



2023 Comprehensive Economic Development Strategy

A look into the economic landscape of New
Hampshire's Lakes Region (Draft August 2023)

Lakes Region Planning Commission
March 13, 2024

What is a CEDS?

A Comprehensive Economic Development Strategy (CEDS) is an action plan developed by a group of local representatives from the private, public, and nonprofit sectors to identify regional priorities for economic and community development.

The CEDS is a foundational requirement for designation of the region as an Economic Development District (EDD) through the US Economic Development Administration. Designation of the Lakes Region as an EDD opens up a variety of possibilities for community and economic development. First and foremost, the region becomes eligible for EDA funding assistance for planning and infrastructure grants which leads to job creation and a reduction in economic distress conditions such as low per capita income, high unemployment, out-migration, sudden and severe job losses, and natural disasters.

The CEDS Workgroup builds relationships among local partners to implement the actions in the CEDS plan for meeting identified measures for economic and community development.

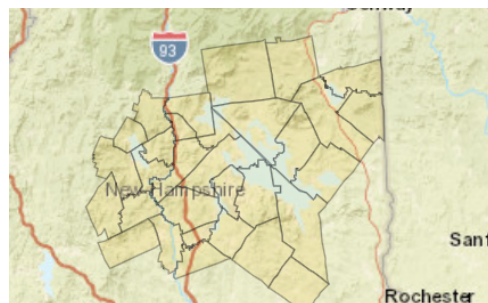
The Process

There are several steps in the development of the Lakes Region CEDS:

1. Develop a **Summary** of *Economic Conditions* for the Lakes Region.
2. Conduct a **SWOT Analysis**, identifying regional *Strengths, Weaknesses, Opportunities, and Threats*.
3. Create an **Action Plan** by identifying *Goals, Objectives, Strategies, and Actions* through a planning process that incorporates stakeholder feedback.
4. Create an **Evaluation Framework** to *identify and monitor performance measures* associated with the plan.

CEDS Vision Statement

Recognizing the critical importance of maintaining and nurturing our natural environment and diverse cultural heritage, the Lakes Region Community will strive to improve its cities' and towns' quality of life through its businesses' increased capacity and prosperity, civic, social, and education institutions, and its citizens. All our efforts will be characterized by respect, communication, cooperation, and integration with others and will exhibit stewardship toward our magnificent natural resources.



Esri, HERE, Garmin, NGA, US... Powered by Esri

New Hampshire's Lakes Region Location Map





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Summary Background

Located in the center of New Hampshire, and encompassing more than 40% of the state's surface water, the Lakes Region provides a wide variety of opportunities for people. Opportunities for recreation, business, housing, and community involvement abound here. The Lakes Region has a long history. As with most regions, there are some obstacles that need to be identified and

addressed to help the region move forward towards an even brighter future.

The Lakes Region is like other rural New England vacation destinations with seasonal tourism, an active recreational community, and an older year-round population. However, five major industries help to define the region, including manufacturing. The top 5 industries employ skilled and unskilled workers in large numbers, although most industries are experiencing labor shortages. Skilled workers are exceptionally well compensated for their knowledge and technical ability since they exist in smaller quantities and are highly sought after. With an older population, lower wages, and higher housing costs in the Lakes Region, it is difficult to find workers for unskilled positions as these jobs usually suit teenagers and people in their 20's as a means of gaining work experience. One primary reason unskilled wages remain low is that this group of workers is increasingly being replaced by mechanization, artificial intelligence, and cheaper seasonal workers.

A large percentage of income is spent on housing, both owning and renting in the Lakes Region. Therefore, most people cannot afford housing sustainably. Lakefront housing is more extravagant and geared toward seasonal occupancy, retirees, and vacationers.* Inland housing is more suited for the Lakes Region's full-time residents with more modest incomes as wage-earning participants in the regional economy.

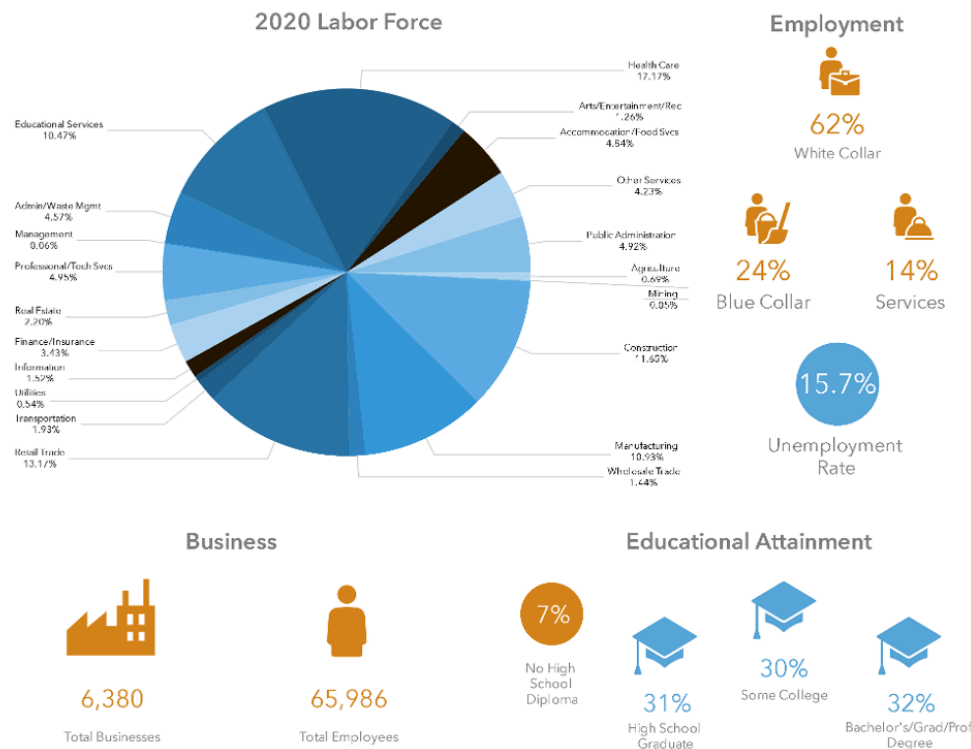
The demand for technology is relatively low in the Lakes Region as part of a lifestyle choice (*Market Profile, The Great Outdoors Tapestry Segment, ESRI, 2020*). The combination of older residents and poor broadband access deter influxes of new technologies. Additionally, consumers in the area have a desire to spend money on life experiences.* On average, the Lakes Region population prefers to spend their time and resources fishing, hiking, biking, and boating. Investing in preserving natural resources, such as hiking trails and public waterways, is paramount to promoting the region's future environmental prosperity. The Lakes Region is vulnerable to shifts in weather patterns, and ecological degradation poses a severe and irreversible threat to the region's long term resiliency.

Parts of the Lakes Region offer serene rural settings, beautiful natural scenery, old fashioned way of life, and timeless outdoor recreation opportunities; yet, for quality of life to be maintained, the region faces economic pressures to modernize, diversify through the new economy, and increase broadband access, but these changes may be met with resistance because they clash with some residents' understandings of local culture and identity, or the immediate needs of retirees/seasonal residents (versus younger/working class).

Housing affordability and environmental preservation must be prioritized to sustain many residents' lifestyles around the lakes. Building upon existing industry and talent networks to strengthen the region's labor force and economic diversification is essential to fostering growth and maintaining its standard of living in the long run.

**Note: The COVID-19 pandemic has been impacting the economy of the Lakes Region in several ways, making this CEDS report all the more timely and important. Social distancing has led to a steep reduction in service businesses such as restaurants, events, and temporary lodging. On the other hand, there has been an increase in people moving to the area, a commensurate need for services including broadband, and more pressure on the housing market.*

The Economic Profile



Source: This infographic contains data provided by Esri, Esri and Infogroup, U.S. Census, American Community Survey (ACS), Esri and Bureau of Labor Statistics. The vintage of the data is 2010, 2020, 2025, 2014-2018.

Employment and Industry: Healthcare Supports Older Demographic

The Lakes Region Planning Commission's (LRPC) purpose is to promote the economic development and environmental preservation of 31 municipalities in central New Hampshire. The Lakes Region is home to 6,380 businesses that support 65,986 hard-working, diligent employees. The top five industries in the Lakes Region are Healthcare (17%), Retail Trade (13%), Construction (12%), Manufacturing (11%), and Educational Services (10%). The regional economy is highly concentrated around these five industries as they make up 63% of the total economy.

As many as 62% of jobs in the region are considered white-collar jobs. The remaining 38% of employees have jobs defined as blue-collar (24%) or service related (14%) jobs. ESRI, our data collection and analysis tool, determines which jobs are classified as white-collar, blue-collar, and service here (scroll to the bottom). The unemployment rate reached 15.7% due to the employment implications of COVID-19 especially affecting the service and retail industries, but historically unemployment is much lower. Throughout the pandemic, white-collar work has been more resilient, with many companies adopting a work from home

platform. Naturally, blue-collar and service work is hands-on and in-person. Employees and businesses in both segments are more negatively affected by COVID-19 and social distancing guidelines.

Healthcare is the largest sector of the Lakes Region economy. With an older population, it is imperative to have the health infrastructure to meet the population's needs. In terms of economic development, healthcare is a consumer good and does not directly promote growth; however, it is essential to maintaining a functioning workforce and contributes to growth residually. Healthcare attracts new technologies and requires innovative and adaptive labor.

Retail Trade and **Construction** contribute to the tourism industry. The tourism industry revolves around the seasonal influx of both second homeowners and short-term renters. The construction industry builds second homes and also restores retail space for local, regional, and national retailers to get their product to consumers. Both industries require a blend of white-collar managers and blue-collar workers. Companies with a vision employ construction companies to build creative, interactive, and fun spaces to attract and retain a healthy customer flow throughout the season.

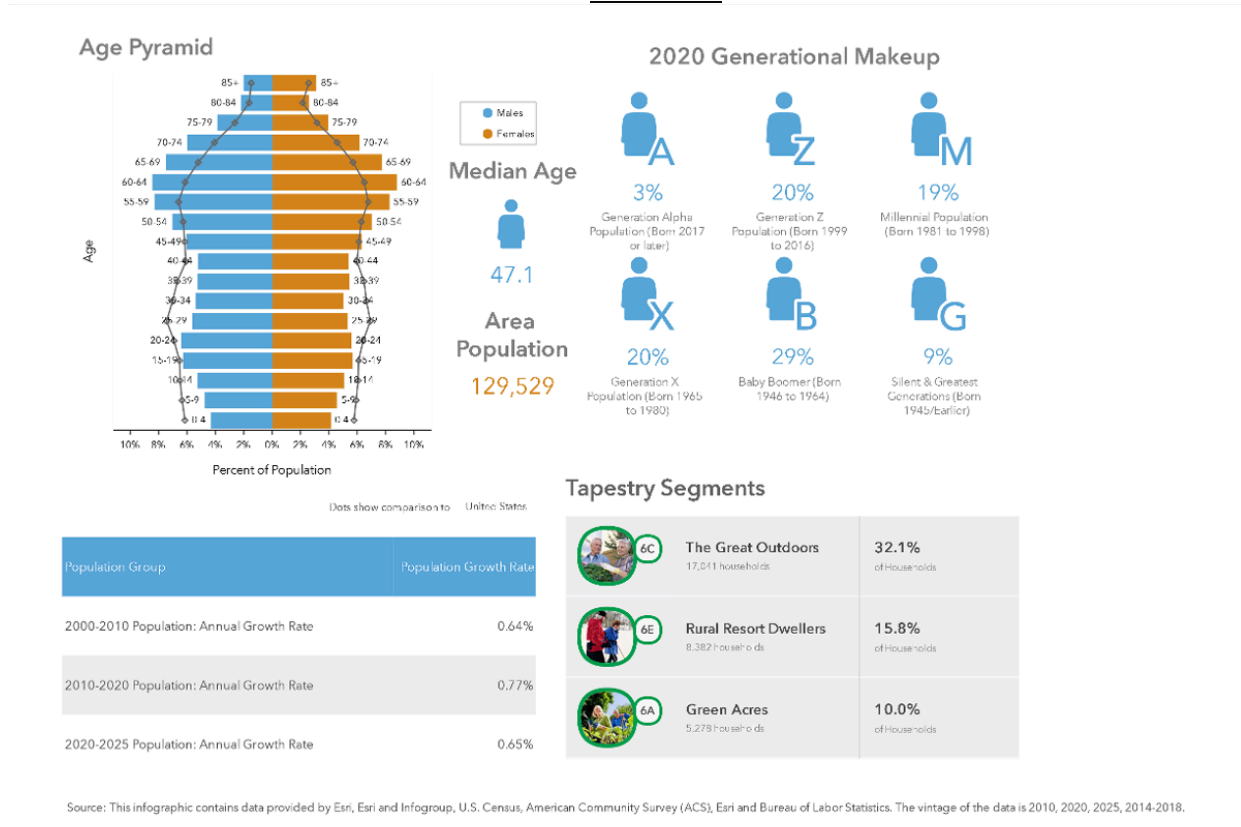
Manufacturing employment is a declining, but vitally important component of the Lakes Region economy. Manufacturing helps to diversify employment opportunities and attract highly specialized workers to the area, such as engineers. A diverse labor force and economy safeguard economic prosperity in times of downturn. Manufacturing is a crucial component of regional economic resiliency. Workers are highly compensated for their technical skillset; thus, manufacturing workers are some of the highest wage earners in the region.

