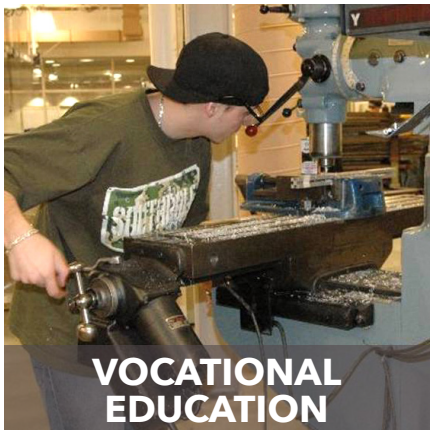
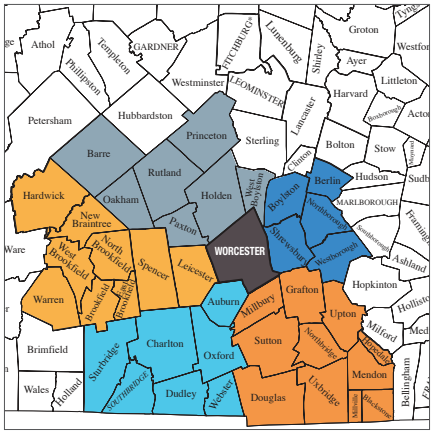
SOUTHERN WORCESTER COUNTY
COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY



















2018

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Third, we would like to thank the 40 municipalities in the Southern Worcester County region, regional business groups and our affiliate chambers for your efforts to engage your respective communities to gain their input into this report. The groups include the Auburn, Blackstone Valley, Central Mass South, Corridor Nine, Wachusett Area, and Webster Dudley Oxford Chambers; the 495-MetroWest Partnership, MassMEP, Mass Biomedical Initiatives, and MassDIGI. *(For a map of municipalities in the CEDS region see Map 1 in the Introduction section below.)*

Fourth, we would like to recognize several regional partners who helped with the writing of this report and gathering of information and data. They are the City of Worcester, Worcester Business Development Corporation, and Central Mass Regional Planning Commission.

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Finally, we would like to acknowledge the tremendous effort of Mark D. Waterhouse, Garnet Consulting Services, Inc., for his expertise, guidance, edits, direction, and analysis in helping to write the report.

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EXECUTIVE SUMMARY

CEDS Territory

This document provides a Comprehensive Economic Development Strategy (CEDS) for the Southeast and Southwest regions of Massachusetts. The Southern Worcester County Region is comprised of forty (40) communities with six (6) distinct sub-regions.

CEDS Territory

CENTRAL	NORTH (7)	NORTHEAST (5)	SOUTHEAST (11)	SOUTHWEST (7)	WEST (9)
Worcester	Bare Holden Oakham Paxton Princeton Rutland W. Boylston	Berlin Boylston Northborough Shrewsbury Westborough	Blackstone Douglas Grafton Hopedale Mendon Millbury Millville Northbridge Sutton Upton Uxbridge	Auburn Charlton Dudley Oxford Southbridge Sturbridge Webster	Brookfield E. Brookfield Hardwick Leicester New Braintree N. Brookfield Spencer Warren W. Brookfield

Public Input

To gain region-wide input and participation, a Strategy Committee comprised of a member from each of the forty (40) communities, plus employer groups, the higher education community, and other regional stakeholders, was created and engaged to help with the process of developing the CEDS. Additionally, there were four public outreach meetings, an online SWOT Survey (in which residents and/or businesspeople from all 40 communities participated), individual meetings, and group meetings where the CEDS process was discussed and feedback was solicited. The data collected during this process helped inform and provide backing for the sections developed within the CEDS report.

Regional Overview

Southern Worcester County possesses unique assets that transcend the Industrial Revolution boom and subsequent deindustrialization of the region. Geographically, the region is comprised of nationally recognized historic sites such as the Blackstone River Valley National Historic Corridor, The Lost Village Scenic Byway repurposed mills from the Industrial Revolution era, a wide array of cultural offerings, parks, and a growing agricultural community. Worcester County has more farms than any other county in the Commonwealth of Massachusetts, with 1,526 farms and Worcester County was ranked 6th out of all counties in the U.S. in farm to consumer sales.

The region's population has grown to 565,853 and is expected to grow by 71,591 from 2015-2035. The majority of population growth in 2035 will come from the 65+ demographic; the region must plan accordingly for an aging population. There are a number of higher education institutions which add to the vibrancy of the region. The region should continue efforts to retain students from these institutions while also attracting the population aged 18-24 to the region through relevant job opportunities, increased entrepreneurship support, and affordable living arrangements. Individuals employed in the region have been steadily increasing from 2011 to 2016, while the unemploy-

ment rate for the region has steadily decreased to 6.20% in 2016 (the most recent data for the SWC region). Despite the decrease in unemployment, the region has an opportunity to further leverage its population actively looking for employment opportunities or those who are marginally attached to the labor force or have become discouraged.

Target Clusters

The region is focused on growing the following industry target clusters:

- Manufacturing
- Education Services, and Health Care and Social Assistance
- Professional, Scientific, and Technical Services
- Agriculture

While the region possesses infrastructure that provides industries in these clusters and other industry sectors with the ability to access markets, support their supply chains, and access a large labor pool through freight rail, active airports, highway infrastructure, commuter rail service to Boston, and regional bus service, further opportunities for economic development are present by updating existing infrastructure, including further buildout of technology infrastructure.

Vision Statement

By the year 2038, businesses in Southern Worcester County and visitors coming to the region for business purposes will recognize it as an exemplary location for investment and development. The region's communities will be talked about as collaborative, flexible, adaptive, innovative, and connected by several transportation modes and state-of-the art telecommunications to other regions and economic hubs.

Visitors coming to the region for non-business purposes will describe the area as vibrant and cultural. The region will capitalize on and highlight the historic, cultural, and tourist resources available to attract those visitors. Those looking to relocate their family will find value in the regional housing stock, affordability of living, and school systems that cater to all students and provide all with a career pathway that meets their needs.

Goals and Objectives

The SWC region is diverse, extending from the urban core of Worcester through the suburban neighborhoods of the nearby towns, to the rural fields and farms of the Brookfields, Hardwick, and New Braintree. Despite its diversity, the region collectively recognizes the purpose of economic development is to attract, retain, expand and create businesses that complement and are supported by the assets of the region. The businesses within our target industry clusters should be given the resources and support required to strengthen, grow, remain and succeed in the region. This CEDS identifies the following Goals and Objectives for the region that will bolster efforts in the recruitment, creation, retention, expansion and transition of businesses for the region.



GOAL 1: CREATE AND OPERATE A ROBUST REGIONAL ECONOMIC DEVELOPMENT PROGRAM.

Establish an Economic Development Organization (EDO) for the region, capitalizing on the ongoing collaboration between stakeholders, and assure that it has adequate staff, funding and other necessary resources to fulfill its mission of providing the region with state-of-the-art economic development services.

OBJECTIVE A: Establish a more formal Regional Economic Development Organization

OBJECTIVE B: Obtain recognition by the U.S. Economic Development Administration as an Economic Development District

GOAL 2: SITE AVAILABILITY, DEVELOPMENT AND SUPPORT INFRASTRUCTURE.

Regularly identify all available and/or underutilized sites and/or buildings within the region. This inventory will provide information including, but not limited to: access to transportation, utility and telecommunications infrastructure capacities, and potential incentives.

OBJECTIVE A: Provide better coordination of available site information for the region and among communities

OBJECTIVE B: Create a regional clearinghouse of available commercial property to foster more collaboration among the municipalities of the region and their economic development efforts to assure that businesses within our target industry clusters and supplementary business prospects are provided with maximum information on suitable sites.

OBJECTIVE C: Using established lists, as well as further input from regional communities, begin the process of prioritizing existing brownfield sites for remediation.

GOAL 3: CREATION OF A STEADY AND ROBUST TALENT TURNPIKE.

Using the Central MA Regional Workforce Blueprint as a guide, ensure there is collaboration and coordination among all educational and training organizations and private industry to identify and align workforce training and skills development to address the current and future needs of the target clusters and other industry sectors within the region.

OBJECTIVE A: Identify skills gaps and provide an array of workforce development initiatives (employment, education, and training) for both residents and businesses throughout the region.

OBJECTIVE B: Using partner organizations such as the Workforce Investment Board and the Career Center identify and recruit individuals who are seeking employment and connect them with pertinent opportunities within the regional clusters.

OBJECTIVE C: Collaborate with school systems and other training partners in the region to market and provide job-related training to students who are not currently contemplating postsecondary education as a career path.

GOAL 4: REGULATORY FLEXIBILITY AND DEVELOPMENT TOOLS.

Support the region's business development efforts by creating a "business friendly" environment focusing efforts on business attraction and retention.

OBJECTIVE A: Work with local municipalities and the business community to ensure ordinances and zoning within their communities fosters the type and level of development which will attract businesses in our target industry clusters.

OBJECTIVE B: Establish a comprehensive list of state and municipal programs that if adopted would attract development and investment in the community.

OBJECTIVE C: Work with municipal leaders and stakeholders to identify state and municipal programs that communities would want to adopt.

GOAL 5: ENHANCING THE ENTREPRENEURIAL SPIRIT.

Foster a robust environment that promotes an entrepreneurial spirit and supports business start-ups throughout the region.

OBJECTIVE A: Work with regional stakeholders to identify what is existing and where the development gaps are in terms of maker-space, incubators, accelerators, co-working space, or other start-up facilities and then work collaboratively to develop them strategically throughout the region.

OBJECTIVE B: Establish a one-stop clearinghouse of information on programs and resources available locally that are targeted to assist start-up businesses and budding entrepreneurs. Working and collaborating with local and state partners, identify the programs currently existing that best assist start-up companies and work to fill need gaps with new programming. Strategize on creation of incentives to keep entrepreneurs within the area. Identify access to capital – venture capital programs. Mobilize the business community to support utilizing the small start-ups

Performance Metrics

The CEDS provides the following performance metrics to evaluate the progress made towards implementing the Goals and Objectives:

- The establishment of an Economic Development Organization for the region recognized by the U.S. Economic Development Administration as an Economic Development District (EDD).
- The number of businesses recruited and amount of private investment realized by the region.
- The level of cross-municipal collaboration, particularly with regard to sharing development site information and inquiries.
- The level of participation by the business community in training programs and the number of trainees hired into full-time jobs.
- Development of a regional Infrastructure Master Plan and Capital Improvement Program.
- Development of a strategy to reduce the region's inventory of brownfields.
- Improvements in the region's perceived development regulatory climate.

Resilience

This CEDS concludes with an analysis of the resilience of the region to prevent and/or recover from a major disruption – both weather or naturally created and economically created. It is recognized that communication plays a large role in the ability to anticipate, withstand, and recuperate from a disruptive event. The following regional strengths were identified as advantages in the resiliency of the SWC area:

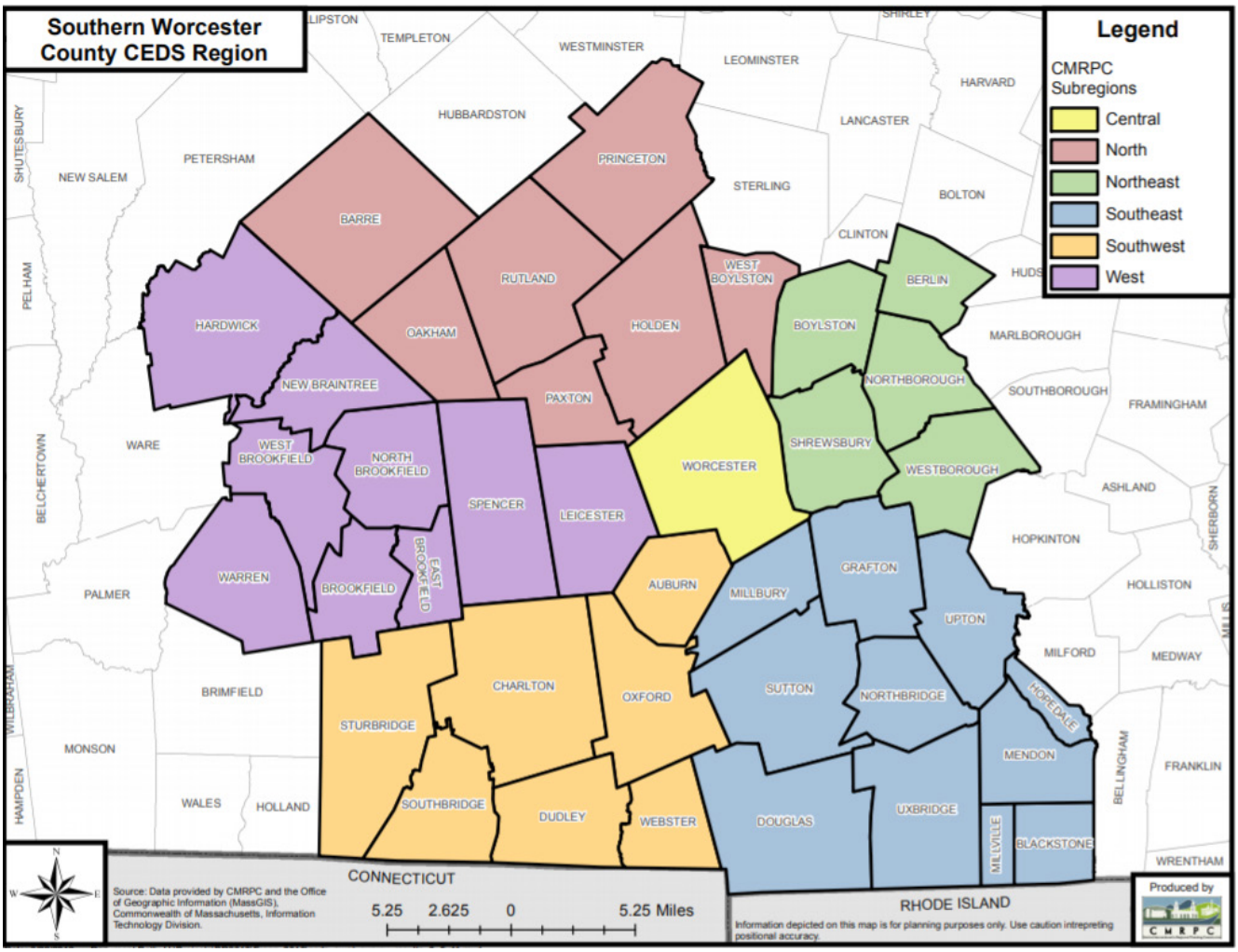
- Diversity of Industries
- Partnerships & Collaboration
- Adaptability
- All communities have adopted Hazard Migration Plans
- Fifteen (15) communities are in the process of creating and adopting Municipal Vulnerability Preparedness Plans

