B, D

[18] Total Cost values have been updated from the 2005 CEDS to reflect the most current estimates.

Priority Project Short-Term List ***continued***					
Project Name	**Project Description**	**Project Proponent**	**Total Cost** [19]	**Funding Source(s)**	**Goals Addressed**
Broadband Initiative	Effort to bring high speed internet opportunities to residential customers	Rindge Telecommunications Committee, Private Companies	To be determined Investments have been made by two Private Companies	Private Sources, *Potential* Grant Funds	B
Age Restricted Active Adult Housing Initiative	Creation of housing opportunities for seniors	Franklin Pierce University, Town of Rindge	To be determined	Private Sources, CDBG Potential	C
NH FastRoads	Broadband infrastructure expansion	UNH, Network New Hampshire Now (NNHN), NH CDFA, MEDC, WCNH.net	$5,500,000 ; part of a $44.5 million project	NNHN grant, private cash, in-kind funding, CDBG.	A, B, D, E, F
Cheshire County Courthouse Expansion	Expansion of existing courthouse	Cheshire County, City of Keene, MEDC	$10,800,000	CDIP tax credits, New Markets Tax Credits, loans from two banks and Cheshire County, and Tax Increment Financing from the City of Keene	B, D, E, F, G
Winchester Wastewater Improvements	Improvements to municipal wastewater facility	Town of Winchester/ NH DES	$4,445,500	Property Taxes/SRF Loan/ ARRA Funds	B

[19] Total Cost values have been updated from the 2005 CEDS to reflect the most current estimates.

Table 51: Priority Project Planning List

Project Name	Project Description	Project Proponent	Total Cost	Funding Source(s)	Goals Addressed
Stormwater management system	Infrastructure improvement	Town of Peterborough	$15,000,000 (Estimate)	To be determined	B
Great Brook River Walk	Downtown enhancement	Town of Antrim	Project is on hold, no cost estimate available at this time	To be determined	B
WW Cross Building Redevelopment	Redevelopment of former Brownfield site into mixed use (commercial and residential) space	MBV, MEDC, Town of Jaffrey, Webster St. LLC, Larry & Stephen Thibeault	$1,100,000	CDIP, MBV RLF, Private Sources, with other resources to be defined	D, C
Attraction of Retail Development	Encouraging retail establishments to locate in a specified corridor	Franklin Pierce University, Town of Rindge	To be determined	Private Sources, CDBG Potential	D, E
Colonial Theatre Sustainability	Investments to support the sustainability of the Colonial Theatre.	Colonial Theatre/City of Keene/NH DRED	$5,000,000	Fundraising, membership dues, donations, theatre revenues, potential grants	B, D, E
ArtsAlive! Collaborative	Encouraging the development of an infrastructure that will sustain, promote, and expand access to arts and cultural resources in the Monadnock Region.	Collaboration of local arts and cultural groups	TBD	TBD	A, B, C, D, E, F
NH Broadband Mapping and Planning Program	Multi-year, multi-agency effort to map broadband access in NH and develop regional broadband plans	UNH, the nine Regional Planning Commissions, NH DRED	$2,400,000	National Telecommunication and Information Administration funding.	A, B, D, E, F

Priority Project Planning List *continued*					
Project Name	**Project Description**	**Project Proponent**	**Total Cost**	**Funding Source(s)**	**Goals Addressed**
Hinsdale, NH Brattleboro, VT Bridge	Infrastructure improvement; replacement of 2 existing but functionally obsolete bridges over the Connecticut River with a new bridge downstream.	Towns of Hinsdale, NH and Brattleboro, VT, NH DOT, VTrans	$36.3 million	NH DOT, State of Vermont	A, B, D, E, F, H
Jaffrey Dogleg	Infrastructure improvement; reconfiguration of the US 202/NH 124 dogleg	Town of Jaffrey, NH DOT	$6,950,000	NH DOT	A, B, D, E, F,
Stoddard-Antrim-Hillsborough NH 9 ROW Purchase	Infrastructure improvement; purchase of ROW access rights and minor capacity and safety improvements on NH Rte 9.	Towns of Stoddard, Antrim, and Hillsborough, NH DOT	$2,250,000	NH DOT	A, B, D, E, F,

4. Short-Term Priority Project Descriptions

Regional Business Incubators

Business incubators are created to provide affordable space, direct technical assistance, value-added professional services, and shared resources to new and developing businesses. They support the CEDS goals to maintain a high-quality labor force, strengthen the economic base, and support a climate for helping business to create a diverse range of employment opportunities. There have been two primary incubators in the Southwest Region, the Hannah Grimes Center at 25 Roxbury Street in downtown Keene and the Whiton Building run by the Monadnock Economic Development Corporation (MEDC) in Peterborough, which is now privately owned. Emerging incubator facilities include the Dunning Building in Walpole, and the Historic Harrisville Project.

