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*Town of  
Wolfeboro*




## WOLFEBORO BUSINESS RETENTION AND EXPANSION

FINAL REPORT

DECEMBER 1, 2015

UNH COOPERATIVE EXTENSION  
COMMUNITY & ECONOMIC DEVELOPMENT PROGRAM

UNIVERSITY OF NEW HAMPSHIRE  
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Wolfeboro Business Retention and Expansion Program

Final Report

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## Summary

The town of Wolfeboro began its Business Retention and Expansion (BR&E) program on October 17, 2014. The Wentworth Economic Development Corporation and the Wolfeboro Economic Development Committee played a key role in bringing this program to Wolfeboro along with the support from the Wolfeboro Board of Selectmen. The BR&E program consist of *Three Steps*:

**Step 1- Organize** → **Step 2- Prioritize** → **Step 3 Implement**

Step 1 was completed in June 2015:

- 100 (out of a list of 120) Businesses were selected in Wolfeboro to sample survey;
- 39 volunteers were recruited to participate in the program;
- 93 Surveys were completed and returned; and
- 27 Red Flag issues were recorded in Wolfeboro.

Step 2 began by reviewing red flag issues uncovered by the interview process. A Campus Review Meeting was held on October 16, 2015 to discuss the survey results and begin to develop strategies and projects. A Leadership Team and Taskforce retreat was organized and held on October 29, 2015 at the Wentworth Economic Development Corporation's office in Wolfeboro. Members of both Leadership Team and Taskforce were in attendance. Three strategies and four projects were developed as a result of the Campus Review meeting, which concluded Step 2. **The strategies and projects** are:

**Strategy 1: Market and promote the Town and business community.**

1. **Coordinate a marketing plan.**

**Strategy 2: Improve communication on infrastructure, community assets and energy costs in Wolfeboro.**

1. **Increase the digital footprint (online presence) of the local business community in Wolfeboro.**
2. **Improve and coordinate two way business communication to keep the business community informed as to the events, new development and business oriented news from town government.**

**Strategy 3: Promote and Increase year round Tourism.**

1. **Expand and create more year round events.**

Step 2 concluded with presentations to the Economic Development Committee on November 10, 2015, Board of Selectmen on November 18, 2015, Wolfeboro Chamber of Commerce on December 3, 2015 and, lastly, a Wolfeboro Business Retention and Expansion Commencement meeting was held on January 14, 2016 at the Wolfeboro Inn. As of the date of publishing, Wolfeboro was engaged in the final stage---Implementation (Step 3).

## **Chapter I. Background on the Wolfeboro Business Retention and Expansion Project**

The purpose of this chapter is to provide an overview of the Wolfeboro Business Retention and Expansion Program. The first section of this chapter briefly explains the role of Business Retention and Expansion (BR&E) as an economic development strategy. The second section addresses the Wolfeboro BR&E Program's objectives and sponsorship and highlights the key steps involved in conducting the program. The third section includes the names of the many people involved in the Wolfeboro BR&E Program. The people involved in organizing the program, visiting businesses, and setting priorities are an important strength of a BR&E visitation program. The final section describes the technical and research assistance provided by the University of New Hampshire Cooperative Extension.

### **Importance of Business Retention and Expansion (BR&E)**

Business Retention and Expansion has become a key element of local economic development efforts. The BR&E economic development program focuses on the retention and expansion of existing businesses to assist them in navigating today's global economy. While the attraction of new business start-ups is an important part of an overall economic development strategy, many communities now recognize that helping existing businesses to survive and grow is key element to a successful economic development effort.

An expansion or contraction is defined as a change in employment at an existing plant or business location. A start-up or dissolution is defined as the creation or closing down of a separate plant or business location. This "churning" of business creation, dissolution, expansion, and contraction is a natural part of a local economy. The BR&E challenge to a community is to capture the expansions while taking preventative actions to reduce the number of dissolutions and diminish the contractions.

Commonly, more jobs are created by business expansions than by new business start-ups. Wolfeboro, in launching this BR&E visitation program, has the potential to improve the climate for existing businesses and therefore benefit from the continued presence and growth of those businesses.

Another benefit of a BR&E visitation program is the information provided by the survey on the community's strengths and weaknesses. The strengths can be highlighted in community promotional material, while the weaknesses give the community an opportunity to make important changes and show businesses it is responsive. By acknowledging its weaknesses, a community also shows businesses it is trustworthy and will take a realistic look at its situation.

A final benefit of a BR&E visitation program, like the one being conducted in Wolfeboro, is how the process enhances the team of local leaders. The team is much broader than many other local economic development teams since it includes representatives from education and government in addition to business and economic development leaders. This diverse membership allows the local BR&E task force to bring in more resources, ideas, and contacts to address problems identified in the survey. Quite often, this local team will continue to interact in addressing other community concerns that arise long after the official program has ended.

### **Overview of the Wolfeboro BR&E Program**

The Wolfeboro Business Retention and Expansion (BR&E) Program is a community effort that began on October 17, 2014. This section of the report details important milestones that have been achieved and details the future goals of the program.

## **Program Objectives**

The Wolfeboro BR&E Program has five key objectives:

1. To demonstrate support for local businesses;
2. To help solve immediate business concerns;
3. To increase local businesses' ability to compete in the global economy;
4. To establish and implement a strategic plan for economic development; and
5. To build community capacity to sustain growth and development.

## **Program Sponsors**

The Wolfeboro BR&E Program is sponsored by the following organizations:

- Town of Wolfeboro;
- Wentworth Economic Development Corporation (WEDCO)
- University of New Hampshire Cooperative Extension

## **Program Organization**

Typically, a BR&E program is organized and launched by a core group of community members. From this core group, additional volunteers are added, beginning with five to eight individuals willing to serve on the Leadership Team. Each of the Leadership Team members play a special role in the BR&E program. From the Leadership Team comes additional volunteers (the BR&E Task Force) assist in conducting the business visits, and finally, the businesses willing to participate in those visits. It is important to note, the Leadership Team is also responsible for the coordination of the milestone meetings and for building community awareness of the program. The Wolfeboro Leadership Team held its first meeting on October 16, 2014, officially launching the program.

As mentioned earlier, the Leadership Team is responsible for the recruitment of the volunteer Task Force. In addition to assisting in the business visits, the BR&E Task Force also serves as a guide for the BR&E process. It should be noted, the Task Force also joins the Leadership Team at their retreat where the group is provided the overall results of the surveys and sets priorities for how to respond to the survey results.

### **Task Force Orientation and Volunteer Training**

The Wolfeboro Leadership Team and Task Force held its first meeting on November 18, 2014. At this meeting, the Task Force learned about the BR&E program and received training. The Task Force also assisted the Leadership Team review and provide input on the survey.

Two Volunteer Visitor training sessions were held on February 5, 2015. The Volunteer Visitor training sessions orient volunteers to the BR&E process and train them on delivering the survey.

## Business Selection

The Wolfeboro Leadership Team and Taskforce identified 120 businesses in the community, of which the team selected 100 businesses as its sample survey group. The Team used a combination of random and convenience sampling to select businesses targeted for visits. A list of all businesses in Wolfeboro was obtained from Reference USA and business information from the community. The Team examined the list of selected businesses and added businesses they felt were critical in the BR&E process. Any business not included on the list could “opt in” and request to be visited by the team. Efforts were undertaken to ensure that a diversity of businesses were selected on the list in Wolfeboro. As a result of this business selection process, the sampled population of businesses was not entirely random; some of the larger businesses which were identified in the most recent New Hampshire “Community Profile” were added to the list in Wolfeboro. Convenience samples are typical of many BR&E programs. They are not statistically representative of the greater business population, yet represent some of the businesses that were interviewed. The Leadership Team and Task Force’s goal was to visit 100 businesses.

## Business Visits

The Wolfeboro Leadership Team and Task Force conducted business visits from February 2015 to June 2015. The visits were conducted by teams of two. The visitors were made up of volunteers and members of the Leadership Team and Task Force. Each participated in each business visit effectively capturing the information shared by businesses during the visits.

Out of 120 businesses identified for a 100 business survey sample size for Wolfeboro’s BR&E program, 93 businesses completed the survey visits. This represents an overall response rate of 93% of the sample group that participated in the program. While the individual survey responses are confidential, it is important to acknowledge the effort of participating businesses.

## Wolfeboro Businesses

The following 93 businesses graciously agreed to be interviewed as part of the BR&E visitation process.

The Art Place	Cornish Hill Pottery	Hunter's Shop & Save
Artisans Corner	Country Bookseller	Imecom Group Inc.
Auto Care Plus	D.K. Water Resource	Wolfeboro Irving & Tire LLC
Ballentine Partners	Consulting	Jonathan R. Lovering & Sons
Bartlett Tree Experts	Dandelion Florist	Kalled Studio - Fine Jewelry
Bayside Grill & Tavern	Downtown Grill Café, LLC	Kingswood Golf Course
Black's Gift Shop & Paper Store	Durgin Stables	Kingswood Press
Bootleggers Footwear Ctr.	Edward Jones Investments	Kurt DeVlyder, Attorney
Bradley's Hardware	Financial Focus	LaBoca Bakery
Brewster Academy	GI Plastek	Laconia Electric
Butternuts Good Dishes	Goodue Hawkkins Havy Yard	Lake Hotel
Case Pharmacy	Granite State News	Lakeview Inn B&B
Carroll County Landscape	Great Waters Music	Leome, McDonnell & Roberts
Champagne Taste	Bridges Hallmark	PA
Citizens Bank	Hampshire Pewter	Linda's Flower & Gifts
Cigarcut Fr.	Harriman Signs & Design	Link Metal Shop
Clearwater Lodges	Huggin Hospital	Logos Unlimited

Lydia's Café of Wolfeboro  
Mari's Treasures  
Maxfield Real Estate Inc.  
Meredith Village Saving Bank  
Mill Street Meat Market  
Mise En Place Inc. Bistro  
Morrissey's Front Porch  
Wolfeboro Auto Parts, Inc.  
NH Boat Museum, Millie B.  
Nolan's Brik Oven Bistro  
Nordic Skier Sports  
Pierce Camp Birchmont  
Points North Financial  
Rite Aid #3744  
Robics RV Park  
Rollins Upholstery

Seven Suns Coffee & Tea  
Skelly's in Wolfeboro  
Gatherings by Stellabona Baker  
Genesis Healthcare-Wolfeboro  
Bay Ctr.  
Technicoil  
Top of the Hill Farm  
Topside Bed & Breakfast  
Winddrifter Resort  
Winnepesaukee Chocolates  
Winter Harbor Veterinary  
Hospital  
Wolfeboro Area Children's  
Center  
Wolfeboro Camp School  
Wolfeboro Computer Solutions

Wolfeboro Eye Associates  
Wolfeboro Inn  
Wolfeboro Trolley Co.  
Wright Museum of World War  
II  
Thirsty Water System  
Prudential Spencer Hughes  
Baker Gagne Funeral Home  
Emma Taylor, LLC  
Richard Neal, DMD  
Cappelli Hair Salon  
Tangles Salon LLC  
Wolfe Trap Grill & Rawbar  
Rental Plus Real Estate  
Penny Candy Shop  
Katie's Kitchen

## **Campus Research Review**

While the Warning Flag Review identified individual business concerns, the Campus Research Review meeting identified overarching, universal themes in the survey results. Once these were identified, the Campus Research Review participants suggested ideas for potential strategies and projects the Leadership Team and Task Force might undertake to address the issues and concerns of the businesses. The Wolfeboro Campus Research Review participants included members of the Leadership Team and Taskforce, economic development professionals, which in this case were representatives from Strafford Regional Planning Commission, Peter T. Paul School of Business and Economics, and University of New Hampshire Cooperative Extension faculty. The Wolfeboro BR&E Campus Research Review was held on October 14, 2015.

## **Key Findings Report Development**

Following the Campus Research Review meeting, University of New Hampshire Extension prepared the Key Findings Report. The goal of the Key Findings Report is to detail the overarching strategies identified by the Campus Research Review team and to put forth potential projects. Potential projects are ideas the Leadership Team and Task Force might use to address the larger strategies identified by the survey. The Key Findings Report also summarizes the survey data, gives a history of the BR&E project, provides context on the local economy and demographics, and contains the raw survey data.

The Wolfeboro BR&E Leadership Team and Taskforce sent the completed surveys to the University of New Hampshire for tabulation and analysis. A summary of the data was prepared for the Campus Research Review meeting. This Key Findings Report was then drafted based on the input of the review panel and other ideas.



## **Task Force Retreat**

A three-hour Leadership Team and Taskforce Retreat was held on October 29, 2015. At the retreat, the Key Findings were presented to the businesses and interested stakeholders of Wolfeboro which included the overall results of the survey, overarching strategies for addressing the universal issues identified, and potential projects for addressing these issues as determined by the Campus Review Team, Leadership Team and Taskforce.

Based on the findings of the Retreat, the Leadership Team and Task Force then sets priorities on major projects to implement. The Leadership Team and Task Force is free to adopt any of the projects listed in this report, to revise and then adopt any of the projects, or to develop its own projects. Quite often, a community will do all three of these in the process of adopting a final list of three to five priority projects.

A project is not considered as a priority project unless at least three people on the Leadership Team and Task Force are willing to take responsibility to see that steps are taken to implement it. The people who agree to work on each project do not need to be experts on the topic and can recruit others from outside the Leadership Team and Task Force to work on the project.

## **Implementation Resources Meeting**

Following the Retreat, the Wolfeboro Leadership Team and Task Force will work with individuals from outside the group who might have projects similar to theirs. The group will usually ask these resource people three questions:

1. Is your group doing any work similar to our proposed project that benefits businesses in our area;
2. If yes, what are you doing and to what degree are you reaching businesses in Wolfeboro; and
3. Would you be willing to collaborate with us and/or how could our BR&E Leadership Team and Task Force help your program?

The priority projects might be modified after these conversations. An Implementation Resources Meeting for the Leadership Team and Task Force will allow the teams to exchange this information and coordinate opportunities and challenges discovered during this resource information gathering process.

The Community Commencement Meeting is the meeting to celebrate the end of the BR&E visitation and planning phase and the beginning of the Wolfeboro BR&E implementation phase. All of the Task Force members, volunteer visitors, local media, and visited businesses are invited. Other local government, business, and community leaders are also invited, as well as regional and state agency representatives and members of the community.

On January 14, 2016, the Wolfeboro Leadership Team and Taskforce held a Commencement meeting at the Wolfeboro Inn. At this meeting the results of the BR&E survey, and the strategies and projects developed were presented. Attendees included community leaders, community members, business leaders and BR&E volunteers, making up almost 50 people in attendance.

## **Quarterly Implementation Meetings**

After the community commencement meeting, the Project team will meet quarterly to discuss progress on the projects and how they might overlap. At quarterly meetings, project work groups will report out their progress and solicit input from group members.

## **People Involved in the Wolfeboro BR&E Program**

The following groups have been critical to the success of Wolfeboro's BR&E Program: 1) the Leadership Team, 2) the Task Force, and 3) the businesses visited. The Campus Review team also deserves acknowledgement for their participation in the process.

### **BR&E Leadership Team**

The Leadership Team coordinated the BR&E program as well as participated in all parts of the Project, including the business visits. This Team will lead the group into the implementation phase.

### **Wolfeboro BR&E Leadership Team Members**

**Overall Coordinator** – Denise Roy-Palmer, Executive Director of Wentworth Economic Development Corporation

**Business Resource Coordinator** – David Owen, Town Manger and Robert Houseman, Planning Director and Development Director

**Milestone Meeting Coordinator** – Kathy Eaton

**Visitation Coordinators** – Alan Harding

**Media Coordinator** – Sheryll Ross

### **Wolfeboro BR&E Task Force**

For its part the Task Force addressed warning flag issues, set priorities for action, and will lead implementation of selected projects. Task Force members also participated in the business visits.