Education is a driving factor in both industry development and employment. The Lakes Region has successfully tapped into the education industry as a significant driver to the regional economy. The region is world-renowned for its dozens of summer camps around the lakes and its high concentration of elite prep schools throughout the area, including Brewster Academy, Tilton School, Holderness School, Proctor Academy, and New Hampton School, to name a few. With the presence of elite secondary schooling, many alumni will study at select colleges and

universities. Hopefully, the high school alumni will have an affinity for the Lakes Region and return with higher education and bring wealth to the Lakes Region.

For Town-Level Economic Profile Infographics, [click here.](#)

To see a Sub-Regional Economic Profile for your town and surrounding communities, [click here.](#)



Population and Age: "Experience Driven Consumers"

The median age of the Lakes Region is 47.1 years old across the 129,529 people that call this area home. Compared to the U.S., the median age of the Lakes Region is 8.6 years older. The Lakes Region is a typical hotspot for older people as the rural environment offers a quiet and peaceful lifestyle and the lake and mountain amenities offer abundant year-round leisure and recreational opportunities. Some residents are native to the area, but others migrants flock from cities as they approach retirement age. The retirement population is very significant because it is similar in size to the working-age population creating bifurcated economic development goals. Retirees are more interested in preserving the quality of life and the serenity of the lakes. In

contrast, the working population wants to create better opportunities and earn higher wages. While on the national level Millennials have surpassed Baby Boomers as the largest generational cohort, the Baby Boomer generation is the leading generational group in the Lakes Region (29%), compared to the relatively small Millennial segment (19%).

Population growth in the Lakes Region, which has been stagnant since 2000, increased by less than 1 percent **per decade** over the past two decades and is expected to do the same for the next five years. In contrast, the entire U.S population has grown faster at less than 1 percent **per year** during the same time.

However, New Hampshire is experiencing higher migration rates from neighboring states. It has developed a reputation for a desirable place to live (*UNH Carsey School, Johnson & Bundschuh, Why People Move...*). Additionally, the COVID-19 pandemic has led many to relocate to the Lakes Region, either inhabiting a second home year-round or purchasing a new property. **This trend has increased property values and worsened the affordable housing problem for lower and middle income wage earners in the region.**

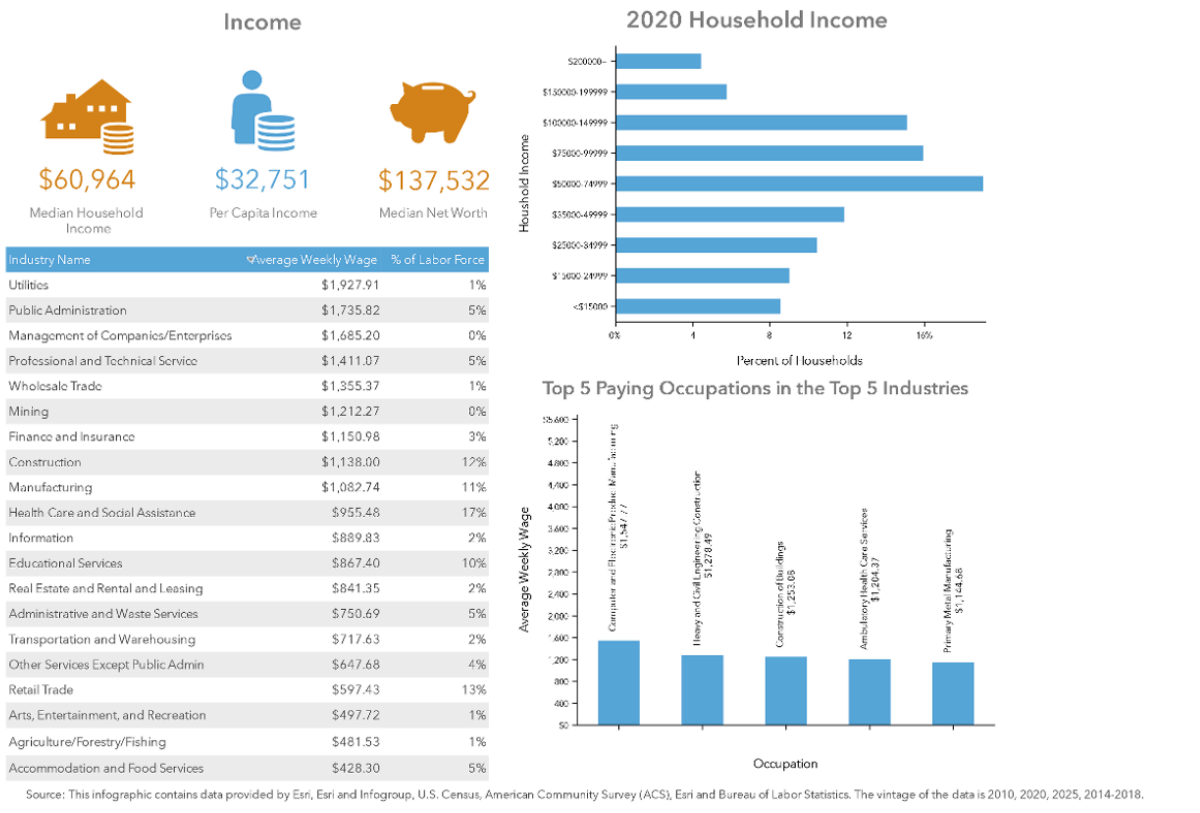
Tapestry segmentation is a descriptive method that uses hybrid quantitative and qualitative analyses to create household and neighborhood classifications based on demographics, socioeconomic factors, and lifestyle characteristics. The largest tapestry segment for the Lakes Region is The Great Outdoors, composing 32.1% of households in the area. The next largest segments are Rural Resort Dwellers and Green Acres that comprise 15.8% and 10%, respectively. Throughout the Lakes Region, dozens of more tapestry segments encompass all people residing in the region. Please click the name of the segment to learn more about it. They are listed below:

- Comfortable Empty Nesters,
- Dorms to Diplomas,
- Front Porches,
- Heartland Communities,
- Home Improvement,
- In Style,
- Midlife Constants,
- Old and Newcomers,
- Parks and Rec,

- Rooted Rural,
- Salt of the Earth,
- Silver and Gold,
- Small Town Sincerity,
- Southern Satellites

To see the infographic for your town, [click here](#).

To see the infographic for your sub-area, [click here](#).



Income: High Skill Receives High Compensation while Retail Industry Suffers Losses

Among the top 5 earning occupations, two are in the manufacturing industry, two are in the construction industry, and one is in the healthcare industry. Usually, top wage-earning fields reflect limited labor supply for a highly specialized job. Of the top five highest paying occupations, four contain a small number of employees and a high degree of compensation. The outlier, Ambulatory Health Care Services, has average annual employment of about 2,000 people (much higher than the other four) with an average weekly wage of \$1,204.37. Additionally, people in the Lakes

Region supplement income through investments from both interest and dividends.

Retail Trade, one of the Lakes Region's leading industries, is declining in wage earnings and employment. As aforementioned, retail trade is the lifeblood of the tourist economy. Since 2010, the industry has experienced a 1.5% decrease in employment and a devastating 61.6% decrease in overall earnings (<https://headwaterseconomics.org/>). The decline in earnings is detrimental to those who work in the industry to make a living. Workers depend on their wages to pay for housing, groceries, and care for themselves and their families.

The top 5 industries, in terms of the labor force, are not the highest wage-earning industries. The top 5 average wage-earning industries only make up 12% of the labor force. Judging that compensation is awarded to those with narrowly available skill sets, it makes sense that those individuals are better paid; however, it does not represent most people that live in the region. On average, the driving industries in the regional economy earn wages in the middle compared to all the industries. As aforementioned, some of the top five industries' occupations earn wages that are on par with some of the highest average wages in the region.

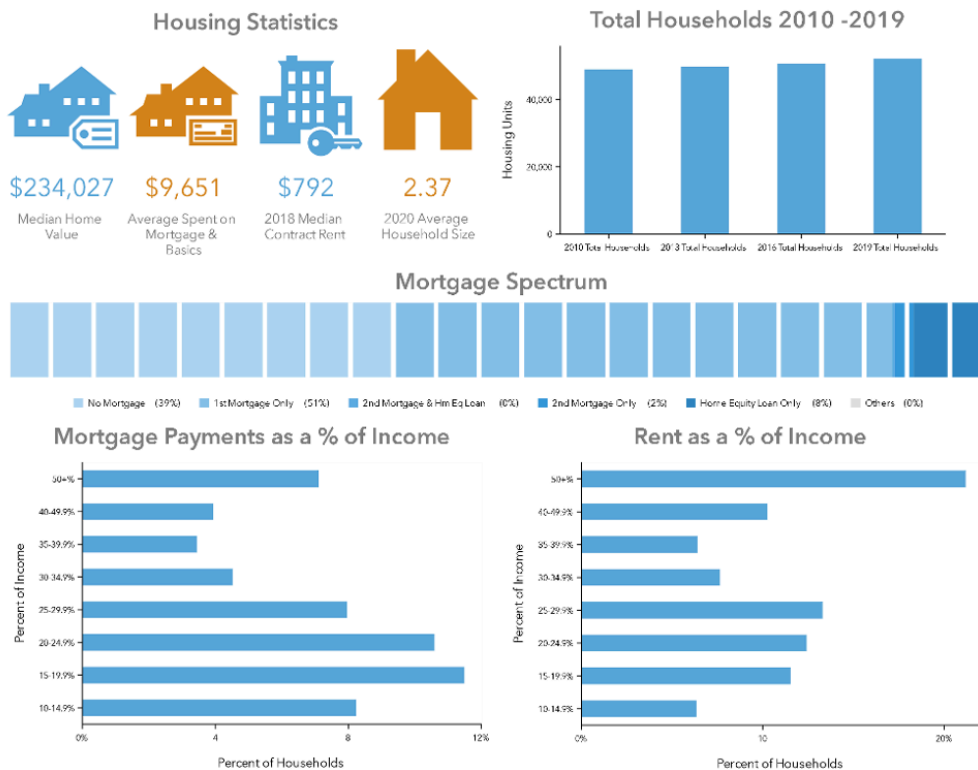
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Housing Needs and Availability



Source: This infographic contains data provided by Esri, Esri and Infogroup, U.S. Census, American Community Survey (ACS), Esri and Bureau of Labor Statistics. The vintage of the data is 2010, 2020, 2025, 2014-2018.

Housing: Limited Supply and Second Home Demand Raise Price while Income Remains Below Average

As of 2020, the median home value in the Lakes Region was \$234,027. On average, households spent \$9,651 on their mortgage payments and other essentials like maintenance and utilities. The median gross rent is \$792 per month. Across New Hampshire, median home value is much higher (\$272,842), and mortgage and other essential payments are also higher (\$11,882). Median contract rent is higher in New Hampshire (\$951) than in the Lakes Region. Although this may lead one to believe that the Lakes Region is a cheaper place to live, per capita income is lower in the Lakes Region than the New Hampshire statewide average. Median housing prices are less expensive in the Lakes Region; however, individuals are also earning less, so affordability remains an issue for those whose income is strictly from wages.