The Hannah Grimes Incubator was originally a part of the Monadnock Region Business Incubator Network, begun in November 2003. The Hannah Grimes Center assumed operations of the incubator as of January 2006 and was able to purchase the facility during the fall of 2007. The Hannah Grimes Center has thus far shared in about $50,000 of the $689,400 total cost of developing the incubator. Initial funding came from a Community Development Block Grant (CDBG), Community Development Investment Program tax credits, private donations, and the Savings Bank of Walpole. Hannah Grimes Marketing and Development was able to purchase the facility through donations and a capital campaign. Incubator office space, which includes full-time as well as part-time "associate" level opportunities, has been full since April 2006. Recently, Hannah Grimes completed renovations that allowed them to expand to 15 business incubator offices. In addition, the Hannah Grimes Center has moved to a new location on Church Street in Keene. This move allowed for the development of the Hannah Grimes Center for Nonprofits to open in their former space. This Nonprofits Center offers the same services as the business incubators, but is tailored for the needs of nonprofit organizations.

The Whiton Incubator was designed for 15 spaces including a warehouse. Though it was previously reported that the Whiton Incubator was operating near capacity, it should be noted that in 2010 the Whiton Building was sold to a Lawrence-based manufacturing firm. The company, New England Products (NEP), is a manufacturing/distribution company that specializes in outdoor seat cushions and accessories for the hunting and stadium industries. This project was funded in part by a Community Development Block Grant, and lead to the creation of 11 new jobs. While several tenants have leased space from NEP and remain within the Whiton Building, it is no longer an incubator.

The Dunning Building in Walpole represents a $750,000 investment, helped by a Community Development Block Grant and the Bank of New Hampshire, to restore an existing building into usable office space. The project began in April of 2005, and continues to the present time. MEDC, the task leader for this project, reports that there are two existing tenants with approximately 20,000 square feet available for lease. Space is being listed as market rate rents to grow businesses.

The Historic Harrisville Project is turning a former brownfield factory into usable commercial/industrial space. The project is identified in Harrisville's 2000 Master Plan. Cheshire Mills I and II were renovated with CDIP, LCHIP, funds from CDFA as well as private donations, and have been rented out. Renovations of the storehouse for the Cheshire Mills, known as the "Temple Project," are approaching completion. Currently a few smaller projects and site work remain, but the majority of the project is complete. Work remaining is mainly in the form of creating spaces to suite tenants. At the time of this report the Cheshire Mills is about 75% leased.

The Webster Incubator building originally required an investment of $1,100,000 from the Community Development Investment Program, Monadnock Business Venture's Revolving Loan Fund (MBV has since been absorbed by MEDC), and private resources to get up and running, and to mitigate the building's brownfield status (a remedial action plan for the Brownfield program has been completed). The building is listed on the supporting projects list under Goal E, Objective 1 and Task 2, as the W W Cross Building Redevelopment project. Recently the building has been purchased by Larry & Steven Thibeault. The site is zoned General Business, which allows for mixed residential and commercial uses.

Troy Mills Redevelopment

In January 2006, the Town of Troy approved re-zoning the land associated with the former Troy Mills complex from "industrial" to "residential/commercial" to support a more feasible array of redevelopment options for the property. Throughout 2006 and 2007, a municipal authority called the Troy Mills Redevelopment Group worked with Troy Blanket Mills, a private developer, to redevelop the mill complex into a mixed-use facility with condominiums, retail space, and entertainment venues. The redevelopment will require cleaning up hazardous substances remaining from the property's former industrial uses. The NH Department of Environmental Services has agreed to provide $2.4 million through three successive low-interest loans from the State's Brownfields Revolving Loan Fund to facilitate the clean-up. The total projected cost for the Troy Mills Redevelopment is anticipated to reach $30,000,000; these funds will come from a combination of grants, private investments, and tax credits.