INTRODUCTION

The Worcester Regional Chamber of Commerce (WRCC) in collaboration with our strategy committee and regional partners from the Central Massachusetts Regional Planning Commission (CMRPC), the Worcester Business Development Corporation (WBDC), Congressman for the 2nd District of Massachusetts James P. McGovern, and the City of Worcester have created a Comprehensive Economic Development Strategy (CEDS) meant to serve as a Five-Year Plan for fostering economic development within the Southern Worcester County (SWC) region.

The CEDS development process provides a comprehensive forum to ensure regional coordination and consistency of economic development planning efforts within the 40 municipality region. The CEDS is meant to serve as a guide for municipalities within the region to aid in economic development. The 2018-2023 CEDS Five-Year Plan for SWC highlights economic opportunities, constraints, regional assets, presents the region's goals and strategies for implementation, a regional resiliency plan, and standards for annual evaluation and updating of the CEDS process.

Map (1), Southern Worcester County CEDS Region, Sub-Regions



SUMMARY OF PROCESS AND PARTICIPATION

Strategy Committee

The Southern Worcester County (SWC) CEDS region is comprised of 40 communities with various levels of economic development needs and resources; therefore each community was offered the ability to participate on the Strategy Committee. This ensured that the individualized needs of each community had ample opportunity to be included in and addressed by the CEDS. In order to ensure the interests and needs of the different business industries in the region were addressed, several business and trade groups were invited to participate as members of the Strategy Committee, including the Chambers of Commerce representing the communities of the region. Given the high number of colleges and universities in the region, several with strong academic programs in fields identified as having growth potential were also invited to participate in the Strategy Committee. The remainder of the committee was rounded out with several individual community members, and representatives from organized labor. The Strategy Committee met 4 times and the attendance roster, meeting minutes and other notes from those meetings are attached at the end of this document in Appendix I. *(pg. 1-29 of Appendix)*

Public Outreach and Focus Groups

There were four public outreach meetings during the process of gathering information for and writing the CEDS. The first three were held in November/December of 2016, at which a SWOT analysis discussion took place with answers and information put into a SWOT summary matrix during the meeting. After all three meetings had been held the document was then analyzed to find common themes and develop the SWOT portion of the CEDS document.

An additional form of outreach was taken to ensure the communities within the region had ample opportunity to participate in the information gathering process. The Chamber reached back out to each municipality, forwarding along a three-question survey designed to allow the municipal officials an opportunity to provide more specific information about their community needs. Along with the correspondence forwarding the questionnaire, follow-up phone calls were made and each community was offered to have representatives from the Chamber come out and discuss the CEDS report and process further. In total 8 communities took advantage of the opportunity and met with representatives from the Chamber and 10 communities completed the questionnaire. The information from these meetings, including notes, list of attendees, and other pertinent information are attached at the end of the document. *(pg. 30-110 of Appendix)*

Once the SWOT analysis was completed it was decided that additional input was needed to ensure a well-balanced and rounded CEDS that encompassed the varying assets and needs of the communities in the region. The SWOT document was then transformed into an online survey which was distributed to all forty (40) municipalities requesting their input. Municipal leaders were invited to participate and to forward the survey link to any staff or department heads they deemed appropriate for their input as well. The survey was then sent along to other groups and stakeholders across the region to gain as broad a level of input as possible. To further ensure broad participation, a fourth public outreach meeting was then scheduled for May of 2018. For a directory of surveys, questionnaires and the survey issued to the 40 municipalities, please see Appendix VI. *(pg. 159-174 of Appendix)*

Some of the information used within this report also came from conversations and dialogue among chamber member businesses at roundtable discussions. The Chamber convenes a manufacturing roundtable, and a healthcare roundtable throughout the year to provide members within those industries to exchange ideas, learn best practices, and discuss common issues and obstacles faced on a regular basis. Additionally, at a March 2018 meeting of the manufacturing roundtable, attendees were requested to take part in the online SWOT survey, in an effort to increase the level of business participation.

In further efforts to expand the participation in the online SWOT survey the CEDS report and process was discussed at several other meetings during the month of March, April and May 2018. All of the responses collected

from the online SWOT survey have been added into the SWOT document *(attached as Appendix II, pg. 78-110)* and have been incorporated into the SWOT summary section below. In total, there were 189 surveys received, representing all forty (40) communities, as well as businesses and other stakeholders. Information regarding meetings referenced in this section has been attached as Appendix II.

Review of Regional Planning Commission

As a partner agency in this process the Central Massachusetts Regional Planning Commission (CMRPC) has been intimately involved in the drafting of the final CEDS. CMRPC provided the majority of the data used in evaluating the demographic characteristics of the region, and in some instances, sub-regional grouping of communities. Additionally, CMRPC was given an opportunity to review the final document during the public comment period.

Confirmation of 30 Day Public Notice

Upon completion and review by the Strategy Committee and other partner organizations the CEDS was then put out for the required thirty (30) day public comment period. Notice for this review phase was shared wtih the strategy committee and placed in local news outlets and on the Chamber's website.

Comments that were received during the comment period are included in Appendix III *(pg. 111-113 of Appendix)* with a detail of how these comments were addressed.

Confirmation of Adoption by Chamber Board

Attached in Appendix IV is the notice of the final report given to the Chamber Board of Directors on September 26, 2018 and the corresponding vote taken to adopt the report.

Relationship of CEDS to other documents including consistency with the State's economic development plan and priorities and similar state and regional plans

During the process of researching, information gathering, and writing of this CEDS, many other reports, documents, strategies, and policies were reviewed. The concepts, goals, objectives, and data analysis incorporated into this document reflect consistent points observed in the other reports and documents reviewed. We believe there are no major or significant inconsistencies between the Southern Worcester County CEDS and other relevant regional or state plans.

LIST OF REPORTS REFERENCED

- Worcester Regional Economic Competitiveness Outlook, 2014
- Central MA Workforce Skills Cabinet Regional Workforce Blueprint
- Open for Business, Steps to Expand Biomanufacturing in Massachusetts
- Arts and Economic Prosperity 5 Worcester, MA, Americans for the Arts
- 2017 Massachusetts Clean Energy Industry Report, Massachusetts Clean Energy Center
- How the Startup Economy is Spreading Across the Country — and How It Can Be Accelerated, Progressive Policy Institute

SUMMARY BACKGROUND

This section of the Southern Worcester County (SWC) CEDS provides a background summary of the region's current economic status and past trends, and forecasts long-term trends for the future, supported by current, relevant data. Where appropriate, the SWC region is compared and contrasted by sub-region and the Commonwealth of Massachusetts. More detailed information is provided in subsequent sections or appendices to the CEDS.

Demographics

The total population of the SWC CEDS region was 565,853 in 2015 (see Table 1 below). The total area of the SWC region measured 960 square miles with a population density of 579 people per square mile in 2010. The SWC population grew at a faster rate than the Commonwealth of Massachusetts from 2000-2015.

The SWC population is predominantly white, with 77.20% of the region categorizing their ethnicity as White alone. Hispanic or Latino residents of SWC represent 10.28% of the population, while Black residents represent 5.13% of the population. The Central and Northeast Sub-regions of SWC are the most racial and ethnically diverse sub-regions in SWC. For a complete list of racial and ethnic demographic information see Table D and D1, in Appendix V. *(pg. 125-126 of Appendix)*

The SWC regional population grew by 9.39% from 2000-2015, each of the sub-regions experienced population growth of at least 5%. The North (13.20%), Northeast (10.18%), and Southeast (16.22%) sub-regions experienced the largest population growth.For a complete list of municipal population growth and population projections, see Table A, A1, C, and Figure C in Appendix V. *(pg. 118,122-123 of Appendix)*

This growing population should provide an increase in workforce and create a need for additional employment. It also creates the need for additional retail opportunities and personal services, which can both be business development opportunities for the region as well as quality of life improvements.

TABLE 2A | Changes in Population, Southern Worcester County Sub-regions, Massachusetts, and U.S., 2000-2015

Region	Population			Percent Change in Population
	2000	2010	2015	2000 - 2015
Southern Worcester County	518,480	556,698	565,853	9.39%
Massachusetts	6,349,097	6,547,629	6,784,240	6.85%
United States	281,421,906	308,745,538	318,563,456	13.20%
North Sub-region	43,980	48,507	49,770	13.17%
Northeast Sub-region	70,038	75,256	77,166	10.18%
Southeast Sub-region	95,674	109,132	111,192	16.22%
Southwest Sub-region	92,018	97,022	97,960	6.46%
West Sub-region	44,122	45,736	46,383	5.12%
Central Sub-region	172,648	181,045	183,382	6.22%

References: US Census Bureau, Decennial 2000 and 2010 Census;
U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimate

The SWC CEDS region median age was 41.2 in 2016 (see Table 2 below). For a complete list of median ages by community, see Tables E and E1 in Appendix V. *(pg. 127-128 of Appendix)*

TABLE 3A | Median Age, Southern Worcester County Sub-regions, U.S., and Massachusetts, 2010-2016

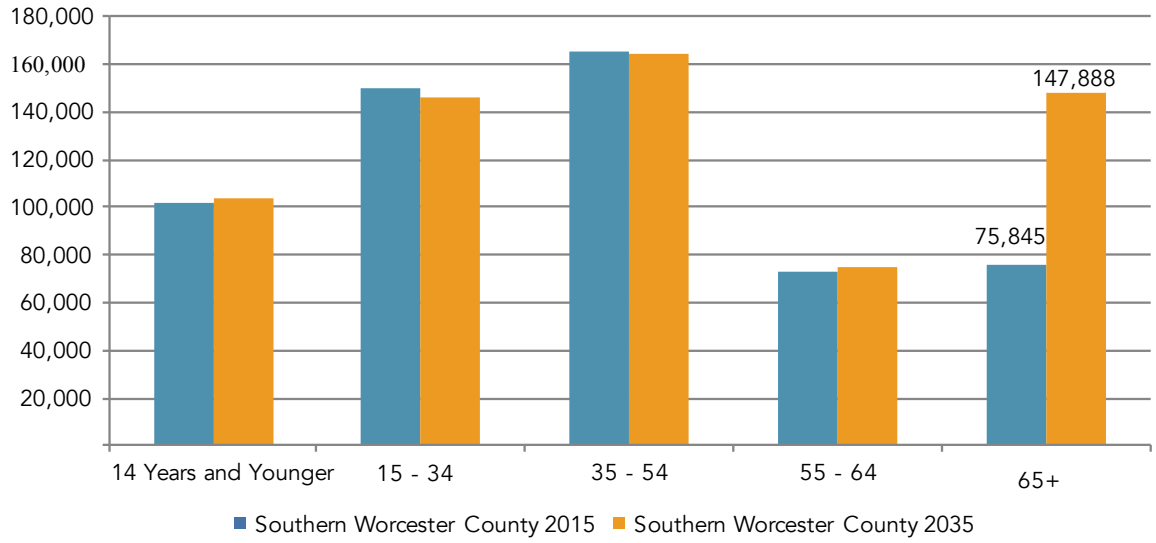
Subregion/Municipality	Median Age	
	2010	2016
SWC Average	40.1	41.2
United States	36.9	37.7
Massachusetts	38.7	39.4
North Sub-region	42.4	41.9
Northeast Sub-region	41.1	43.1
Southeast Sub-region	39.7	42.1
Southwest Sub-region	39.8	41.3
West Sub-region	42.8	43.3
Central Sub-region	34.1	34

References: U.S. Census Bureau, Decennial 2010 Census
U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates

Figure 4 on the following page represents population estimates for SWC from 2015-2035. The SWC population is expected to increase by 12.65% or an estimated 71,591 residents from 2015-2035. The 15-34 aged population is expected to decrease by 2.66% or 4,007 residents. The majority of growth for the SWC population from 2015-2035 can be attributed to an increasing population of those aged 65+. From 2015-2035, the 65+ population is estimated to increase by 94.99% or 72,043 residents.