### **Wolfeboro BR&E Task Force Members**

Mary DeVries, Director of Wolfeboro Chamber of Commerce

Linda Murray, Wolfeboro Selectmen

David Bowers, Board of Selectmen

Kathy Barnard, Planning Board Chair

Michael Connelly, President of Huggins Hospital

### **Wolfeboro Volunteers**

Nancy Stock

Robyn Masteller

Don McBride

Nancy Jones

Lucy Van Cleve	Krista Marschner
Charles Wibel	Mike Roush
John Simms	Erica Horsken
Hank Why	Aaron Morrissey
Peter Pijoan	Bob Tougher
Lucy Van Cleve	John MacDonald
Allan Bailey	Ann Hammond
Beth Flagg	Barbara Bridges
Lisa Tarter	Paul O'Brien
Allan Bailey	Terri Harriman
John Simms	Cindy-Sue Patten
Gordon Hunt	Lisa Lutts
Bob Ness	Donald Muscavitz, Jr.
Aaron Morrissey	Mike Roush
Lisa Tarter	Lucy Van Cleve
Dick Eaton	Cindy-Sue Patten

### **Campus Research Review Team**

The Campus Research Review panel was comprised of University Faculty and Wolfeboro Task Force Members. A list of participants in the Campus Research Review follows.

### **Campus Research Review Members**

- Overall Coordinator:** Denise Roy-Palmer, Executive Director-Wentworth Economic Development Corp.
- Business Resource Coordinator(s)** – David Owen, Town Manager and Robert Houseman, Planning Director and Development Director
- Milestone Meeting Coordinator** – Kathy Eaton
- Visitation Coordinator** – Alan Harding
- Media Coordinator** – Sheryll Ross

### **BR&E Task Force Members**

- |                                    |   |
|------------------------------------|---|
| Kathy Barnard, Planning Board      | Chair Linda Murray, Selectmen                 |
| David Bowers, Selectmen            | Michael Roush, Lakes Region Technology Center |
| Michael Connelly, Huggins Hospital | Mary DeVries, Wolfeboro Chamber of Commerce   |

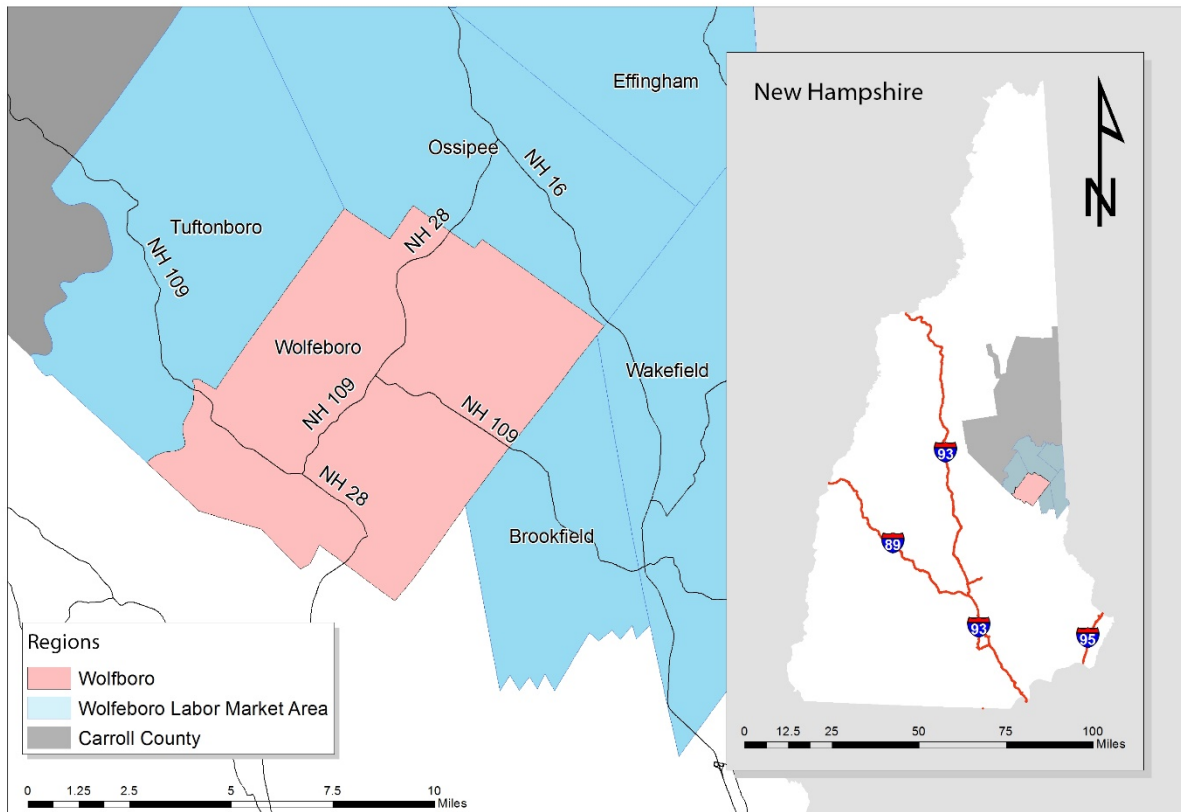
### **University of New Hampshire**

- Carmen Lorentz, State Director. NH Dept. of Economic Development
- Matthew Sullivan, Senior Planner-Strafford Regional Planning Commission
- Kim Clark, Peter T. Paul School of Business and Economics
- Charlie French, UNHCE Program Leader-Community and Economic Development Program
- Geoff Sewake, Community and Economic Development Field Specialist
- Brendan Prusik, Forestry Field Specialist
- Andre Garron, State Specialist, Economic Development

## Chapter II. Profile of Wolfeboro's economy and demographic.

The Town of Wolfeboro is located in the Lakes Region of New Hampshire, meeting the eastern shore of Lake Winnepesaukee, the largest lake in New Hampshire at Wolfeboro Bay. Wolfeboro also contains the seventh largest lake in New Hampshire, Lake Wentworth. Wolfeboro is part of Carroll County, and the Wolfeboro Labor Market. **See Map 1, below.** A Labor Market is an area defined by the U.S. Department of Labor, Bureau of Labor Statistics that can be distinguished by its geographic and economic integration that provides employment, close to a person's place of residence. The Wolfeboro Labor Market includes the New Hampshire communities of Brookfield, Effingham, Ossipee, Tuftonboro, Wakefield and Wolfeboro, and is entirely located within Carroll County.

Wolfeboro is located about 50 miles (~1.25 hour drive) from New Hampshire's largest city, Manchester (population 109,565), and about 40 miles (~1 hour drive) from New Hampshire's state capitol, Concord (population 42,695). In addition, Boston, Massachusetts (population 617,594), is about a two hour drive to the south (US Census). Major transportation routes include New Hampshire Route 28, which runs northeast to New Hampshire Route 16 in Ossipee, and southwest to New Hampshire Route 140. Additionally, New Hampshire Route 109 runs northwest towards Sandwich, and southeast through Wakefield to the Maine border. There is no direct access to Interstate 93, Interstate 95, US Route 3 or US Route 202. However, from Wolfeboro, the Spaulding Turnpike is about a 30 minute drive, which connects with US Route 202 and eventually with Interstate 95; and Interstate 93 and US Route 3 are accessible by way of a fifty minute drive along New Hampshire Route 28 and Route 140.



**Map 1. The Town of Wolfeboro as located in the Wolfeboro Labor Market, Carroll County, and the State of New Hampshire.**

## A. Demographics.

According to the New Hampshire Office of Energy and Planning, there are approximately 6,270 people residing in Wolfeboro (2011). Looking at Carroll County and the Wolfeboro Labor Market, there were an estimated 47,700 and 20,260 people, respectively (NH OEP, 2011). When compared to the population of the State of New Hampshire (1,316,470 persons), Carroll County and the Wolfeboro Labor Market respectively make up about 3.6 and 1.5 percent, of the state’s population (NH OEP, 2011). Of note, Carroll County is the third least populated county in the State. If we look at the population trend for Wolfeboro from 2000 to 2010, we find that it has grown by 3.1 percent. **See Table 1.** By comparison, Carroll County, the Wolfeboro Labor Market, and the State have grown by 9.4, 9.1 and 6.5 percent, respectively. **See Table 1.** As a point of additional comparison, Coos and Grafton, Belknap, and Strafford Counties, which border Carroll County to the north, west, southwest and south have seen population growth at 0.1, 9.0, 6.7 and 9.7 percent, respectively.

**Table 1. Est. Population Trend, 2000-2010 (NH OEP, 2011).**

Area	Population (2000)	Population (2010)	Percent Change
Wolfeboro	6,080	6,270	3.1%
Carroll County	43,610	47,700	9.4%
Wolfeboro Labor Market	18,570	20,260	9.1%
New Hampshire	1,235,790	1,316,470	6.5%

If we look at the communities located within Carroll County, we find that there’s a wide range of communities, from 41 people in Hart’s Location to Wolfeboro at 6,270. **See Table 2.** The community experiencing the highest growth in Carroll County is Chatham, with a current population of about 340 and an estimated population growth of 29.6 percent from 2000 to 2010. Within the Wolfeboro Labor Market, the community with the highest growth is Wakefield, with a current population of about 5,080, has grown 19.4 percent from 2000 to 2010. **See Table 2.** Within the Wolfeboro Labor Market, Wolfeboro has experienced the least growth at 3.1 percent, and in the Carroll County, Moultonborough grew the least, losing around 9.8 percent of its population from 2000 to 2010. **See Table 2.**

**Table 2. Population Trend, 2000-2010, for Carroll County and the Wolfeboro Labor Market (US Census, 2000 & 2010).**

Town/City	In Wolfeboro Labor Market	Population (2000)	Population (2010)	Percent Change
<b>Carroll County</b>				
Albany		654	735	12.4%
Bartlett		2,705	2,788	3.1%
Brookfield	X	604	712	17.9%
Chatham		260	337	29.6%
Conway		8,604	10,115	17.6%
Eaton		375	393	4.8%
Effingham	X	1,273	1,465	15.1%
Freedom		1,303	1,489	14.3%
Hart’s location		37	41	10.8%
Jackson		835	816	-2.3%
Madison		1,984	2,502	26.1%
Moultonborough		4,484	4,044	-9.8%
Ossipee	X	4,211	4,345	3.2%
Sandwich		1,286	1,326	3.1%
Tamworth		2,510	2,856	13.8%
Tuftonboro	X	2,148	2,387	11.1%
Wakefield	X	4,252	5,078	19.4%
Wolfeboro	X	6,083	6,269	3.1%

The town of Wolfeboro has a slightly different age makeup in comparison to Carroll County and the Wolfeboro Labor Market. For example, Wolfeboro’s makeup of 25 to 34 year olds is about 5.8 percent of the total population or around 2 percent less than Carroll County (8.2 percent) and the Wolfeboro Labor Market (7.6 percent) ---when compared to the State (11.0 percent) that difference jumps to 6.2 percent. This trend reverses when looking at the percent of population 65 and older. In Wolfeboro, the 65 and older group fills 28 percent of the total population, compared to the State at 13.5 percent, Carroll County at 20.6 percent and the Wolfeboro Labor Market at 21.7 percent. **See Table 3.**

**Table 3. Population by Age (NH OEP, 2011).**

Area	Total	0-14	15-24	25-34	35-44	45-54	55-64	65 and Over
Wolfeboro	6,269	14.0%	8.7%	5.8%	10.0%	16.6%	16.9%	28.0%
Wolfeboro Labor Market	20,256	15.1%	9.4%	7.6%	11.8%	17.5%	16.8%	21.7%
Carroll County	47,698	14.9%	9.5%	8.2%	12.0%	17.5%	17.4%	20.6%
New Hampshire	1,316,470	17.6%	13.5%	11.0%	13.6%	17.2%	13.5%	13.5%

In regards to race/ethnicity, the Wolfeboro has around the same percent persons of color (2.4 percent) as the rest of Carroll County (2.5 percent) and the Wolfeboro Labor Market (2.5 percent). When compared to the State, Wolfeboro’s population carries about 3.7 percent fewer persons of color. **See Table 4.** However, as noted, Wolfeboro nearly follows the racial makeup of its greater county and Labor Market Area. **See Table 4.**

**Table 4. Population Estimate by Race/Ethnicity (US Census, 2010).**

Area	Population (2000)	White	Other
Wolfeboro	6,270	97.6%	2.4%
Wolfeboro Labor Market	20,260	97.5%	2.5%
Carroll County	47,820	97.5%	2.5%
New Hampshire	1,316,470	93.9%	6.1%

In 2013, the New Hampshire Office of Energy and Planning in partnership with the state Regional Planning Commissions, conducted a projected population study. Based on the findings of that study, by the year 2040, Wolfeboro is projected to grow by 8.2 percent (NH OEP, 2013). **See Table 5.** Significantly, Wolfeboro is projected to grow near the State average (8.4 percent). However, as compared to the Carroll County (15.0 percent) and the Wolfeboro Labor Market (15.0 percent), Wolfeboro is expected to see about 6.5 percent lower growth rate than either of the two regions. **See Table 5.**

**Table 5. Projected Population Growth (NH Office of Energy and Planning, 2013).**

Area	Population (2010)	Population (2020)	Population (2040)	Percent Change
Wolfeboro	6,269	6,183	6,785	8.2%
Wolfeboro Labor Market	20,256	21,223	23,291	15.0%
Carroll County	47,818	50,115	54,997	15.0%
New Hampshire	1,316,470	1,359,836	1,427,098	8.4%

## B. Unemployment.

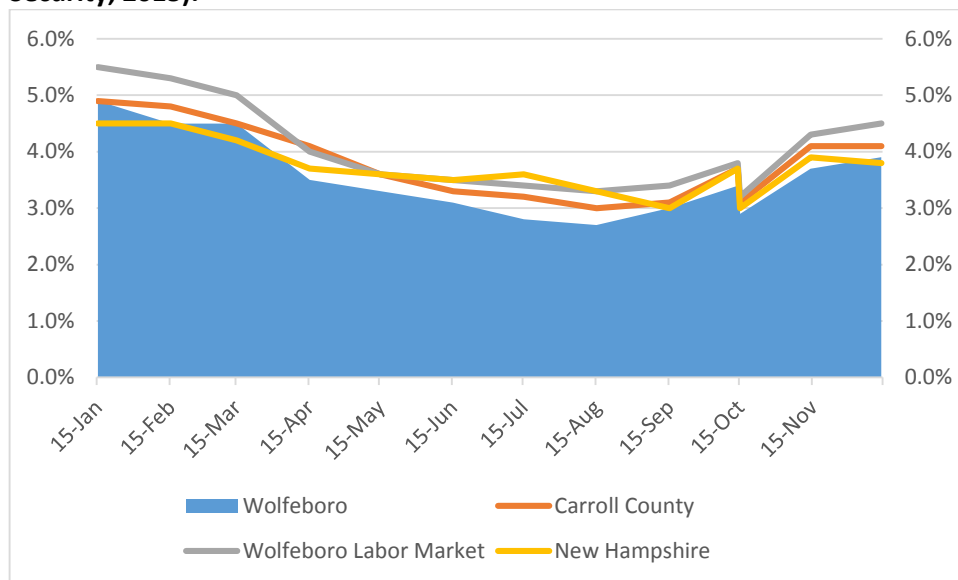
Since October 2014, unemployment rate in the town of Wolfeboro have generally held near the New Hampshire average. **See Table 6 & Figure 1.** Moreover, when compared to the rest of Carroll County and the Wolfeboro Labor Market, Wolfeboro has generally done better than the regions. **See Table 6 & Figure 1.**

**Table 6. Percent Unemployment\*, October 2014 to 2015 (NH Employment Security, 2015).**

Area	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15
<b>Wolfeboro</b>	3.4%	3.7%	3.9%	4.9%	4.5%	4.5%	3.5%	3.3%	3.1%	2.8%	2.7%	3.0%	2.9%
<b>Wolfeboro Labor Market</b>	3.8%	4.3%	4.5%	5.5%	5.3%	5.0%	4.0%	3.6%	3.5%	3.4%	3.3%	3.4%	3.2%
<b>Carroll County</b>	3.7%	4.1%	4.1%	4.9%	4.8%	4.5%	4.1%	3.6%	3.3%	3.2%	3.0%	3.1%	3.1%
<b>New Hampshire</b>	3.7%	3.9%	3.8%	4.5%	4.5%	4.2%	3.7%	3.6%	3.5%	3.6%	3.3%	3.0%	3.0%

\*Not seasonally adjusted.

