

Economic Development Advisory Council
DRAFT Meeting Minutes
June 12, 2015, 9:00 am to 10:30 am
Grappone Toyota Community Room, 594 NH-3A, Bow, NH 03304

Attendees:

EDAC Members:

1. Carmen Lorentz
2. Zenagui Brahim
3. Dean Christon
4. Kathy Eneguess
5. Judy Gove
6. Jeffrey Hayes
7. Daniel Lee
8. Mark MacKenzie
9. Sarah Smith
10. Tim Sink
11. Philip Suter
12. David Mullen
13. Patrick Clark
14. Pat McDermott
15. Eric Crainich
16. Stephen Heavener

Members of the Public:

- Mark Holden, Associated Builders and Contractors

Department of Resources & Economic Development

- Jeff Rose, Commissioner
- Patrice Myers

1. Lorentz called the meeting to order at 9:06 AM, welcomed the group and had the attendees introduce themselves for the benefit of the guest attendee.
2. The minutes of March 13, 2015 were moved, seconded, and unanimously approved.
3. Lorentz gave an update on the status of the FY 16-17 budget, stating that new funding for out-of-state travel and technology tools was approved by both House and Senate. In addition, \$107,000 for business accelerator programming through Live Free and Start is included and an increase of \$30,000 per year for the Small Business Development Center. The only cut from the Governor's proposed

budget was \$25,000 per year from the Innovation Research Center.

4. Lorentz went through a power point presentation showing the draft vision, goals and objectives of the division's draft strategic plan, as well as the draft key industries that the division will focus its pro-active work on. The presentation is attached and herein incorporated into the minutes. Discussion included how to address the youth retention issue, suggestions for organizations who could be involved in industry partnerships to address workforce gaps, and how to help transition low-wage workers to better careers. On the key industries, suggestions were made to add examples of occupations, age and gender breakdown, and existing career pathways to the industry cluster summaries as appropriate. Discussion also centered around how to move from this strategic plan for the division to a state economic development strategy.
5. Public comment: Mr. Holden asked about the HB 294 legislation re: a comprehensive development plan for the state. The bill has been retained. Discussion focused on the importance of conveying the work of the EDAC to the legislature.

The meeting was adjourned at 10:31 AM.

DRAFT



New Hampshire
Economic Development

Economic Development Advisory Council
June 12, 2015

Vision 2016-17 (draft)

New Hampshire Economic Development is the lead economic development organization in New Hampshire, and its responsive staff provide timely expertise, offer effective programs, and build creative partnerships that are highly valued by local, regional, and statewide stakeholders.

Goal 1: Focus programs on key industries.

Objectives for FY 16-17:

- **Target outreach for business retention programs based on regional industry cluster analysis.**
 - ✓ **Metrics: detailed metrics for business retention, government contracting, international commerce, job training grants are under development.**
- **Create and deploy a business/investment attraction marketing campaign focused on key industries #1-7.**
 - ✓ **Metrics: number of new active leads in key industries.**
- **Focus out of state travel resources on key industries #1-7**
 - ✓ **Metrics: number of trade shows and events in key industries.**

Goal 2: Provide tools that are valuable to local, regional, and state partners.

Objectives for FY 16-17:

- **Market availability of EMSI subscription for use in local planning, grant writing, and economic impact studies.**
 - ✓ **Metrics: how many projects completed using EMSI data.**
- **Launch site selection website to enhance business recruitment marketing.**
 - ✓ **Metrics: website analytics.**
- **Market availability of site selection website for use by local and regional economic development organizations.**
 - ✓ **Metrics: number of local and regional EDOs that link to the site selection website.**

Goal 3: Build partnerships that have a meaningful impact on workforce development.

Objectives for FY 16-17:

- Establish a process for staff to help them build industry partnerships to address workforce gaps in key industries.
 - ✓ Metrics: process mapped out, staff trained.
- Create industry partnerships to address workforce gaps in key industries.
 - ✓ Metrics: number of partnerships created, number of companies and partners involved.

Goal 4: Address the need for an economic development strategy for New Hampshire.