The region must plan accordingly for an aging population through a concentration on senior citizen inclusive economic development, including accessible transportation, elderly services, senior housing development and affordable healthcare coverage. Figure 1, which follows shows the change in age cohorts for the SWC and Massachusetts populations between 2015 and 2035.

FIGURE 4 | Demographic Age Breakout, Southern Worcester County, 2015 - 2035

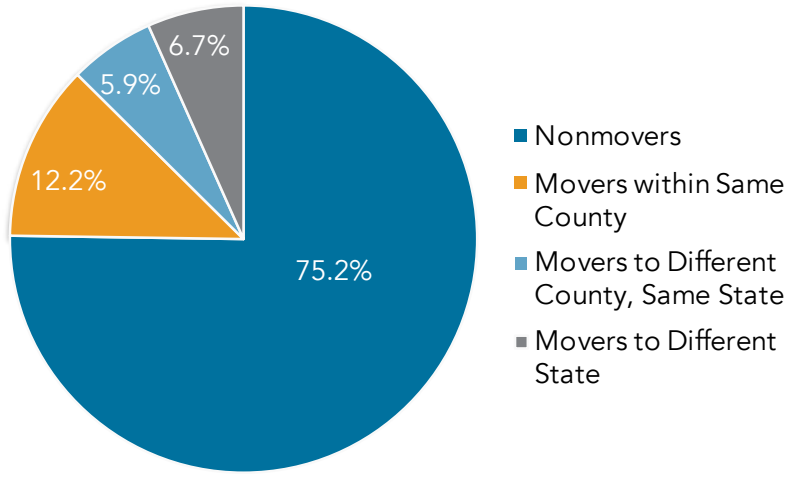


References: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates
UMass Donahue Institute Population Estimate Program

The 2011-2015 American Community Survey (ACS) and the Puerto Rico Community Survey (PRCS) published County to County migration flows by asking respondents whether they lived in the same residence 1 year ago. For people who lived in a different residence, the location of their previous residence is collected.

The region should focus on retaining young adults aged 18-24 to offset the aging population by creating opportunities for employment that are attractive to young adults and creating cultural amenities that increase the quality of life for young adults. The 2011-2015 ACS and PRCS stated that 10,482 18-24 year olds in Worcester County either moved to a different county in the same state or a different state (see figure 2 below). This statistic represents 12.57% of 83,396 18-24 year olds in Worcester County. A majority (52.97%) of the young adults moving to a different county within the same state relocated to the Greater Boston region, either in Essex County, MA or Suffolk County, MA. The percentage of young adults moving out of state was more statistically varied, while 12.51% moved to Rhode Island in either Providence County or Washington County.

FIGURE 5 | Outward Migration of 18 - 24 Year Olds, Worcester County, 2011-2015



References: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates

Education

There are 13 institutions of higher education within the SWC region which economic development efforts should continue to capitalize on. The region falls slightly under the Commonwealth's percentage of the population aged 25 years or greater with a Bachelor's degree or higher (37.53%) for 2016, while above the U.S.' percentage of the population with a Bachelor's degree or higher (30.30%). The high level of educational attainment for SWC provides the region with a highly skilled work force, which constitutes an essential component of the region's capacity to generate and support economic growth. The highly skilled workforce is a deciding factor for businesses to expand in and/or relocate to the region. A strong educational system also helps attract and retain workers who seek excellent educational opportunities for themselves or their children. Economic growth in the region is highly dependent on maintaining a workforce with high skill levels and diverse skill levels. There was an 11.75% increase in the number of students enrolled in K-12 education within the SWC region from 2010-2015. These 97,673 students provide a pipeline of talent for the future workforce. For a complete list of educational attainment and K-12 enrollments, see Tables J and L in Appendix V. *(pg. 138-140 of Appendix)*

Housing

As with population, household formations (defined as more than one person establishing a shared living space) have been increasing and are projected to continue this trend. Communities with the largest increase in household formations from 2010-2015 were Hardwick (23.47%), Sturbridge (17.71%), Brookfield (15.45%) and Leicester (15.42%).

Continued growth in household formations will likely require new housing stock, which will support the region's construction industry. With the retirement of older construction workers, suitable training and apprenticeship programs will be required for a new generation of those entering the construction trades. The West sub-region of the SWC area had the largest growth in household construction from 2010-2015, increasing by 9.40%. For a complete list of housing formations from 2011-2016, see Tables B and B1 in Appendix V. *(pg. 120-121 of Appendix)*

The median price of homes sold in Worcester County is currently $252,100 as of March 2018 and has increased 8.8% in the past year.[1] Demand for housing is outstripping supply as a larger number of home buyers are moving west from the Boston region, also tied to a greater number of millennials moving to the region. In 2016, the ACS reported there were 329,285 total housing units in Worcester County, 302,794 of those housing units were occupied. Of those 302,794 occupied housing units, 64.70% were owner occupied while 35.3% were renter occupied.[2]

The availability of low or moderate-income housing in communities is an important measurement for the affordability of communities. Many of our communities have housing committees and other have authorities as well. Housing developed under Chapter 40B is eligible and other types of housing qualify to a community's affordable housing stock. Chapter 40B is a state statute, which enables local Zoning Boards of Appeals to approve affordable housing developments under flexible rules if at least 20-25% of the units have long-term affordability restrictions. Subsidized housing inventory of total housing stock in the SWC region ranges from 0% in New Braintree to 13.40% in Worcester. The average subsidized housing inventory for the region is 4.69%. For a complete list of subsidized housing inventory in the SWC region in 2017, see Table Q in Appendix V. *(pg. 148-149 of Appendix)* The Housing Choice Initiative rewards municipalities that have produced certain rates or amounts of new housing units in the last five years and that adopted best practices related to housing production that will sustain a 21st century workforce and increase access to opportunity for Massachusetts residents. Communities that achieve the

[1]https://www.mass.gov/info-details/2018-housing-choice-communities

[2]https://www.zillow.com/worcester-county-ma/home-values/

[3]U.S. Census Bureau, 2012-2016 American Community Survey 5-Year Estimates

Housing Choice designation will have exclusive access to apply for the new Housing Choice Grant Program and receive bonus points or other considerations to certain state grant programs. The Housing Choice Initiative also includes separate funding for the Small Town Housing Choice competitive capital grant program exclusively for towns with population under 7,000. Currently 5 municipalities within SWC have been awarded designation as Housing Choice communities. These are Boylston, Grafton, Holden, Rutland, and Worcester.[1]

Infrastructure

The region's transportation infrastructure provides companies with the ability to access markets, support their supply chains, and access a large labor pool. The region possesses existing freight rail infrastructure, with Class I, II, and III operators providing service to businesses throughout the SWC area. CSX Corporation, a Class I operator, the Providence and Worcester railroad, managed by Genesee & Wyoming, and Pan Am Railways, Inc., both Class II operators, control the freight rail lines through the region. Additionally, there are three short-line, or Class III, operators in the SWC area, the Grafton/Upton Railroad, the East Brookfield & Spencer Railroad, and the Massachusetts Central Railroad that provide freight options for shipping of goods. This rail infrastructure is an important component in the movement of goods to and from the area, and there are also trucking distribution facilities connected to the rail system that provide opportunities to move goods between rail and road. *(For a map of freight rail infrastructure in the SWC region, see Map 1 in Appendix VII on pg. 176 of Appendix.)*

The Framingham/Worcester Massachusetts Bay Transit Authority (MBTA) commuter rail line supports passenger rail transportation to and from Boston, currently with twenty (20) roundtrips each day connecting work opportunities with residents in both the greater Boston and Worcester areas. There should be continuous tracking, scheduling, and service improvements made to the Framingham/Worcester line to increase and improve the ridership experience. The inter- and intra-city public transportation system, managed by the Worcester Regional Transit Authority (WRTA), is another tool providing mobility for residents and workers within the SWC region. Thirteen (13) communities in the region are served by twenty-eight (28) fixed bus routes, this figure increases to 29 communities in SWC when considering Paratransit services. *(For a map of the WRTA service area, as well as bus and shuttle routes, see Map 2 in Appendix VII on pg. 177 of Appendix)*

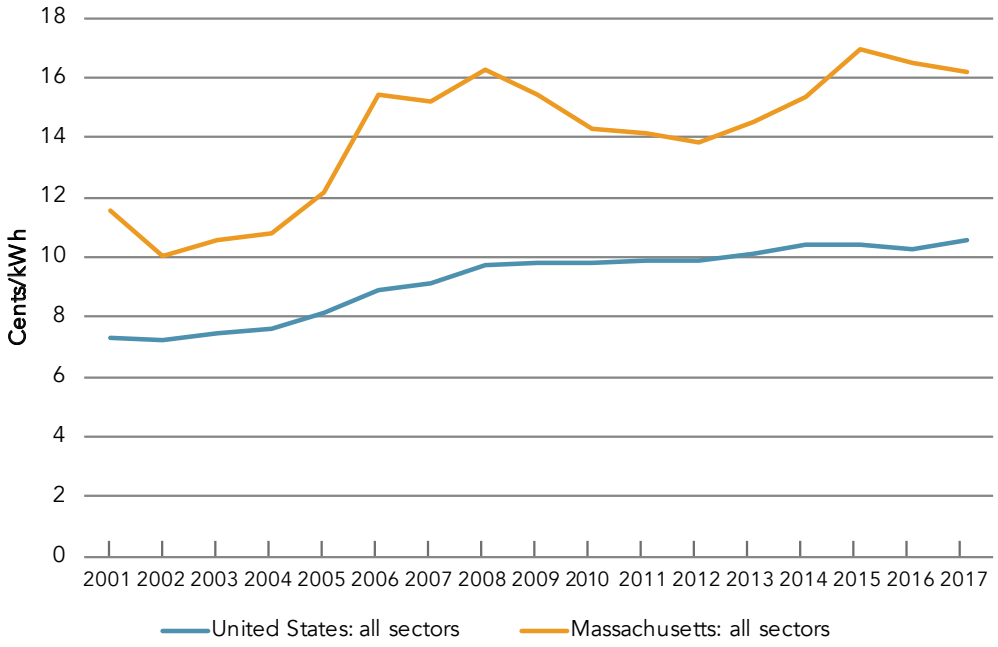
The SWC region also is geographically located at the intersection of several major highways that are another critical resource for the movement of goods and people. Continual improvements occur along these roadways and at the major intersections of these routes to improve travel. These major transportation routes include the Massachusetts Turnpike (Interstate 90), Interstates (290, 190, 495, 84), Routes (20, 9, 140), and the Worcester-Providence Turnpike (MA-146). Throughout the SWC area there are also smaller state routes that provide easy movement of goods and people across the region. *(For a map of the highway infrastructure in the region, see Map 4 in Appendix VII on pg. 179 of Appendix)* A final piece of the transportation infrastructure is the five (5) airports in the region. There is an expectation that the Worcester Regional Airport, the largest and only one with commercial aviation, will play a critical role in the region as an infrastructure asset as service to and from other airports expands. For a list of Airport Characteristics in the SWC region, see Table T in Appendix V on pg. 157 of Appendix. *(For a map of the airports in the region see Map 3 in Appendix VII on pg. 178 of Appendix)*

Utility infrastructure, or lack thereof in some of the rural communities, acts as a limitation to economic development. The limited natural gas infrastructure in parts of the SWC region limits the capacity of available parcels for many industrial development options for businesses using natural gas for heating or as a necessary process element. Similarly, the need for public water and sewer infrastructure limits the development capacity of parcels currently served by on-site wells and septic systems.

Shorter construction seasons, high construction costs, and the limited supply of readily developable sites within the area are also constraints on development. Three out of 40 municipalities within the SWC region have limited or no broadband service.[3] Electric and natural gas prices in Massachusetts have increased this past decade due to higher delivery costs of natural gas; Figure 3 provides information on the increase in electric costs from 2001 to 2017. Natural gas is used by power plants in New England to produce over 40 percent of the region's electric power. Other areas of the country that are less dependent on natural gas for electricity generation have not seen rate increases comparable to this region.[4]

Massachusetts needs to better diversify its energy portfolio by expanding the resources used to produce power, improving transmission efficiencies and promoting renewable energy resources.