**Figure 1. Percent Unemployment\*, October 2014 to 2015 as Compared to Other Regions. (NH Employment Security, 2015).**



Encouragingly, Wolfeboro has experienced a drop in unemployment of around 0.5 percent from October 2014 when compared to October 2015. Carroll County, the Wolfeboro Labor Market Area and the State all experienced similar decreases in unemployment when comparing the same time period, 0.6, 0.6 and 0.7 percent, respectively. **See Table 6 & Figure 1, above.**

### C. Employment and Wages.

In the 2<sup>nd</sup> Quarter of 2015, the Wolfeboro had approximately, 2,993 jobs, with an average weekly wage of \$750. **See Table 7.** By comparison, the State average weekly wage for the same time period was, \$987 or a difference of \$237. **See Table 7.** However, Wolfeboro’s weekly wages as compared to the rest of Carroll County (\$664) and the Wolfeboro Labor Market (\$742), are slightly higher than the rest of the region at \$86 and \$58, respectively. **See Table 7.**

**Table 7. 2014 2<sup>nd</sup> Quarter, Employment and Wages for All Sectors (NH Employment Security, 2014).**

Area	Units	Average Employment	Average Weekly Wage
<b>Wolfeboro</b>	294	2,993	\$750
<b>Wolfeboro Labor Market</b>	647	6,365	\$742
<b>Carroll County</b>	1,897	19,586	\$664
<b>New Hampshire</b>	46,472	638,573	\$967

A more detailed wage and employment analysis of Wolfeboro and the greater Wolfeboro Labor Market area is provided in, **Table 8.**

**Table 8. 2015 2<sup>nd</sup> Quarter, Employment and Wages (NH Employment Security, 2015).**

		Wolfeboro*			Wolfeboro Labor Market			New Hampshire		
NAICS Code	Industry	Units	Avg. Empl.	Avg. Weekly Wage	Units	Avg. Empl.	Avg. Weekly Wage	Units	Avg. Empl.	Avg. Weekly Wage
	<b>Total, Private plus Gov't</b>	294	2,993	\$750.08	647	6,365	\$742.43	46,472	638,573	\$966.66
	<b>Total Private</b>	281	2,477	\$735.10	599	4,840	\$691.59	44,407	551,713	\$962.54
<b>101</b>	<b>Goods-Producing Industries</b>	37	214	\$818.56	98	460	\$831.46	6,016	94,097	\$1,144.53
<b>11</b>	<b>Agriculture/Forestry/Fishing</b>	n	n	n	n	n	n	260	2,076	\$570.82
<b>21</b>	<b>Mining</b>	n	n	n	n	n	n	68	539	\$1,060.78
<b>23</b>	<b>Construction</b>	n	n	n	60	173	\$857.33	3,735	24,211	\$995.25
<b>31-33</b>	<b>Manufacturing</b>	11	141	\$756.33	29	232	\$846.62	1,953	67,271	\$1,216.64
<b>102</b>	<b>Service-Providing Industries</b>	245	2,262	\$727.19	501	4,380	\$676.91	38,391	457,616	\$925.12
<b>22</b>	<b>Utilities</b>	n	n	n	4	31	\$1,480.79	99	2,191	\$1,845.12
<b>42</b>	<b>Wholesale Trade</b>	4	6	\$1,543.62	18	36	\$1,494.89	4,923	27,568	\$1,609.63
<b>44-45</b>	<b>Retail Trade</b>	46	378	\$576.94	104	985	\$500.06	5,829	94,330	\$561.31
<b>48-49</b>	<b>Transportation and Warehousing</b>	n	n	n	8	40	\$483.18	875	13,060	\$775.02
<b>51</b>	<b>Information</b>	5	21	\$657.64	9	39	\$434.43	728	12,432	\$1,564.81
<b>52</b>	<b>Finance and Insurance</b>	17	116	\$1,375.21	25	284	\$1,645.76	2,079	28,299	\$1,556.80
<b>53</b>	<b>Real Estate and Rental and Leasing</b>	10	44	\$890.33	17	53	\$707.17	1,324	6,634	\$858.24
<b>54</b>	<b>Professional and Technical Service</b>	24	78	\$1,184.08	44	134	\$968.30	5,903	33,294	\$1,512.43
<b>55</b>	<b>Management of Companies/Enterprises</b>	n	n	n	n	n	n	534	8,514	\$2,114.08
<b>56</b>	<b>Administrative and Waste Services</b>	25	97	\$932.15	49	194	\$819.67	3,666	34,716	\$819.62
<b>61</b>	<b>Educational Services</b>	n	n	n	n	n	n	717	19,221	\$1,016.28
<b>62</b>	<b>Health Care and Social Assistance</b>	37	726	\$841.95	67	1,153	\$773.92	3,681	88,073	\$992.78
<b>71</b>	<b>Arts, Entertainment, and Recreation</b>	9	49	\$397.61	15	89	\$412.60	744	11,339	\$385.74



		Wolfeboro*			Wolfeboro Labor Market			New Hampshire		
NAICS Code	Industry	Units	Avg. Empl.	Avg. Weekly Wage	Units	Avg. Empl.	Avg. Weekly Wage	Units	Avg. Empl.	Avg. Weekly Wage
72	Accommodation and Food Services	33	398	\$361.69	82	907	\$318.78	3,485	57,438	\$354.07
81	Other Services Except Public Admin	26	85	\$613.28	49	146	\$600.38	3,633	20,239	\$681.28
99	Unclassified Establishments	0	0	\$0.00	0	0	\$0.00	171	268	\$1,426.98
	<b>Total Gov't</b>	13	517	\$821.93	48	1,525	\$903.75	2,065	86,859	\$992.80
	<b>Federal Gov't</b>	2	14	\$1,093.16	12	42	\$847.31	378	7,528	\$1,290.58
	<b>State Gov't</b>	3	13	\$620.17	13	85	\$1,038.70	877	20,257	\$1,019.88
	<b>Local Gov't</b>	8	490	\$819.61	23	1,398	\$897.29	810	59,074	\$945.57

\*Wolfeboro employment data is adjusted annually. "n" describes data that does not meet disclosure standards.

According to the data, the Service Industry provides the bulk of jobs available in Wolfeboro and the greater Wolfeboro Labor Market Area, or 75.6 percent and 68.8 percent, respectively. **See Table 8, above.** Other areas of major employment in Wolfeboro are in the Healthcare and Social Assistance (726 jobs), Government (517 jobs), and Accommodation and Food Services (398 jobs). **See Table 8, above.**

Interestingly, the top four earning jobs by weekly wage in Wolfeboro are, Wholesale Trade (\$1,543.62), Finance and Insurance (\$1,375.21), Professional and Technical Service (\$1,184.08), and Federal Government (\$1,093.16). **See Table 8, above.**

## Chapter III. BR&E Key Findings, Strategies, and Potential Projects

This chapter presents the business survey results, describes the types of businesses visited, their characteristics, and then introduces three strategies for addressing the issues and opportunities identified in the survey. The potential local projects were developed by the author based on feedback from the Campus Research Review meeting, Leadership Team and Taskforce and, lastly, on general economic development theory and practice.

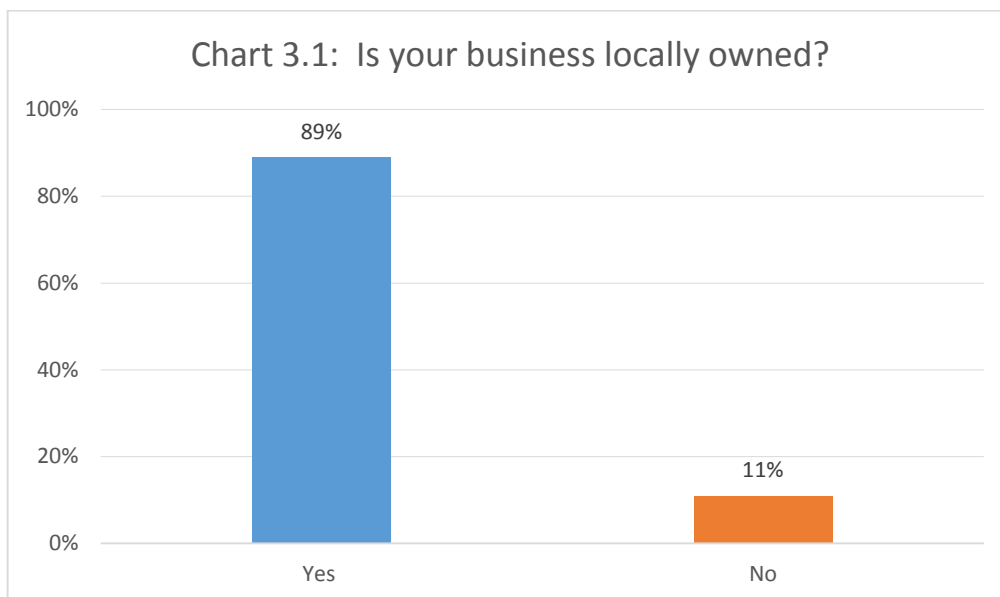
The potential local projects are suggestions for the Leadership Team and Task Force to consider in order to address business concerns in the community expressed through the responses on the survey form. Recommendations for projects to implement were made by the Leadership Team and Task Force at their retreat which took place on October 29, 2015.

The final priority projects will then be selected and developed by the Wolfeboro BR&E Leadership Team and Taskforce. Wolfeboro might use the suggested projects from this report, they might modify them, or they might adopt new projects developed locally. Typically, a community BR&E will result in three to five projects to move into immediate implementation. However, Wolfeboro may choose to phase more projects in over time.

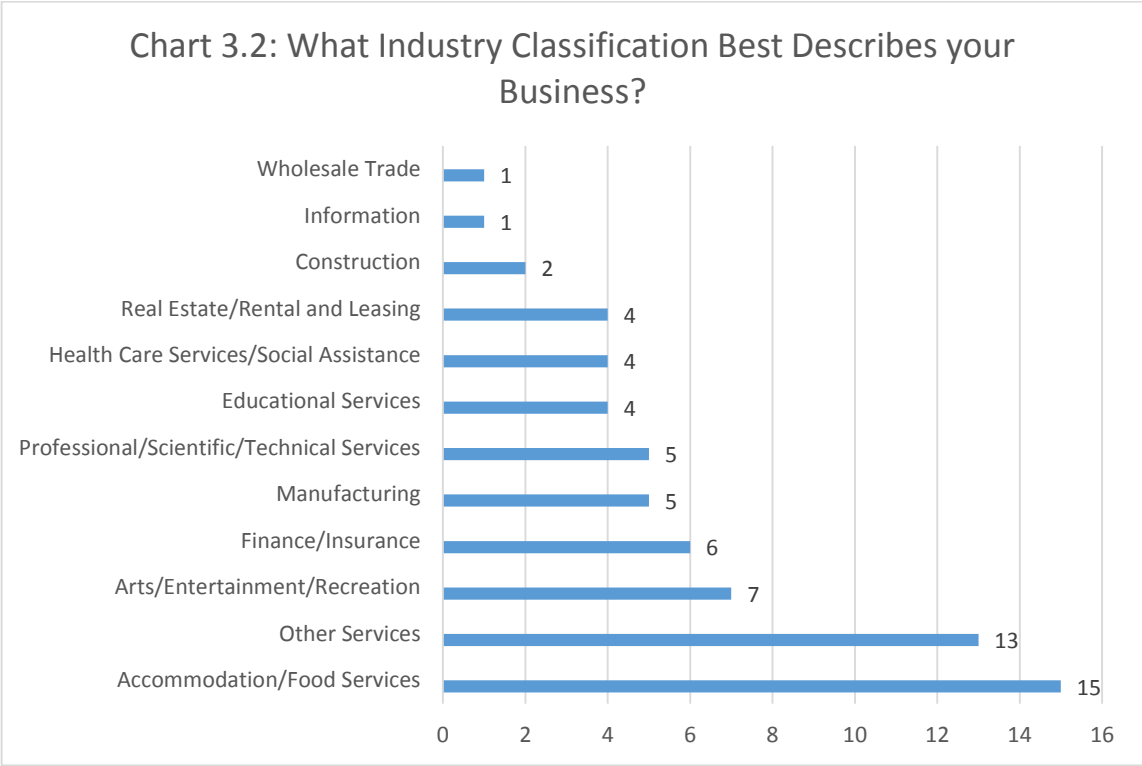
### Key Findings of Businesses Visited

Participants in the Wolfeboro BR&E program attempted to visit 100 local business of which 93 businesses participated in the program, visited by the Wolfeboro Leadership Team, Taskforce and 39 volunteer visitors. The business visitation, part of Step 1, took place from February 5 to June 1, 2015.

The Wolfeboro's Leadership Team and Task Force used a comprehensive method to select businesses targeted for visits. See Ch. 1 of this report for the business selection process used. Of the 93 businesses visited in Wolfeboro, 89 percent are locally-owned (see Chart 3-1) and only 11 percent of the businesses surveyed are not locally-owned. Having a high percentage of locally owned businesses significantly contributes to the economic stability of the community by being a stabilizing force weathering the peaks and valleys of the national economy. Locally owned businesses tend to stay and contribute to the local economy through hiring local people and buying supplies and other item locally as well.



Wolfeboro decided on a diverse sample of businesses to visit and survey (see chapter 1 for details, p. 3). The final mix of the 93 businesses surveyed resulted in Accommodation/Food Services being having the most returned surveys (15), followed by Other Services (13), Arts/Entertainment/Recreation (7), Finance/Insurance (6), Manufacturing and Professional/Scientific/Technical Services (5). See Chart 3-2 below.



Surveyed businesses in Wolfeboro currently employ a total of 1,811 individuals. According to chapter 2 of this report, in 2014, the average employment in Wolfeboro was 2,993. Total employment of surveyed businesses grew over three years prior to the BR&E visits. Chart 3.3 shows that Wolfeboro full time employment grew by 5 full time jobs, part time and seasonal jobs remained the same. Seasonal jobs were the only group that saw significant increase in the number of jobs increasing from two seasonal jobs in 2012, to 24 jobs in 2015.

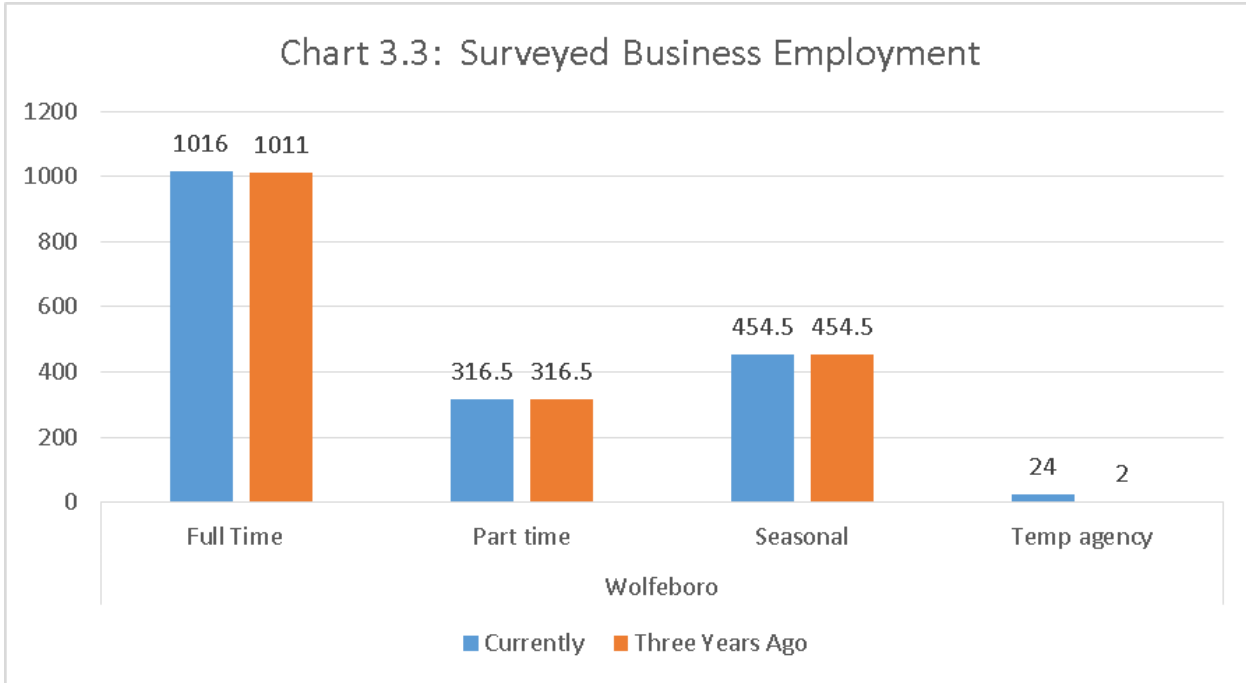


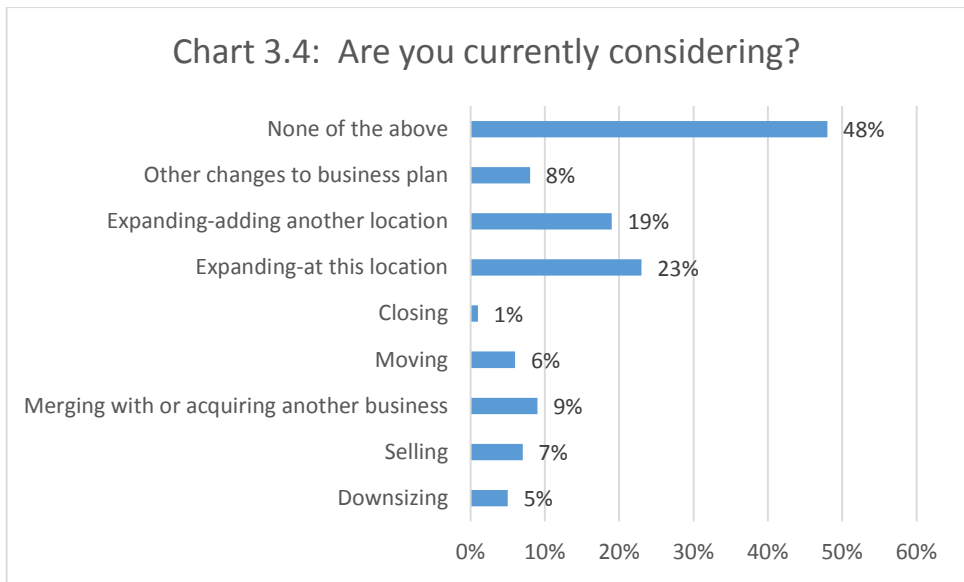
Table 3.3 shows the several reasons for the increase in employment in Wolfeboro. Growth in demand was cited by 30 percent of the businesses surveyed and 23% indicated a change in profits contributed to the slight increase in employment over the three years.