The housing market slowdown and economic downturn have impacted the speed at which the redevelopment of Troy Mills proceeds. Most physical activity slowed down at Troy Mills but that hasn't stopped the Troy Mills Developers (TMD) from continuing to move the project forward in other areas. Currently, the Troy Mills Developers are searching for viable commercial enterprises for the site. Planning for the central courtyard demolition has been completed. Removal of roofs just north of the brick mill and west of the marketplace has been completed, and work is continuing northward with further roof removal and demolition of associated structures. Approximately 25 percent of the demolition has been accomplished.

The project has also utilized the SWRPC Brownfields Program during the reporting period. Funds from the Brownfields Program were used to remove a large underground storage tank from the Troy Mills site in 2010.

TMD is planning to use sustainable and green building practices during the redevelopment and the selected demolition approach is a good example of putting some of these concepts into practice. To the extent possible, all materials that are considered useable during some stage of redevelopment are being recycled rather than being sent to a landfill. All recoverable metals have been recycled; the southern yellow pine in the roofs is being removed so that it can be reused; the original brick that results from demolition will be used to replace damaged or deteriorating sections of the brick mill; and, concrete and unusable brick will be retained on site, crushed, and used as fill. The demolition will remove the "heat island" effect of a large expanse of roofs and benefit the environment in other ways as well. For example, the impervious roof areas removed will be replaced by grassed areas, swales and a water storage feature, thereby reducing the rate and amount of stormwater runoff to the Ashuelot River.

Another item the TMD and Troy Redevelopment Group accomplished was the successful submittal of a subgrant application to the NH Department of Environmental Services (NHDES) and the Environmental Protection Agency (EPA) under ARRA for $400,000. This subgrant will be used to complete the exterior environmental investigations and clean up of the Troy Mills as part of the approved Remedial Action Plan.

Recently, the project applied for and was awarded a USDA Rural Business Enterprise grant for $29,000. This grant will facilitate a study to determine the feasibility of a 50,000 square foot vertical farm at the site.

The project supports the CEDS goals to prepare for future development; balance housing opportunities with trends in income, employment and community character; strengthen the economic base; and support the climate for helping to create a diverse range of employment opportunities.

Antrim Mill Redevelopment

The former Goodell Factory in Antrim is being transformed into the “Antrim Mill” business complex. The development plan began in response to a visioning process held by the Town, and the redevelopment is supported in Antrim’s current Master Plan.

The Goodell Factory at one time made cutlery, necessitating a clean-up of the lead-polluted site before redevelopment could occur. With this clean-up now complete, part of the former shop floor space has been converted to office space. The Main Street Office Building has been rehabilitated and offers commercial space for up to six tenants. Among the tenants include the regional prosecutor, a private business, and a residence. The total cost anticipated for the Antrim Mill Redevelopment is expected to reach up to $2.5 million. The Antrim Mill project is active and continues to be a priority in Antrim’s community development plans. The Antrim Mill supports the CEDS goals to prepare for future development; balance housing opportunities with trends in income, employment, and community character; strengthen the economic base, and support a climate for helping business to create a diverse range of employment opportunities.

Downtown Keene Railroad Land Development Project

In the heart of downtown Keene, MEDC plans to construct mixed use (commercial and residential) buildings on the site, to provide green space, to construct at-grade parking spaces reserved for tenants and visitors to the site, to relocate and realign the existing bike path, and to pay for infrastructure improvements that support the project.

MEDC was able to purchase the J.A. Wright building in Keene when it became vacant, which was added to the Keene Railroad Land Development project. Since the last CEDS update, the facility now hosts Southwestern Community Services which is the Community Action Program for the Region. The building had additionally hosted the First Course culinary training program, but this program closed in 2011.

Four buildings have completed construction as of this report. One is a 28-unit senior housing apartment building. The second is a mixed-use building that will have eight residential condominiums and three commercial condominiums. Construction of the third building, a 100-room Courtyard Marriott hotel, has also been completed. There are still three buildable lots remaining to be developed. The Monadnock Market Food Co-operative completed construction and opened in 2013; with 14,000 square feet and employing over 25 individuals it is an excellent addition to the site and represents a $4 million dollar investment. Projects planned for one of the remaining three buildable lots include a mixed-use commercial and housing building. All three sites are under agreement at this time.