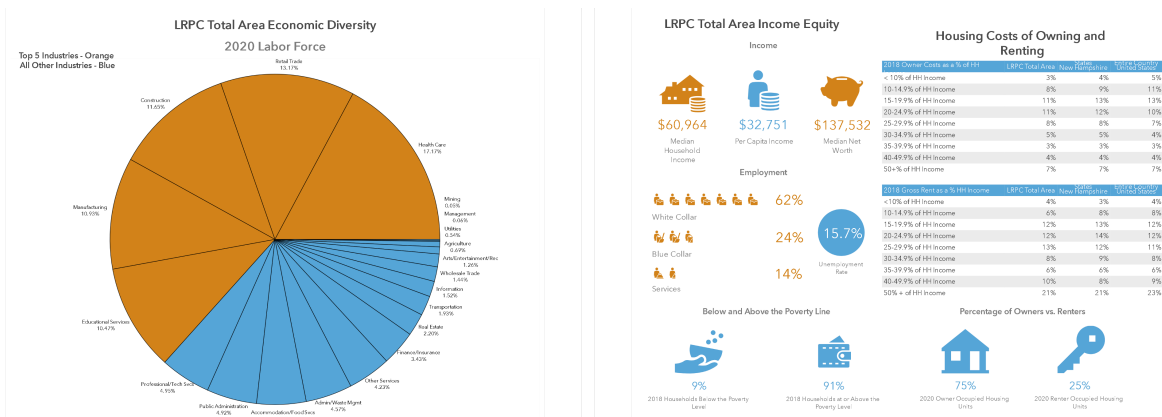
Affordability guidelines state that housing payments should compose a maximum of 30% of your income to be financially sustainable. By these standards, 38% of homeowners can afford their mortgage sustainably. The remaining 62% of owners are spending too much on their mortgage payments. Additionally, only 43% of renters can afford their rental payments, and a staggering 21% of renters are paying more than 50% of their

income in rental costs. Across New Hampshire, 42% of homeowners can afford their mortgage payments, and 47% of renters can afford their rental payments. As compared to the state, people in the Lakes Region have difficulty with housing costs. Housing affordability is a two-part problem: lower income levels for full-time residents and second-home construction driving up housing prices in the region. For a more in-depth and even more recent analysis of the Lakes Region Housing market, please follow this link to the 2023 Lakes Region Housing Needs Assessment (add link).

Housing construction has been slow. Only 3,195 units have been built over the last decade which accounts for only 3% of the total housing supply. Most of the housing supply (38%) was either built before 1939 (19%) or between 1980 and 1989 (19%). In the Lakes Region, the median year for housing construction is 1978. Older homes are often more expensive to maintain because they require repairs and maintenance, such as a new roof or a new heating system. Upgrading homes to be more energy-efficient makes them cheaper to maintain. Still, the fixed cost to upgrade is steep and is often a deterrent. A relatively recent decline in alternative energy including solar panels combined with new government tax incentives and rebates are creating new incentives for residences and communities to consider investing in renewable energy systems.

To see the infographic for your town, [click here](#).

To see the infographic for your sub-area, [click here](#).



To maximize this infographic's usability, please use full-screen mode (arrows in the top right corner) and the slider in the middle to compare the information on both figures.

Economic Resilience

The concept of resiliency has mostly superseded the idea of sustainable development within regional planning over the last decade or so. At its most basic level, resiliency is a measure of how strong a community is in the face of adversity and how well a community and its people are prepared to undergo a crisis, or even a disaster, and bounce back from it.

Economic resiliency can then be thought of as the strength of the regional economy, its stability, and its vulnerability to economic shocks.

One measure of economic resiliency is certainly economic diversification, the idea that it is not a good strategy to have all of your eggs in one basket. In a regional economy, this translates into the composition of employment and industries. If your regional economy is overly reliant on any one industry, then you are vulnerable to economic shocks to that industry that could undermine the entire economy.

In the Lakes Region, our economy is more resilient than most economies that are primarily focused on tourism. One clear advantage that the region has is a concentration of manufacturing employment which is considered an export industry capturing wealth from outside the region even in times of poor economic performance. The region has some other employment concentrations in educational services which include a wide variety of prep schools and summer camps that capitalize on the region's beauty and quality of life.

Up for debate is the impact of second homes on the region's resiliency. Certainly, second homes are a major part of the region's tax base and generate a large percentage of the region sales with income that is generated outside the region. Traditionally, it has been believed that second homeowners do not require much in the way of town services nor add expenses like students to the school system.

However, the analysis becomes much more complex when you consider the divide between second homeowners, especially with the lakefront property and year-round residents. These groups tend to have different community development objectives, housing concerns and environmental protection goals. This

bifurcation of goals can impact the region's stability, and resolve for long-term planning undermining future economic performance. Our goal, through the CEDS planning process, is to identify the region's opportunities and challenges and chart the most productive way forward to improve the economic futures of the region's residents. We will continue to seek common ground among the many stakeholders in the Lakes Region.

Despite the relatively low poverty rate, there are areas with poverty rates that are higher than the state average.

SWOT Analysis

Strengths

- **Natural/Scenic Resources:** Natural beauty is a strength of the area that retains and attracts residents, fuels the tourist economy, especially in the summer and fall
- **Tourism:** Influx of visitors into the region during times when scenic resources are most potent and outdoor recreation opportunities are most abundant
- **Community Goals:** Passionate members focused on preserving their community and the environment (Ex. Walkable communities benefit both young and older adults)
- **Seasonal Workforce*:** The workforce contracts and expands to accommodate a dramatic increase in summer population
- **Private Secondary Education:** Quality private high school options, potential for alumni retention post-college
- **Creative Economy:** Many of the region's rural areas have a long tradition of being home to exceptional traditional craftspeople and artistic talent. There are numerous theater or performing arts space - old and new - around the region.
- **Blend of Unskilled and Skilled Labor:** Healthcare, Retail Trade, Manufacturing, Construction, Education
- **Experience-Driven Consumer Economy:** People in the market segments of the Lakes Region spend their free time hiking, biking, fishing, and boating; More demand for services and material goods than consumer technology
- **Transportation access*:** Proximity to I-93 corridor creates live/work flexibility for some Lakes Region communities

- (*) Asterisk indicates that this same topic is also found in another SWOT area.

Weaknesses

- **Aging Workforce:** Labor shortage for unskilled and highly technical work, Non-working age population growth outpacing working-age population growth, Younger workers cannot replace older ones at a quick enough rate
- **Income disparity between seasonal and year-round residents:** Seasonal and Retired Occupants – have lived and worked somewhere else, earning an income large enough to enjoy a second home and travel, higher propensity to spend on vacation; Year-round Occupants – live and work in the area, many people struggle to afford their housing on their budget, lower propensity to spend as an established household (see Tapestry Analysis).
- **Public School Drop-Out rates:** High degrees of opioid use exist among teens and young adults throughout the state of N.H.
- **Low levels of housing affordability:** Housing supply shortage elevates price and deters young homebuyers with less liquidity
- **Seasonal Workforce*:** seasonal jobs tend to be low pay and often don't compel workers to stay and establish themselves in the region; seasonal economy can be very challenging for regional businesses and services.
- **Broadband Access:** Limited access to high-speed internet and while progress is being made there are still many populations where digital equity is an increasingly recognized
- **Healthcare Affordability:** Healthcare costs are rising nationally, and with a concentrated older population, demand is rising
- **Transportation access*:** Some communities in region remain very remote and limited to commuting or accessing regional amenities due to slow and seasonally variable rural roads or seasonally congested two-lane roadways.

Opportunities

- **Telemedicine:** Offer access to premier medical professionals at a lower cost
- **Prominent Construction Industry:** Affordable housing initiatives, Add more housing supply to the region to help address unfulfilled labor gap documented by BEA

- **Low Tax Environment:** Formidable to small businesses and entrepreneurs
- **Consulting opportunities from retired persons:** Local human capital that has succeeded in their respective industry
- **Old Building Restorations:** Brick and Beam architecture is popular among young persons for both office and living space. “Historic preservation” and “adaptive reuse” to expand housing, main street revitalization and downtown quality of life, regional identity building, and tourism economy opportunities
- **Telecommuting:** Increased population as formerly seasonal residents spend more time at their second home and telecommute to work. Opportunity to fill labor gap
- **Bimodal population by age:** Healthy population of older retirees supported by an increasing number of high wage-earning, younger migrants



Threats

- **Declining earnings in significant sections of the economy:** Retail Trade, which is 13% of the regional economy, is experiencing a decline in wages. E-commerce threatens traditional retail centers.
- **Seasonal Business:** Severe labor shortages resulting in reduced operating hours and fewer establishments
- **Pollution of natural/scenic resources:** Damaged or polluted resources will deter people from visiting/migrating to the area and hurt the NH Lakes Region Brand.
- **Climate Change:** Strange, new, and unpredictable weather patterns threaten to change the landscape of the region and limit the outdoor recreation industry
- **Rising Home Value:** Becoming increasingly challenging to afford, Deter young people who need more affordable options. Many of the (second) homes in the region are owned by Baby Boomers.
- **Changes in travel economy:** Potential damage to the number of visitors if preferences start to change, either too many or too few could damage the integrity of the region
- **Over-development:** Over-development could threaten the serenity of the area and create problematic congestion. Many locals fear “suburbanization” and developments that seem

placeless and disconnected from community. This can also be a threat to the regional agricultural heritage (a relatively small econ sector in Lakes Region but important part of NH identity).

- **Substance Abuse:** Lowering the high school graduation rate, Negatively affecting the labor supply also impacting the reputation of cities' safety, appeal of public parks, etc.

Combining Strengths and Opportunities

By cross-examining where strengths and opportunities align, we can identify avenues to improve our regional economy's quality of life and formulate goals and objectives.

- Tapping into the construction industry in the region, both new and restorative projects can add new, more affordable housing supply to the market. This requires civic/stakeholder engagement-- planning boards working with developers in ways that can preserve local culture and be sustainable. Using *local builders and developers* when possible! Avoiding economic leakage.
- Accessible scenic vacation potential with a low-tax environment. The region has a multi-generational appeal, bringing repeat visitors, not just second-homeowners.
- Repeated tourism and vacation fosters migrants and seasonal home buyers
- Bimodal population offers support for older Baby Boomers while allowing younger generations to shape industry and community
- Expansion of broadband resources to accommodate the future of the workplace and healthcare
- Telemedicine* provides access to better medical professionals and specialists
- Telecommuting allows residents to work from home and participate in the global workforce while enjoying high quality of life from region's leisure and recreational amenities. Note, this does depend upon reliable broadband service.
- Seek investment in businesses or initiatives that preserve that natural environment or scenic resources



Combining Weaknesses and Threats

By cross-examining where weaknesses and threats align, we can identify sections of our regional economy that are most exposed to potential malfeasance and aim to proactively prevent them.

- Rising home values deter migrants and many younger workers from entering the housing market
- Wealth gap between lakefront residents and inland residents is inequitable and is harmful to building community
- Many students are dropping out due to substance abuse issues
- Decline in the prominent retail trade industry - It was not the highest paying industry, but its' robust nature allowed for a lot of low-skill workers to earn a living; E-commerce will continue to contract the industry
- Housing affordability will continue to become more of an issue without larger increases to supply
- Shifts in typical weather patterns may negatively impact the environmental conditions as well as tourism
- Aging population may cause volatility in future real estate market, job vacancies, losses to public school funding, and unknowns in tourism life cycle
- While telemedicine* can provide access to quality healthcare, it may also reduce the number of local healthcare jobs and the availability of local medical professionals.

Goals and Objectives

It is essential to consider both economic and environmental goals in the context of economic development. Economic goals are driven by diligent workers, new ideas, and innovative technologies. Environmental objectives are set forth to preserve the communities that we live in and ensure sustainability in using

our natural resources. Both types of goals are complementary and are essential to developing the economy in new, healthy ways.

Economic Goals

1. Workforce Development
2. New Technology Economy
3. Entrepreneurship
4. Creative Economy
5. Sustainability-oriented Business
6. Year-round Outdoor Economy



Economic Summary

Better training programs for workers in the area will help improve high school students' career awareness and adequately prepare workers for their choice. The region must improve broadband access and technology in the area to promote the new economy. While consumers are not in high demand for technology, improvements in technological infrastructure will enable a new type of worker to work remotely effectively. The new wave of telecommuting, forced by workplace conditions conjured by COVID-19, may be stickier than initially thought. Better broadband in the area will enable workers to be more effective. Attract and foster environmentally sustainable businesses. Modern

entrepreneurship stems from providing a solution to an unmet need. Most entrepreneurs own and operate small businesses that thrive in strong local economies, while some grow their operations into large corporations that change the world. Entrepreneurship also promotes the aesthetic appeal in the region by providing a stage for local artists and artisans. Through involvement on Planning Boards there is opportunity for local people to change the streetscapes of the downtown areas, enhancing the unique feel and appeal of Lakes Region communities. Foster the year-round outdoor economy by encouraging outdoor recreation businesses, manufacturers, etc, as well as tourism-oriented businesses).