FIGURE 22 | AVERAGE RETAIL PRICE OF ELECTRICITY (ANNUAL), MASSACHUSETTS & U.S., 2001-2017



Reference: U.S. Energy Information Administration

3 Massachusetts Broadband Institute, 2014, http://broadband.masstech.org/news-andupdates/map-gallery/massbroadband-123-maps-data

4 Overview of Electricity & Natural Gas Rates. Retrieved February, from http://www.mass.gov/ago/doing-business-in-massachusetts/energy-and-utilities/energy-rates-and-billing/electric-and-gas-rates.html

Income and Poverty Rates

The average per capita income for the SWC region was $35,474 in 2016. Six communities in the region experienced decreases in their per capita income from 2010-2016. Boylston (-7.15%) and West Boylston (-6.08%), located in the Northeast and North Sub-regions experienced the largest decreases in per capita income. Economic development in these communities should focus on attracting high-paying industries that can increase the per capita income for residents. This focus can increase overall disposable income that can better support the region's retail, service, restaurant and other businesses. (*For a complete list of per capita income within the region, see Tables F and F1 in Appendix V (on pages 128-129 of Appendix)*

TABLE 14A | Per Capita Income, Southern Worcester County Sub-regions & Massachusetts, 2010-2016

Region/Sub-region	Per Capita Income		
	2010	2016	% Change 2010-2016
SWC Average	$32,685	$35,474	8.54%
Massachusetts	$33,936	$38,069	12.18%
North Sub-region	$33,777	$37,668	11.52%
Northeast Sub-region	$43,671	$46,647	6.81%
Southeast Sub-region	$35,444	$39,066	10.22%
Southwest Sub-region	$29,260	$32,109	9.74%
West Sub-region	$29,721	$32,130	8.10%
Central Sub-region	$24,236	$25,224	4.08%

References: US Census Bureau, Decennial 2010 Census, U.S. Census Bureau, 2011-2015 American Community, Survey 5-Year Estimates

The median household income for the SWC region was $77,760 in 2016. The median household income for the Commonwealth of Massachusetts was $70,954 in 2016. Municipalities that had median household incomes below the State threshold include:

The high median household income in the SWC region can be attributed to the median household incomes in

- Barre (North Sub-region)
- Oxford (Southwest Sub-region)
- Webster (Southwest Sub-region)
- Hardwick (West Sub-region)
- Warren (West Sub-region)
- Worcester (Central Sub-region)
- Dudley (Southwest Sub-region)
- Southbridge (Southwest Sub-region)
- Brookfield (West Sub-region)
- Spencer (West Sub-region)
- West Brookfield (West Sub-region)

the North ($91,094), Northeast ($101,333), and Southeast ($93,163) sub-regions of SWC. Economic development in the North, Southwest, West, and Central sub-regions should focus on raising the levels of household income by providing job opportunities within the high-paying industry sectors. There are six municipalities in the SWC region considered to have high household median income ($100,000+). The Northeast sub-region of SWC has the highest average for household median incomes ($101,333). For a complete list of median household incomes, see Tables F2 and F3 in Appendix V. *(pg. 130-131 of Appendix)*

The Southwest, West, and Central sub-regions of SWC have the largest concentrations of populations living below the poverty level. Despite economic growth at the level of household median income, this economic growth has not transferred for populations at the median level of income and below. The unemployment rate, median wages, and wage inequality in the bottom half of the wage distribution are significant determinants of the poverty rate. Municipalities in the SWC region that are experiencing poverty rates of greater than 10% of the population in 2016 include:

- Oxford (Southwest Sub-region)
- Southbridge (Southwest Sub-region)
- Webster (Southwest Sub-region)
- Brookfield (West Sub-region)
- Hardwick (West Sub-region)
- Spencer (West Sub-region)
- Warren (West Sub-region)
- Worcester (Central Sub-region)

Populations under the age of 18 living below poverty levels should also be a focus for economic development. The average for SWC in 2016 for the population under 18 living below the poverty level was 10.70%; these percentages are rather low throughout the region with exceptions to several pockets of poverty in the different sub-regions. Municipalities in the SWC region that are experiencing poverty rates of greater than 10% for their population under 18 include:

- West Boylston (North Sub-region)
- Uxbridge (Southeast Sub-region)
- Oxford (Southwest Sub-region)
- Webster (Southwest Sub-region)
- Hardwick (West Sub-region)
- Warren (West Sub-region)
- Northbridge (Southeast Sub-region)
- Dudley (Southwest Sub-region)
- Southbridge (Southwest Sub-region)
- Brookfield (West Sub-region)
- Spencer (West Sub-region)
- Worcester (Central Sub-region)

For a complete list of poverty rates for the general population and the population less than 18 years old, see Tables I and I1 in Appendix V. *(pg. 137-138 of Appendix)*

Labor Force and Employment

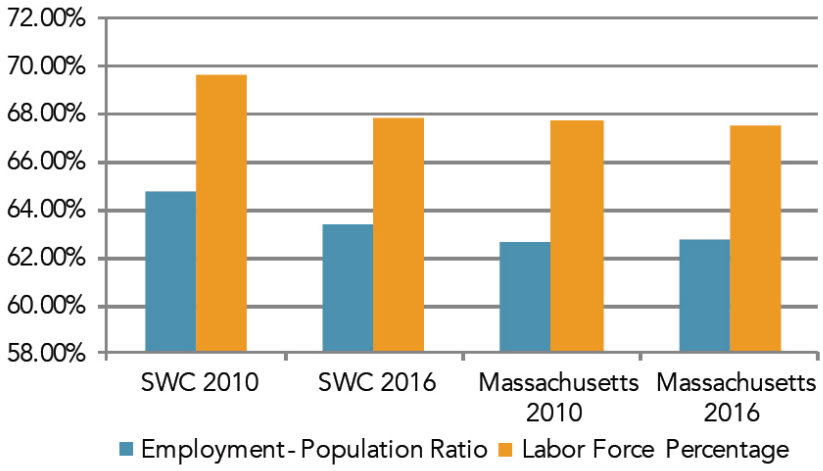
The Bureau of Labor Statistics (BLS) defines labor force participation as the percentage of the population 16 years and older either working or actively seeking work. The BLS defines the employment to population ratio as the percentage of the population 16 years and older currently working. Those who have no job and are not looking for one—are not counted in the labor force; this includes the population that is going to school, retired, maintain family responsibilities, those marginally attached to the labor force, and discouraged workers.

The average employment-population ratio for the SWC sub-regions was 63.40% in 2016. The Southeast (68.90%) and Northeast (68.10%) Sub-regions had the highest employment-population ratios in 2016. Douglas (73.70%), located in the Southeast Sub-region had the highest employment-population ratio in the SWC region. West Boylston (38.70%), located in the North Sub-region had the lowest employment-population ratio for the SWC region in 2016. There were 30 municipalities that experienced decreasing or flat employment-population ratios from 2010-2016 in the SWC region. Eight municipalities had employment-population ratios level or lower than 60% in 2016.

The labor force participation rate for the SWC was 67.80% in 2016. Half of the municipalities in the SWC region had labor force participation rates greater than or equal to 70% in 2016. The Southeast (73.30%) and Northeast (70.80%) Sub-regions had the highest labor force participation percentages in 2016. Blackstone (76.80%) and Douglas (76.20%), both located in the Southeast Sub-region had the highest labor force percentages in 2016. West Boylston had the lowest labor force participation out of the SWC region in 2010 and 2016, dropping to 40.90% over the 6 year period.

The employment-population ratio and labor force participation rates (see Figure 4 below) for the SWC region suggests that 4.40% of the SWC region or an estimated 22,634 people over the age of 16 in the SWC region were actively seeking work in 2016. This figure does not include those who are marginally attached to the labor force or discouraged workers (that is, those people who have stopped trying to find work after an extended period of unemployment). Statistics such as these suggest portions of the region may have an untapped labor pool, allowing expanding businesses or those employers new to the region may to have access to available workforce. However, the skillsets of this potential labor pool are unknown and there may be need for additional skills training programs. For a complete list of employment-population ratios and labor force participation, see Tables G, G1, H, H1, and Figure H in Appendix V. *(pg. 132-136 of Appendix)*

FIGURE 17 | Employment-Population & Labor Force Participation



References: U.S. Census Bureau, 2012-2016 American Community Survey 5-Year Estimates
U.S. Census Bureau, 2006-2010 American Community Survey

The region is dependent on industry clusters as displayed by the largest employers in the SWC region (see Table 4 below). These clusters include:

- Professional, Scientific, and Technical Services
- Educational Services, and HealthCare and Social Assistance
- Manufacturing
- Finance and Insurance

TABLE 18 | INDIVIDUALS EMPLOYED BY INDUSTRY, 2011-2016

Industry	Southern Worcester County Total	Percent Change 2011-2016	Percent of Total SWC Employment	SWC Mass. LQ	SWC U.S. LQ
Civilian employed population 16 years and over	286,432	4.05%	-	-	-
Agriculture, forestry, fishing and hunting, and mining	1,171	-2.01%	0.41%	1.01	0.21
Construction	15,915	-14.12%	5.56%	1.02	0.89
Manufacturing	33,520	-10.53%	11.70%	1.29	1.13
Wholesale trade	7,461	-11.95%	2.60%	1.13	0.97
Retail trade	33,654	8.72%	11.75%	1.10	1.02
Transportation and warehousing, and utilities	11,737	0.19%	4.10%	1.13	0.82
Information	5,799	-12.31%	2.02%	0.86	0.96
Finance and insurance, and real estate and rental and leasing	18,680	-4.40%	6.52%	0.87	0.99
Professional, scientific, and management, and administrative and waste management services	31,993	12.58%	11.17%	0.83	1.00
Educational services, and health care and social assistance	78,932	8.51%	27.56%	0.98	1.19
Arts, entertainment, and recreation, and accommodation and food services	22,437	18.68%	7.83%	0.89	0.81
Other services, except public administration	11,580	-5.07%	4.04%	0.91	0.82
Public administration	10,438	1.55%	3.64%	0.92	0.77

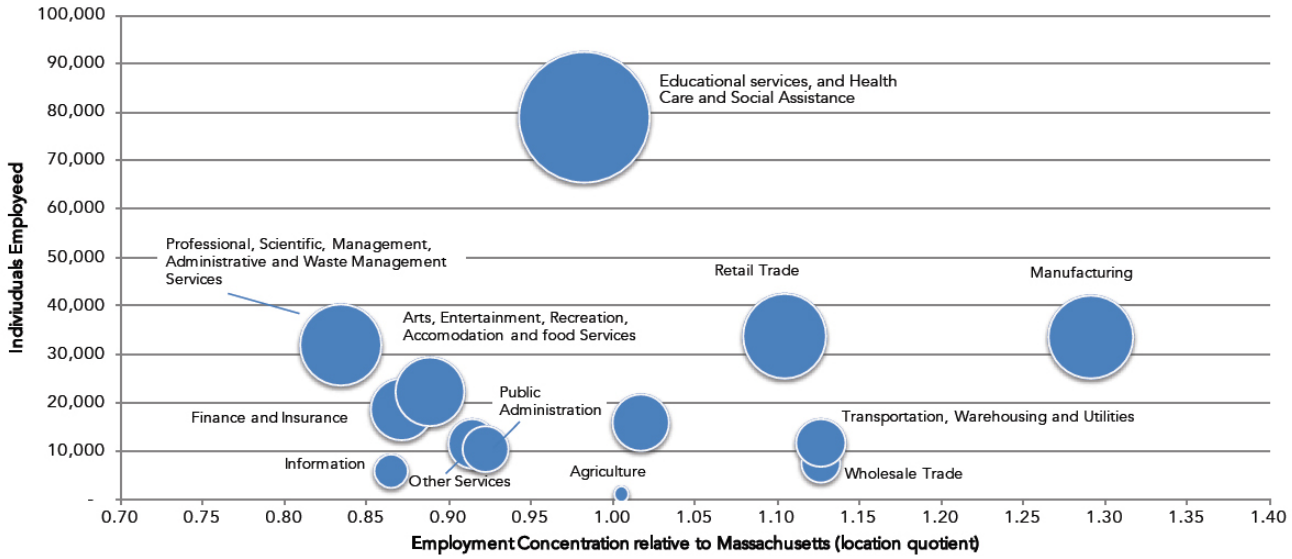
References: U.S. Census Bureau, 2012-2016 American Community Survey 5-Year Estimates
U.S. Census Bureau, 2007-2011 American Community Survey

Industries with the largest percentage increases in individuals employed from 2011-2016 include:

- Arts, entertainment, and recreation, and accommodation and food services (18.68%)
- Professional, Scientific, and Management, and Administrative and Waste Management Services (12.58%)
- Educational Services, and Health Care and Social Assistance (8.51%)

For more information on industry employment by sub-region, see pages 150-153 in Appendix V.

FIGURE 5 | INDUSTRY EMPLOYMENT CONCENTRATION AND SIZE OF INDUSTRY SOUTHERN WORCESTER COUNTY, 2016



The size of spheres in Figure 5 above designates the proportion of specific industry employment relative to individuals employed for the whole SWC region. Educational services, and Health Care and Social Assistance (27.56%) followed by Retail Trade (11.75%), Manufacturing (11.70%), and Professional, Scientific, Management, Administrative and Waste Management Services (11.17%) comprise 62.18% of industry employment for SWC.