Objectives for FY 16-17:

- **Identify funding sources.**
- **If funding is secured, procure an economic development consultant to facilitate the planning process.**

Key Industries, Take 2

Regional LQ Analysis of More Industry Clusters

- *Great North Woods*
- *Upper Valley*
- *White Mountains*
- *Lakes Region*
- *Central*
- *Southwest*
- *Southern Tier*
- *Seacoast*

NH Economy Overview

Population (2014)	1,326,980
Jobs (2014)*	704,192
Establishments	49,000+
Average Earnings (2014)	\$57,263
Unemployed (11/2014)	29,148
Completions (2013)	20,323
GRP (2013)	\$68,364,232,908

**includes self-employed*

Advanced Textiles & Composites

6,116 Jobs (2014)

20% above National average

11.3% change (2015-20)

Nation: -5.1%

389 Establishments (2014)

\$54,405 Ave. Earnings (2014)

Nation: \$53,120

Sampling of industries:

- Fastener, Button, Needle, and Pin Manufacturing
- Fabric Coating Mills
- Nonwoven Fabric Mills
- Broadwoven Fabric Mills
- Other Cut and Sew Apparel Manufacturing
- Outdoor Advertising
- Commercial Screen Printing
- Graphic Design
- Textile Bag & Canvas Mills
- Abrasive Product Mfg.

*Of Regional Significance in:
Seacoast, Southern Tier, Central,
Southwest*

Life Sciences Manufacturing & Research

7,046 Jobs (2014)
15% above National average

7.9% change (2015-20)
Nation: 6.7%

267 Establishments (2014)

\$97,008 Ave. Earnings (2014)
Nation: \$128,463

Sampling of industries:

- Optical Instrument & Lens Mfg
- R&D in Physical, Engineering & Life Sciences
- Surgical Appliance & Supplies Mfg
- Surgical & Medical Instrument Mfg
- Biological Product Mfg
- Pharmaceutical Mfg
- Ophthalmic Goods Mfg
- Dental Equipment & Supplies Mfg

*Of Regional Significance in:
Seacoast, Southern Tier, Southwest,
Upper Valley*

Computer & Electronic Product Manufacturing

14,432 Jobs (2014)

195% above National average

-6.6% change (2015-20)

Nation: -2.7%

269 Establishments (2014)

\$109,705 Ave. Earnings (2014)

Nation: \$122,898

Sampling of industries:

- Computer Storage Device Mfg
- Semiconductor & Related Device Mfg
- Electronic Connector Mfg
- Bare Printed Circuit Board Mfg
- Analytical Lab Instrument Mfg
- Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System & Instrument Mfg
- Printed Circuit Assembly

*Of Regional Significance in:
Seacoast, Southern Tier, Lakes
Region*

Electrical Equip, Appliance & Component Mfg

3,660 Jobs (2014)

113% above National average

-6.7% change (2015-20)

Nation: -3.1%

55 Establishments (2014)

\$86,960 Ave. Earnings (2014)

Nation: \$85,947

Sampling of industries:

- Electric Lamp Bulb & Part Mfg
- Lighting Fixture Mfg
- Fiber Optic Cable Mfg
- Transformer Mfg
- Relay & Industrial Control Mfg
- Motor & Generator Mfg
- Current-Carrying Wiring Device Mfg
- Communication & Energy Wire Mfg

*Of Regional Significance in:
Seacoast, Southern Tier, Central,
White Mountains, Upper Valley*

Fabricated Metal Product Manufacturing

10,037 Jobs (2014)

53% above National average

0.4% change (2015-20)

Nation: 2.5%

399 Establishments (2014)

\$64,789 Ave. Earnings (2014)

Nation: \$63,368

Sampling of industries:

- Machine Shops
- Ball and Roller Bearing Mfg
- Sheet Metal Work Mfg
- Metal & Valve Pipe Fitting Mfg
- Metal Stamping
- Precision Turned Products
- Valve & Hose Fitting Mfg
- Bolt, Nut, Screw, Rivet & Washer Mfg
- Power Boiler & Heat Exchanger Mfg
- Fabricated Structural Metal Mfg

*Of Regional Significance in:
Southern Tier, Southwest, Central,
Lakes Region, Upper Valley*

Primary Metal Manufacturing

2,415 Jobs (2014)

28% above National average

-1.1% change (2015-20)

Nation: -1.4%

38 Establishments (2014)

\$70,464 Ave. Earnings (2014)

Nation: \$79,246

Sampling of industries:

- Iron, Steel, Aluminum Foundries
- Aluminum Foundries
- Copper Rolling, Drawing, Extruding, and Alloying
- Iron & Steel Pipe & Tube Mfg
- Secondary Smelting, Refining and Alloying
- Nonferrous Metal Smelting & Refining

*Of Regional Significance in:
Southern Tier, Lakes Region, White
Mountains, Upper Valley*

Machinery Manufacturing

7,686 Jobs (2014)

46% above National average

2.0% change (2015-20)