Environmental Goals

1. Social Capital & Cultural Heritage
2. Sustainability
3. Improve Quality of Place
4. Hands-on/Direct Management of Outdoor Resources



Expanding on our Goals and Objectives

1. **Workforce Development:** Improve the workforce's preparation by ensuring extensive coordination between educational and training organizations and the needs of business and industry.
2. **New Economy:** Define where digitization, the internet, social media, and other future-oriented communications modes will take the regional economy so that the region can better take advantage of these new opportunities; to improve the region's technology infrastructure, specifically related to increases in bandwidth, reliability, redundancy, predictability, and access.
3. **Social Capital & Cultural Heritage:** To strengthen social networks and build engaged communities through planning and the creation of opportunities for economic growth.
4. **Sustainability:** The built environment of the Lakes Region should be maintained and enhanced in an environmentally sustainable manner. To assist the Lakes Region in adjusting to the need for lower-cost and renewable fuels, while considering

the impacts of these potential developments on the natural environment. To effectively protect or enhance natural resources through conservation efforts. Encourage sustainability-oriented businesses. Foster a Year-round Outdoor Economy and Hands-on/Direct Management of Outdoor Resources.

5. **Entrepreneurship:** Expand entrepreneurship in the region by supporting entrepreneurs of all types, especially farmer entrepreneurs and artist entrepreneurs.
6. **Creative Economy:** Support development of catalyst projects that can spur the creative economy such as public art, maker-spaces, programming, and other projects that enhance the creative sector's visibility.
7. **Improve Quality of Place:** Support projects that make the Lakes Region a more attractive, inviting, and affordable place for young people to live, work, and play.
8. **Housing:** Support projects that improves access to more affordable year-round housing options for wage earners supporting regional businesses and services.

Strategic Direction & Action Plan

A part of the preparation of the 2020 Lakes Region Comprehensive Economic Development Strategy (CEDS), the CEDS Committee and the LRPC staff contacted the 31 municipalities in the region and solicited potential economic and community development projects consistent with the CEDS Goals & Objectives.

The purpose of the above effort was to publicize the CEDS and generate applications for projects considered to have an economic development potential regardless of EDA funding eligibility. An emphasis was made to encourage the submission of projects that are eligible for EDA funding.

Evaluation Framework

To evaluate the effectiveness of implementation, an annual review of the region's economic prosperity will be undertaken using measures such as changes in employment and private sector

investment. Much of the current baseline socioeconomic data to start this comparison is found in the Economic Profile section. The CEDS Committee will review these data as new information becomes available. It is important to note that monitoring the effectiveness of the economic development strategies and action steps is an ongoing process and will be refined over time.

In an effort to organize our projects' goals and objectives, we will employ a SMART approach. The SMART criteria is a helpful acronym for time and goal management. Each of our projects will be organized using the following approach:

Specific: Each project will have a tailored approach to a particular objective. By specifying the purpose of the project, the process of how begins to reveal itself

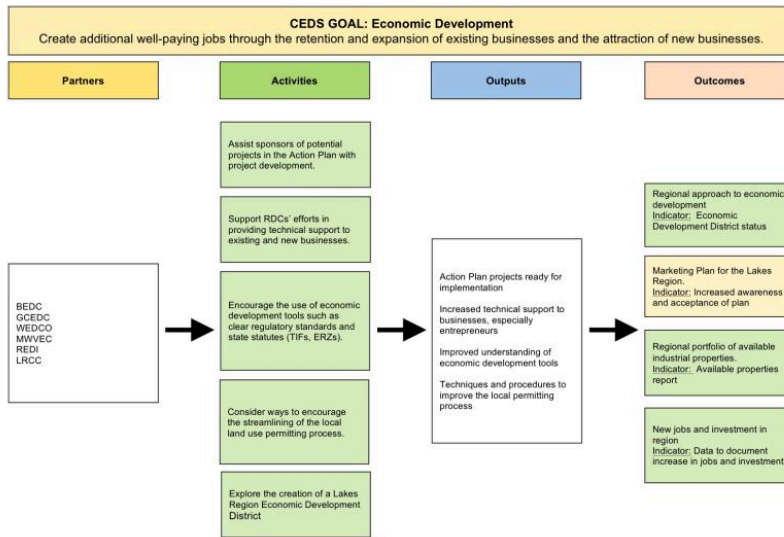
Measurable: Quantifying goals in terms of metrics is useful to determine what success looks like.

Attainable: Ensuring that any project set forth is realistic in cost, labor requirements, scope, and sustainability.

Relevant: In examining our goals and objectives to formulate our projects, we ensure that the projects stem from relevant issues and opportunities in our community.

Time-bound: By establishing a timeline or a set date, results are more easily realized with a realistic and well thought out plan.

In addition to the SMART approach, the Lakes Region CEDS will monitor progress toward our goals and objectives based on partners involved, and activities undertaken to achieve measurable Outputs and Outcomes as provided in the example below.



TIMEFRAME COLOR KEY: NEAR TERM (≤3 years) MED. TERM (4-8 years) LONG TERM (≥9 years)

2023 Lakes Region CEDS Implementation Plan

1 - Workforce Development				
Strategy	Action	Performance Measures	Responsible Entity	Time Frame
Improve the workforce's preparation by ensuring extensive coordination between educational and training organizations and the needs of business and industry.	Support BCEDC - High School student interns			<ul style="list-style-type: none"> • Short (1-3 yrs) • Mid (3-5 yrs) • Long (5+ yrs)
	Support the Lakes Region Community College internship program		Belmont, LRCC	
	Advocate for reliable public transportation for workers and students			

2 - New Economy				
Strategy	Action	Performance Measures	Responsible Entity	Time Frame
Define where digitization, the internet, social media, and other future-oriented communications modes will take the regional economy so that the region can better take advantage of these new opportunities to improve the region's technology infrastructure , specifically related to increases in bandwidth, reliability, redundancy, predictability, and access.	<ul style="list-style-type: none"> • Bristol Broadband • Carroll Co. broadband • Grafton Co. broadband 			<ul style="list-style-type: none"> • Short (1-3 yrs) • Mid (3-5 yrs) • Long (5+ yrs)
	School District-wide wireless infrastructure		Gilford	
	New legislation for Communication Districts			

4 - Sustainability				
Strategy	Action	Performance Measures	Responsible Entity	Time Frame • Short (1-3 yrs) • Mid (3-5 yrs) • Long (5+ yrs)
The built environment of the Lakes Region should be maintained and enhanced in an environmentally sustainable manner.	Phase 2 of Lake Winnisquam Scenic trail, paved multi-use trail		Belmont, NH DOT (TAP)	
	Phase 3 of Lake Winnisquam Scenic trail, paved multi-use trail		Belmont, NH DOT (TAP)	
	Brook Road bridge – replace red-listed municipal bridge with box culvert; project is designed and costs have been estimated		New Hampton	
	Village Schoolhouse repairs		Center Harbor	
	McCrislis Hill Rd paving		Center Harbor	
	Fliott Rd paving		Center Harbor	
	Hawkins Road Rd paving		Center Harbor	
	High Haith Rd paving		Center Harbor	
	Historic Town Hall		Effingham	
	Snow Rd bridge replacement		Effingham	
	Green Mtn Rd reconstruction		Effingham	
	Town Office Building Improvements & repairs		Freedom	
	Road improvements & extend bike path		Freedom	
	Tannery Hill Bridge repairs		Gilford	
	Summit Ave Bridge repairs		Gilford	
	DPW building design & construction		Gilford	
	GHS Roof replacement		Gilford	
	GMS/GHS paving		Gilford	
	GMS/GHS Rooftop AC Units		Gilford	
	GFS Gym window repointing		Gilford	
	GFS Roof replacement		Gilford	
	Public Safety Building		Bristol	
	GHS Locker Room renovations		Gilford	
	Fire Station improvements		Gilford	
	Academy septic System		Gilmanston	
	Academy Roof		Gilmanston	
	GIW Town Hall Roof		Gilmanston	
	GIW Fire Station paving		Gilmanston	
	Recycling Facility paving		Gilmanston	
	Library Roof replacement		Sandwich	
	Gilmanston School replace 1966 roof		Gilmanston	
	Library foundation repairs		Center Harbor	
	Library addition		Freedom	
	Police Building replacement		Sandwich	
	Town Facilities paving		Moultonborough	
	Taylor House project		Moultonborough	
	Highway Garage building expansion		Moultonborough	
	Library Roof Replacement		Moultonborough	
	Lees Mill Landing retaining wall		Moultonborough	
	Thompson St & Smith Hill Rd reconstruction with water/sewer		Ashland	
	Convert former Utilities building to Police Station		Ashland	
	Town Hall redesign		Ashland	
	High School repave track		Barnstead	
Emery Rd top coat		Andover		
Maple St reconstruction		Andover		
Flagpole Rd overhaul		Andover		
ADA Compliance in Community Facilities		Belmont		
New Police Station		Belmont		
Fire Station – renovate kitchen		Belmont		
Highway Garage Heating System upgrade		Tuftonboro		
New Police facility		Tuftonboro		
Highway Garage paving		Tuftonboro		
Tuftonboro Neck Bridge replacement		Tuftonboro, NH DOT		
Union Wharf Rd bulkhead reconstruction		Tuftonboro		
Town House repairs (floor & foundation)		New Hampton		
Town Office Roof		New Hampton		
Public Safety Bldg - Fire House 2nd floor		New Hampton		
Brook Road bridge – red listed		New Hampton		
Shem Valley Rd Bridge (red listed)		Alexandria		
Cole Hill Rd Bridge (red listed)		Alexandria		
Build new Town Office & renovate current building for Police Dept		Sanbornton		
Hammond Hill Rd Bridge (red listed)		Bridgewater		
Bridgewater Hill Bridge (red listed)		Bridgewater		
Assist the Lakes Region in adjusting to the need for lower-cost and renewable fuels	Electricity Charging Stations			
	Biomass power generation			
	Regional Energy aggregation			
	Support Granite State Clean Cities Coalition - Town-negotiated energy systems contracts			
	Solar - Explore attached and detached solar options			
	Solar Panels on town buildings		New Hampton	
	Community Solar at land fills and Wastewater treatment plants			
	Solar Farm on closed landfill (in Bristol, owned by New Hampton)		New Hampton	
	Solar Array for Water & Sewer Plant		Bristol	
	Woodpellet boilers and district heating			
	Union Avenue (Main to Gilford) Road, Stormwater, Sewer and Water Upgrades		Laconia	
	Woodvale Drive Area Sewer Project		Laconia	
	RH Route 11 B Sewer Project		Laconia	
White Oaks Road Sewer Project		Laconia		
Lakeport Area Sewer and Water Upgrades - Laconia		Laconia		
Court Street Phase 3 Road and Stormwater Upgrades		Laconia		
Weirs Blvd Bridge #135-128 over Langley Brook		Laconia		
Salt Shed facility build		Bristol		
Highway Dept - bldg to cover sand pile, build addition to salt shed, enlarge garage to house equip, establish gravel pit, study runoff impact from facility to Loon Lake & town water supply		Freedom		
GIW Town Hall Septic System		Gilmanston		
Gilmanston School leachfield/pump station		Gilmanston		
Gilmanston School 3,000 water storage		Gilmanston		
Gilmanston School 10,000 fire sprinkler tank		Gilmanston		
Water Treatment Plant reuse of backwash/waste water system		Meredith		
Water line extension & booster pumping station to serve Parade Rd/DW Hwy area		Meredith		
Clean & line all sewer lines		Meredith		
Force Sewer Main to WRBP-inoperable valves		Meredith		
New Well - Waring Rd		Belmont		
Iron & Manganese removal treatment		Belmont		
Lake Rd culvert wall & dredging		Tuftonboro		
New Salt Storage facility		Ossipee		
Replace Water Lines on Huckins St		Ossipee		
Replace Water Lines on Dorrs Corner Rd		Ossipee		
Run power to Sewer Camp David to install scale/meter		Ossipee		
Multiple Town Buildings improvements/upgrades		Ossipee		
Replace Police Station		Ossipee		
To effectively protect or enhance natural resources through conservation efforts.	Support Land trust groups - Coordinate with Conservation Commissions			
	Support the development and implementation of Watershed Management Plans			
	Encourage BMPs for maintenance of closed land fills			
	Support reducing water and soil pollution through collection of Household Hazardous Wastes			
	Encourage effective use of resources through Solid Waste Management programs			
	Transfer Station Improvements		Bristol	
	Transfer Station - new storage shed		Effingham	
	Transfer Station - build dumpster roof covering		Effingham	
	Transfer Station - concrete pads & walls		Effingham	
	Transfer Station - build waste oil station		Effingham	
	Transfer Station paving		Freedom	
	Solid Waste Dept Maintenance/Storage facility		Tuftonboro	
	Build new Transfer Station with gravel pit		Alexandria	
Solid Waste Facility-build pole barn		Ossipee		
Encourage sustainability-oriented businesses.				
Foster a Year-round Outdoor Economy and Hands-on/Direct Management of Outdoor Resources.	4-season multiuse pathway linking Bristol Falls Park and USACE Whitewater Park in Franklin		Bristol	