Table: 3.3: Top Reasons For Change in Employment over Past Three Years	Wolfeboro
Other	32%
Growth in demand	30%
Change in profits	23%
Expansion	17%
Change in management	13%

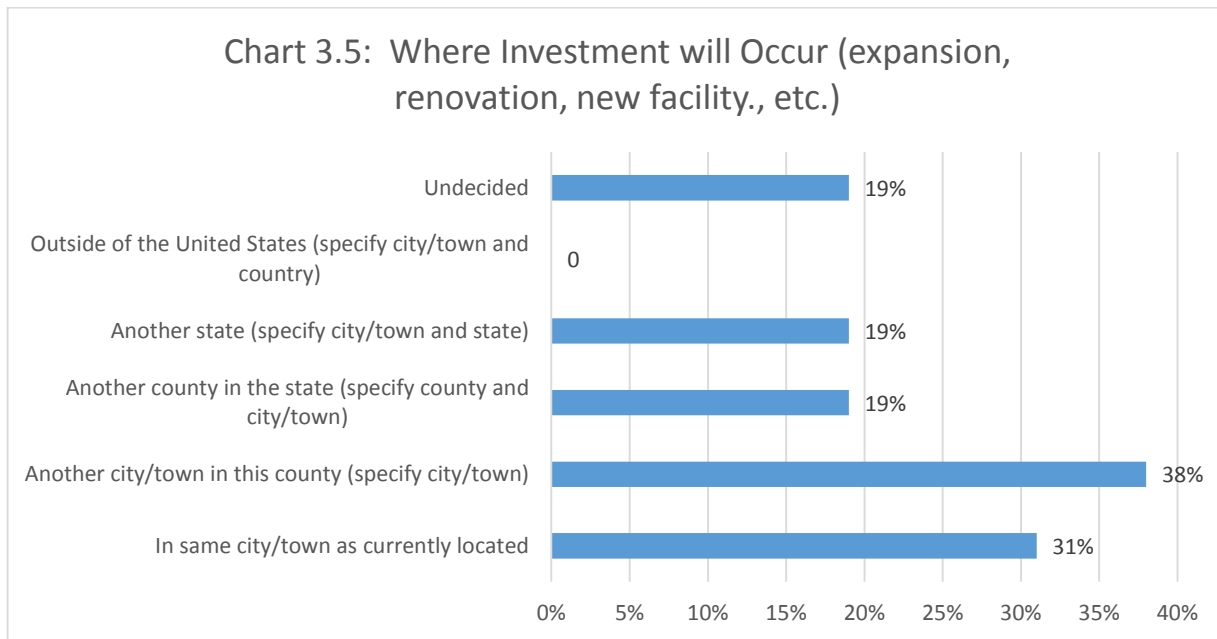
The average starting wage for all businesses ranges from \$10.37 an hour for Unskilled Service Workers, to \$34.22 an hour for a person involved in Information Technology (Table 3.4). These rates translate into weekly starting wages for full-time employees of \$415 for the lowest category to \$1,369 for the highest category. The average weekly wage in Wolfeboro, as highlighted in chapter 2, is \$750. The highest weekly wages in Wolfeboro was Management of Companies of \$2,114.08.

<b>Table 3.4: Average Hourly Starting Wage Paid by Category</b>	<b>Wolfeboro</b>
<b>Professional/Managerial (managers, accountants, HR professionals etc.)</b>	<b>\$25.20</b>
<b>Information Technology</b>	<b>\$34.22</b>
<b>Engineers, Scientists and Technicians</b>	<b>\$16.00</b>
<b>Arts, Design and other Creative Occupations</b>	<b>\$25.80</b>
<b>Healthcare Related</b>	<b>\$25.63</b>
<b>Office and Administrative (secretaries, office clerks, receptionists, etc.)</b>	<b>\$16.04</b>
<b>Unskilled Service Workers (food prep., retail sales, housekeeping, etc.)</b>	<b>\$10.37</b>
<b>Agricultural</b>	
<b>Construction</b>	<b>\$24.67</b>
<b>Repair and Skilled Maintenance (not janitorial)</b>	<b>\$19.00</b>
<b>Unskilled Manufacturing (assembly, production helpers, etc.)</b>	<b>\$12.40</b>
<b>Skilled Manufacturing (welders, machinists, etc.)</b>	<b>\$17.13</b>
<b>Transportation</b>	<b>\$12.17</b>

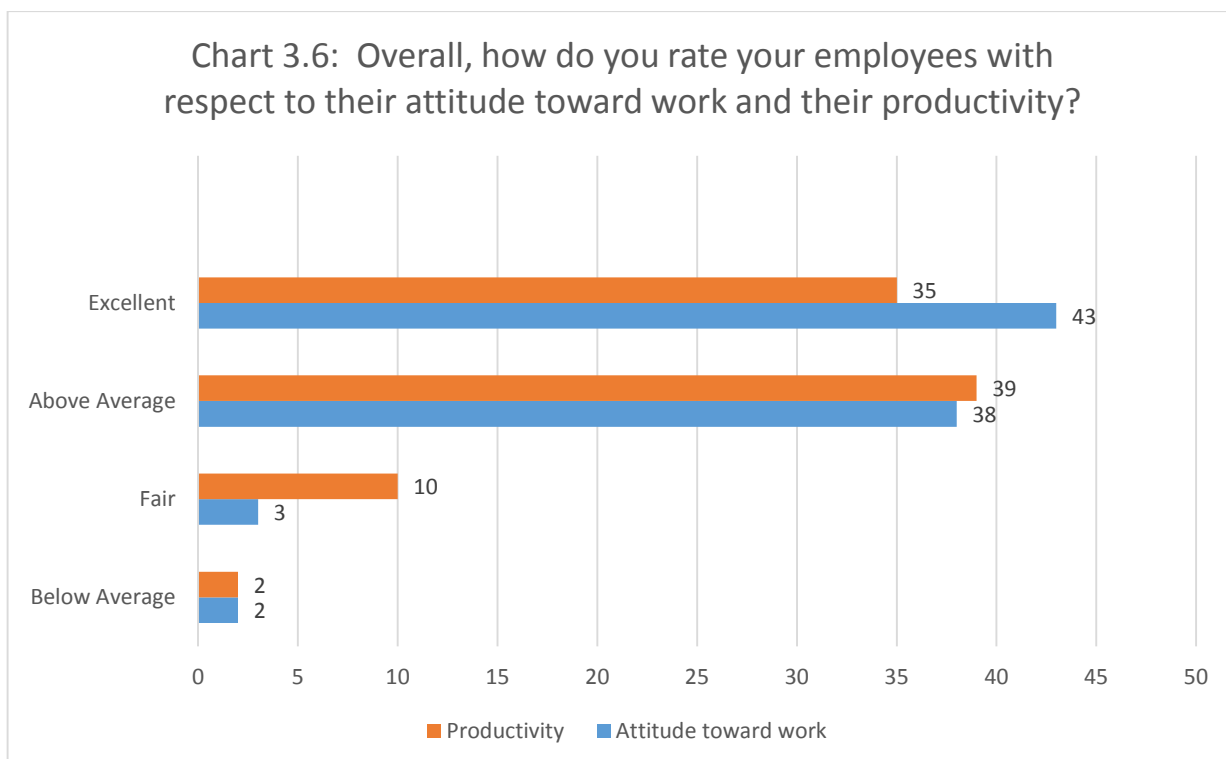
Several businesses in Wolfeboro are planning to expand or add a new location. A very small number of businesses planned to close or indicated moving from Wolfeboro, as shown in Chart 3-4. The majority of the respondents in Wolfeboro indicated “None of the above”, which can be interpreted that they are content at their current location.



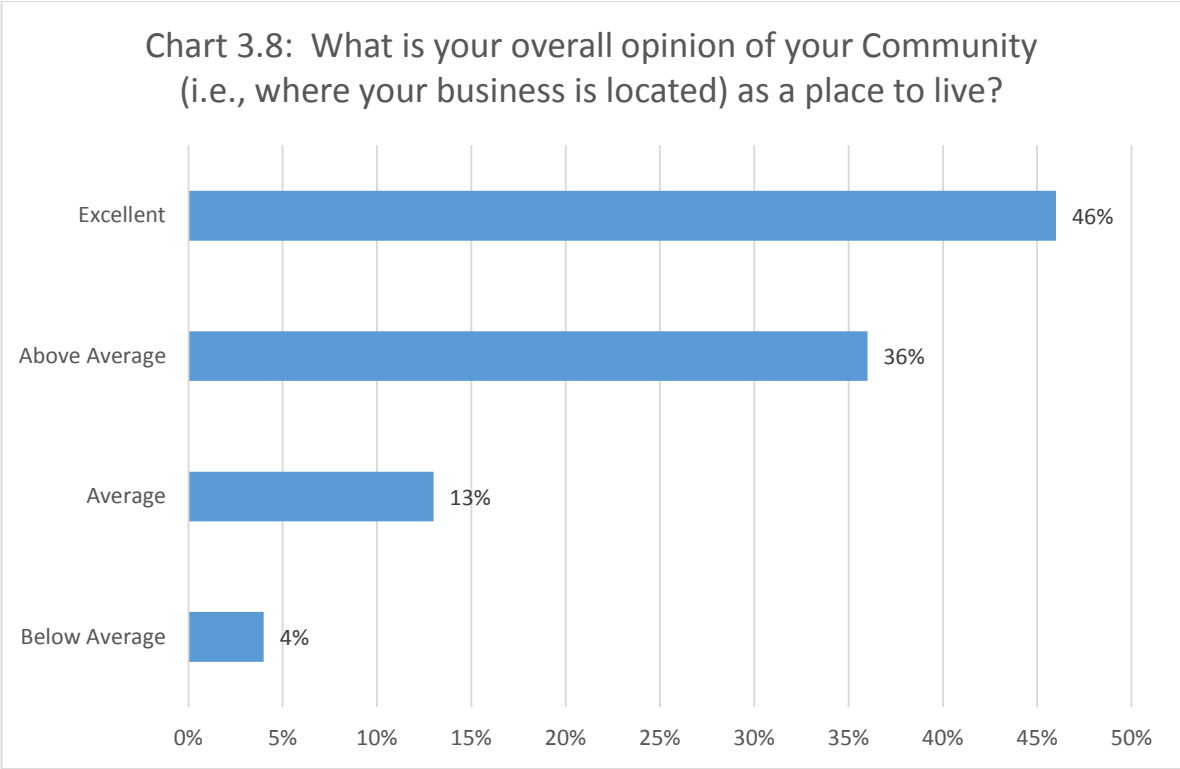
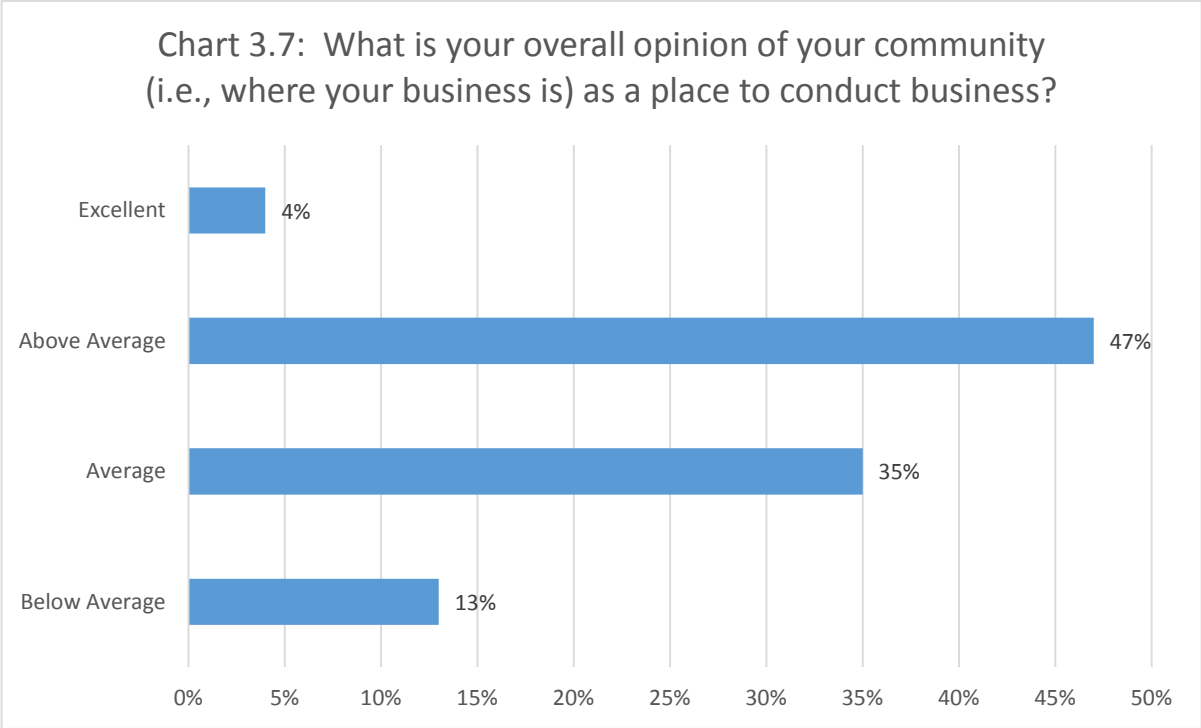
38% of the businesses surveyed indicated that their investments will occur in another city or town within the county. In our red flag discussion, we determined that most of these businesses currently have a presence in Wolfeboro and seek additional presence in a new market area. However, as many as nine of the investments would occur elsewhere (see Chart 3-5).



Businesses surveyed in Wolfeboro identify the workforce in town as having an above average to excellent view on its community's rating on its attitude towards work and productivity.



Finally, businesses shared their opinion of Wolfeboro as a place to do business and as a place to live. On average, businesses scored Wolfeboro as an “Above Average” place to do business and an “Excellent” place to live. This result is in line with the other New Hampshire communities that have participated in a BR&E survey.



## Chapter IV. Survey Analysis and Results

The previous chapter identified the key findings of the survey data tabulated for the Town of Wolfeboro. The information gathered by the surveys will be the foundation of establishing projects that will attempt to address the issues the businesses communicated through the surveys to help them grow and expand. As mentioned before, we cannot thank each visitor enough for the time they gave to visit and collect information from each of the 93 participating businesses.