The project will ultimately develop seven acres of land that once was the center of activity for the rail industry in the Monadnock Region and now sits vacant. The development plan came in response to a public request for proposals issued by the City. The total cost for the project is estimated to reach $55,000,000. Funding for the project comes from the New Hampshire Community Development Finance Authority (CDFA) through its CDBG program, USDA Rural Development, MEDC's Revolving Loan Fund, a Keene Tax Increment Finance District, a NH Business Finance Authority Guarantee, MEDC procured bank loans, a Green Cap loan, and SWRPC administered Brownfield funds. The project will create new jobs and the income of the new tax increment district will benefit Keene. In addition, the entire Region will benefit from a revived, pedestrian-oriented and small-business focused downtown neighborhood in Keene as the cultural and economic center of the Southwest Region.

A second phase to this development is in the preliminary stages and will be associated with the City of Keene's Industrial Heritage Trail which links business and services to further define the downtown center.

The Downtown Keene Railroad Land Development Project supports the CEDS goals to maintain a high-quality labor force; prepare for future development; balance housing opportunities with trends in income, employment and community character; strengthen the economic base, and support a climate for helping business to create a diverse range of employment opportunities.

Jaffrey Park Theatre

This project entails the restoration of the 1929 Park Theatre building in downtown Jaffrey to create a multi-purpose entertainment space capable of hosting live performances and films, as well as meetings of town, school, and local civic organizations. The project is supported in Jaffrey's current Master Plan.

In early 2006, a 501(c)3 organization formed by a local, grass-roots committee succeeded in raising the funds to purchase the theater building. Fundraising efforts are currently underway to enable the building restoration. A total of $1.7 million is anticipated to be needed to complete the project. According to a feasibility study, the economic benefits of the project will be in the range of four million dollars during the first five years of operation.

As of June 2013, the project changed to the demolition of the theater and construction of a new building. Throughout the latter part of 2012 and into 2013, the theater's trustees worked to revise the site plan and develop a more comprehensive timetable for construction. The demolition is set to take place in September and October 2013 and construction on the building to begin in the spring of 2014. The Park Theatre continues to plan on partnering with Franklin Pierce University to host a Technical Theater Program to train high school and college students in technical theater arts. The partnership is on hold with the changes in plans for the theatre and presidency at the college but is anticipated to happen once the construction is complete.

The SWRPC Brownfields Assessment Program completed the Phase II Environmental Site Assessment (ESA) for the theater in June 2013. The ESA included a geophysical survey to determine if a suspected underground storage tank (UST) was present on the site, some soil boring advancement and monitoring well installation to inspect an area of underground soil and water near a neighboring gas station, and a limited hazardous materials assessment on the structure's roof materials. As a result of the ESA, a 2,000 gallon UST was discovered on the site and subsequently removed using Brownfields Assessment Program funds. The cost of this assessment and removal will be approximately $35,000.

The Jaffrey Park Theater Project supports the CEDS goals to prepare for future development; strengthen the economic base, and support a climate for helping business to create a diverse range of employment opportunities.

Jaffrey Civic Center

The Jaffrey Civic Center is seeking to add an elevator to make its facilities ADA accessible. Adding the elevator will ensure all residents can participate in the myriad cultural opportunities associated with this public space. In addition to the arts and civic programs offered by the Civic Center, increasing accessibility would also allow everyone to access the Jaffrey Historical Society, which operates out of the same building as the Civic Center.

The Jaffrey Civic Center Project supports the CEDS goal to prepare for future development. The total cost for the project is anticipated to reach $260,000; funding will come from a combination of grant sources and private donations. The project is currently working on fundraising and looking at other potential solutions.

Advanced Industrial Park Wastewater Treatment Plant

The Town of Jaffrey is upgrading its facilities with an advanced, industrial park wastewater treatment plant so that it may comply with EPA regulations. This project supports the CEDS goal of preparing for future development; it also supports the retention of hundreds of local jobs in companies dependent on town infrastructure.

At the March 24, 2007 Town Meeting, Jaffrey voters authorized the Town to borrow $12,840,840 to build a new plant; an additional $530,160 in borrowed funds were authorized to cover elements of the project already undertaken, including designing the new facility. Construction on the Industrial Park Water Treatment Plan has been completed; however additional funding was pursued for the Stone Arch Bridge Industrial Park water line extension. The preliminary architectural work has been completed for this phase of the project in 2011. The Stone Arch Bridge Industrial Park water line extension project is anticipated to be completed during the summer of 2013. The total cost of the Stone Arch Bridge Industrial Park water line project is approximately $1.6 million.

Tax Increment Finance District Related Infrastructure Improvement Projects

Tax Increment Finance Districts (TIF) have been formed in a number of municipalities for the purposes of financing local infrastructure projects. TIF Districts support the CEDS goal of preparing for future development.