5 - Entrepreneurship				
Strategy	Action	Performance Measures	Responsible Entity	Time Frame • Short (1-3 yrs) • Mid (3-5 yrs) • Long (5+ yrs)
Expand entrepreneurship in the region by supporting entrepreneurs of all types	Support RDCs (Grafton, BEDC,) Business attention and financing services			
	Support Plymouth Enterprise Center			
	Support PSU & LRCC Business programs			
Especially farmer entrepreneurs	Support NH Cooperative Extension			
	Support connection between Genuine Local (Laconia) - NH State School			
	Support NH Beginning Farmers Program			
	Support BCCD			
Especially artist entrepreneurs				
Others Supported	Manufacturing			
	Green energy			

6. Creative Economy				
Strategy	Action	Performance Measures	Responsible Entity	Time Frame • Short (1-3 yrs) • Mid (3-5 yrs) • Long (5+ yrs)
Support development of catalyst projects that can spur the creative economy such as public art, programming, and other projects that enhance the creative sector's visibility.	Support Meredith Center for the Arts, Silver Center (PSU)		Meredith	

7 - Quality of Place				
Strategy	Action	Performance Measures	Responsible Entity	Time Frame • Short (1-3 yrs) • Mid (3-5 yrs) • Long (5+ yrs)
Support projects that make the Lakes Region a more attractive, inviting, and affordable place for people of all ages to live, work, and play.	Multi-use trail and reconstruct sidewalks from Elm Street to Elm Street Elementary School		Laconia, NH DOT (TAP)	
	Pedestrian improvements to Meredith's downtown, sidewalks, crosswalks, sight distance improvements		Meredith, NH DOT (TAP)	
	Phase III Moultonborough Pathway project, Moultonboro Neck Road		Moultonborough, NH DOT (TAP)	
	New Sidewalks on Warren Street, Russell Street, and Crawford Street		Plymouth, NH DOT (TAP)	
	New Sidewalks on Avery Street, Cummings Street, Hawthorne Street, and Merrill Street		Plymouth, NH DOT (TAP)	
	Re-decking Weirs Beach dock and boardwalk		Laconia	
	ADA improvements to Parks and Rec buildings		Laconia	
	Beach Bathhouse repairs		Center Harbor	
	Parks & Rec - recoat tennis & basketball courts, repair skating rink & ball field fences, establish new activity on old tennis court		Freedom	
	Ice Rink improvements		Moultonborough	
	States Landing Phase 3: dredging, boat launch, park improvements		Moultonborough	
	Great Meadow Trail		Tuftonboro	
	Constitution Park improvements		Ossipee	
	Duncan Lake Beach improvements		Ossipee	
	Build approach road to Bridgewater Town Beach on Pemi River		Bridgewater	
Harness the retired population's access to capital and knowledge for investment in the region				

8 - Housing				
Strategy	Action	Performance Measures	Responsible Entity	Time Frame • Short (1-3 yrs) • Mid (3-5 yrs) • Long (5+ yrs)
Support projects that improves access to more affordable year-round housing options for residents.				

9 - Transportation				
Strategy	Action	Performance Measures	Responsible Entity	Time Frame • Short (1-3 yrs) • Mid (3-5 yrs) • Long (5+ yrs)
Support Communities through the Transportation Advisory Committee and the Ten Year Transportation Plan	Bike ped improvements to Lake St.		Bristol/NHDOT	Short
	Mill City Park Trestle Bridge for pedestrians		Franklin/NHDOT	Short
	Laconia NH Airport Improvements		Gilford/NHDOT	Short-Long
	Construct pedestrian islands, sidewalks, and improve curbs		Gilamnton/NHDOT	Long
	Increase capacity to 54" CMP culvert under NH Route 107 in Gilmanton.		Gilamnton/NHDOT	Mid
	Const. 4,300lf of sidewalk on Elm St. And 8' wide multi-use path on the other side of Elm St.		Laconia/DOT	Long
	Intersection improvements for Laker Lane, True Rd, Quarry Rd and Patrician Shore Circle with NH 25.		Meredith/NHDOT	Long
	Intersection improvements on NH 25 between Lake Shore Drive (W) and Lake Shore Drive (E).		Moutonborough/NHDOT	Short
	NH 25 / Whittier Highway Complete Streets improvements to Moultonborough Center Village.		Moutonborough/NHDOT	Mid
	Sheridan RD and NH 25 intersection improvements		Moutonborough/NHDOT	Mid
	Intersection and sidewalk improvements to Highland Street at and in the vicinity of Reservoir Rd.		Plymouth/NHDOT	Short
	Intersection improvement to the NH 25/Smith Bridge		Plymouth/NHDOT	Long
	Reconstruct and re-classify Calef Hill Road from Clark Road north 1.97 miles to Sanbornton town line		Tilton/NHDOT	Short
	Main/School Street intersection safety improvements (roundabout)		Tilton/NHDOT	Long
	NH 28 improvements from NH 109 to Alton town line		Wolfeboro/NHDOT	Short

Cases Studies

The Lakes Region can point to several examples of projects that successfully enhance the region's economy and/or environment.

Winnepesaukee River Basin Project - Managing waste and protecting the environment, serving the western Lakes Region

Culinary Program at Lakes Region Community College - Belmont

Culinary programs pick up again after pande...

Culinary programs in New Hampshire are bouncing back after a difficult year. When the COVID-19 pandem...

<https://www.wmur.com/article/culinary-programs-pick-up-again-after-pandemic-disruption/35917927#>

Colonial Theater - Laconia - Helping to revitalize the city's downtown.

Harriman Hill - Wolfeboro - Meeting the housing needs of a critical segment of the area's workforce.

Maker's Mill - Wolfeboro - Enriching rural lives and fostering fulfilling livelihoods by bringing people together to discover, cultivate, and share their unique gifts and skills.

Franklin Waterpark - Franklin - New England's first whitewater park, connecting the community with the river.

DRAFT 2023 Prospective Steering Committee Regional Development Corporations

Justin Slatterly, Belknap Economic Development Council

Anne Duncan Cooley, Grafton County Economic Development Council

Jack Terrill, Wentworth Economic Development Corporation

Jac Cuddy, *Mt. Washington Valley Economic Council*

Local Economic Development Leaders

Seth Creighton, City of Franklin Planner

City of Laconia, TBA-Hiring new planner

Ash Fischbein, Ossipee Economic Development Committee

William Dowey, Bristol Economic Development Committee

Mark McConkey, Freedom Commissioner and State Rep.

Celeste Burns, Moultonborough Commissioner and Business owner

Roger Murray, Wolfeboro Economic Development Committee

Niel Cannon, City of Franklin Consultant

Franklin Industrial Development Corp

Affordable Housing

Carmen Lorenz, Lakes Region Community Developers

Laconia Housing Authority

Institutions, Utilities, Nonprofits

Jada Lindblom, UNH Cooperative Extension

Chambers of Commerce

NHEC

Workforce Rep

LR Community College

LRG Healthcare

Potential Business Leaders who served in the past

Andrew Pike, Opeechee Construction

Chris Dickinson, Northway Bank

Jennifer Anderson, Laconia Motorcycle Week Association

Amy Landers, Lakes Region Tourism Association

Daniel Mills, GI Plastek

Gary Groleau, NH Ball Bearing Inc.

John Howe, NH Business Sales

Bill Johnstone, NH Electric Cooperative

Moe Lafreniere, The Common Man / Great American Dining

Christopher Williams, AIA, Christopher P. Williams Architects

Fran Newton, Smith Hill Consulting

Jack Terrill, Granite United Way

LRPC Staff

Jeffrey R Hayes, Executive Director

Dave Jeffers, Regional Planner

Ryan Paterson, Assistant Planner

Tracey Secula, Grant Administrator

Preface to Appendices - Regional Maps

There are multiple types of infrastructure referred to in economic development and the Lakes Region is strong in many areas but lacking in some others. Below, we graphically review some of the most important infrastructure in the lakes region.

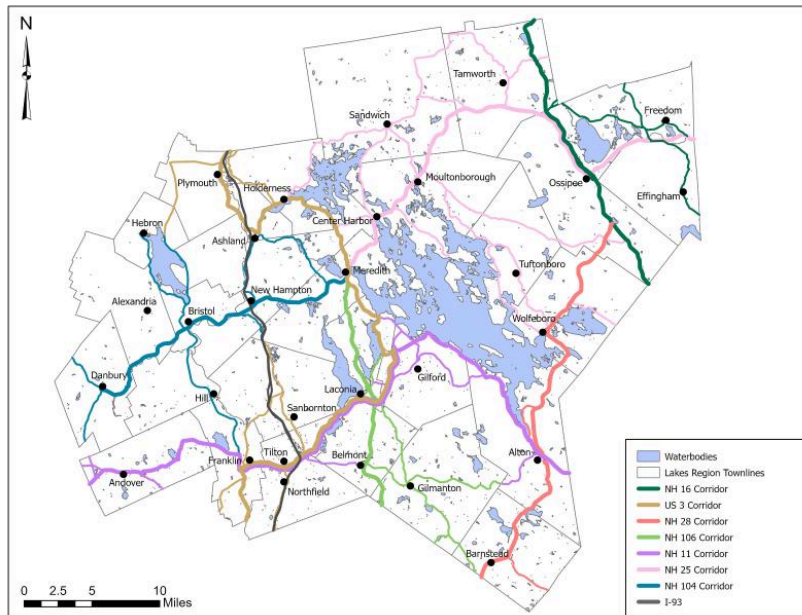
- Hard Infrastructure: Transportation, water & sewer, industrial parks, telecommunications, energy and much more.

- Social/Human: health care, education, counseling, social services, social institutions and social capital, town centers, labor market areas, regional planning commission, (also see labor force and demographics section for more information).
- Green infrastructure (conserved, open space and farmland, extensive water resources including high capacity aquifers, conservation, trails, wetlands, water, air)

DISCLAIMER: Data located in these maps may only be subsets of original source data collected from various state, federal, and local governments, as well as other organizations. LRPC can not verify the validity or accuracy of any data used due to varying data collection and processing methods used by the various organizations that collected this data. LRPC does not accept any liability for the uses of this data. User should verify accuracy of data with data source organization. Contact LRPC for original data layers and source agency/organization. These maps are for planning purposes only.

Appendix I - Hard Infrastructure

Regional Transportation Corridors: LRPC has organized the region into eight major corridors (I93, US3, NH11, NH16, NH25, NH28, NH104, NH106) that connect the many Lakes Region communities together and put the region into close proximity with Maine, Vermont, Massachusetts and Canada allowing for visitors and freight to enter and leave the region. These corridors are individually analyzed in LRPC's DRAFT 2023 Lakes Region Transportation Plan in terms of their impact inside and outside the region. This detailed assessment allows for better tailored solutions for each set of challenges in our unique communities.