### Strengths, Weaknesses, Opportunities, and Threats

During the Campus Research Review meeting (see Chapter 1 of this report), participants were asked to look critically at a summary of the survey results and identify any strengths, weaknesses, opportunities, and threats in the data. Some important data points:

- Overall, 93 businesses completed surveys which reveals a very strong and engaged business sector in Town;
- Wolfeboro is the largest community in its labor market---91% of the jobs in Wolfeboro are in the Service Providing Industries;
- The remaining 9% of the jobs in Wolfeboro are in the Good Producing Industries; and
- On the horizon, businesses indicated that they see technology challenges within their respective industries and a related need to train their workforce to meet those challenges.

**Strengths** identified include:

1. 89% of the businesses in town are locally owned;
2. A majority of the businesses surveyed indicated that they seek to expand in town;
3. The surveyed businesses also indicated they have a high regard for workers Productivity and Attitude toward at work and expect to increase their employment base by 92 jobs over the next three years; and
4. Lastly, the businesses surveyed have an Above Average opinion (47%) of Wolfeboro as a place to do business and an excellent opinion (46%) on Wolfeboro as a place to live.

**Weaknesses** identified include:

1. Of the businesses surveyed, 50% indicated that ownership/management did not have a succession plan;
2. The businesses surveyed were dissatisfied with the following community factors: Energy costs, broadband speed and telecommunications and broadband reliability;
3. In Wolfeboro, the 65 and older group **fills 28%** of the total population, compared to the State at 13.5%, Carroll County at 20.6% and the Wolfeboro Labor Market at 21.7%;
4. The concern of the businesses was the lack of unskilled workers might be tied to the lack of young workers; and
5. Lastly, when asked what three items are the most important community factors to be improved, the business response was parking situation, traffic flow and signage and public restrooms.



The Campus Research Review panel identified several opportunities within the survey responses.

**Opportunities** identified include:

1. Over 40% of the businesses surveyed indicated that they will undergo major technological changes in the future; and
2. 30% of the businesses surveyed responded that they will invest in expanding, renovating or adding a new facility in town.

**Threats** identified included:

1. Running out of room for business expansion and issues related to expansion;
2. Creating a more friendly business environment in Wolfeboro; and
3. Improving communication between the business community and local government.

Most of the ideas presented in this report as pertinent to Wolfeboro's BR&E program were contributed by the 19 people that attended the Campus Review meeting held on the main campus of the University of New Hampshire and the Leadership Team and Taskforce retreat held on October 29, 2015.

### **Overview of Business Retention and Expansion Strategies**

Business retention and expansion programs have a long history. These programs exist to serve the existing business community by educating decision makers and community leaders on better understanding what issues are restraining the growth and prosperity of the business sector. Realizing profits are a key component to the retention and expansion of businesses. A community's environment, its sense of place, to live and raise a family are important as well in attracting and retaining a diverse and productive workforce. Loyalty to the community alone cannot keep businesses in a community. In a free market economy, such as the United States, making a profit is the responsibility of business owners and managers. Government and community groups cannot singularly make a business profitable. However, to the extent that government and community groups can influence the business environment in their community, they can help businesses survive and grow. The next section of this report details strategies and potential projects Wolfeboro can consider to help its businesses become more competitive and, therefore, remain in and contribute to the local economy.

The potential projects included in this report are intended to be ideas the community can consider during its Leadership Team and Task Force Retreat. The propose themes and Projects were developed using the input received at the Campus Review Team meeting, and based on economic development theory, experience and practice. The projects reflect the results of the input received and analysis of the business survey.

None of the projects included in this report will address all of the businesses' concerns or serve as a key to prosperity for all businesses and the community. However, they are all potential options that can help strengthen the business sector and the local economy. Note that feasibility analysis has not been conducted on these potential project ideas.

After the Leadership Team and Task Force prioritizes its recommendations, the recommendations will be taken to the Wolfeboro Boards of Selectmen to report. The Wolfeboro Leadership Team and Taskforce will determine how the recommendations will move into implementation. The most effective BR&E implementation involves collaboration among various sectors in the community. This collaboration is a benefit in itself to the local businesses as it provides a forum for addressing important issues, efficiently links businesses to policy makers, helps minimize the duplication of services, and helps inform a cross-section of the community about economic and business issues.

## **Business Retention and Expansion Strategies for Wolfeboro**

The Leadership Team and Taskforce meeting was held on October 29, 2015 in which about 20 people were present. The group reviewed the BR&E survey key findings, the results from the Campus Review Meeting and the resulting proposed strategies and projects that came out of that meeting.

### **Strategy 1: Market and promote the Town and business community.**

1. Coordinate a marketing plan

### **Strategy 2: Improve communication on infrastructure, community assets and energy costs in Wolfeboro**

2. Increase the digital footprint (online presence) of the local business community in Wolfeboro
3. Improve and coordinate two way business communication to keep the business community informed as to the events, new development and business oriented news from town government.

### **Strategy 3: Promote and Increase year round Tourism**

4. Expand and create more year round events

## **Process for Setting Priority Recommendations**

For each of the above strategies, we will use the following process at the Wolfeboro Leadership Team and Taskforce Retreat to refine the proposed strategies and projects:

1. Survey results from the BR&E business visits will be reviewed;
2. The Leadership Team and Taskforce participants will review the suggested strategies and projects to insure they are responding to the businesses' concerns;
3. The Leadership Team and Taskforce participants will nominate projects they feel best fit the local area (including new suggestions or modifications of the potential projects in this report); and
4. After final discussion, the Leadership Team and Taskforce will use the Impact Feasibility grid to determine three to five high impact and high feasibility projects.

The recommendations of the BR&E Leadership Team and Taskforce will be presented to the Wolfeboro Board of Selectmen.

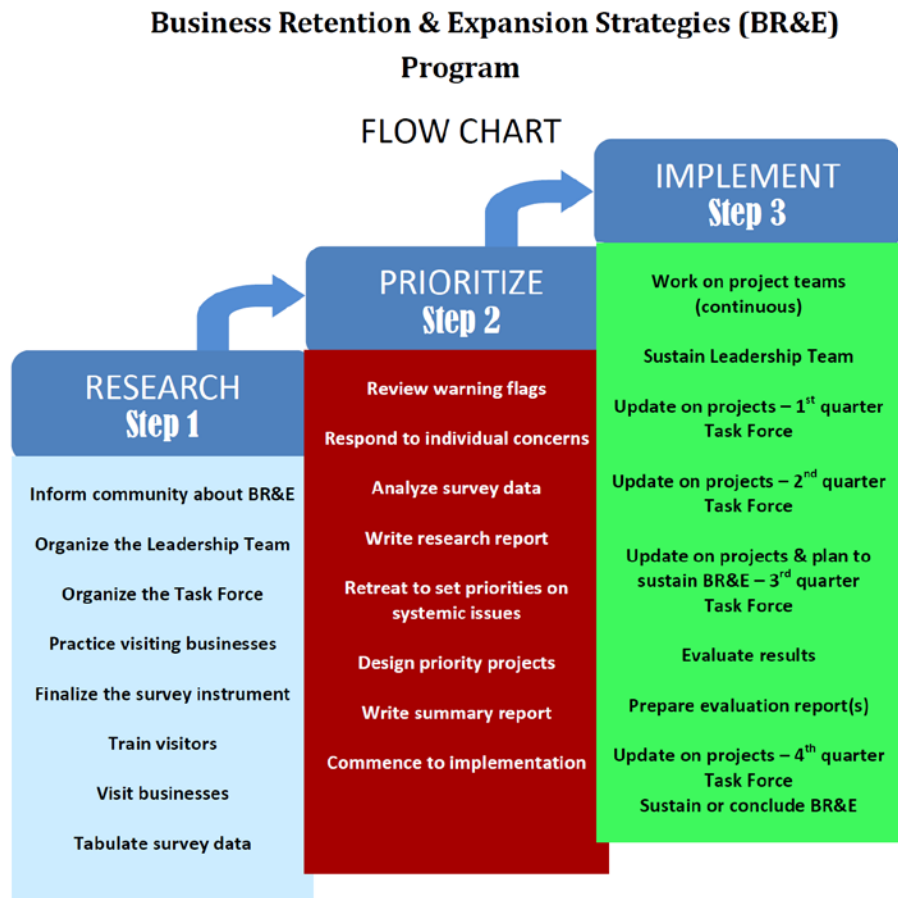
## Chapter V. Hints on Successful Implementation of BR&E Projects

The Wolfeboro BR&E Leadership Team and Taskforce completed steps 1 and 2 of the BR&E program.

Implementation is the 3<sup>rd</sup> step of the program.

As indicated at the beginning of this program, the reason that the third step is higher than the first two is because it is the hardest step to accomplish.

The community started the BR&E process by asking the business community about their issues, concerns and barriers within the business survey conducted in Step 1. We analyzed that data, discussed it at multiple events and developed projects to address their concerns towards creating an environment conducive to their growth.



Now it is time to put that information into action through the projects identified in the chapter 3. The following information on implementation strategies was developed by the University of Minnesota Business Retention and Expansion Strategies Programs and information contained in the “Local Leadership Manual”.

The following tips for successful project implementation come from two sources: 1. the experiences of more than 200 communities that have carried out BR&E programs in the past (Information gathered from the University of Minnesota Business Retention and Expansion Strategies Programs). These tips are reprinted, with permission, from the BR&E program booklet entitled “Local Leadership Team Manual”. The experiences of nine Minnesota communities as well as a literature search of published articles about BR&E successes (see bibliography below). Note: these tips are for the approach taught by the University of Minnesota Extension. Local modifications to the BR&E process may make some of these tips less relevant.

Some good tips to success:

- Follow sound strategic planning processes.
- From the beginning, stress that the BR&E Visitation Program is a two or three-year effort.
- Projects that have an economic development professional or other staff person involved with a percentage of their time allocated to it are correlated with greater success.

- At the Wolfeboro BR&E Leadership Team and Task Force Retreat, a UNH Extension Specialist asked those present at the meeting to indicate one of the projects on which they will work. Accountability for implementation is correlated with greater success.
- Even more success is correlated with projects that are done in teams rather than done by an individual.
- Set up a special implementation panel to help the Leadership Team and Task Force oversee project implementation progress.
- Meet at least quarterly to monitor implementation progress.
- Set a date for the first quarterly Implementation meeting before the community commencement meeting.
- Plan each quarterly meeting well.
- Contact the priority project teams between quarterly meetings of the Task Force to encourage them to meet regularly and make progress on their projects.
- Elect or appoint a new Leadership Team at the first quarterly Task Force meeting.
- Keep in touch with the University of New Hampshire Extension BR&E Program.
- Invite regional and state agency, chamber, or other representatives to your quarterly meetings<sup>1</sup>.
- Frequently distribute one page outlines or bulleted lists of projects.
- Keep publicizing the projects, especially the successes.

Select some priority projects that are easier to accomplish (i.e. “winnable”) among the other more difficult, long-term projects. Sports teams build momentum by having little victories as they move forward. Sport commentators often comment on who has the momentum in sporting events. In the same way, the BR&E Task Force can build momentum by celebrating its accomplishments as it moves forward toward full implementation of all its priority projects. Thus, picking some “low hanging fruit” among the projects can build the team’s spirit and confidence.

- Ensure that the projects selected do not have major opposition.
- Adequate funding is necessary.

Details on these tips are provided in the “Local Leadership Team Manual” and/or are cited in the bibliography below.

### **Design Priority Projects**

Getting from the Prioritize Step 2 of the BR&E process to Implement Step 3, and being successful in implementation, takes effort and planning. Once the priority projects are selected, the next step is to design specific, measurable, attainable, realistic, and time bound projects (i.e. “SMART”, see [http://en.wikipedia.org/wiki/SMART\\_criteria](http://en.wikipedia.org/wiki/SMART_criteria)). Extension can help the community with this process if it wishes by convening the priority project teams at a joint meeting (i.e. where all the teams are there simultaneously) and facilitate SMART project planning. Regardless, the priority projects need to be designed and sourced for success. Each priority project team needs to create a 2 to 3 paragraph summary description to go in the BR&E Summary Report that Extension staff compiles for the Community Commencement Meeting.

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<sup>1</sup> Loveridge, Scott and George Morse, “Local Leadership Team Manual,” in the series entitled *Implementing Local Business Retention and Expansion Visitation Programs*, Northeast Regional Center for Rural Development, NERCRD

## **Community Commencement Meeting**

The Wolfeboro commencement meeting was held on January 14, 2016. This meeting is both a celebration as it is informational. The results of the survey and the conclusions of the program are presented to those attending. After the meeting, participants are encouraged to ask questions of the Leadership Team and Task Force members individually or discuss ways in which they can participate in implementation of priority projects. Several Minnesota communities (the program is still fairly new in NH) have successfully used a process where they ended the large group session by breaking up into small groups led by the priority project teams. In this way, those in attendance that are interested in a particular project can get more in-depth information, offer their insights, and possibly become involved in it. Details on this meeting are given on pages 13-15 of the "Local Leadership Team Manual."

## **Continuing BR&E Visits**

Communities need to continually reach out and communicate with their existing businesses by making in-person BR&E visits. The University of New Hampshire Extension BR&E Program is improving its assistance for BR&E work in New Hampshire. In the near future, Wolfeboro may wish to do some additional BR&E visitation and follow-up action.

## **Bibliography of Literature Pertaining to Successful Priority Project Implementation**

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Morse, George and Inhyuck Ha. "How Successful are Business Retention and Expansion Implementation Efforts?" *Economic Development Review*: 1997 pp8-13.

Maples, Melissa. "Business Retention: The Basics and Beyond." *Economic Development Review*. 1996 14(3) 4-8.

## CHAPTER VI. Miscellaneous Resources

### **New Hampshire Department of Resource and Economic Development (DRED)**

#### **NH Division of Economic Development**

172 Pembroke Road  
Concord, NH 03302-1856  
T: 603.271.2591  
F: 603.271.6784  
E: [info@nheconomy.com](mailto:info@nheconomy.com)

#### **Workforce Community Development**

172 Pembroke Road  
Concord, NH 03302-1856  
Contact: Michael Power  
[michael.power@dred.nh.gov](mailto:michael.power@dred.nh.gov)  
603-271-7275

### **New Hampshire Community Development Finance Authority**

The Community Development Finance Authority (CDFA) was established by legislation ([RSA 162-L](#)) in 1983 to address the issues of affordable housing and economic opportunity for low and moderate income New Hampshire residents.

Whether it's providing funding for infrastructure improvements, helping break ground on a new affordable housing development, or providing working capital that allows a business to hire low-to-moderate income workers, the **Community Development Block Grant (CDBG)** is a powerful tool for community growth and benefits to LMI residents.

14 Dixon Ave, Suite 102  
Concord, NH 03301  
P 603-226-2170  
F 603-226-2816  
<http://www.nhcdfa.org/>

### **Lakes Region Community College**

The Lakes Region Community College campus is located in the Lakes Region of New Hampshire, adjacent to the Belknap Mountains and the Gunstock Ski Area. The White Mountains Recreation Areas are a short drive to the north, and the cities of Concord and Manchester and the Seacoast are less than an hour to the south. Laconia has a population of approximately 17,000, and Belknap County, in which the College is located, has a population of approximately 60,000.

Lakes Region Community College is part of the Community College System of New Hampshire, a public system of higher education consisting of seven independent colleges, plus local academic centers.

Lakes Region Community College is accredited by the New England Association of Schools and Colleges (NEASC) Commission on Institutions of Higher Education, a non-governmental, nationally-recognized organization whose affiliated institutions include elementary schools through collegiate institutions offering post-graduate instruction.

(603) 524-3207  
Contact Form  
379 Belmont Road  
Laconia, NH 03246

<http://www.lrcc.edu/>

**Lakes Region Planning Commission (LRPC)**

103 Main Street, Suite #3  
Meredith, NH 03253  
603-279-8171  
Fax: (603) 279-0200

<http://www.lakesrpc.org>

**Wentworth Economic Development Corporation**

WEDCO's mission is to promote and support businesses and the creation of employment opportunities by providing development assistance and financing.

WEDCO is a private nonprofit 501 (c)(3) regional economic development corporation serving businesses of all sizes in the New Hampshire towns of Brookfield, Effingham, Farmington, Milton, Middleton, Moultonborough, New Durham, Sandwich, Tuftonboro, Wakefield, Wolfeboro, etc.