Nation: -0.4%

157 Establishments (2014)

\$91,080 Ave. Earnings (2014)

Nation: \$79,928

Sampling of industries:

- Optical Instrument & Lens Mfg
- Machine Tool Mfg
- Printing Machinery & Equip Mfg
- Commercial & Industrial Equip Mfg
- Sawmill, Woodworking, and Paper Machinery Mfg
- Cutting Tool & Machine Tool Accessory Mfg
- Special Die & Tool, Die Set, Jig, and Fixture Mfg
- Food Product Machinery Mfg
- Semiconductor Machinery Mfg

*Of Regional Significance in:
Southern Tier, Southwest, Central,
White Mountains, Upper Valley*

Business & Financial Services

67,492 Jobs (2014)

0% above National average

9.5% change (2015-20)

Nation: 6.7%

8,536 Establishments (2014)

\$94,249 Ave. Earnings (2014)

Nation: \$98,216

Sampling of industries:

- Engineering Services
- Insurance Agencies
- Human Resources Consulting
- Marketing & Advertising
- Lawyers
- Investment Advice
- Payroll Services
- Scientific & Technical Consulting
- Architectural Services
- Testing Laboratories
- CPAs

*Of Regional Significance in:
Seacoast, Southern Tier*

Information Technology & Telecommunications

37,820 Jobs (2014)

28% above National average

3.6% change (2015-20)

Nation: 6.3%

3,653 Establishments (2014)

\$109,548 Ave. Earnings (2014)

Nation: \$108,542

Sampling of industries:

- Computer Systems Design
- Software Publishers
- Data Processing, Hosting & Related Services
- Wiring Installation Contractors
- Wired Telecommunications Carriers
- Overlap with Advanced Electronics & Machinery Mfg
- Overlap with Business Services

*Of Regional Significance in:
Seacoast, Southern Tier*

Arts, Entertainment & Visitor Industries

25,728 Jobs (2014)

1% above National average

3.0% change (2015-20)

Nation: 4.6%

1,672 Establishments (2014)

\$29,623 Ave. Earnings (2014)

Nation: \$42,881

Sampling of industries:

- Hotels, Inns, Bed & Breakfasts
- Golf Courses
- Ski Areas
- Summer Camps
- Independent Artists
- Amusement & Theme Parks
- Theater Companies
- Sports Teams & Clubs
- Arcades
- Movie & Drive-In Theaters
- Marinas
- Historical Sites
- Scenic & Sightseeing
Transportation

*Of Regional Significance in:
Lakes Region, Great North Woods,
White Mountains,
Upper Valley*

Food & Beverage

53,229 Jobs (2014)

16% *below* National average

5.0% change (2015-20)

Nation: 5.1%

3,210 Establishments (2014)

\$25,172 Ave. Earnings (2014)

Nation: \$26,145

Sampling of industries:

- Restaurants & Bars
- Farms (Vegetable, Animal, Dairy)
- Specialty Food Stores
- Wineries & Breweries
- Fruit & Vegetable Markets
- Support Activities for Animal Production
- Fishing

Education & Knowledge Creation

31,298 Jobs (2014)

2% above National average

3.4% change (2015-20)

Nation: 6.2%

930 Establishments (2014)

\$56,377 Ave. Earnings (2014)

Nation: \$57,118

Sampling of industries:

- Colleges, Universities, Professional Schools
- Newspaper Publishers
- Sports & Recreation Instruction
- Educational Support Services
- Fine Arts Schools
- Periodical Publishers
- Professional & Management Development Training
- Internet Publishing & Broadcasting & Web Search Portals
- Exam Preparation & Tutoring
- Junior Colleges
- Flight Training

*Of Regional Significance in:
Seacoast, Southern Tier, Southwest,
Upper Valley*

Forest & Wood Products

10,180 Jobs (2014)

1% *below* National average

-11.3% change (2015-20)

Nation: -5.1%

782 Establishments (2014)

\$49,821 Ave. Earnings (2014)

Nation: \$52,609

Sampling of industries:

- Contractors (roofing, siding, finish carpentry, framing)
- Logging
- Sawmills
- Lumber, Plywood, Millwork and Wood Panel Wholesalers
- Cabinet & Countertop Mfg
- Paper Mills
- Paper Bag and Coated/Treated Paper Mfg
- Prefabricated Wood Building Mfg
- Adhesive Mfg
- Wood Furniture Mfg
- Custom Woodwork/Millwork Mfg

*Of Regional Significance in:
Southwest, White Mountains,
Great North Woods*