Current TIF projects related to infrastructure improvement include a water line extension associated with the Stone Arch Bridge in Jaffrey; water, sewer, and road improvements associated with the Monument

Road Industrial Park in Hinsdale; and road improvements associated with the in Swanzey. Plans have been completed for the water line extension in Jaffrey.

In Hinsdale, efforts are underway to attract more businesses to the TIF District to increase the funds available for infrastructure improvements. The Monument Road Industrial Park, which is a 400-acre business park in Hinsdale is located within the Town's TIF District. The Town of Hinsdale approved the appropriation of more funds from the capital reserve fund at Town Meeting in 2013.

In Swanzey, the first phase of the planned road construction is complete, and planning is underway to prepare for the second phase. Within the Swanzey TIF District, which is located within the Town's Industrial Park, construction of the new 36,000 ft^2 state-of-the-art Moore Nanotechnology manufacturing facility has been completed.

Downtown Antrim Water Flow Improvement

The Town of Antrim is investing $120,000 to perform water flow improvement projects in their community. This project supports the CEDS goal of preparing for future development.

A new water line on Summer Street and work on North Main Street have been completed. Work remains to be done on Highland Avenue; this project is identified in the Capital Improvement Plan for the Town.

As of this report, the project for Highland Avenue and Pleasant Street has altered to work on the drainage and water flow. A warrant article for $40,000 for the engineering work was presented at the 2013 Town Meeting and passed. The funds for the project will be coming from the general operations account. It is unknown at this time when the work will begin or how long it will take to complete.

Rindge Broadband Initiative

The Town of Rindge Telecommunications Committee continues to work on their charge of bringing high speed internet capabilities to local residences. This project supports the CEDS goal of preparing for future development.

The Rindge Telecommunications Committee draws members from a variety of local stakeholders, including Town officials as well as interested citizens. Franklin Pierce University, which is located in Rindge, helps facilitate and provides technical expertise to the Committee. The goal is to increase access for Rindge residents and businesses.

This initiative is still ongoing. Since the last Annual Report, Verizon has expanded services in the area. The Committee is also continuing discussions with Argent Cable regarding their ability to provide services to the residents of Rindge. They hope to have a multiple providers to choose from within the town. Additionally, the initiative has supported the development of the FastRoads project, which will bring last-mile connections to the residents of Rindge. The goal then will be to see how to leverage funds to help other un-served and underserved areas.

Age Restricted Active Adult Housing Initiative

Franklin Pierce University has been actively considering adding an age-restricted, active-adult housing community on a portion of the University's land holdings in the Town of Rindge. This project supports the CEDS goal to balance housing opportunities with trends in income, employment and community character.

Rindge, along with the State of New Hampshire as a whole, is experiencing an increase in the average age of its population. The Housing Initiative undertaken by Franklin Pierce addresses this trend by providing a housing opportunity geared toward the anticipated booming age bracket. The University intends the development to provide more than simply a place to live, as residents of the new units will be encouraged to engage with the University community through a variety of academic, athletic, and cultural opportunities.

As of this report, this project this project is currently on hold due to the economic conditions; however it has been made a part of the Rindge Economic Development Action Plan.

Winchester Wastewater Improvements

This project was moved from the Planning list to the Short-term Priority Projects list. This project has two phases and is being funded with ARRA, a SRF loan, and property taxes. Phase I started in May 2010 and is nearly complete. The total cost for Phase I is $3.9 million. Phase I encompassed the majority of the project, and included new clarifiers, newly designed oxidation ditches, new septic receiving facility, new centrifuge, new headworks and watering equipment, new tanks and pumps, an electrical update, and a new generator. Phase II is estimated to cost $545,500 and will begin in the spring of 2012 with completion expected during the summer of 2012. Phase II includes the demolition of the old headworks, addition of new influent pumps, clarifier covers, lining of the oxidation ditches, ionization for new headworks, upgrades to the lab facilities, and upgrades to the air systems.

The Town determined that the centrifuge that was installed is smaller than the required size and has caused the Town to go to court to remedy the situation. The installation of a larger centrifuge is the final part of this phase of the project. The completion of the project is contingent on the results of the court case and the installation of the larger centrifuge.

NH FastRoads

The NH FastRoads project is a collaborative effort of the New Hampshire Community Development Finance Authority, the Monadnock Economic Development Corporation, the thirty-five towns of the Southwest Region, and WCNH.net (the eight towns of west central New Hampshire). The goal of the effort is to help ensure that the businesses, institutions, and residents of the Region have adequate broadband infrastructure to support jobs and sustainable economic development. The FastRoads project compliments the NHBMPP as its focus is deployment of broadband infrastructure.