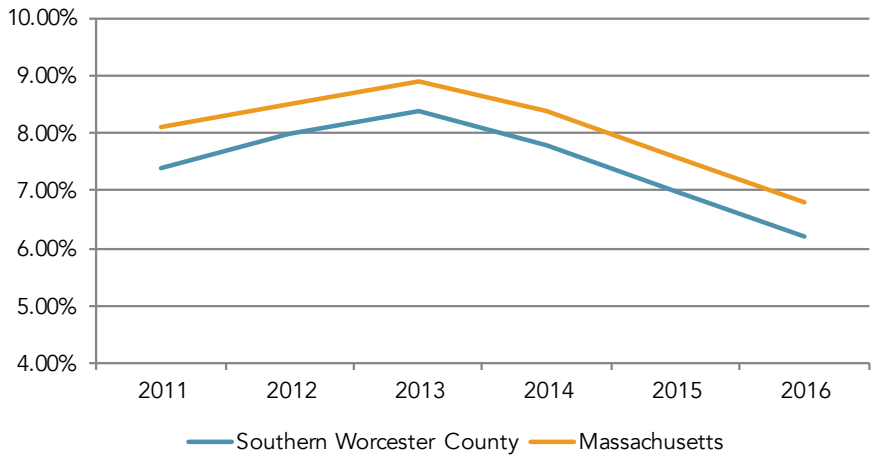
Location quotients (LQ) are defined by the BLS as comparisons of the concentration of an industry within a specific area to the concentration of that industry locally or nationwide. An LQ greater than 1 indicates an industry with a greater share of the local area employment than is the case at the state level or nationwide.[6] While Manufacturing employment has decreased from 2011-2016, the industry has the largest employment concentration (LQ: 1.29) relative to state- level employment in the SWC region. The Commonwealth of Massachusetts is known for its world class educational and medical institutions, the SWC region's LQ for Educational Services,

While it is important to retain top employers for the region, SWC is primarily a region of small employers under the Small Business Association (SBA) criteria with less than 500 employees or less than $7.5 million in average annual receipts for nonmanufacturing industries. Therefore business retention and expansion programs should be aimed at assisting small businesses. For a full list of employers in the SWC region with 500+ employees, see Table M in Appendix V. *(pg. 141-142 of Appendix)*

[6] QCEW Establishment Size Classes (For NAICS-Based Data). (2016, December 15). Retrieved from https://data.bls.gov/cew/doc/info/location_quotients.htm

Unemployment rates in the SWC CEDS region have been lower than unemployment rates at the state level from 2011-2016 (see Figure 6 below). Unemployment rates have been declining in all of the SWC Sub-regions. The unemployment rate is still a cause of concern and must be a focus of continuing economic development efforts within the region. For a complete list of unemployment rates for, see Table N in Appendix V. *(pg. 142 of Appendix)*

FIGURE 20 | Unemployment Rate, Southern Worcester County & Massachusetts, 2011-2016



Reference: American Community Survey, 5-Year Estimates, 2011 - 2016

References: U.S. Census Bureau, 2012-2016 American Community Survey 5-Year Estimates..

The Central Mass Workforce Investment Board (CMWIB) is the region's primary workforce development authority. The CMWIB covers 33 out of the 40 towns within the designated SWC region. The CMWIB offers several programs to offset the number of displaced workers across industry sectors, focusing specifically on future labor market demands. For a full list of employers in the SWC region with 500+ employees, see Table M in Appendix V. *(pg. 141 of Appendix)*

TABLE 21 | Profile of Massachusetts and Central Massachusetts Unemployment Insurance Claimants by Industry Sector, February 2017

Industry by Two-Digit NAICS* Sector Code	Massachusetts		Central Massachusetts WDA	
	# of Claimants	% of Population	# of Claimants	% of Population
11 - Agriculture, Forestry, Fishing and Hunting	1,121	1.30%	63	0.80%
21 - Mining, Quarrying, Oil and Gas Extraction	239	0.30%	19	0.20%
22 - Utilities	224	0.30%	27	0.30%
23 - Construction	18,415	21.60%	1,704	21.90%
31-33 - Manufacturing	5,722	6.70%	810	10.40%
42 - Wholesale Trade	2,946	3.50%	338	4.30%
44-45 - Retail Trade	6,120	7.20%	623	8.00%
48-49 - Transportation and Warehousing	2,565	3.00%	247	3.20%
51 - Information	1,505	1.80%	102	1.30%
52 - Finance and Insurance	2,144	2.50%	180	2.30%
53 - Real Estate and Rental Leasing	1,379	1.60%	96	1.20%
54 - Professional, Scientific, and Technical Services	6,233	7.30%	497	6.40%
55 - Management of Companies and Enterprises	368	0.40%	29	0.40%
56 - Admin & Support, Waste Mgmt & Remediation Serv.	12,669	14.90%	1,080	13.90%
61 - Educational Services	1,214	1.40%	107	1.40%
62 - Health Care and Social Assistance	5,458	6.40%	547	7.00%
71 - Arts, Entertainment, and Recreation	2,979	3.50%	294	3.80%
72 - Accommodation and Food Services	6,546	7.70%	298	3.80%
81 - Other Services (except Public Administration)	3,633	4.30%	317	4.10%
92 - Public Administration	1,627	1.90%	203	2.60%
99 - INA (No NAICS Code)	2,065	2.40%	198	2.50%

**NAICS is the North American Industry Classification System*

Reference: Massachusetts Executive Office of Labor and Workforce Development, Department of Unemployment Assistance, 2017

Construction employment represents the industry with the highest percentage of Unemployment Insurance (UI) Claims for all industries (see Table 5 above); this is due to the shorter construction season in the region.

Regional Target Industry Clusters

Various studies at different point in time have identified several existing and potential target clusters for the SWC region. In March 2014, the Worcester Regional Chamber of Commerce prepared a "Worcester Regional Economic Competitiveness Outlook." That analysis identified three Growth Sectors and two Declining Sectors that were shaping the regional economy. The Growth Sectors were: Manufacturing, Education and Health, and Professional, Scientific and Technical Services. The Declining Sectors were the Information Sector and Wholesale Trade. During the preparation of this CEDS, these sectors were reevaluated and the growth sectors were reconfirmed.

Worcester County hosts a diverse group of industries, many poised for expansion under the proper circumstances. The presence of world class educational institutions, central location of the region as an opportunity for industries to access large markets, and clustering of industries with well-paying career tracts position the SWC region to succeed on a national and international level. Fostering a clustering of businesses from specific industries and growth sectors will also lead to an increase in supply chain interaction and development or growth in ancillary related businesses, thereby creating a network to support the overlying industry.



As previously referenced, there are three economic sectors, as defined by the United States Department of Commerce, United States Census Bureau that should be the focus for expansion and growth in the coming years[6], with the recently published Central MA Regional Workforce Blueprint[7] identifying an additional three in their report "Transportation, Warehousing and Logistic, Construction, and Retail/Hospitality." The region's current mix of educational attainment, higher education and training institutions, and age of the population provides a stable foundation for success in these sectors and a system ready to support their growth.

Implementation of this CEDS report will focus on the three mutually identified primary growth opportunities for the foreseeable future in the region: Manufacturing; Professional, Scientific and Technical, and Educational Services; and Health Care (including Social Assistance) sectors. Additionally, through the public outreach process, it was noted that Agriculture, because of its prevalence in Central Massachusetts, should also be considered a target cluster.

[6]Any unreferenced statistics used in this section were collected and provided as part of the Worcester Regional Economic Competitiveness Outlook and were sourced from the 2010 1-Year Estimates American Community Survey for Worcester, Boston, and Massachusetts, the 2000 and 2010 County Business Patterns for Worcester County, and the 2007 and 2011 Economic Census for Worcester County

[7]http://www.cmwib.org/uploads/3e/7b/3e7bf4a53c3cf3fe078fa08bdfc7059e/Central-MA-Regional-Workforce-Blueprint-final-march-2018.pdf

Manufacturing

Manufacturing, defined as establishments engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products, has long been an integral part of regional economy.[5] Worcester County, like many other regions in the area, had previously seen deterioration in its manufacturing workforce through offshoring. Prior to the 1970s, manufacturing represented approximately half of the workforce in the City of Worcester and the region, before these manufacturing jobs were sent overseas. As measured by employment, manufacturing has continued to struggle in the region as it has across the Commonwealth, due to manufacturer's difficulty in attracting qualified, skilled candidates to fill their labor needs. Additionally, advancements in technology and lean-manufacturing have streamlined the workforce and decreased the reliance on manpower to achieve the same productivity level.

Despite these changes, there is optimism in the industry to realize potential growth and recruitment within the region. While the Massachusetts Executive Office of Labor and Workforce Development predicts a 5% decrease in employment for the Manufacturing sector over the next decade, it should be noted that several subsectors in the Central Massachusetts region covered by this CEDS are predicted to see an increase in employment.[6]



These subsectors are:

- Food Manufacturing: + 3.1%
- Paper Manufacturing: + 4.2%
- Nonmetallic Mineral Product Manufacturing: + 4.1%
- Electrical Equipment, Appliance, and Component Manufacturing: + 4.1%



The Worcester Regional Chamber of Commerce, through its Manufacturing Roundtable discussions with area manufacturers, recognizes the growth potential in the number of vacancies those manufacturers are seeking to fill on an ongoing basis. Through local partnerships, the region continues to recruit cohorts for manufacturing training to provide a talent turnpike of entry-level skilled employees to assist in meeting the needs of the manufacturing community.

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[5] Definition of manufacturing as provided by the United States Department of Commerce: United States Census Bureau: https://www.census.gov/econ/manufacturing.html

[6] Decade defined as 2014-2024: http://lmi2.detma.org/Lmi/Industry_Projection.asp?area=15000005long&cmd=Go

In addition, there are other resources that could aid in the attraction of additional manufacturing companies:

- The existing freight rail infrastructure, including the centralized location of the CSX Intermodal Terminal within Downtown Worcester, for the movement of goods and components is critical to the manufacturing industry.
- The access to several major highways within the area provides additional transportation options (both for inbound components and outbound product) and provides access to a large labor pool from which employees can be drawn.
- In addition to the freight rail port, the Worcester region hosts a local port authority and customs house, located at the Worcester Regional Airport, to service air-bound and ground-transported imports/exports. ; Additionally there is a port of entry for freight rail as well, allowing for more convenience and ease in the import and export of goods internationally.
- A regional airport with both commercial and general aviation services for the movement of clients, workers and employers.
- Continued investment in manufacturing training by Quinsigamond Community College (QCC), Worcester Polytechnic Institute (WPI), and the vocational/technical high schools serving the area.
- The interest of communities in the region to work with manufacturers on pre-permitting or expedited permitting of sites specifically for marketing as a manufacturing site.
- The use of financial incentives to support the development of manufacturing.

These factors, combined with the resurgence of the local manufacturing economy and the continued involvement of training partners creating a talent pool of skilled and ready-to-work employees, should provide the necessary tools to market the region to prospective manufacturing employers and support the growth of those already in the region.

Professional, Scientific and Technical Services



Professional, Scientific and Technical Services is comprised of establishments that specialize in performing professional, scientific, and technical activities for others that require a high degree of expertise and training. Services that are included (but are not limited to) in this sector are: legal advice and representation; accounting, bookkeeping, and payroll services; architectural, engineering, and specialized design services; computer services; consulting services; research services; advertising services; photographic services; translation and interpretation services; and veterinary services. This sector excludes entities that are primarily engaged in providing a range of day-to-day office administrative services, such as financial planning, billing and recordkeeping, personnel, and physical distribution and logistics.[7]

The Massachusetts Executive Office of Labor and Workforce Development projects this sector to see a 10.3% growth in employment over the next decade.[8] Additionally, there are two subsectors within this employment sector that are of significant importance in the region: Scientific Research & Development (R&D) and Computer Systems Design and Related Services.

7 Definition of Professional, Scientific and Technical Services as provided by the United States Department of Commerce: United States Census Bureau: https://www.census.gov/econ/isp/sampler.php?naicscode=54&naicslevel=2#

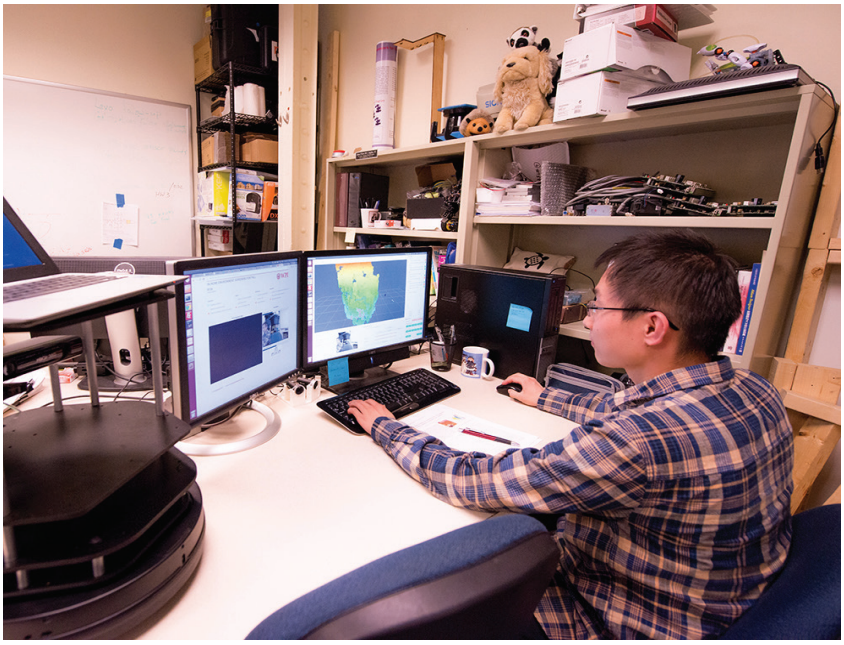
8 Decade defined as 2014-2024: http://lmi2.detma.org/Lmi/Industry_Projection.asp?area=15000005long&cmd=Go

The SWC region has recently experienced a growing cluster of biotech, bio-manufacturing, and life sciences companies. At the center of this growing cluster, the City of Worcester has played an integral role with the establishment of one of the first biotechnology parks in the county, the Massachusetts Biotechnology Research Park, known today as the UMass Medicine Science Park. This development spurred significant regional development within the surrounding communities with projects such as Grafton's CenTech Park which was created to provide the manufacturing component of the biotechnology industry, complementing the research occurring within the area. From 2000 to 2010 the Scientific R&D industry saw a 37.7% growth across the region. As this industry continues to expand, growth within the SWC region is expected to continue.