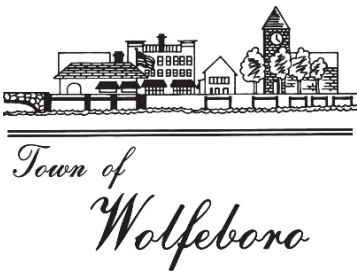
**Wentworth Economic Development Corporation**

7 Center Street  
Lower Level Citizens Bank Building  
PO Box 641  
Wolfeboro, NH 03894  
(603) 569-4216  
Fax: (603) 569-3317

<http://wedco-nh.org/>

## APPENDICES





Business ID: \_\_\_\_\_  
For Visitation Coordinator only



**BUSINESS RETENTION AND EXPANSION PROGRAM**  
**Interview Guide**

BUSINESS NAME: \_\_\_\_\_

Address: \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Phone \_\_\_\_\_ Website \_\_\_\_\_

**PERSON INTERVIEWED:**

Job title: \_\_\_\_\_

Date of visit: \_\_\_\_\_

Email \_\_\_\_\_

**OTHER KEY OFFICIALS IN THIS ESTABLISHMENT:**

Owner \_\_\_\_\_

Chief Exec. Officer \_\_\_\_\_

Plant Manager \_\_\_\_\_

Personnel Officer \_\_\_\_\_

VOLUNTEER VISITORS: \_\_\_\_\_

Please Print

\_\_\_\_\_

Please Print

**Note to Visitation Coordinator: After placing the ID number on this cover sheet and on pages 1 and 3 of the survey, remove the cover sheet and file separately to ensure confidentiality of results.**



## BUSINESS RETENTION AND EXPANSION PROGRAM

### Background

*We believe our existing businesses are our best prospects for future development. The purpose of this program is to see how we can help them succeed.*

- I. This program is sponsored by the following organization(s):
  1. Town of Wolfeboro / Economic Development Committee
  2. Wentworth Economic Development Corporation
- II. Technical and applied research assistance for this program is provided by the University of New Hampshire Cooperative Extension.
- III. Business, government, and educational leaders have agreed to help us work with our local businesses on this program.
- IV. The survey is a cooperative effort involving volunteers drawn from other businesses, local government, and educational institutions.
- V. The objectives of the program are:
  1. To demonstrate support for local businesses
  2. To help solve immediate business concerns.
  3. To increase local businesses' ability to compete in the global economy
  4. To establish and implement a strategic plan for economic development.
  5. To build community capacity to sustain growth and development.
- VI. Confidentiality - Your individual answers to this survey are confidential and will not be released except as required by law. Your response will be summarized with those of others to produce an overall result in percentages or averages. **If we find an issue in your survey response in which a certain individual or individuals may be able to respond to your concern in a beneficial way, you will be asked at the end of the survey whether you authorize us to release your survey information to them.**
- VII. The "Skip It Rule" - If there is a question that you feel might be best to skip, we will do that; just let us know. There is no need to explain your reasons.
- VIII. Copy of Final Report - Copies of the summary will be provided to all businesses that participate in this survey.

## Business Retention and Expansion Strategies Program Survey

N=93

Community: Wolfeboro

Date: \_\_\_\_\_

Q1. Is all the information on the cover sheet complete and correct? (Check one answer). If no, make the necessary corrections.

87%  Yes

13%  No

Q2a. Did your business begin its operation in this community? (Check one answer)

85%  Yes

15%  No

Q2b. If no, where did you move from and when?

Community \_\_\_\_\_

State \_\_\_\_\_

Year \_\_\_\_\_

Q2c. If yes, what year? 1812-2013

Q3. What type of facility is this? (Check all that apply)

12%  Branch

1%  Distribution

18%  Headquarters

9%  Home-based business

4%  Manufacturing

7%  Office-operation (non HQ)

Research & Development

19%  Retail Sales Office

40%  Other: \_\_\_\_\_

Other:

Bake shop

MOTEL

Recreation

RESTURANT/HOSPITALITY

BAKERY WITH RETAL RELATED TO

ENTERTAINING

NON PROFIT FAMILY AND CHILD

AND FAMILY SERVICES

ORGANIZATION

ACADEMIC CAMPUS. SUMMER Retail

BOARDING SCHOOL

restaurant

originally retail

wholesale

Commercial Rental Property

Retail

Retail

Convenience Store

contractor

Skilled nursing and rehab

Retail

Lodging

hospitality

Veterinary Hospital

auto repair

Funeral home

Hair Salon

Non-profit History Museum

Information Technology

Resort Motel

Art Gallery- Frame Shop

Restaurant

cafe

Restaurant

non-profit museum

residential camp for children

Restaurant

Art Gallery

farm

mechanical services, electrical,

plumbing, hvac, water quality

Q4a. Is your business locally owned? (Check one answer)

85%  Yes

15%  No

Q4b. If No, where is your corporate headquarters located? (Please identify city, state & country)

Q5a. Do you have multiple locations? (Check one answer)

31%  Yes

69%  No

Q5b. If Yes, where are they located?

Q6. Which of the following North American Industry Classification System (NAICS) categories best describes your business? (Check one answer)

- Administration/Support/Waste Management/Remediation Services
- 1%  Agriculture/Forestry/Fishing/Hunting
- 16%  Accommodation/Food Services
- 8%  Arts/Entertainment/Recreation
- 2%  Construction
- 4%  Educational Services
- 6%  Finance/Insurance
- 4%  Health Care Services/Social Assistance
- 1%  Information
- Management of Companies & Enterprises
- 5%  Manufacturing
- Mining, Quarrying, and Oil and Gas Extraction
- 14%  Other Services
- 5%  Professional/Scientific/Technical Services
- Public Administration
- 4%  Real Estate/Rental and Leasing
- 27%  Retail Trade
- Transportation and Warehousing
- Utilities
- 1%  Wholesale Trade

## Your product/service

Q7. We are interested in learning about your primary products and services.

	a. Name the major products or services offered by this establishment	b. What percentage of your total sales comes from each? (Total should equal 100%)	c. Are sales of this product or service? (Check one answer)		
			Increasing	Stable	Decreasing
(1)			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
(2)			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
(3)			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
(4) Other products or services (specify)			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q8a. What is special or unique about your major products or services?

Q8b. What are the one or two most important reasons that customers might choose your competitors over you?

## Labor Force

Q9. Please estimate how many workers (including yourself) are employed by you at this location. We'd like you to break this out between full-time and part-time for the two time periods shown.

	a. Full Time	b. Part time (as defined by the business)	c. Seasonal (hired by the business)	d. Temp agency employees
Currently	1016	316.5	454.5	24
Three years ago	1011	316.5	454.5	2

Q10. If the number of employees changed from three years ago, please identify up to 3 reasons for the employment change. (Check up to three reasons)

8%  Business did not exist 3 years ago

13%  Change in management

23%  Change in profits

Change in subcontracting

11%  Changes in worker efficiency

9%  Corporate decisions/policies

4%  Entered new markets

17%  Expansion

2%  Government regulation

30%  Growth in demand

13%  Increased competition

9%  Lack of demand

6%  New products/services

2%  Renovation

6%  Technological changes

32%  Other

Other: No change

lost franchise

SICKNESS

Sold Retail Location Now Working From Home

no employees

Straight to counter the cyclical nature of our business and avoid annual layoffs will grow the core of employees as the business grows.

relocation

economy better since 3yrs

retired

Needed the help

Downturn in the economy since 2008. Lack of Demand. Difficult to find experienced seasonal summer help

Closed branch office

seasonal - June through august

new model - increased business

Q11. What is the average hourly starting wage paid to employees in each category? (If you do not have employees in that category, write Not Applicable or NA)

	Average Hourly Wage or NA
Professional/Managerial (managers, accountants, HR professionals etc.)	\$25.20
Information Technology	\$34.22
Engineers, Scientists and Technicians	\$16.00
Arts, Design and other Creative Occupations	\$25.80
Healthcare Related	\$25.63
Office and Administrative (secretaries, office clerks, receptionists, etc.)	\$16.04
Unskilled Service Workers (food prep., retail sales, housekeeping, etc.)	\$10.37
Agricultural	
Construction	\$24.67
Repair and Skilled Maintenance (not janitorial)	\$19.00
Unskilled Manufacturing (assembly, production helpers, etc.)	\$12.40
Skilled Manufacturing (welders, machinists, etc.)	\$17.13
Transportation	\$12.17

Q12. Does your company have problems recruiting employees in the following categories?  
(Circle one answer per line)

	Yes	No	Unsure	Not Applicable	Mean
Professional/Managerial (managers, accountants, HR professionals etc.)	<input type="radio"/> 11	<input type="radio"/> 32	<input type="radio"/> 2	<input type="radio"/> 32	2.71
Information Technology	<input type="radio"/> 1	<input type="radio"/> 7	<input type="radio"/> 0	<input type="radio"/> 55	3.74
Engineers, Scientists and Technicians	<input type="radio"/> 3	<input type="radio"/> 7	<input type="radio"/> 0	<input type="radio"/> 55	3.65
Arts, Design and other Creative Occupations	<input type="radio"/> 3	<input type="radio"/> 10	<input type="radio"/> 0	<input type="radio"/> 52	3.55
Healthcare Related	<input type="radio"/> 4	<input type="radio"/> 6	<input type="radio"/> 0	<input type="radio"/> 53	3.62
Office and Administrative (secretaries, 7office clerks, receptionists, etc.)	<input type="radio"/> 2	<input type="radio"/> 33	<input type="radio"/> 4	<input type="radio"/> 33	2.94
Unskilled Service Workers (food prep., retail sales, housekeeping, etc.)	<input type="radio"/> 20	<input type="radio"/> 24	<input type="radio"/> 1	<input type="radio"/> 34	2.62
Agricultural	<input type="radio"/> 1	<input type="radio"/> 4	<input type="radio"/> 0	<input type="radio"/> 59	3.83
Construction	<input type="radio"/> 2	<input type="radio"/> 8	<input type="radio"/> 0	<input type="radio"/> 55	3.66
Repair and Skilled Maintenance (not janitorial)	<input type="radio"/> 7	<input type="radio"/> 13	<input type="radio"/> 0	<input type="radio"/> 50	3.33
Unskilled Manufacturing (assembly, production helpers, etc.)	<input type="radio"/> 4	<input type="radio"/> 6	<input type="radio"/> 0	<input type="radio"/> 56	3.64
Skilled Manufacturing (welders, machinists, etc.)	<input type="radio"/> 3	<input type="radio"/> 5	<input type="radio"/> 1	<input type="radio"/> 57	3.70
Transportation	<input type="radio"/> 0	<input type="radio"/> 9	<input type="radio"/> 0	<input type="radio"/> 56	3.72

Q13. If you answered "yes" for any category in question 12 above, identify up to 3 of the most important reasons for your recruiting problem. (Circle up to three) N=43

- 42%  Competition for employees
  - 7%  High cost of training employees
  - 16%  High wage rates for labor
  - 42%  Inadequate labor skills
  - 23%  Poor work attitudes
  - 5%  Workers cannot pass screening (drug, criminal record check, etc.) please specify
  - Workers lack documentation of legal work status
  - 28%  Workers will not commute into the area
  - 28%  Workers will not relocate into the area
  - 33%  Other High Cost of Housing
- Other  
LACK OF HIGH SCHOOL KIDS  
WORKERS DONT WANT TO  
WORK SEASONALLY  
THE JOBS ITSELF "NO ONE  
WANTS THEIR HANDS IN  
DIRTY WATER (DISHWASHER)  
LOW WAGES  
varies sometimes lack of available  
staff  
lack of qualified applicants  
Workforce with necessary skill set  
is aging.  
lack of workforce  
Technology changes  
Nature of business-undesirable,  
work is not for everyone  
Lack of skilled labor  
Unemployment compensation  
Availability of Housing in season  
lack of suitable aged people



Q14. Please estimate, by percentage, the commute time for your employees. Total should equal 100%.

	By %, commute time for your employees
Within a 15 minute drive one way	72%
16-30 minute drive one way	27%
31-60 minute drive one way	.9%
61+ minute drive one way	.1%

Q15. What resources are you currently using to locate new employees? (Circle all that apply). N=84

- 39%  Ad in local community papers
- 8%  Ad in metro / state-wide papers
- 13%  Hire our own apprentices
- 14%  Hire people who were initially temporary employees
- 42%  Internet advertising on job boards (e.g. Monster, Craig's List, etc.)
- 20%  Internet advertising on our own website
- 23%  Internet advertising through social media (e.g. Facebook, LinkedIn, etc.)
- 10%  Job Fair
- 8%  New Hampshire Office of Workforce Opportunity
- 6%  Placement office of four-year, community and / or technical colleges
- 7%  Private search firm
- 18%  Professional associations
- 32%  Promote from within
- 52%  Referrals from existing employees
- 15%  Sign in the window
- 6%  Temporary agency / staffing service business
- 1%  Union
- 27%  Walk-in
- 70%  Word of mouth
- 18%  Other \_\_\_\_\_

Q16. Do you expect the number of employees you have in each of the following categories to increase, decrease or stay the same over the next three years? (Check Increase, Stay Same, Decrease as it applies). If you expect a change, how many employees will be added or subtracted? (Indicate by how many).

	Increase	Stay Same	Decrease	How Many
Professional/Managerial (managers, accountants, HR professionals etc.)	<input type="radio"/> 9	<input type="radio"/> 50	<input type="radio"/> 2	20.5
Information Technology	<input type="radio"/> 5	<input type="radio"/> 21	<input type="radio"/> 1	4.5
Engineers, Scientists and Technicians	<input type="radio"/> 3	<input type="radio"/> 16	<input type="radio"/>	.5
Arts, Design and other Creative Occupations	<input type="radio"/> 4	<input type="radio"/> 23	<input type="radio"/> 1	1
Healthcare Related	<input type="radio"/> 2	<input type="radio"/> 17	<input type="radio"/>	1
Office and Administrative (secretaries, office clerks, receptionists, etc.)	<input type="radio"/> 7	<input type="radio"/> 36	<input type="radio"/>	6
Unskilled Service Workers (food prep., retail sales, housekeeping, etc.)	<input type="radio"/> 11	<input type="radio"/> 18	<input type="radio"/> 1	55.5
Agricultural	<input type="radio"/> 1	<input type="radio"/> 18	<input type="radio"/>	
Construction	<input type="radio"/> 1	<input type="radio"/> 18	<input type="radio"/>	
Repair and Skilled Maintenance (not janitorial)	<input type="radio"/> 5	<input type="radio"/> 20	<input type="radio"/>	3
Unskilled Manufacturing (assembly, production helpers, etc.)	<input type="radio"/> 2	<input type="radio"/> 18	<input type="radio"/>	
Skilled Manufacturing (welders, machinists, etc.)	<input type="radio"/> 1	<input type="radio"/> 17	<input type="radio"/>	
Transportation	<input type="radio"/>	<input type="radio"/> 18	<input type="radio"/>	

-5 93

Q17. Overall, how do you rate your employees with respect to their attitude toward work and their productivity? (Circle one answer per line)

	Poor	Below Average	Fair	Above Average	Excellent
Attitude toward work	<input type="radio"/>	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 38	<input type="radio"/> 43
Productivity	<input type="radio"/>	<input type="radio"/> 2	<input type="radio"/> 10	<input type="radio"/> 39	<input type="radio"/> 35

Q18a. Employees and owners often need additional training. Do you need training for either workers or managers?

52%  Yes

48%  No

Q18b. If yes, please estimate the number of employees needing training for each category.

	Number of People Needing Training
General Skills	79
Managerial Skills	88.5
Sales and Marketing	86.5
Computer Skills	134
Other Skills (please list)	165

Q19. How do you currently train your employees? (Check all that apply)

- 7%  A government supported program (e.g. NHWorks or similar program)  
Apprenticeships
  - 25%  Contract with private vendors for online training
  - 15%  Contract with private vendors for on-site training
  - 4%  Contract with public vendors (technical colleges, etc.) for online training
  - 4%  Contract with public vendors (technical colleges, etc.) for on-site training
  - 4%  Do not provide any employee training
  - 79%  In-house training (one-on-one by supervisor or co-worker, training department classes, etc.)
  - 49%  Self-taught (manuals, videos, training materials)
  - 45%  Send employees to training offsite
  - 14%  Other (Please list) \_\_\_\_\_
  - 2% Secondary/HighSchool Training
  - 2% Apprenticeships
- Other Skills-please list-(from Q.18b):
- FOOD SAFE CERTIFICATION
  - EARLY CHILDHOOD DEV.
  - Professional Cert/ health and safety
  - Creative Skills
  - Customer Service
  - specific plastic processing skills
  - ongoing recertification
  - all new employees
  - Common Sense
  - Technical-Continuing Ed.
  - We are all learning and keeping up to date on new skills of the framing trade.
  - museum work
  - equipment operation
  - dental
  - experience
- Other for Q.19
- on job train
  - I TRAIN THEM
  - IN HOUSE TRAINING
  - WEDCO NH MADE HANA
  - GRIMES- KEENE WREN
  - NA
  - Realtor Organization has a lot of programs for training agents
  - Landscape assoc. workshops
  - Realtor organization has a lot of programs for training agents
  - Rarely send staff off-site
  - Educators come to my salon seminars/workshops
  - museum conferences

## Customers

Q20. We are interested in the location of your customers. Please estimate the percent of your gross sales coming from the following locations:

	By % - (all items should total 100%)
Local (within 25 miles)	
Regional (26-100 miles)	
Outside the region but in the United States	
Outside the U.S.	