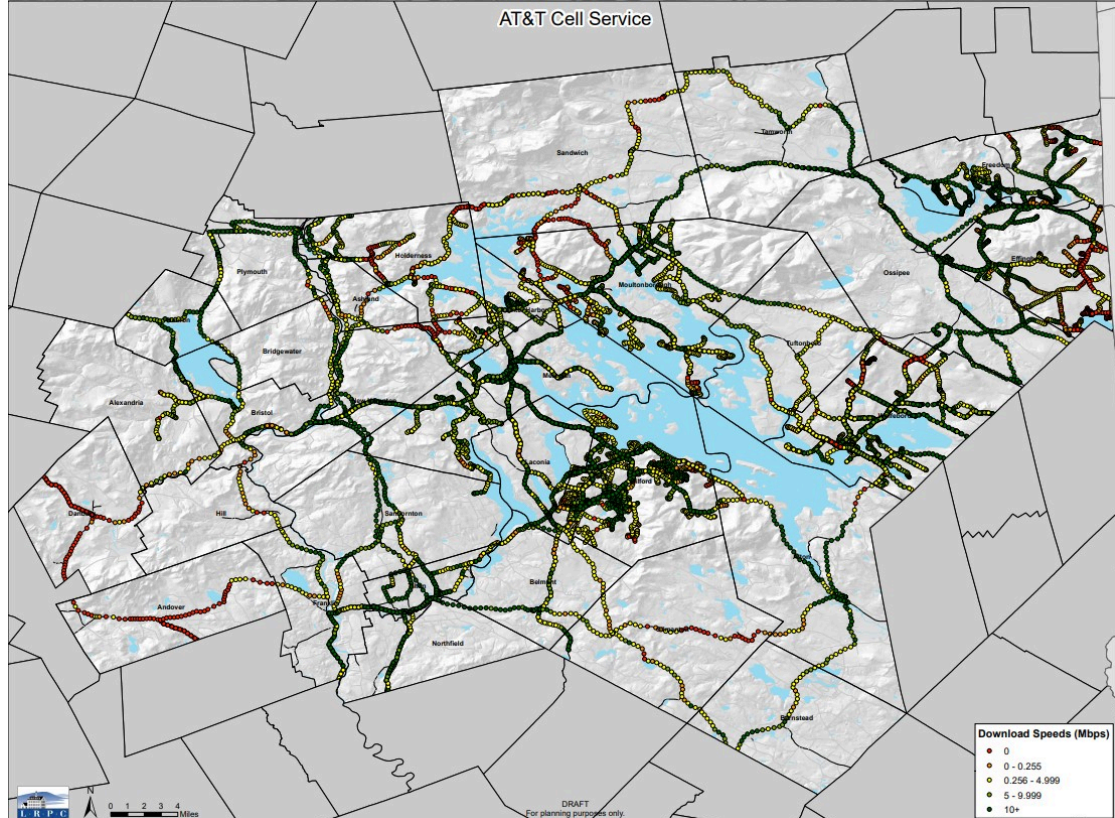
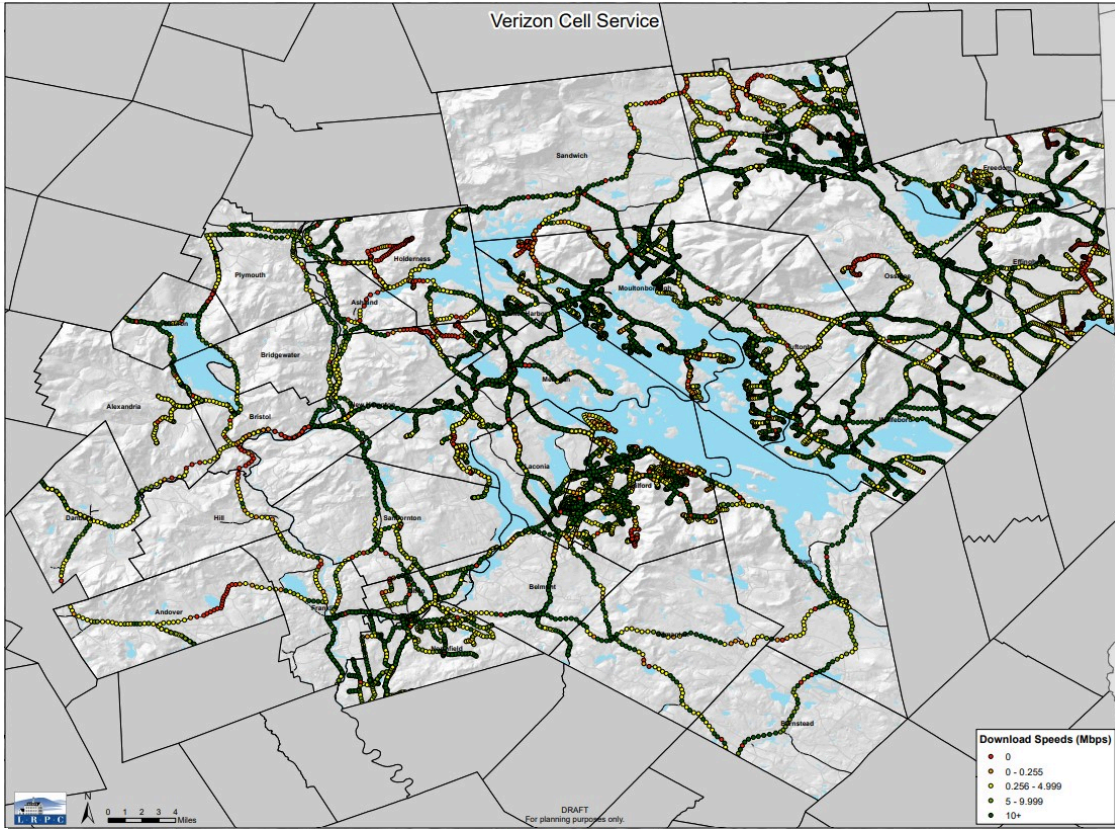
Map displaying the various transportation corridors throughout the region.

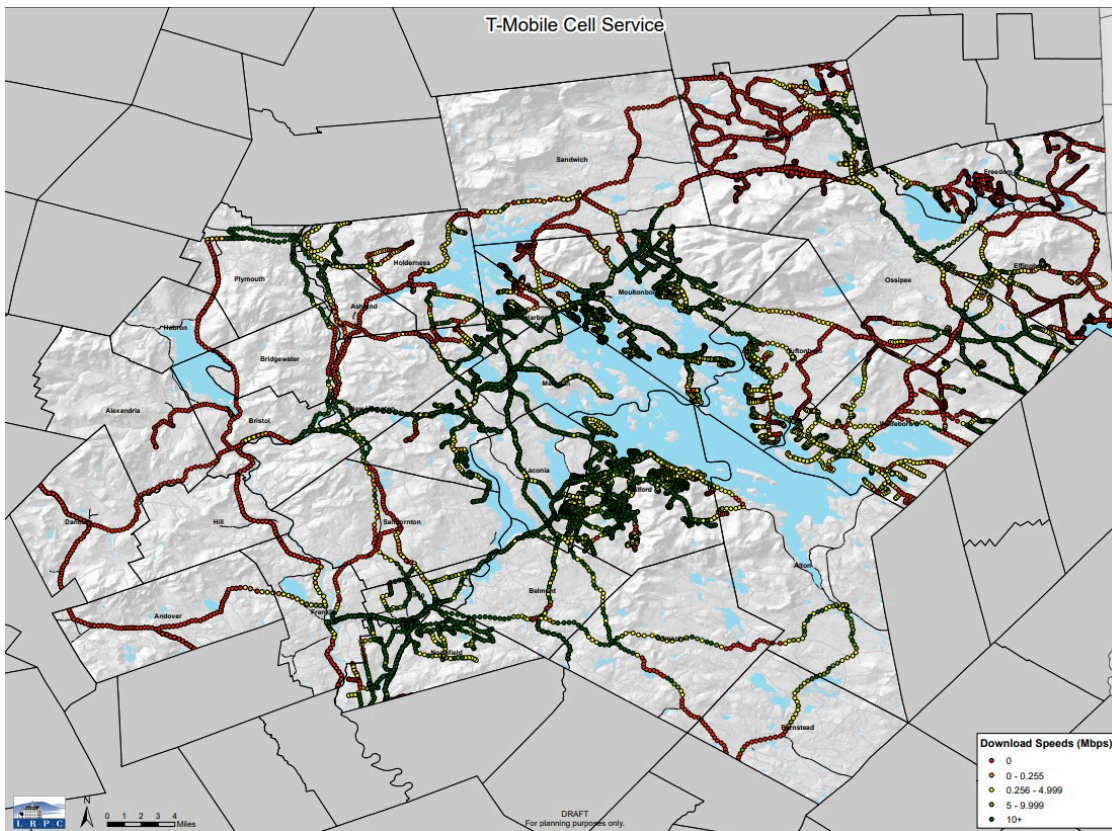
Broadband and Cell Service in the Lakes Region (interactive maps): Broadband service has become an indispensable part of modern life. Currently over 90% of the region is served by broadband at over 77,000 locations in the region. The State of NH BEA just received over \$196,000,000 in federal funds from the Bipartisan Infrastructure Act to address unserved addresses in the state.

NH Granit Broadband Mapping Tool

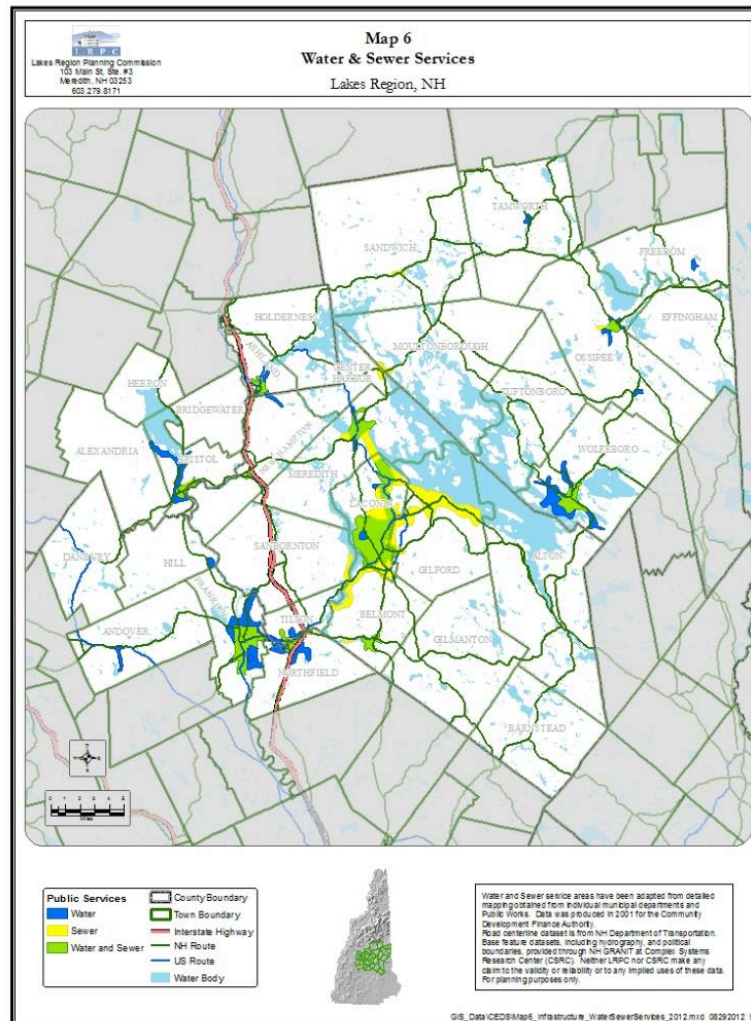
Lakes Region Cellular Phone Service: In addition to Broadband, cellular service has also become necessary in the modern economy. Cell coverage maps are considered proprietary

information which is unavailable from the PUC, so LRPC worked with some state and federal officials to map cell service for the region. In part, we found that there are coverage issues throughout the region and advertised cell company coverage areas are not always accurate.





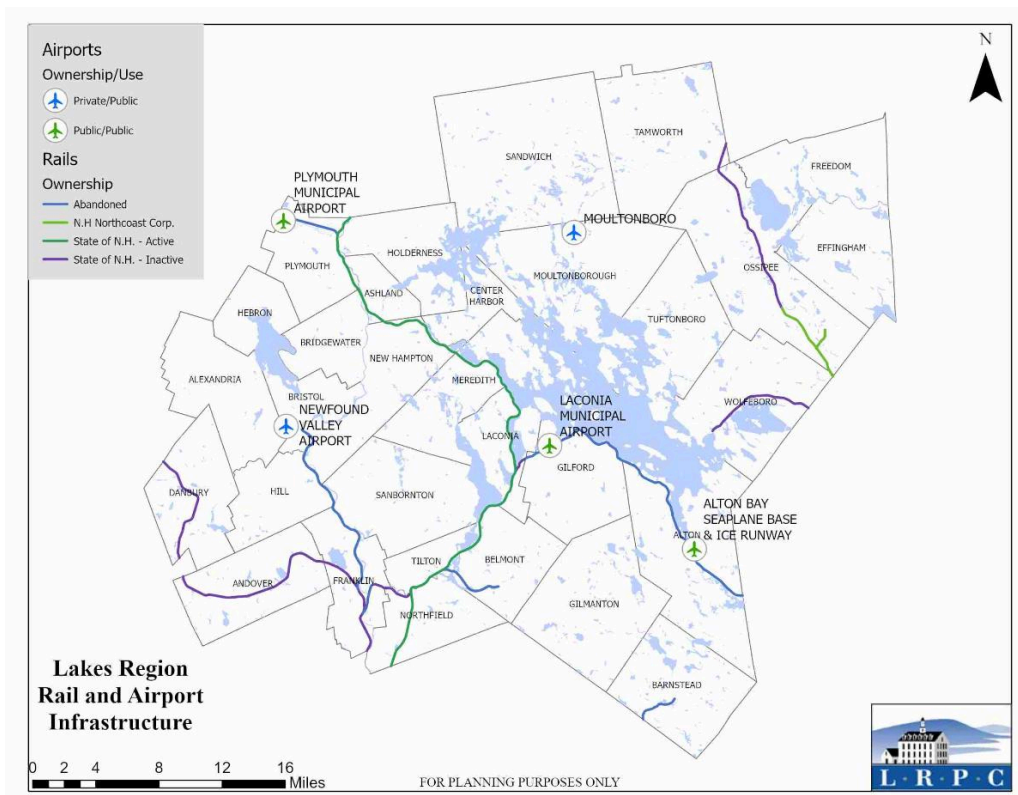
Water and Sewer Service: Availability of water & sewer has been in the spotlight recently because of its importance not only from an environmental standpoint, but also because without sewer & water the cost of developing workforce housing is prohibitively high in many cases. The Winnepesaukee River Basin Project (WRBP) is a large public works project from the 1970's that was implemented on the southern side of the lake. For over 50 years, this project has helped to safeguard water quality in the lakes region while at the same time allowing for higher density development especially in the region's two small cities Laconia and Franklin. The availability of sewer and water will be a major determinant of growth and landuse density for the region in the future.