The Computer Systems Design and Related Services subsector saw a 46.3% growth during the period of 2000 to 2010 and is expected to continue to experience high growth within the region. Custom Computer Programming Services is a subsector within this area and is of particular interest to the region as it includes video game development. This subsector also grew during the 2000 to 2010 period by 36.7%. Much like the increased interest in Scientific R&D being related to a collaborative partner organization in the region, this subsector also benefits from a strong regional resource. The Massachusetts Digital Games Institute (MassDiGI) is also a statewide resource for the digital and video game industry and is located on the Worcester campus of Becker College. The mission of MassDiGI is to foster growth in the innovation economy and provide a career path and talent development for the gaming industry. MassDiGI is also a United States Department of Commerce Economic Development Administration (EDA) University Center.

Educational Services and Health Care and Social Assistance

Educational services are defined as establishments that provide instruction and training in a wide variety of subjects. This instruction and training is provided by specialized establishments, such as schools, colleges, universities, and training centers. These establishments may be privately owned and operated, for-profit or not-for-profit, or they may be publicly owned and operated.[9]



9 Definition of Educational Services as provided by the United States Department of Commerce: United States Census Bureau: https://www.census.gov/econ/isp/sampler.php?naicscode=61&naicslevel=2

Health Care and Social Assistance is defined as establishments providing health care and social assistance for individuals. Some entities provide medical care or social assistance exclusively, while others provide health care combined with social assistance, making it more difficult to distinguish the difference. Therefore, these two categories are combined by the U.S. Census Bureau due to the difficulty in distinguishing between types of service provided by some employers in this sector.[10]

While manufacturing has seen a decline in employment over the past several decades, Educational Services and Health Care and Social Assistance have increased and represent one of the largest employment sectors in the region. The growth in Educational Services between 2000 and 2010 was 6.2% in the region, while the Health Care and Social Assistance sector saw a 14.8% growth. The Massachusetts Executive Office of Labor and Workforce Development predict a 6.1% increase in employment for both the Educational Services and Health Care and Social Assistance sectors over the next decade.[11]

The Health Care and Social Assistance sector benefits from the region's access to top-tier health care facilities, including the University of Massachusetts Memorial Healthcare system, operating facilities in Worcester, Leominster, and Marlborough, the University of Massachusetts Medical School in Worcester, and other entities operating within the region. As one of the largest employers within the region, UMass Medical (13,200 highly educated and skilled individuals) is considered to be one of the premier teaching hospitals within the region and recruits from among the top students looking to pursue a career in the medical fields. The Massachusetts College of Pharmacy and Health Sciences University (MCPHS) produces graduates trained in a variety of healthcare fields. Graduates from institutions such as UMass Med, MCPHS, and Tufts Cummings School of Veterinary Services add to the talent pool of available employees and are supplemented by the work of the technical/vocational high schools and other training providers trying to meet the needs of health care employers.

With a continued push for diversification in the education options for students, combined with the network of public and private institutions in the K-12 subsector and thirteen colleges and universities in the region, employment options in this sector should continue to grow in the region.

Agriculture



Worcester County has more farms than any other county in the Commonwealth of Massachusetts, with 1,526 farms. The region also has some of the highest farm to consumer sales in the country, ranking 6th in comparison to counties across the United States. With new businesses appearing in the agriculture space including, farmers markets, farm-to-table aggregators, the Worcester Regional Food Hub which aggregates fresh, local produce for sale to institutional buyers in the region, and farm side stands, there is a tremendous amount of potential in the agriculture industry in the region. The increased demand for local produce has allowed local farms the opportunity to diversify their product offerings and increase revenue streams outside of the traditional forms of revenue.

10 Definition of Health Care and Social Assistance as provided by the United States Department of Commerce: United State Census Bureau: https://www.census.gov/econ/isp/sampler.php?naicscode=62&naicslevel=2#

11 Decade defined as 2014-2024: http://lmi2.detma.org/Lmi/Industry_Projection.asp?area=15000005long&cmd=Go

SWOT ANALYSIS

This summary of the SWC region's primary strengths, weaknesses, opportunities and threats (or issues) is derived from several sources, including but not limited to:

- Input from residents, business people, government officials and board/commission members, not-for-profit agency representatives, and others who participated in the development of this CEDS. In particular, four widely publicized meetings were held in different portions of the region. The compilation of discussion points from these meetings is provided in Appendix II *(pg. 30-110 of Appendix)*
- Other research reports of relevance to preparation of this CEDS.
- Statistical data obtained from a wide variety of regional, state and federal sources.

References below to Strengths, Weaknesses, Opportunities or Threats were derived from the analysis of responses to the online SWOT survey conducted as part of the research for this CEDS as well as discussion input received during the series of regional meetings that were conducted.

Strength and Opportunities

Regional Economy

For the near-term to intermediate future, the regional economy is anchored in four industries that are responsible for much of the employment (50.43% as of 2016) in the region – Educational Services, Health Care and Social Assistance, Professional, Scientific and Technical Services, and Manufacturing. The Service Sector in the region is also a strong component of the workforce.[12] The growth of the innovation economy and active collaboration between academia and private industry clusters in Robotics, Engineering, Digital Gaming and Biopharmaceuticals & Medical Devices are competitive advantages for the regional economy. Jobs within these innovation economy industries, which cut across all industry sectors, typically pay high wages and support a high standard of living for the local community. SWC has the opportunity to take advantage of the growing Life Sciences industry, which is expected to continue growth in the state. The state leads the nation in Biopharmaceuticals & Medical Device employment but there is room for growth in biomanufacturing. The Biopharma industry is growing in Massachusetts - jobs in the industry grew by 28.0% from 2007-2016.[13]

Central Massachusetts can serve as a model for building a cluster around Biomanufacturing and Biotech Research and Development. Employment in these sectors grew by 12.0% and 40.0% from 2007-2016. SWC should leverage the available workforce, public-private partnerships, accessible location, research and development activity, and business support for STEM focused industries. The Biomanufacturing Park in Worcester is an example of collaboration from public and private entities creating infrastructure to advance industry clusters by creating a 44-acre site with approximately 350,000 square feet of pad-ready space. The focus on current target clusters and innovation economy industries was viewed as a strength or opportunity by all sub-regions except the Southeast and West sub-regions.

Diversification of the economy is important for decreasing dependency on the dominant four industries cited above and generating greater skill matches for the region's labor market. Highlighted in the community meetings was the importance of the growing arts community and cultural festivals. Increased regional focus on the arts not only increases the value of living in the region but serves as an economic multiplier, generating $125.7

12 Quarterly Census of Employment and Wages 2017 Second Quarter. (2017, March 7). Retrieved from https://data.bls.gov/cew/apps/data_views/data_views.htm#tab=Tables

13 Open for Business, Steps to Expand Biomanufacturing in Massachusetts, November 20th 2017

million in economic activity in the city of Worcester alone.[14] The green energy sector is growing in the state, as well as in Central Massachusetts. Central Massachusetts green energy businesses grew by 2.9% from 2016-2017.[15] The Arts and Culture industries were viewed as a Strength or Opportunity by all sub-regions.

The travel, tourism, and hospitality industry is critical in leveraging the historical and cultural assets in the region as an engine for economic growth. The Massachusetts Office of Travel & Tourism (MOTT) is the state agency dedicated to promoting Massachusetts as a leisure travel destination. Discover Central Massachusetts, the local tourism agency as designated by MOTT, markets Central Massachusetts as a competitive destination for travel and tourism, as well as conventions, meetings, and events, while supporting agricultural tourism and promotion. Discover Central Massachusetts' coverage designated by MOTT represents 35 out of the 40 communities in SWC. Three communities are served by the MetroWest Visitors Bureau. In 2015, more than 3,220 people were employed in tourism-related jobs in Central Massachusetts alone, accounting for a payroll of over $90 million annually. Travelers spent $523 million in the Central Massachusetts region, resulting in local tax receipts of $11.4 million and supporting 3,306 jobs.[16] Tourist expenditures include many categories including lodging, entertainment, dining, transportation, and fuel; many local businesses rely on the spending of visitors to the region. The region offers both tourism destinations, such as museums, and other notable places of interest, while also offering outdoor destinations, such as trails, scenic byways, outdoor sports activities, and water recreation activities.

Opportunity Zones are a new community development program established by Congress in the Tax Cuts and Jobs Act of 2017 to encourage long-term investments in low-income urban and rural communities nationwide. The Opportunity Zones program provides a tax incentive for investors to re-invest their unrealized capital gains into Opportunity Funds that are dedicated to investing into Opportunity Zones designated by the chief executives of every U.S. state and territory. As of May, 2018 5 Census Tracts in SWC have been approved for Opportunity Zones. These Census Tracts are located in:

- Spencer
- Sturbridge/Charlton
- Webster
- Worcester (2 Tracts)

Expansion into new markets was noted as an opportunity for the region's employers. The Worcester Regional Chamber of Commerce has been working since 2014 to develop strategies to promote economic development in the region through import / export trade agreements, additional educational partnerships, cultural exchanges, and other strategic efforts. Seven countries have been identified as prime areas for such partnerships: Germany, Canada, Ireland, Ghana, Taiwan, Israel, and Mexico. These international efforts are part of the Chamber's ongoing strategy of Recruit, Retain, and Incubate. Germany, Canada, and Mexico alone represent $7.4 billion of Massachusetts' $26.7 billion exported goods in 2017. There are existing businesses, cultural and governmental relationships which can continue to be built.



14 Arts and Economic Prosperity 5 Worcester, MA Washington D.C.: Americans for the Arts.
15 2017 Massachusetts Clean Energy Industry Report, Boston MA: Massachusetts Clean Energy Center
16 DCM Mission. (n.d.). Retrieved from https://www.discovercentralma.org/membership/mission/

Workforce

A substantial proportion of the Worcester County's population over the age of 25 (37.53%) has a bachelor's degree or higher, contributing to a highly skilled workforce. The educational levels of the workforce were viewed as a Strength. The region possesses a large number of vocational and technical high schools capable of creating a talent pipeline that can meet the skill demands of a wide variety of employers. Investments made by Quinsigamond Community College throughout the region in Southbridge, Northbridge, and Blackstone will further increase advanced manufacturing skills. For example, a new advanced manufacturing training program in Blackstone Valley will offer certificate courses and customized curriculums to address a present skills gap in manufacturing. SWC must take advantage of funds and training programs to retrain workers who are unemployed or discouraged. The manufacturing sector should continue to market jobs within the sector to younger generations. The age and skills of the workforce were predominantly viewed as a Strength or Opportunity. Both gaps in skills availability and some collaborative efforts to create training opportunities to fill the needs of employers in the region were noted.

Agriculture

The region should continue to support local farm initiatives such as Central Mass Grown and the Regional Environmental Council. These initiatives are important in supporting an ecosystem of farms, value-added businesses, retailers, restaurants and community organizations. In the most recent census from the United States Department of Agriculture (USDA), there were 1,526 farms in Worcester County. These farms focus on selling their products in farmers markets, diversified farm stands, and community-supported agriculture farm shares, as well as to restaurants that feature farm-to-table menu items. The agricultural business was viewed as a Strength or Opportunity by all sub-regions.

Education

Educational attainment was noted as a competitive advantage of the region. There are 13 institutions of higher education in SWC. The involvement of these colleges and universities in community-building has improved the standard of living in the region. Local colleges possess high value-added research and development initiatives aimed at fostering innovation and commercialization. For example, MassDIGI at Becker College and Practice Point at WPI are both products of economic development through the collaboration of state government, academia, and industry. Institutions like Quinsigamond Community College, Clark University's Small Business Development Program, and Nichols College have been key proponents in mentoring local small businesses in growth strategies, financing and loan assistance. Opportunities through these types of institutions include leveraging the efforts of the region's technical and vocational schools and increasing the capacity and exposure to industry skill demands. The region can market the SWC corridor as a pipeline of talent development for growing businesses in all of the region's target clusters. The impact of local community colleges was viewed as a Strength of all sub-regions.



Economic Development and Business Climate

AVAILABLE SITES & BUILDINGS, PLANNING & DEVELOPMENT



Community collaboration between government leaders and economic development staff was frequently cited as strength for the region. Those staffed to promote economic development can provide targeted support services for communities. For the region to create further opportunity for economic development, focus should be placed on joint efforts for rezoning, site consolidation, and brownfield remediation to create developable sites. There is an opportunity for the SWC region to work together to promote economic development by making investments into pad-ready sites.

The Central Massachusetts Regional Planning Commission (CMRPC) has worked with regional communities to develop prioritization projects in the form of Priority Development Areas (PDA) and Priority Preservation Areas (PPA). There are currently 23 PDAs within SWC as outlined by CMRPC. These 23 PDAs are located within Grafton, Millbury, Northbridge, Shrewsbury, Southbridge, Spencer, Sturbridge, Webster, Westborough, West Boylston, and Worcester.