Q21a. Is your business currently exporting internationally? (Check one answer)

- 4%  Yes, we export directly from our business  
 Yes, but we sell our product internationally through another company which exports it (ex: US parent company, etc.)  
 96%  No

Q21b. If no, what prevents you from exporting your product? (Check all that apply)

- 47%  Business designed to serve specific area  
 20%  Business is too small  
 3%  Concerns about receiving payment  
 5%  Costs I risks are too high  
 7%  Lack of knowledge of foreign countries/markets  
 5%  Lack of specific export knowledge  
 2%  Language barrier  
 2%  Never fully considered it before- but I would like to consider it  
 7%  Restrictive state and or federal regulations  
 Starting plans to export  
 2%  Tough competition  
 45%  Other \_\_\_\_\_

Q22. If you export now, or previously exported, please identify problems, if any, that you have exporting your product(s). (Check all that apply)

- 8%  Transportation of product  
 Lack of export financing  
 Restrictive state and/or federal regulations  
 Inadequate knowledge of foreign countries/markets  
 50%  Other \_\_\_\_\_  
 42%  I do not have problems exporting my product(s)

## Changes

Q23a. Are there any major technological innovations on the horizon in your industry that might affect your company? (Check one answer)

- 42%  Yes
- 38%  No
- 20%  Not Sure

Q23b. If yes, what are these?

Q23c. If yes, will these new technologies require retraining of your labor force?

- 66%  Yes
- 34%  No

Q24. Does this company have a succession plan (ownership/management)?

- 34%  Yes
- 50%  No
- 16%  Not Applicable

Q25. Are there changes in your business plan for the next three years? (Check all that apply)

- 40%  No change in operations
- 20%  Change in mix of goods/services
- 27%  Add or subtract product lines
- 5%  Change production technology
- 30%  Other \_\_\_\_\_

Q26. Do you have a written business plan?

- 45%  Yes
- 55%  No

Q27a. Do you have any plans to modernize or expand your present building(s) or equipment?

- 48%  Yes
- 52%  No

Q27b. If Yes, what is planned?

Q27c. If yes, when will the work begin (year)

## Future Location Decisions

Q28. Are you currently considering? (Check all that apply)

- 5%  Downsizing
- 7%  Selling
- 9%  Merging with or acquiring another business
- 6%  Moving
- 1%  Closing
- 23%  Expanding-at this location
- 19%  Expanding-adding another location
- 8%  Other changes to business plan
- 48%  None of the above

Q29. If you said in Question 28 that you are considering downsizing, selling, moving or closing, what are the reasons? (Check all that apply)

- 25%  Changing market conditions
- 25%  Overcrowded building
- 19%  No land for expansion
- 6%  Transportation problems
- Crime/vandalism
- Low work productivity
- Environmental concerns
- Rigid code enforcement (including ordinances and building codes)
- High local taxes
- High state taxes
- Lease expiration
- Poor telecommunications/internet
- 6%  Insufficient labor supply
- 38%  Retiring
- 13%  Another business opportunity
- Business incentives from other jurisdiction(s)
- Trying to sell business but unable to sell it
- Other(specify)

Q30. If moving or expanding at another location, where are you considering? (Check all that apply)

- 31%  In same city as currently located
- 38%  Another city in this county (specify city) \_\_\_\_\_
- 19%  Another county in the state (specify county and city) \_\_\_\_\_
- 19%  Another state (specify city and state) \_\_\_\_\_
- Outside of the United States (specify city and country) \_\_\_\_\_
- 19%  Undecided

Q31. If not expanding your business, what is the single biggest factor or issue preventing you?

Q32a. Do you rent / lease or does this business own this facility? (Check one answer)

46%  Rent/Lease

54%  Own

Q32b. If Rent/Lease, when does the current rental agreement expire?

Q33a. Does your company currently own or rent / lease sufficient property to allow for expansion if necessary? (Check one answer)

49%  Yes

7%  Maybe

44%  No

Q33b. If Maybe or No, what type of land, buildings, and space needs do you foresee?

Increase retail and production space

Dream list: To have enough space for an office and workshop/classroom

NEED MORE LAND

MORE PARKING/LAND

CATERING, MORE KITCHEN SPACE

YES FOR PRODUCTION SPACE IN BROOKFEILD NO FOR THIS RETAIL LOCATION. RENTAL

SPACE IN SEACOAST WITH REASONABLE RENT

renting housing a challenge in town. Impacts recruiting

COTTAGES OFF PROPERTY TO TOWN OF WOLFEBORO

Warehouse/parking lot

don't need additional nap space

no plans to expand

not interested in local expansion

parking

Just spent \$3.5mil adding 24k sq.ft. of warehouse and 12k sq.ft. of future manufacturing space.

Additional 1,000 sq.ft.

Only interior renovations

Handicap access. Good parking

Building

further discussion required (same with Q29&30) (Q28 open to ideas) (Q20 less than 75% of yearly sales are from out of towners or summer time folks)

none at this location. Parking lot or up.

Restriction - land for grazing. Productive ag land... while there are fields around, not productive to farming.

Top of the Hill bought a lot of land to use. Aerate expensive and time consuming.

Downtown office space.

## Community Factors

Q34. If your business had to select a new location in the near future, how important would each of the following factors be in the decision-making process?

	Not at all Important	2	3	Very Important	Not Applicable	Mean
<b>A. Workforce</b>						
1. Availability of skilled labor	<input type="radio"/> 16	<input type="radio"/> 6	<input type="radio"/> 9	<input type="radio"/> 44	<input type="radio"/> 14	3.38
2. Availability of unskilled labor	<input type="radio"/> 24	<input type="radio"/> 7	<input type="radio"/> 14	<input type="radio"/> 18	<input type="radio"/> 22	3.08
3. Wage rates	<input type="radio"/> 15	<input type="radio"/> 11	<input type="radio"/> 22	<input type="radio"/> 23	<input type="radio"/> 16	3.16
4. Employee health care cost	<input type="radio"/> 18	<input type="radio"/> 9	<input type="radio"/> 7	<input type="radio"/> 24	<input type="radio"/> 28	3.41
5. Union presence	<input type="radio"/> 38	<input type="radio"/> 2	<input type="radio"/> 4	<input type="radio"/> 6	<input type="radio"/> 37	3.02
<b>B. Education and Training</b>						
1. K-12	<input type="radio"/> 10	<input type="radio"/> 9	<input type="radio"/> 13	<input type="radio"/> 28	<input type="radio"/> 24	3.56
2. Higher education within a reasonable drive	<input type="radio"/> 17	<input type="radio"/> 11	<input type="radio"/> 20	<input type="radio"/> 18	<input type="radio"/> 21	3.17
3. Technical training programs	<input type="radio"/> 18	<input type="radio"/> 15	<input type="radio"/> 18	<input type="radio"/> 13	<input type="radio"/> 22	3.07
<b>C. Transportation/Location</b>						
1. Highway accessibility	<input type="radio"/> 16	<input type="radio"/> 7	<input type="radio"/> 19	<input type="radio"/> 30	<input type="radio"/> 17	3.28
2. Air service	<input type="radio"/> 29	<input type="radio"/> 13	<input type="radio"/> 8	<input type="radio"/> 5	<input type="radio"/> 32	2.98
3. Proximity to major markets	<input type="radio"/> 17	<input type="radio"/> 14	<input type="radio"/> 13	<input type="radio"/> 24	<input type="radio"/> 20	3.18
4. Proximity to raw materials	<input type="radio"/> 35	<input type="radio"/> 6	<input type="radio"/> 5	<input type="radio"/> 5	<input type="radio"/> 36	3.01
5. Proximity to service suppliers	<input type="radio"/> 23	<input type="radio"/> 11	<input type="radio"/> 15	<input type="radio"/> 14	<input type="radio"/> 25	3.08
6. Railroad service	<input type="radio"/> 42	<input type="radio"/> 5	<input type="radio"/> 0	<input type="radio"/> 1	<input type="radio"/> 40	2.91
7. Public Transportation	<input type="radio"/> 29	<input type="radio"/> 10	<input type="radio"/> 9	<input type="radio"/> 8	<input type="radio"/> 32	3.05
<b>D. Land, Buildings, and Credit</b>						
1. Availability of land	<input type="radio"/> 14	<input type="radio"/> 8	<input type="radio"/> 7	<input type="radio"/> 28	<input type="radio"/> 27	3.55
2. Cost of land	<input type="radio"/> 13	<input type="radio"/> 8	<input type="radio"/> 8	<input type="radio"/> 33	<input type="radio"/> 24	3.55
3. Availability of buildings	<input type="radio"/> 6	<input type="radio"/> 6	<input type="radio"/> 8	<input type="radio"/> 53	<input type="radio"/> 13	3.71
4. Cost of buildings	<input type="radio"/> 5	<input type="radio"/> 1	<input type="radio"/> 7	<input type="radio"/> 59	<input type="radio"/> 14	3.88
5. Availability of loans	<input type="radio"/> 12	<input type="radio"/> 5	<input type="radio"/> 13	<input type="radio"/> 37	<input type="radio"/> 18	3.52
6. Cost of loans	<input type="radio"/> 12	<input type="radio"/> 6	<input type="radio"/> 10	<input type="radio"/> 39	<input type="radio"/> 18	3.53
<b>E. Utilities</b>						
1. Energy cost (electric, natural gas)	<input type="radio"/> 8	<input type="radio"/> 15	<input type="radio"/> 16	<input type="radio"/> 41	<input type="radio"/> 9	3.31
2. Energy reliability (electric, natural gas)	<input type="radio"/> 8	<input type="radio"/> 11	<input type="radio"/> 13	<input type="radio"/> 49	<input type="radio"/> 9	3.44
3. Telecommunications & broadband reliability	<input type="radio"/> 6	<input type="radio"/> 5	<input type="radio"/> 9	<input type="radio"/> 60	<input type="radio"/> 10	3.70



	Not at all Important	2	3	Very Important	Not Applicable	Mean
4. Telecommunications & broadband cost	○ 7	○ 10	○ 16	○ 47	○ 8	3.44
5. Broadband speed	○ 6	○ 4	○ 16	○ 56	○ 6	3.59
<b>F. Local Business Support</b>						
1. Community attitude towards business	○ 2	○ 6	○ 8	○ 67	○ 6	3.78
2. Community promotion of itself and business	○ 3	○ 6	○ 10	○ 64	○ 6	3.72
3. Chamber of commerce	○ 9	○ 13	○ 18	○ 42	○ 6	3.26
4. Economic development authority	○ 7	○ 13	○ 23	○ 36	○ 10	3.33
5. Incentives for business investment in facilities, worker skills or more workers	○ 9	○ 11	○ 21	○ 31	○ 15	3.37
<b>G. Quality of Life</b>						
1. Recreational opportunities	○ 4	○ 5	○ 13	○ 58	○ 9	3.71
2. Cultural opportunities	○ 4	○ 8	○ 19	○ 48	○ 10	3.58
3. Social organizations and networks	○ 4	○ 13	○ 21	○ 43	○ 7	3.41
4. Housing supply	○ 8	○ 8	○ 23	○ 40	○ 10	3.40
5. Housing costs	○ 8	○ 9	○ 24	○ 38	○ 9	3.35
6. Health care facilities	○ 7	○ 9	○ 21	○ 41	○ 9	3.41
7. Availability of child care	○ 11	○ 16	○ 19	○ 31	○ 11	3.17
<b>H. Government and Regulation</b>						
1. Fire Department	○ 3	○ 6	○ 20	○ 51	○ 7	3.61
2. Police Department	○ 2	○ 6	○ 19	○ 53	○ 7	3.66
3. Sewer & Water	○ 5	○ 6	○ 17	○ 49	○ 8	3.58
4. Street Maintenance	○ 2	○ 6	○ 23	○ 48	○ 8	3.62
5. Environmental regulations	○ 4	○ 8	○ 25	○ 39	○ 10	3.50
6. Planning and zoning	○ 3	○ 8	○ 21	○ 45	○ 9	3.57
7. Code enforcement	○ 5	○ 8	○ 19	○ 44	○ 9	3.52
<b>I. Local Government Financial Management</b>						
1. Property Taxes	○ 2	○ 10	○ 13	○ 53	○ 11	3.69
2. Other Local Taxes and fees	○ 4	○ 9	○ 16	○ 49	○ 11	3.61
3. Spending priorities	○ 5	○ 8	○ 23	○ 42	○ 9	3.48
4. Budget process & financial management	○ 3	○ 11	○ 21	○ 44	○ 8	3.49

Q35. Based on the following factors, please rate your satisfaction with your current location as a place for your company to do business.

	Very Dissatisfied	2	3	Very Satisfied	Don't Know	Mean
<b>A. Workforce</b>						
1. Availability) of skilled labor	<input type="radio"/> 12	<input type="radio"/> 23	<input type="radio"/> 19	<input type="radio"/> 17	<input type="radio"/> 13	2.95
2. Availability of unskilled labor	<input type="radio"/> 4	<input type="radio"/> 9	<input type="radio"/> 33	<input type="radio"/> 18	<input type="radio"/> 19	3.47
3. Wage rates	<input type="radio"/> 1	<input type="radio"/> 7	<input type="radio"/> 45	<input type="radio"/> 25	<input type="radio"/> 3	3.27
4. Employee health care cost	<input type="radio"/> 19	<input type="radio"/> 13	<input type="radio"/> 16	<input type="radio"/> 5	<input type="radio"/> 29	3.15
5. Union presence	<input type="radio"/> 0	<input type="radio"/> 1	<input type="radio"/> 5	<input type="radio"/> 9	<input type="radio"/> 66	4.73
<b>B. Education and Training</b>						
1. K-12	<input type="radio"/> 0	<input type="radio"/> 6	<input type="radio"/> 28	<input type="radio"/> 34	<input type="radio"/> 13	3.67
2. Higher education within a reasonable drive	<input type="radio"/> 3	<input type="radio"/> 21	<input type="radio"/> 25	<input type="radio"/> 15	<input type="radio"/> 17	3.27
3. Technical training programs	<input type="radio"/> 5	<input type="radio"/> 13	<input type="radio"/> 23	<input type="radio"/> 13	<input type="radio"/> 26	3.53
<b>C. Transportation/Location</b>						
1. Highway accessibility	<input type="radio"/> 6	<input type="radio"/> 18	<input type="radio"/> 32	<input type="radio"/> 21	<input type="radio"/> 5	3.01
2. Air service	<input type="radio"/> 6	<input type="radio"/> 17	<input type="radio"/> 15	<input type="radio"/> 10	<input type="radio"/> 25	3.42
3. Proximity to major markets	<input type="radio"/> 4	<input type="radio"/> 19	<input type="radio"/> 25	<input type="radio"/> 18	<input type="radio"/> 13	3.22
4. Proximity to raw materials	<input type="radio"/> 3	<input type="radio"/> 8	<input type="radio"/> 15	<input type="radio"/> 9	<input type="radio"/> 39	3.99
5. Proximity to service suppliers	<input type="radio"/> 2	<input type="radio"/> 12	<input type="radio"/> 27	<input type="radio"/> 17	<input type="radio"/> 18	3.49
6. Railroad service	<input type="radio"/> 5	<input type="radio"/> 5	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> 47	4.27
7. Public Transportation	<input type="radio"/> 11	<input type="radio"/> 13	<input type="radio"/> 6	<input type="radio"/> 5	<input type="radio"/> 34	3.55
<b>D. Land, Buildings, and Credit</b>						
1. Availability of land	<input type="radio"/> 5	<input type="radio"/> 10	<input type="radio"/> 22	<input type="radio"/> 17	<input type="radio"/> 21	3.52
2. Cost of land	<input type="radio"/> 9	<input type="radio"/> 19	<input type="radio"/> 17	<input type="radio"/> 9	<input type="radio"/> 20	3.16
3. Availability of buildings	<input type="radio"/> 6	<input type="radio"/> 23	<input type="radio"/> 18	<input type="radio"/> 13	<input type="radio"/> 17	3.16
4. Cost of buildings	<input type="radio"/> 9	<input type="radio"/> 15	<input type="radio"/> 22	<input type="radio"/> 10	<input type="radio"/> 19	3.20
5. Availability of loans	<input type="radio"/> 7	<input type="radio"/> 5	<input type="radio"/> 19	<input type="radio"/> 19	<input type="radio"/> 26	3.68
6. Cost of loans	<input type="radio"/> 6	<input type="radio"/> 6	<input type="radio"/> 17	<input type="radio"/> 18	<input type="radio"/> 28	3.75
<b>E. Utilities</b>						
1. Energy cost (electric, natural gas)	<input type="radio"/> 10	<input type="radio"/> 24	<input type="radio"/> 36	<input type="radio"/> 15	<input type="radio"/> 2	2.71