Map displaying the areas serviced by municipal water and sewer.

Airports and Aeronautics: The state of New Hampshire has 12 airports that are included in the National Plan of Integrated Airport Systems (NPIAS) and eligible for Federal Aviation Administration (FAA) Airport Improvement Program (AIP) funding for capital improvements. NHDOT provides a state match when federal funding is available. In the Lakes Region, the Laconia Municipal Airport, located in Gilford, is the only NPIAS airport and the only airport eligible for FAA funding. The Laconia Municipal Airport is categorized as a Regional General Aviation Airport by FAA, serving regional and national markets with high levels of activity. General aviation airports provide connections to the larger aviation system while providing access to their respective communities, focusing mainly on specialized services that scheduled airline service cannot provide. At the Laconia Airport these services include emergency medical services, aerial law enforcement and border control, agricultural functions, military training exercises, flight training, aviation and aerospace

education, time-sensitive air cargo services, and executive business and personal travel. In 2013, more than 200 aircraft (including several business jets) were based at the Laconia Airport and there were an estimated 43,725 operations including itinerant (non-local) aircraft. A 2007 Economic Impact Study showed that the Laconia Municipal Airport has a \$55 million annual total economic impact to the region; yet it is operationally self-sufficient and not supported by taxpayer funds. There are another 12 airports in the state that are open to the public. Although they do not qualify for FAA funding, they do qualify for NHDOT funding based on an 80 percent state and 20 percent local split. Due to state budget reductions, there has been no funding for this activity for the past two bienniums. In the Lakes Region, there are three airports in this category: Alton Bay Seaplane Base (Ice Runway), Moultonborough Airport and the Newfound Valley Airport in Bristol. More than 100 privately owned airports, heliports and seaplanes are available for private use in New Hampshire. They are not required to be registered with the State or with FAA.



Map displays the location of airports and rail infrastructure by type of ownership and public access.

Railroads: Railroads have played an important role in the history of industry in the Lakes Region. Evidence of this is still prevalent in many communities where repurposed or abandoned rail stations stand as a reminder of this important time in the region's

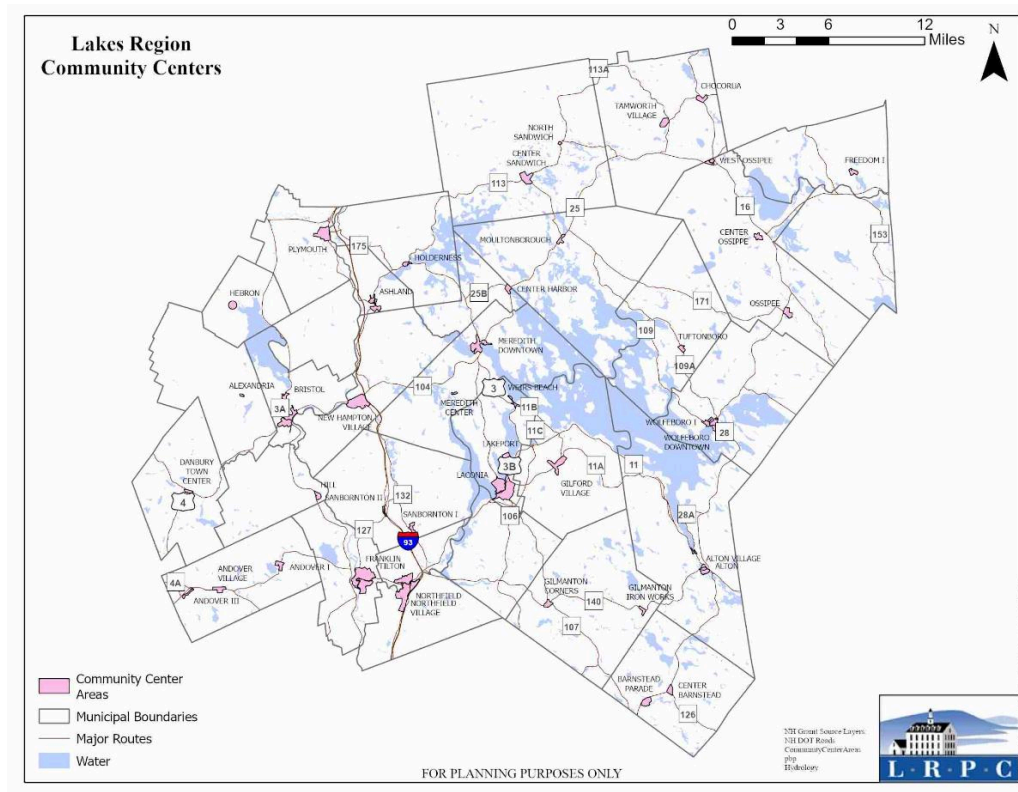
growth and development. The Ashland Railroad Station, Laconia Passenger Station, and Alton Bay Railroad Station, among many others are preserved as part of the National Register of Historic Places and serve as monuments to the history and culture for us as well as future generations. The train depot on Main Street in Center Ossipee is currently a restaurant.

The Lakes Region has limited rail service as illustrated in the Map above. At present there are two operational rail lines serving the Lakes Region: the Concord/Lincoln line extending 73 miles from Concord north to Lincoln; and New Hampshire Northcoast extending 42 miles from Rollinsford, NH north to Ossipee. These active rail lines are used by three operators. New England Central Railroad brings a limited amount of freight to the Laconia area. New Hampshire Northcoast, owned by Boston Sand & Gravel, operates five days a week hauling aggregate material from Ossipee to Rochester for transfer to another railroad for downtown Boston. Aggregate material from the Ossipee pit was used for much of the construction of the I-93 “big dig” tunnel through downtown Boston. The Plymouth and Lincoln Railroad (also known as the Hobo and Winnepesaukee Railroad) serves primarily as a tourist railroad during the summer season with limited service in the fall. It provides limited freight service.

The state of NH has debated the future of rail both for passenger and freight service and, at present, there is no clear policy direction as how to proceed. For further information on rail, see the NH State Rail Plan, 2012. The future of rail in NH will in part be guided by the NH Capitol Corridor Alternatives Analysis and Service Development Plan which is being developed and may provide future links to the Lakes Region. The analysis in this plan, which is currently being developed, will include an assessment of freight and the impacts on the Lakes Region. New Hampshire has recently been awarded a \$1.4 million TIGER (Transportation Investment Generating Economy Recovery) grant to upgrade a section of freight rail line from Rochester to Ossipee. This section of rail is owned by the New Hampshire Northcoast Corp., a subsidiary of Boston, Sand and Gravel. Companies currently ship gravel and propane on the rail line parallel to Route 16. The upgrade will enable the tracks to carry more cars and freight; potentially aiding economic development opportunities in Ossipee and reducing the amount of truck traffic on NH Route 16, leading to less congestion and road wear.

Appendix II - Social/Human

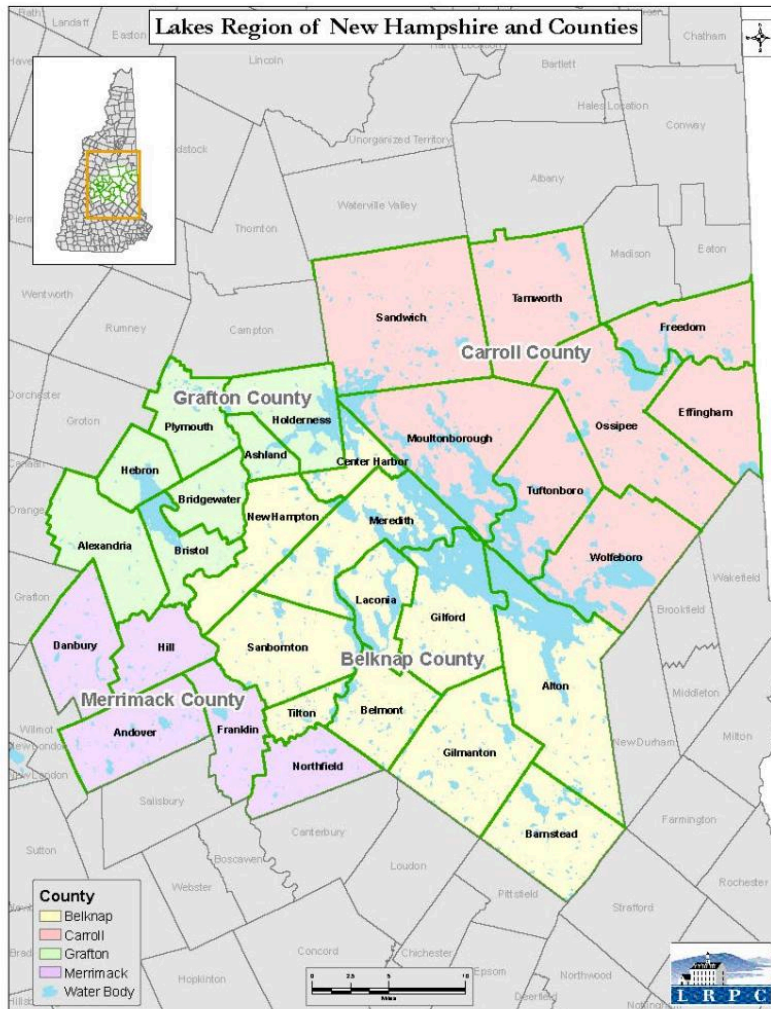
Lakes Region Community Centers: The region's greatest asset is its 31 distinct and unique towns and cities with the iconic New England charm. In an age of development sprawl and online shopping, many community centers are not the bustling downtowns that they once were, but at the same time, there are some expanding downtowns that are growing in regional significance.



Map displaying downtowns, villages, and other community center areas.

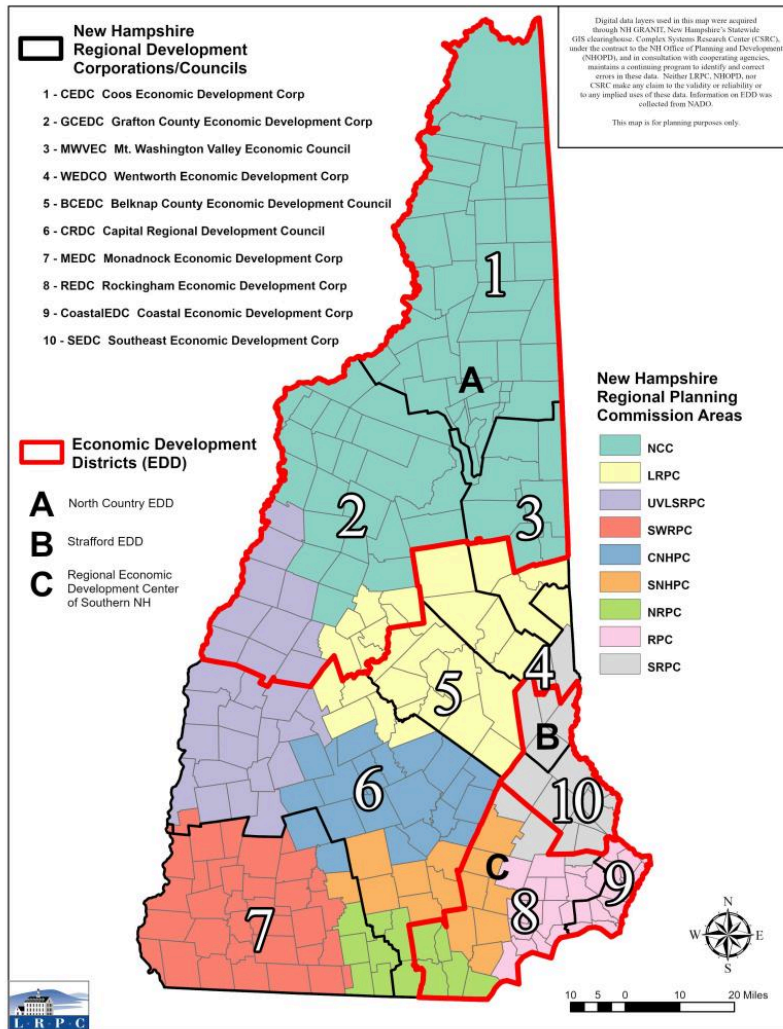
Labor Markets Associated with Lakes Region Communities:

The Lakes Region is a busy area fragmented by many water bodies, separating the region into 8 labor market areas, 6 of which are centered in the region. Labor markets are determined by analyzing commuting times focused on economic centers.