As of the time of this report, this project is nearly complete. The new 250-mile fiber network which runs from Orford to Rindge is 95% completed and will be "lighted" in phases starting this summer and extending in to early next year. The network runs fiber-optic cable through 235 hubs, including schools, hospitals and municipal buildings. The “middle mile” network will connect to local networks rather than individual customers to provide broader infrastructure to small, rural towns and service providers would connect to homes and businesses. The “last mile” portions of the network will directly connect to 1,300 homes and businesses in underserved Rindge and Enfield. FastRoads is an open-source wholesale system that any provider can tap into then sell the service to homeowners and businesses. They have partnered with Sovernet and WiValley to provide access; three more service provider agreements are in the process.

Cheshire County Courthouse Expansion

As part of its efforts to keep all Cheshire County and current State court functions in the City of Keene, Cheshire County, the City of Keene and Monadnock Economic Development Corporation are partnering together to expand the existing courthouse building at 12 Court Street by building vertically on the existing site. An addition is proposed above the existing parking lot. This addition will include three levels including a level for the District Court, a level for the Superior Court and a ground-level parking lot.

The project is currently under construction, and is on budget and on schedule. It is anticipated to be completed in December 2013.

VI. Evaluation

This section provides a description of the methodology for evaluating the Southwest Region CEDS program on a quantitative and qualitative basis. The evaluation includes three separate areas: the CEDS Implementation Process, the CEDS Goals and the CEDS Priority Projects.

1. Evaluation Methodology

The Evaluation Methodology includes both quantitative and qualitative measures. Quantitative measures will reflect such indicators as numbers of participants, number of completed projects, the number of requests for information and other measurable results. As time progresses, SWRPC will be able to fine-tune these quantitative measures and evaluation criteria to better gauge success and determine which measures to use.

Qualitative measures are more descriptive and not as "black and white" as quantitative measures. While quantitative measures are judged on numbers, qualitative measures simply state the opinion of the evaluator, in this case, the CEDS Advisory Committee or SWRPC staff. Nonetheless, it is important to utilize both measures because numbers do not tell the whole story in evaluating programmatic efforts.

2. Evaluation of CEDS Implementation Process

The three critical components of the CEDS Implementation Process are the Levels of Participation, Data Development and Dissemination, and CEDS Marketing and Outreach. The quantitative and qualitative measures and evaluation criteria for each of these components are as follows:

A. Levels of Participation

During the course of each year, SWRPC will be scheduling four CEDS Committee meetings as well as two public meetings. These meetings can be scheduled in conjunction with other CEDS economic development stakeholders in the region. As part of the public meetings, SWRPC will use an evaluation form to determine how the participants judged the session.

Participation at the CEDS Advisory Committee meetings and Public Forums is critical to the continuing success of the CEDS program. SWRPC needs to attract, through its recruitment and outreach efforts, people from various backgrounds with a stake in economic development to maintain the public nature of the CEDS process.

The current CEDS Advisory Committee membership represents the major interests of the community and reflects the demographic and social make-up of our Region. To ensure that viewpoints of all sectors of the community are considered in the future, efforts will be made by the Advisory Committee to further diversify the interests represented by reaching out to those groups and organizations that represent residents that are traditionally underrepresented in local decision making processes.

Quantitative Measures: Attendance at CEDS Committee meetings and public meetings; number of evaluation forms submitted.

Qualitative Measures: Survey of CEDS Committee members; Opinions and subject matter from evaluation forms on public meetings, affiliation of participants; updated mailing list.

Evaluation Criteria:

1) CEDS Advisory Committee meeting:

   10+ attendees (excellent).
   6-9 attendees (good)
   <6 attendees (needs improvement)

2) Public meeting:

   30+ attendees (excellent)
   15-29 attendees (good)
   0-14 attendees (needs improvement)

   75%+ evaluations completed (excellent)
   50%+ evaluations completed (good)
   < 50% evaluations completed (needs improvement)

B. Data Development & Dissemination

SWRPC provides data to the general public and local communities on an ongoing basis. The additional role related to the CEDS complements the efforts SWRPC already makes to keep the public and member communities apprised of new data impacting the Region. Among the data provided are U.S. Census figures, local and regional traffic counts, labor market information, housing affordability information and GIS maps. SWRPC provides this information by telephone, mail and on its web site: www.swrpc.org.