	Very Dissatisfied	2	3	Very Satisfied	Don't Know	
2. Energy reliability (electric, natural gas)	○ 6	○ 10	○ 41	○ 26	○ 3	3.12
3. Telecommunications & broadband reliability	○ 8	○ 14	○ 37	○ 25	○ 1	2.96
4. Telecommunications & broadband cost	○ 10	○ 17	○ 40	○ 17	○ 2	2.81
5. Broadband speed	○ 9	○ 19	○ 41	○ 16	○ 1	2.78
<b>F. Local Business Support</b>						
1. Community attitude towards business	○ 5	○ 16	○ 24	○ 41	○ 3	3.24
2. Community promotion of itself and business	○ 11	○ 22	○ 25	○ 27	○ 2	2.85
3. Chamber of commerce	○ 12	○ 18	○ 25	○ 29	○ 3	2.92
4. Economic development authority	○ 2	○ 15	○ 20	○ 21	○ 25	3.63
5. Incentives for business investment in facilities, worker skills or more workers	○ 13	○ 17	○ 16	○ 4	○ 34	3.35
<b>G. Quality of Life</b>						
1. Recreational opportunities	○ 1	○ 2	○ 16	○ 70	○ 0	3.74
2. Cultural opportunities	○ 2	○ 19	○ 31	○ 32	○ 5	3.21
3. Social organizations and networks	○ 2	○ 7	○ 36	○ 34	○ 8	3.45
4. Housing supply	○ 4	○ 21	○ 26	○ 25	○ 11	3.21
5. Housing costs	○ 7	○ 27	○ 24	○ 18	○ 9	2.94
6. Health care facilities	○ 12	○ 20	○ 26	○ 26	○ 3	2.86
7. Availability of child care	○ 1	○ 9	○ 22	○ 24	○ 30	3.85
<b>H. Government and Regulation</b>						
	1	1	2	2	9	4.13
1. Fire Department	○ 2	○ 1	○ 28	○ 52	○ 4	3.63
2. Police Department	○ 3	○ 4	○ 28	○ 49	○ 3	3.52
3. Sewer & Water	○ 5	○ 10	○ 29	○ 34	○ 6	3.31
4. Street Maintenance	○ 5	○ 17	○ 37	○ 26	○ 1	3.01
5. Environmental regulations	○ 3	○ 8	○ 34	○ 23	○ 18	3.52
6. Planning and zoning	○ 6	○ 16	○ 30	○ 21	○ 12	3.20
7. Code enforcement	○ 7	○ 16	○ 31	○ 18	○ 13	3.16
<b>I. Local Government Financial Management</b>						

8. Schools

	Very Dissatisfied	2	3	Very Satisfied	Don't Know	
1. Property Taxes	<input type="radio"/> 9	<input type="radio"/> 15	<input type="radio"/> 36	<input type="radio"/> 18	<input type="radio"/> 9	3.03
2. Other Local Taxes and fees	<input type="radio"/> 5	<input type="radio"/> 16	<input type="radio"/> 35	<input type="radio"/> 11	<input type="radio"/> 17	3.23
3. Spending priorities	<input type="radio"/> 5	<input type="radio"/> 16	<input type="radio"/> 41	<input type="radio"/> 11	<input type="radio"/> 13	3.13
4. Budget process & financial management	<input type="radio"/> 3	<input type="radio"/> 12	<input type="radio"/> 41	<input type="radio"/> 12	<input type="radio"/> 18	3.35

Q36. Do you have any suggestions for improving the items above (in Question 35) that you gave lower ratings to? If so, please give the item number and your suggestion for each item:

Q37a. Do the following community features related to tourism have a positive impact, no impact, or negative impact on your business? (Check one answer for each item)

	Very Positive Impact (2+)	1+	No Impact (0)	-1	Very Negative Impact (-2)	Mean
(a) Activities for children and teens	<input type="radio"/> 32	<input type="radio"/> 25	<input type="radio"/> 29	<input type="radio"/> 2	<input type="radio"/> 2	2.08
(b) Amusement and recreation activities	<input type="radio"/> 43	<input type="radio"/> 20	<input type="radio"/> 23	<input type="radio"/> 3	<input type="radio"/> 1	1.88
(c) Arts and cultural events	<input type="radio"/> 36	<input type="radio"/> 33	<input type="radio"/> 19	<input type="radio"/> 0	<input type="radio"/> 1	1.84
(d) Community atmosphere	<input type="radio"/> 54	<input type="radio"/> 24	<input type="radio"/> 12	<input type="radio"/> 0	<input type="radio"/> 0	1.53
(e) Community: diversity:	<input type="radio"/> 27	<input type="radio"/> 20	<input type="radio"/> 37	<input type="radio"/> 6	<input type="radio"/> 0	2.24
(f) Festivals or events	<input type="radio"/> 39	<input type="radio"/> 31	<input type="radio"/> 19	<input type="radio"/> 1	<input type="radio"/> 0	1.80
(g) Historic atmosphere (downtown, barns, etc.)	<input type="radio"/> 44	<input type="radio"/> 25	<input type="radio"/> 22	<input type="radio"/> 0	<input type="radio"/> 0	1.76
(h) Information for tourists	<input type="radio"/> 40	<input type="radio"/> 26	<input type="radio"/> 21	<input type="radio"/> 4	<input type="radio"/> 0	1.88
(i) Landscapes (downtown, farm, natural)	<input type="radio"/> 41	<input type="radio"/> 26	<input type="radio"/> 22	<input type="radio"/> 1	<input type="radio"/> 1	1.85
(j) Lodging facilities	<input type="radio"/> 37	<input type="radio"/> 22	<input type="radio"/> 21	<input type="radio"/> 6	<input type="radio"/> 4	2.09
(k) Meeting/conference facilities	<input type="radio"/> 28	<input type="radio"/> 19	<input type="radio"/> 36	<input type="radio"/> 7	<input type="radio"/> 0	2.24
(l) Museums/historic sites	<input type="radio"/> 38	<input type="radio"/> 28	<input type="radio"/> 24	<input type="radio"/> 0	<input type="radio"/> 0	1.84
(m) Natural environment	<input type="radio"/> 60	<input type="radio"/> 13	<input type="radio"/> 18	<input type="radio"/> 0	<input type="radio"/> 0	1.54

	Very Positive Impact (2+)	1+	No Impact (0)	-1	Very Negative Impact (-2)	Mean
(n) Outdoor recreation (including hunting/fishing)	<input type="radio"/> 53	<input type="radio"/> 22	<input type="radio"/> 15	<input type="radio"/> 1	<input type="radio"/> 0	1.60
(o) Proximity to potential visitors	<input type="radio"/> 43	<input type="radio"/> 27	<input type="radio"/> 15	<input type="radio"/> 5	<input type="radio"/> 1	1.84
(p) Seasonal tourism	<input type="radio"/> 62	<input type="radio"/> 12	<input type="radio"/> 10	<input type="radio"/> 6	<input type="radio"/> 0	1.56
(q) Transportation access for potential visitors	<input type="radio"/> 31	<input type="radio"/> 19	<input type="radio"/> 32	<input type="radio"/> 4	<input type="radio"/> 4	2.23

Q37b. Which of the features listed in Question 37a do you feel should be the focus of a marketing image for this community? (Please list the letters for up to three choices)

- First Choice (n)-Outdoor Recreation
- Second Choice (m) Natural Environment
- Third Choice (d) Community atmosphere

Q38a. Please rate the following factors about retail in this community. (Circle one for each item)

	Poor	2	3	Excellent	Don't Know	Mean
(a) Advertising	<input type="radio"/> 5	<input type="radio"/> 32	<input type="radio"/> 33	<input type="radio"/> 7	<input type="radio"/> 12	2.88
(b) Coordinated store hours	<input type="radio"/> 27	<input type="radio"/> 20	<input type="radio"/> 20	<input type="radio"/> 7	<input type="radio"/> 16	2.61
(c) Customer service	<input type="radio"/> 1	<input type="radio"/> 13	<input type="radio"/> 39	<input type="radio"/> 28	<input type="radio"/> 8	3.33
(d) Exterior atmosphere of the area (e.g. front entrances, rear entrances, landscaping, street trees, store fronts, sidewalks, cleanliness, signage)	<input type="radio"/> 2	<input type="radio"/> 15	<input type="radio"/> 43	<input type="radio"/> 30	<input type="radio"/> 1	3.14
(e) Feeling of safety (e.g. lighting, security)	<input type="radio"/> 0	<input type="radio"/> 1	<input type="radio"/> 27	<input type="radio"/> 62	<input type="radio"/> 1	3.69
(f) Group advertising	<input type="radio"/> 17	<input type="radio"/> 19	<input type="radio"/> 27	<input type="radio"/> 4	<input type="radio"/> 23	2.97
(g) Hours - Evening	<input type="radio"/> 33	<input type="radio"/> 23	<input type="radio"/> 18	<input type="radio"/> 6	<input type="radio"/> 9	2.27
(h) Hours - Weekend	<input type="radio"/> 7	<input type="radio"/> 20	<input type="radio"/> 44	<input type="radio"/> 9	<input type="radio"/> 9	2.92
(i) Internet presence (i.e. can you find community retailers online?)	<input type="radio"/> 6	<input type="radio"/> 13	<input type="radio"/> 43	<input type="radio"/> 13	<input type="radio"/> 15	3.20
(j) Knowledge and friendliness of local personnel	<input type="radio"/> 2	<input type="radio"/> 8	<input type="radio"/> 39	<input type="radio"/> 38	<input type="radio"/> 4	3.37
(k) Merchandising by retailers	<input type="radio"/> 4	<input type="radio"/> 19	<input type="radio"/> 34	<input type="radio"/> 16	<input type="radio"/> 16	3.24
Other (specify)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

	Poor	2	3	Excellent	Don't Know	Mean
(m) Parking situation (e.g. number of spaces, location)	<input type="radio"/> 38	<input type="radio"/> 27	<input type="radio"/> 16	<input type="radio"/> 5	<input type="radio"/> 0	1.86
(n) Prices	<input type="radio"/> 7	<input type="radio"/> 34	<input type="radio"/> 39	<input type="radio"/> 4	<input type="radio"/> 5	2.62
(o) Public restrooms	<input type="radio"/> 19	<input type="radio"/> 27	<input type="radio"/> 37	<input type="radio"/> 0	<input type="radio"/> 7	2.43
(p) Quality of merchandise handled by merchants	<input type="radio"/> 1	<input type="radio"/> 8	<input type="radio"/> 54	<input type="radio"/> 22	<input type="radio"/> 5	3.24
(q) Special events or promotions in the shopping area	<input type="radio"/> 12	<input type="radio"/> 23	<input type="radio"/> 38	<input type="radio"/> 11	<input type="radio"/> 5	2.71
(r) Traffic flow/signage	<input type="radio"/> 22	<input type="radio"/> 33	<input type="radio"/> 32	<input type="radio"/> 2	<input type="radio"/> 1	2.19
(s) Variety of businesses	<input type="radio"/> 17	<input type="radio"/> 38	<input type="radio"/> 30	<input type="radio"/> 4	<input type="radio"/> 1	2.27
(t) Variety of places to eat	<input type="radio"/> 8	<input type="radio"/> 30	<input type="radio"/> 43	<input type="radio"/> 8	<input type="radio"/> 1	2.60

Q38b. What three items from the above list in Question 38a are the most important to be improved? (Identify up to three letters from the above list)

First Choice (m) Parking situation

Second Choice (r) Traffic Flow signage

Third Choice (t) Variety of places to eat

Q39. Considering all the factors in Question 38a, how would you rate the overall atmosphere in your local shopping area? (Check one answer)

0%  Poor

13%  Below Average

35%  Average

47%  Above Average

4%  Excellent

Q40. What is your overall opinion of your community (i.e. where your business is) as a place to conduct business? (Check one answer)

2%  Poor

9%  Below Average

33%  Average

37%  Above Average

19%  Excellent

Q41. What is your overall opinion of your community (i.e. where your business is) as a place to live? (Check on answer)

0%  Poor

4%  Below Average

13%  Average

36%  Above Average

46%  Excellent

Q42. What state and local policies are of greatest significance to your company?

## Broadband

Q43. How important is broadband (high speed internet) to your business?

- 71%  Very Important
- 11%  Important
- 12%  Somewhat important
- 6%  Not important

Q44. What types of internet connection do you have at your business (If more than one, which is used more)?

- 63%  Cable
- 28%  DSL
- 7%  Fiber Optics
- 43%  Wireless
- 0%  Satellite
- 1%  Dial-up
- 3%  Other Cellular, EDIA Primary
- 9%  If more than one, which is used more Wireless, Cable DSL & Fiber

Q45. What does your business currently use the internet for (check all that apply).

- |  |                          |
|--|--------------------------|
| 76% <input type="checkbox"/> Advertise   | Other:                   |
| 51% <input type="checkbox"/> Sell your product (ecommerce)                       | ORDERING SUPPLIES        |
| 47% <input type="checkbox"/> Support Services                                    | PURCHASING               |
| 40% <input type="checkbox"/> Train staff/Clients                                 | NOTHING                  |
| 68% <input type="checkbox"/> Manage Data   | e commerce               |
| 69% <input type="checkbox"/> Research  | doesn't use for business |
| 48% <input type="checkbox"/> Recruit employees                                   | POS through computer     |
| 83% <input type="checkbox"/> Communicate with clients/customers                  | escribe                  |
| 42% <input type="checkbox"/> Teleworking (Use of broadband away from the office) | customer access          |
| 11% <input type="checkbox"/> Other _____   | pay bills                |
|  | education                |

Q46. What is the current upload speed?

- 11%  Less than 1.5 Mbps
- 9%  1.6-2.99 Mbps
- 3%  3-5.99 Mbps
- 1%  6-9.99 Mbps
- 3%  10-24.99 Mbps
- 7%  25-100 Mbps
- 2%  Greater than 100 Mbps
- 63%  Not sure

To measure your upload and download speed, go to the following link: [http://iwantbroadbandnh.org/speed\\_test](http://iwantbroadbandnh.org/speed_test)



Q47. What is the current download speed? (See results from above speed test)

- 3%  Less than 1.5 Mbps
- 3%  1.6-2.99 Mbps
- 5%  3-5.99 Mbps
- 9%  6-9.99 Mbps
- 11%  10-24.99 Mbps
- 6%  25-100 Mbps
- 4%  Greater than 100 Mbps
- 59%  Not sure

Q48. Is your internet upload and download speed connectivity sufficient for your business needs?

- 78%  Yes
- 15%  No
- 7%  Not sure

Q49. We have covered many issues. Please help us set some priorities on how the UNHCE BR&E Task Force can help your business or what we should work on to help all of our existing businesses grow and expand. Please give your additional comments.

Q50. If we find an issue in your survey response in which a certain individual or individuals may be able to respond to your concern in a beneficial way, do you authorize us to release your survey information to them?

- 60%  Yes - Your contact information will be shared with the resource person(s) to aid them in understanding your company and the concern.
- 40%  No - We will provide you information about the resource available to assist you, and you will make the first contact with the resource. The resource person(s) will not have access to your survey.