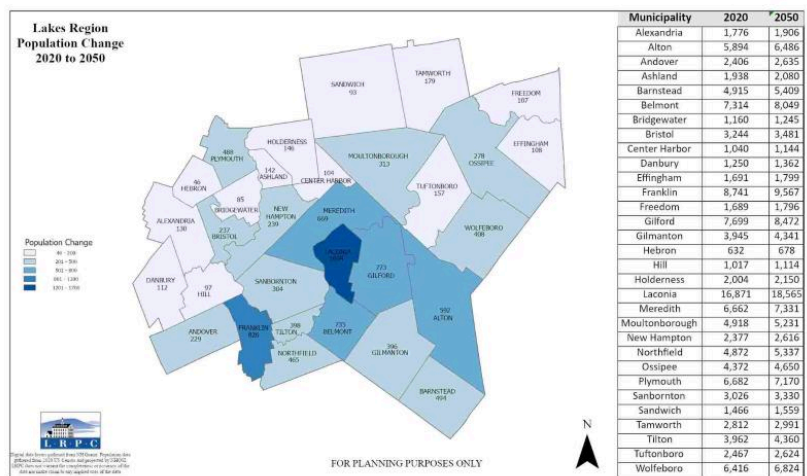


Map displays the Lakes Region and the four counties within its area.

Social Infrastructure: NH has 9 Regional Planning Commissions, 10 Regional Development Corporation, and 3 EDA Designated Districts. Other important economic development related groups include chambers of commerce, local development corporations, rotary clubs and much more!

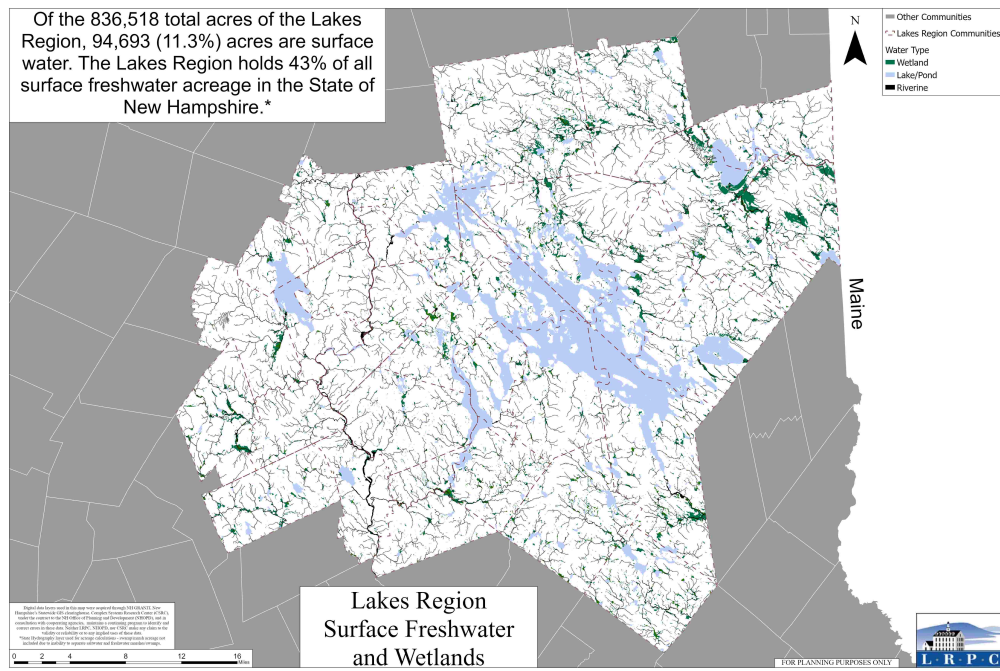


Population Growth: All of the Lakes Region Communities are projected to see an increase in the the coming years. These increase in population can cause a strain on the housing market, and according to the LRPC Housing Needs Assessment, an additional 7,444 units will be needed by 2040.



Appendix III - Green Infrastructure

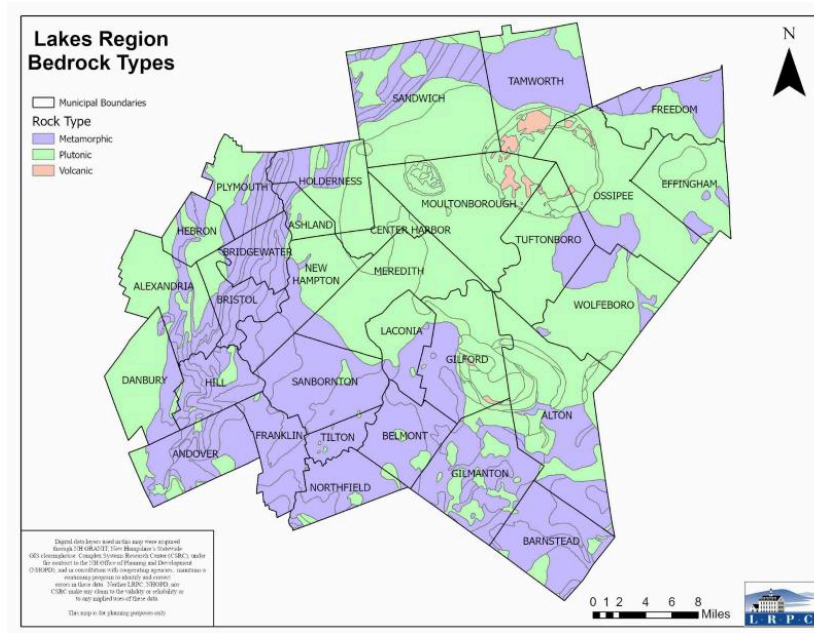
Lakes Region Surface Waters and Wetlands: The Lakes region is replete with surface water and wetlands which provide many water related business and recreation opportunities but also important ecological services for wildlife and the overall health of our water quality. The Lakes Region encompasses over 43% of the state's surface waters and forms the headwaters of the Merrimack River.



Map displaying all of the surface freshwater and wetlands in Lakes Region. The Lakes Region holds a large portion of the states surface freshwater.

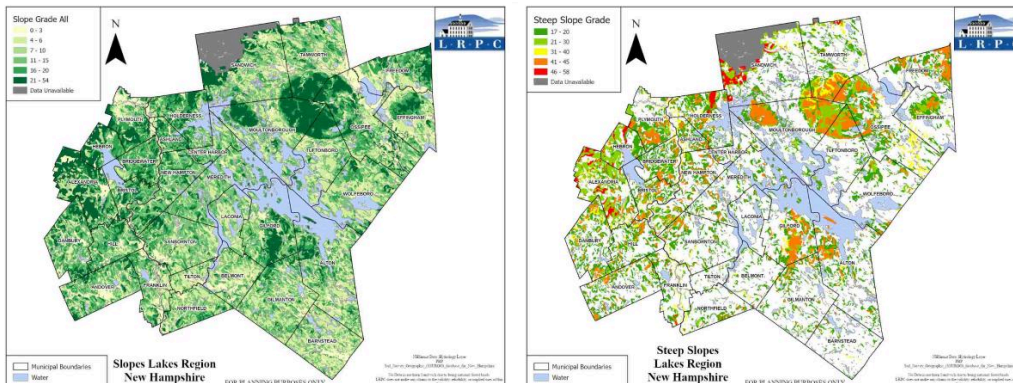
Lakes Region Sub-Watersheds Map: The importance of the region's water resources are a tremendous asset to the state . The Lakes Region contains 6 major watersheds: Saco River, Pemigewasset River, Winnepesaukee River, Merrimack River, Contoocook River, Salmon Falls-Piscataqua Rivers. The map below displays that smaller watersheds within them.

Bedrock of the Region: The land and water of the lakes region sit on the bedrock of the region often forming underwater ridges and valleys. The region is also to a very interesting massive collapsed ancient volcanic formation, called a volcanic ring dike, which spans over parts of 5 towns; this volcanic formation is now called the Ossipee Mountains and is located in the upper right portion of the Lakes Region.



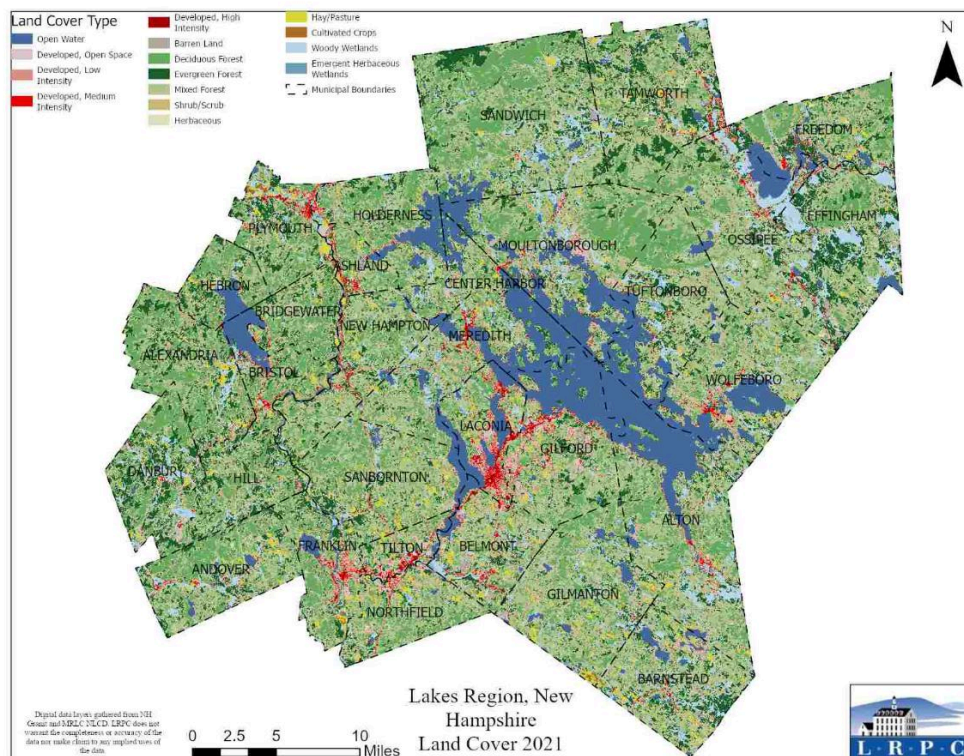
Map displays the types of bedrock found in the Lakes Region. The region is comprised 3 types of rock.

Slopes: The Lakes Region consists of many hills and mountains, which can pose a challenge to those who wish to build here. Steep slopes are generally considered to be 15% and over. These slopes can also have the potential to cause issues such as flooding, erosion, and other drainage issues.



The map on the left shows all of the slopes for the region. The map on the right shows only steep slopes in the region.

Land Cover: Land cover is useful in showing the environment around the region. Much of the Region is composed of deciduous and mixed forest. There is also significant development, generally along major transportation corridors in the Region.



Wildlife Habitat: The State of New Hampshire Fish and Game Department produces a Wildlife Action Plan to help determine human impact and potential impact on wildlife and to be used in comprehensive conservation planning. The ranking of importance covers things like the rarity of the habitat, the type and importance of the flora and fauna it supports, and other various factors. The Lakes Region contains many tier 1 lands throughout, which includes many of its major lakes.