Quantitative Measures: Requests for data and information; types of information being requested; copies of the CEDS requested; and requests for presentations.

Qualitative Measures: Level of data available; information on the web page; mailings to local communities; and quality of data available.

Evaluation Criteria:

25+ annual requests and referrals (excellent)
15+ annual requests and referrals (good)
< 15 annual requests and referrals (needs improvement)

C. CEDS Marketing & Outreach

SWRPC will maintain ongoing marketing and outreach efforts to promote the CEDS. Presentations will be made to Boards of Selectmen and to various businesses, social, and community groups upon request. The CEDS document will also be on the SWRPC web site.

Quantitative Measures: Number of presentations before government, business, social and community groups; number of mailings sent to economic development stakeholders in the region related to the distribution of the CEDS or public meetings.

Qualitative Measures: Level of success in making presentations; additional contacts made as a result of marketing and outreach; and feedback from CEDS Committee members on CEDS document and presentations.

Evaluation Criteria:

5+ annual presentations or events (excellent)
2-3 annual presentations or events (good)
< 2 annual presentations or events (needs improvement)

3. Evaluation of Goals and Objectives

Establishing quantitative and qualitative measures for the CEDS Goals and Objectives is more difficult to accomplish than those for the CEDS implementation process. Until there is sufficient programmatic experience, it is difficult to determine what the evaluation criteria should be, particularly in terms of total dollars or jobs created. Having gained a couple years' experience, however, the 2005 Evaluation Criteria have been revised for the 2007 CEDS Update. Outlined below are quantitative and qualitative measures and evaluation criteria for each Goal within the 2007 CEDS:

Goal A: Maintain a high-quality labor force.

Quantitative Measures: Number of new training programs; increase in number of trainees; and number of additional companies serviced.

Qualitative Measures: Integration of economic development and labor force development systems; new labor force development programs to address unemployed and underemployed; responsiveness to layoffs in the region and new training programs designed to address future labor market needs.

Evaluation Criteria:

1) Number of active programs providing labor force training, including entrepreneur training programs, internship programs, and vocational programs.

5+ (excellent)
2-4 (good)
<2 (needs improvement)

2) Annual enrollment in programs providing labor force training.

100+ (excellent)
50-99 (good)
<50 (needs improvement)

Goal B: Prepare for future development.

Quantitative Measures: Number of municipal land use regulation and policy updates that help protect the region's natural, cultural and historic resources and encourage concentrated development ("smart growth"); amount of open space preserved; number of DOT projects funded; number of updated municipal capital improvement plans; number of new Tax Increment Finance Districts (TIF).

Qualitative Measures: Municipal "Smart Growth" initiatives; transportation improvement projects moved forward; improved travel time along the highways and roadways; quality of travel; travel to work information; and increased water and sewer capacity.

Evaluation Criteria:

Annual municipal capital improvement, transportation, and zoning and land-use regulation activities related to future development.

12+ (excellent)
6-11 (good)
< 6 (needs improvement)

Goal C: Balance housing opportunities with trends in income, employment and community character.

Quantitative Measures: Number of municipal land use regulation and policy updates that help increase housing production; number of new housing units; number of new residential building permits.

Qualitative Measures: Response from business community on housing needs; general newspaper articles; housing values; and non-profit housing activities in the region.

Evaluation Criteria:

1) Annual number of new residential units.

   600+ (excellent)
   401-599 (good)
   <400 (needs improvement)

2) Median rental housing cost is affordable to median income household.

   Median rental housing costs require less than 30% of the median household income (good)
   Median rental housing costs require spending 30% or more of the median household income (needs improvement)

3) Homeownership opportunities are available for median income households.

   At the time of evaluation, the annual average sale price—as collected from Realtor Association data—will be compared to HUD median income figures for the same time period as available at the time of evaluation. Using the Bloomberg-determined average 30-year fixed interest rate for that time period, based on a 20% down payment, and disregarding property taxes or any additional home ownership costs, the income and price figures will be examined to see if a median income household can afford monthly mortgage payments on the average home sale price.

   Monthly mortgage for the average home sale price requires less than 30% of the median household income (good)
   Monthly mortgage for the average home sale price requires spending 30% or more of the median household income (needs improvement)

Goal D: Strengthen the economic base.

Quantitative Measures: Number of new small business incubators and business support programs; number of new businesses; number of tourists.