There are over 332 properties for sale within SWC. The composition of these properties is: 153 parcels of land, 64 office buildings or spaces, 54 industrial buildings, 49 retail spaces, 11 flex-use spaces, and one property for medical use. Within SWC, there are 586 properties currently available for lease. The composition of these properties is: 252 properties available for office use, 111 properties available for industrial use, 166 properties for retail use, 32 properties for flex use and 25 properties for medical use.[17] There are currently only two real estate sites being advertised for development within the SWC region on the MassEcon ZoomProspector database.[18] MassEcon also operates a ReadyMass100 program which selects up to 100 properties that reflect a high level of marketability and will attract prospective companies and site selectors to consider Massachusetts as an expansion location. There are currently 8 properties from the SWC that have been accepted to the ReadyMass100 program.[19] Once a property meets all minimum criteria for a parcel of land or building, a one-time fee is applied for the site to be given ReadyMass100 priority status. The sharing of information for available sites and buildings was viewed as an Opportunity in the region. These services include:

1. Highlighted on the ReadyMass 100 searchable portfolio
2. Promoted to the national and local site selection community
3. Provided priority status in matching companies' real estate needs through MassEcon's Site Selection Service

The region has the opportunity to accelerate development by taking better advantage of existing listing and site certification programs that are currently in use.

17 CoStar Group, Retrieved from www.costar.com
18 http://statema.zoomprospector.com/
19 https://massecon.com/services/readymass100/search/

BUSINESS CLIMATE, FINANCING & INCENTIVES

Through various state programs, communities are equipped with several development tools and options to facilitate business growth and expansion through implementation of progressive ordinances and zoning, and streamlined local and state permitting. Massachusetts General Law Chapter 43D, known as the Expedited Permitting program, was signed into law in 2006 and amended in 2012 creating a transparent process to expedite municipal permitting to create a "Priority Development Site" (PDS).[20] A PDS is a publicly or privately-owned property that is designated at the local level and approved by the Commonwealth's Interagency Permitting Board. This program can be utilized for sites meeting the following criteria:

1. Commercial, Industrial, Residential, or Mixed Use
2. Development or Redevelopment of at least 50,000 square feet of gross floor area in a new or existing building/structure

The benefits of opting into Chapter 43D include:

1. Priority consideration for the MassWorks Infrastructure Program grants, brownfields remediation assistance, and other financing through quasi-public organizations
2. Online marketing of a site and promotion of a pro-business regulatory climate
3. Improved municipal planning and permitting efficiencies
4. Collection of special fees for priority development site permit applications

Currently, only 11 of the 40 communities within the geographic scope of SWC are designated Chapter 43D communities. The Massachusetts Office for Business Development (MOBD) also offers the Microlending and Community Development Capital Program as a capital lending program for nonprofits, including Community Development Financial Institutions (CDFIs) and Community Development Corporations (CDCs), that cannot secure traditional financing through banks.[21] The funding secured for nonprofits will provide for an extension of credit to small businesses in the form of:

1. $100,000 available for direct loans and technical assistance
2. $125,000 available for leveraging federal and/or private funds extending credit to small businesses.

MOBD also offers the Economic Development Incentives Program (EDIP), which is the Commonwealth's investment tax credit program for businesses. EDIP tax credits are available to companies that make qualifying investments in new facilities and create or retain jobs. Within the EDIP is the Tax Increment Financing (TIF) tool which allows municipalities to grant property tax exemptions to landowners of up to 100% of the tax increment of development for a maximum period of 20 years. MOBD also extends the opportunity for municipalities to apply for District Improved Financing (DIF), which is used for designating development districts. A DIF provides municipalities with greater flexibility in proposed zoning and financial plans for acquiring land for construction. The use of tools such as DIF and TIF within the EDIP encourages redevelopment of existing sites, urban infill, and revitalization. These tools provide opportunities to increase property value and increase tax revenue through multi-unit housing or commercial development.[22]

Opportunities for business climate improvements are also possible through broad-based customer service training and municipal skills development training. SWC should focus on collaboration surrounding economic development, sharing best practices and leads or lead assistance to best gain access to state funds.

20 https://www.mass.gov/service-details/chapter-43d-expedited-local-permitting
21 https://www.mass.gov/service-details/2018-microlending-and-community-development-capital-program
22 https://www.mass.gov/service-details/smart-growth-smart-energy-toolkit-modules-district-improvement-financing-diftax

ENTREPRENEURSHIP SUPPORT



Start-up activity in the region has been on the rise. The region was included in the top ten by the Progressive Policy Institute's "Next in Tech" research report as one of the top ten emerging technology hubs.[23] Important in the nurturing of start-ups for the region are programs hosted by the Worcester Regional Chamber of Commerce such as SCORE and StartUp Worcester which offer mentoring and financial support to start-ups. The supply of collaborative workspaces such as co-working spaces, maker spaces, incubators, and accelerators were cited as a strength. There are currently 12 collaborative workspaces in SWC which support growth for general start-ups, as well as supporting the Digital Gaming, Robotics, Engineering, and Biotechnology regional clusters. The entrepreneurship and small business mentoring programs at local colleges were also cited as strengths. Access to capital for start-ups is an opportunity to increase the activity of the start-up ecosystem. There is an opportunity for the region to collaborate in providing an adequate inventory of collaborative work spaces to grow the start-up economy. The increased number of homebased businesses should also serve as a complement to the growing supply of collaborative workspaces within the region.

Infrastructure

Assets of the transportation infrastructure that were cited as strengths include the highway system, proximity to five international airports (Logan International Airport, T.F. Green International Airport – RI, Bradley International - CT, John F. Kennedy International and LaGuardia International - NY), a well utilized freight rail system managed by CSX Corporation and the Providence and Worcester railroad, managed by Genesee & Wyoming. Other strengths of the regional transportation system include the Framingham/Worcester MBTA rail line supporting passenger rail transportation to and from Boston, and the regional public transportation system managed by the Worcester Regional Transit Authority. The existing transportation network provides companies with the ability to access a broad regional market, support their supply chains, and access a large labor pool. SWC is near several markets within New England including Boston, Springfield, Providence, RI, and the Connecticut market. Businesses can reach over 8 million customers within 50 miles.

UTILITY & TELECOMMUNICATIONS INFRASTRUCTURE: Water, Sewer, Electrics, Gas, Telecommunications

The updating of existing treatment facilities for public sewer was valued as a priority for communities. The reliability and consistency of electric power, along with proactive measures such as tree trimming to prevent future power outages, were also identified as strengths of the existing electric utility infrastructure. Availability of natural gas is important as part of the region's infrastructure. Communities must seek to build out municipal infrastructure to attract development. Municipal aggregation for electric power allows for more efficient rates, and companies are working in consortiums to purchase power together. Many available sites that are development-ready have access to three-phase electric power which allows a company to move in and use electricity at a lower rate. Opportunities are present for communities to designate themselves as a Green Community, gaining access to funds for solar and renewable energy. There is opportunity for growth in the region by laying fiber networks. Improving the high speed voice and data network throughout the region will aid current business operations and work as an attraction for relocating businesses.

23 Mandel, M. (2017). How the Startup Economy is Spreading Across the Country — and How It Can Be Accelerated (Rep.). Washington D.C.: Progressive Policy Institute. Retrieved from http://technet.org/blog/how-the-startup-economy-is-spreading-across-the-country

LEADERSHIP AND POLITICS

Strengths highlighted include an engaged leadership and skilled municipal staff. The engagement and accessibility of state legislators was also noted as a strength. Political civility in the region continues to be considered important in accelerating economic development. There is community interest in setting up quarterly meetings to meet with local legislators to discuss current projects and new programs, as well as share ideas on opportunities for more effective collaboration.

PUBLIC SERVICES AND FACILITIES

Public facilities and infrastructure are being updated by many communities. Libraries in SWC are emerging as resilient public institutions by diversifying revenue streams and positioning themselves as resource centers for all members of their community. The police, fire and elderly services in communities are well-managed and provide efficient resources. Opportunities voiced included increased regionalization of services in order to achieve cost savings and more efficient management and service delivery.

QUALITY OF LIFE AND REGIONAL IMAGE

SWC possesses a wide array of outdoor amenities including parks, ski trails, hiking trails, bike trails, and hunting opportunities. The region's many cultural and historical assets were also noted as a strength. Cost of living in the region is relatively lower and there is a strong regional school system. Low crime rates were voiced as a strength. The good perception of the region in surrounding communities coupled with the reputation of the historical and strong educational institutions produce a vibrant and positive community image. Opportunities include greater positioning and partnering with Providence and Hartford, as well as greater marketing of The Blackstone Valley and The Last Green Valley National Heritage Corridors registered under the National Park Service.







Weaknesses and Threats

Regional Economy

Reliance on the retail industry and the service economy were voiced as weaknesses for the region. While open-air shopping centers have been successful in growing retail and attracting visitors to the CEDS region, it is recognized that the shift in consumer purchasing through online vendors poses a severe threat to the longevity of these developments. The lack of diversification in the region's tax base poses a serious threat to the stability of its communities. As companies seek to offset costs by moving production processes out of the region, the tax base for the region has been shrinking which has created a difficult cycle for recruiting new businesses with incentives. Low wage levels for young people and older residents reentering the workforce were identified as a weakness for the region, limiting the ability for area businesses to attract and retain a high-quality workforce.

The impacts of new federal tariffs against imported goods such as steel and aluminum have been detrimental to the region's manufacturers who rely on importing these goods. The tariffs have increased costs for manufacturers in the region, forcing manufacturers to eat costs within their profit margins or pass them onto their customers. The cycle of economic growth since the Great Recession has benefited manufacturers in the region who have been expanding operations in the region and increasing hiring. An increased purchasing price for raw materials threatens this growth, while offsetting these costs with personal cuts becomes difficult to do in an already squeezed labor market. With domestic supply of steel and aluminum unable to keep up with domestic demand, wait times and prices for these raw materials have increased. The increased tariffs and possible renegotiation of NAFTA places the SWC region and the Commonwealth in a state of uncertainty, these measures have already lowered the Associated Industries of Massachusetts' business confidence index down by more than five percentage points to 61.3.

Automation in the manufacturing sector has created greater efficiencies for manufacturers and yielded ever-higher productivity as companies are able to produce more goods with less workers, leading to layoffs in this industry. Unfortunately for employers, they are in a race with a generational shift as older workers begin to retire in greater numbers, overwhelming their ability to replace these aging workers with machines. In the transportation industry there has been significant research on the development of autonomous vehicles and discussion whether this progression in technology will disrupt employees who are drivers in the transportation industry.

Discussions with local distribution industry professionals indicate that this innovation is many years away from having an impact locally – while the technology may be rapidly advancing, the prohibitive cost of buying and maintaining an autonomous delivery truck will prevent wide scale implementation and any noticeable decline in local jobs driving. More imminent, these professionals suggest, is the greater utilization of automation in the sorting, handling, and preparation of products as they move through the distribution network. Beyond the short term, it is anticipated that delivery trucks, even autonomous ones, will still need a human presence on board for the foreseeable future to ensure the safe handling and delivery of goods and material. Outsourcing and the use of third party agencies for staffing has created a lowering of business reputations in the community-labor pool, and a decrease in the ability to promote from within as talented entry level support staff.

Workforce and Demographics

A weakness of the regional labor supply is a mismatch of skills development for jobs in the advanced manufacturing and agriculture sectors, as well as other industries in the region. Many of the older, more experienced workers are retiring and this is leaving gaps that are proving difficult for employers in manufacturing and trade industries to fill as younger workers are not choosing to enter these fields in numbers sufficient to the need. A corollary issue we are seeing with an aging workforce is that many older workers do not appear to be equipped with the appropriate skill set to work in a technology-rich workplace, such as advanced manufacturing. As a greater number of refugee and immigrant populations come into the region, there is potential to fill the employment gaps in these industries that are experiencing a labor supply shortage. Challenges that are present with these new populations are a lack of English proficiency, limited education beyond high school, and a lack of job-specific skills. It has been reported that the waiting list for our region for English for Speakers of Other Languages (ESOL) classes is greater than 1,000 candidates. These people's lives are largely on hold as their ability to work in living-wage jobs is significantly impaired by their lack of English fluency.

Noted in the community meetings was the need for better training and education from the vocational and technical schools, as well as soft-skill development. The lack of retention of local college graduates (the "brain drain"), cost of housing as a constraint, as well as aging populations, combined with out-migration in some communities were identified as concerns. Messaging regarding careers in the manufacturing industry should be refocused around the skill demand that is present. Other issues include lack of funding for additional staff for Central Massachusetts Workforce Investment Boards (CMWIB), which services 37 surrounding communities in Central Massachusetts.

Education

The lack of training and education for existing job opportunities in the region was identified as a weakness in the region. Lack of guidance for students seeking opportunities outside of higher education was a stated weakness. Issues present involve schools being rewarded for providing a skilled workforce that is ready to meet labor market demands and the necessity for stronger linkages between businesses and schools. Funding for vocational schools and public schools is inadequate. Waitlists for vocational schools are increasing, and funding in K-12 public schools does not provide the necessary amenities for all students.