Qualitative Measures: Identification of additional economic development needs; establishment of permanent CEDS Committee and increased financial support for economic development projects in the region; cooperation between businesses and institutions of higher education; enhanced tourism-related opportunities.

Evaluation Criteria:

1) Net annual number of new businesses.

   30+ (excellent)
   15-29 (good)
   <15 (needs improvement)

2) Identify incubators in the Region, their industry sector of activity, the number of tenants they currently host, and the success rate of their graduates.

   Information gathered for all incubators in the Region (excellent)
   Information gathered for the majority of incubators in the Region (good)
   Failure to identify and assess the activities of the majority of incubators in the Region (needs improvement)

Goal E: Support climate for helping business to create a diverse range of employment opportunities.

Quantitative Measures: Number of municipal land use regulation and policy updates (regarding location and required lot sizes) that help commercial and industrial development; number of new start-ups from incubator space; number of new jobs created; number of layoffs within the Region; number of unemployed in the region; number of residents below 80% of the area median household income.

Qualitative Measures: Reputation of area as a place to invest private funds; ability to complete projects; public-private partnerships; collaboration among public agencies; leveraging private investments and eligibility for funding.

Evaluation Criteria:

1) Annual major municipal business related land-use regulation and policy updates.

   5+ (excellent)
   3-4 (good)
   < 3 (needs improvement)

2) Annual number of businesses initiated by public-private partnerships.

   5+ (excellent)

3-4 (good)
< 3 (needs improvement)

Goal F: Promote the concept of Regionalism.

Quantitative Measures: Public outreach, presentations and events on Regionalism; number of inter-municipal resource-sharing agreements and collaborative projects.

Qualitative Measures: Enhanced cooperation of regional organizations and agencies; increased public participation in CEDS meetings.

Evaluation Criteria:

Annual number of presentations and events on Regionalism.

5+ (excellent)
3-4 (good)
<3 (needs improvement)

Goal G: Strengthen local governments.

Quantitative Measures: Number of residents volunteering for municipal governance; number of training sessions for volunteer and professional staff.

Qualitative Measures: Better decision-making; more efficient municipal administration and service delivery.

Evaluation Criteria:

1) Annual number of training sessions for municipal volunteer and professional staff.

5+ (excellent)
3-4 (good)
<3 (needs improvement)

2) Annual number of municipal volunteer and professional staff trained each year.

75+ (excellent)
50-74 (good)
>50 (needs improvement)

3) Annual number of inter-municipal resource-sharing agreements and collaborative projects.

5+ (excellent)
3-4 (good)
<3 (needs improvement)

Goal H: Strengthen the quality of health services.

The CEDS Advisory Committee decided not to address health services as an issue that warrants special attention at this time. Subsequent CEDS updates will revisit the issue, because of its importance for the prosperity of the Region.

4. Evaluation of CEDS Priority Projects

The CEDS Priority Projects represent a major component of the overall CEDS effort. These projects are funded through multiple sources and each one addresses a specific goal or goals within the CEDS. These projects are important to the local communities and non-profit agencies that sponsored them and have been included because they help move the Southwest Region closer to its Vision. In essence, this component will be deemed to be successful if projects are implemented, there is movement along the Short-Term, Medium- and Long-Term project priority lists, and new projects are submitted each year.

Quantitative Measures: Number of projects implemented; number of EDA projects funded; number of projects moving from the Long-Term lists to the Medium and Short-Term lists; number of new projects submitted; number of jobs created.

Qualitative Measures: Quality of projects moving forward; types of new projects submitted; goals addressed in new projects; and number of EDA projects submitted.

Evaluation Criteria: Annual number of projects initiated.

3+ projects (excellent)
2 projects (good)
1 project (needs improvement)

Evaluation Criteria: Annual number of projects completed.

2+ projects (excellent)
1 projects (good)
0 projects (needs improvement)

5. Analysis of Regional Economy

The analysis of the regional economy, including its strengths, weaknesses, opportunities and threats, constitutes the basis for the work of the CEDS Advisory Committee. There is a direct link between examining current conditions and developing goals, objectives and tasks that will help strengthening the Region. Because of this link, the Advisory Committee will revisit the State of the Region chapter of the CEDS document on an annual basis to update such relevant data as employment numbers and plant closures. Significant changes in the regional economy will make a discussion of strengths, weaknesses, opportunities and threats necessary, which will require an update to the current goals, objectives and tasks, and a review of proposed projects and programs.