Economic Development and Business Climate

AVAILABLE SITES & BUILDINGS, PLANNING & DEVELOPMENT

There is a lack of focus in creating a regional plan to entice the commercial real estate industry to become an active partner in the region. The lack of supply and inability to identify pad-ready sites throughout the region serves as an impediment to future economic development. Given the industrial history of the region, SWC possesses a number of brownfield sites and a supply of older manufacturing buildings that require significant investments for redevelopment. The redevelopment of obsolete industrial complexes that potentially contain debilitating structural conditions or other environmental concerns is burdensome for private development. These development efforts are impeded even more when there are historic registry barriers that must be accounted for in the redevelopment efforts. The Commonwealth's historic tax credit program has been a boon for preservationists and developers, providing money to rehabilitate properties across the state although the increased competitiveness of the program and lack of equitable year-to-year funding has stalled redevelopment projects. The rural characteristics of communities should be maintained despite changes caused by economic development efforts. Restructuring of zoning for the potential of the property and the prohibitive costs that come with redeveloping and rehabilitating properties is seen as a threat to the region. The vacant mill sites need infrastructure development to be repurposed. Small communities may not have the staff capacity for effective planning and development.

BUSINESS CLIMATE, FINANCING INCENTIVES & TAXES



A structural weakness to the economic development of the region includes the zoning process and lack of rezoning for the purpose of future development. There is difficulty in the zoning process for communities in rezoning parcels for future use meeting current and projected market needs, which impedes development or redevelopment of these sites. Communities must better assist businesses in understanding and complying with the state and local regulations. Other weaknesses of the region include difficulty in utilizing Economic Development Incentives Programs (EDIP) from the Massachusetts Office of Business Development (MOBD) in small towns and communities. The process for receiving state financing for job creation has grown increasingly competitive and there is a lack of incentives for job creation. Developers share negative experiences in working with parts of the region which creates a cycle of avoidance by developers. Volunteer boards must recognize they are also a part of the economic development ecosystem.

Issues highlighted for business support services were the lack of information sharing about business prospects between towns if a town does not meet the criteria for a developer, and the need to redevelop real estate availability databases. There is a lack of updated real estate site listings for many communities.

Communities using a dual rate tax system often have a challenging time attracting businesses to locate into their communities. The presence of a dual rate tax system disproportionately taxes businesses at a higher level than residences in the community, deterring business activity in the community, and therefore the region. Within the region there are currently 3 communities that have a split tax rate. Another issue noted was the conflict of greater services and lesser taxation in communities. For a complete list of municipalities in the region, with corresponding property tax rate systems, see Table T in Appendix V. *(pg. 157 of Appendix)*

ENTREPRENEURSHIP SUPPORT

Given the central location of the region, as well as the wealth of intellectual capital within the area, SWC is positioned to leverage its location, entrepreneurial and industrial legacy; however, there are a number of gaps throughout the region that have impeded the development of a support system for these entrepreneurial endeavors. Many of the talented students graduating from the universities and colleges often do not stay in the region due to the lack of employment opportunities and the type of lifestyle offered within the region (versus the more metropolitan areas of Boston or Cambridge). Another consideration to enhance the entrepreneurial support system in the region is the need to develop a greater talent connection between students and the various business clusters within the region.

Infrastructure

LOCATION AND TRANSPORTATION INFRASTRUCTURE



The SWC is at the center of New England's transportation network, with easy access to virtually any part of the region. Whether by road, rail, and air, the SWC region has great connections beyond its borders for both people and goods; however, these systems have seen an increase in usage and require significant upgrades to address the increased capacity.

As populations within the region continue to grow, connectivity amongst these populations is critical. The region suffers from an obsolete public transportation system that does not adequately service its populations, particularly in the first and last mile connections of workers to employment opportunities between the smaller communities and larger employers. Some of this lack of service is a direct result of the underfunding of the regional transit authority. There is also a distressed, overburdened roadway network that serves as a barrier to attracting business and residents. Further, the current ownership configuration of the existing rail system creates an access issue, in addition to the age of the system, requiring upgrades to serve the increased needs of these growing communities.

UTILITY & TELECOMMUNICATIONS INFRASTRUCTURE: Water, Sewer, Electrics, Gas, Telecommunications



In order to fully effectuate development throughout the SWC, communities must be served by adequate water, sewer, natural gas, electrical, and communication infrastructure. In some of the more rural communities within SWC, the lack of water and sewer infrastructure is a critical impediment to economic development and quality of life. Communities without adequate water systems are required to negotiate with neighboring communities to obtain water at higher price points. In addition to the lack of water capacity, many SWC communities have aging public sewer systems

that require significant upgrades due to their condition and increased usage. The levels of mandates required by the EPA at the Federal and State level do not match the levels of funding being allocated. Due to the high costs of these significant upgrades, SWC communities are forced to be reactive to its infrastructure needs and have limited ability, both structurally and financially, to be proactive in its utility needs.

In addition to water and sewer capacity, many SWC communities have inadequate access to good, high-speed telecommunications infrastructure, including lack of cellular coverage in some areas. As we continue to see a heavy reliance on digital access for businesses and residents alike, access to good, high-speed internet service is critical in supporting businesses and helping residents maintain a quality standard of life.

Though not unique to SWC, new developments within our communities are often faced with the questions and concerns of rising energy costs and how it impacts the decision to move forward with these investments. The cost of electricity for residents and businesses alike has continued to be a glaring issue from both quality of life and economic development perspectives. In some communities a lack of heavy or three-phase power limits the potential of development sites. Further, the availability of natural gas service within some parts of the region is limited or non-existent. Given the environmental and financial considerations of expanding these types of services, it has become increasing important to review options for implementing renewable energy, reducing carbon emissions and providing businesses and residents with an efficient, and cost-effective energy source.

Leadership and Politics

Participation on boards and commissions is losing popularity among all ages while there is also high turnover for town managers or administrators. Sense of community has been shrinking in some areas in the region. There is a lack of voluntarism and engagement in community issues. Civic participation in public office and election turnout was voiced as an issue for the region.

Public Services & Facilities

Services vary in quality depending on the community. Funding is not keeping up with deteriorating facilities and the need for updates. Some communities do not allocate additional revenue beyond state funding for public facility improvements. Public services and facilities contribute to quality of life standards, as these standards deteriorate it impacts the ability to recruit a skilled workforce.

Quality of Life and Regional Image

Housing, as it relates to recruitment of a talented workforce, along with the overall high cost of housing were listed as weaknesses for the region. Additionally, it was noted that several areas within the region lack restaurant or dining options which was noted to inhibit quality of life. Regionally, it was discussed that the image of the region from those outside the region is poor. While this may not be a reality to those living in the region it is a stigma associated with the region and would need to be addressed in order to enhance the regional image.

Regional Vision Statement

By the year 2038, businesses in Southern Worcester County and visitors coming to the region for business purposes will recognize it as an exemplary location for investment and development. The region's communities will be talked about as collaborative, flexible, adaptive, innovative, and connected by several transportation modes and state-of-the art telecommunications to other regions and economic hubs.

Visitors coming to the region for non-business purposes will describe the area as vibrant and cultural. The region will capitalize on and highlight the historic, cultural, and tourist resources available to attract those visitors. Those looking to relocate their family will find value in the regional housing stock, affordability of living, and school systems that cater to all students and provide all with a career pathway that meets their needs.

Regional Goals and Objectives

Despite its diversity, the region collectively recognizes the purpose of the economic development is to attract, retain, expand and create businesses that complement and are supported by the assets of the region. The businesses within our target industry clusters should be given the resources and support required to strengthen, grow, remain and succeed in the region. This CEDS identifies the following Goals and Objectives for the region that will bolster efforts in the recruitment, creation, retention, expansion and transition of businesses for the region.

GOAL 1: CREATE AND OPERATE A ROBUST REGIONAL ECONOMIC DEVELOPMENT PROGRAM.

Establish an Economic Development Organization (EDO) for the region, capitalizing on the ongoing collaboration between stakeholders, and assure that it has adequate staff, funding and other necessary resources to fulfill its mission of providing the region with state-of-the-art economic development services.

OBJECTIVE A: Establish a more formal Regional Economic Development Organization

OBJECTIVE B: Obtain recognition by the U.S. Economic Development Administration as an Economic Development District

GOAL 2: SITE AVAILABILITY, DEVELOPMENT AND SUPPORT INFRASTRUCTURE.

Regularly identify all available and/or underutilized sites and/or buildings within the region. This inventory will provide information including, but not limited to: access to transportation, utility and telecommunications infrastructure capacities, and potential incentives.

OBJECTIVE A: Provide better coordination of available site information for the region and among communities

OBJECTIVE B: Create a regional clearinghouse of available commercial property to foster more collaboration among the municipalities of the region and their economic development efforts to assure that business within our target industry clusters and supplementary business prospects are provided with maximum information on suitable sites.

OBJECTIVE C: Using established lists, as well as further input from regional communities, begin the process of prioritizing existing brownfield sites for remediation.

GOAL 3: CREATION OF A STEADY AND ROBUST TALENT TURNPIKE.

Using the Central MA Regional Workforce Blueprint as a guide, ensure there is collaboration and coordination among all educational and training organizations and private industry to identify and align workforce training and skills development to address the current and future needs of the target clusters and other industry sectors within the region.

OBJECTIVE A: Identify skills gaps and provide an array of workforce development initiatives (employment, education, and training) for both residents and businesses throughout the region.

OBJECTIVE B: Using partner organizations such as the Workforce Investment Board and the Career Center identify and recruit individuals who are seeking employment and connect them with pertinent opportunities within the regional clusters.

OBJECTIVE C: Collaborate with school systems and other training partners in the region to market and provide job-related training to students who are not currently contemplating postsecondary education as a career path.

GOAL 4: REGULATORY FLEXIBILITY AND DEVELOPMENT TOOLS.

Support the region's business development efforts by creating a "business friendly" environment focusing efforts on business attraction and retention.

OBJECTIVE A: Work with local municipalities and the business community to ensure ordinances and zoning within their communities fosters the type and level of development which will attract businesses in our target industry clusters.

OBJECTIVE B: Establish a comprehensive list of state and municipal programs that if adopted would attract development and investment in the community.

OBJECTIVE C: Work with municipal leaders and stakeholders to identify state and municipal programs that communities would want to adopt.

GOAL 5: ENHANCING THE ENTREPRENEURIAL SPIRIT.

Foster a robust environment that promotes an entrepreneurial spirit and supports business start-ups throughout the region.

OBJECTIVE A: Work with regional stakeholders to identify what is existing and where the development gaps are in terms of maker-space, incubators, accelerators, co-working space, or other start-up facilities and then work collaboratively to develop them strategically throughout the region.

OBJECTIVE B: Establish a one-stop clearinghouse of information on programs and resources available locally that are targeted to assist start-up businesses and budding entrepreneurs. Working and collaborating with local and state partners, identify the programs currently existing that best assist start-up companies and work to fill need gaps with new programming. Strategize on creation of incentives to keep entrepreneurs within the area. Identify access to capital – venture capital programs. Mobilize the business community to support utilizing the small start-ups

Regional Action Plan

The set of Objective Statements and details that follow provide the required details for the activities on which the SWC's economic development efforts will be focused over the next five years.

SWC Regional CEDS

Objective #1A: Establish an Economic Development Organization for the region

Objective Elements

This Objective is comprised of the following elements:

- Identification of stakeholders to take part in the establishment of an Economic Development Organization (EDO).
- Determination of where the EDO will be housed – a division within a regional stakeholder organization or a stand-alone entity.
- Staffing and funding levels for the REDO.

Supports Goals:

Goal 1: Create and operate a robust regional economic development program.

Rationale for Objective and Background Information

There is no federally recognized regional Economic Development Organization (EDO) or Economic Development District (EDD) for the region and the establishment of an EDO is the initial step to establishing an EDD. Whether or not the region is recognized as an EDD, having a functioning regional EDO will be important to the region's future economic development activities.

Objective #1A Major Action Steps and Schedule

Action Steps	Schedule
1. Identification of key stakeholders across the region.	February 2019 to May 2019
2. Convene meetings of stakeholders to determine the scope and structure of the EDO. In particular, establish a funding strategy for the EDO.	June 2019 – July 2019
3. Establish the EDO and determine the appropriate staffing needs, location and obtain initial funding.	July 2019 to October 2019

Responsibility

Primary:	Support:
• The Worcester Regional Chamber of Commerce	• The Office of Congressman McGovern • The Worcester Business Development Corporation • Central Massachusetts Regional Planning Commission • City of Worcester and Municipalities in the region • Other key regional stakeholders, such as MassDiGI, the five Chambers of Commerce affiliated with the Worcester Regional Chamber of Commerce, the Corridor Nine Chamber of Commerce, and the 495/MetroWest Partnership

	• Members of the SWC CEDS Strategy Committee who wish to participate in the creation of an EDO • Key state agencies who could provide sources of funding, such as MOBD and Mass Development

Resources Needed

	Item	Amount	Possible Sources
Funding:	• Operational funding (salaries, benefits, office costs, etc.)	$175,000 - $200,000	EDA Funding State Funding Municipal Funding Private funding
Other:	• Guidance will be needed from the EDA to ensure the EDO fits the requirements necessary to apply for an Economic Development District designation		

Performance Measures

- The establishment of an EDO by October 2019.

Timeframe

This Objective is:

☑ Short-term	☐ Intermediate-term	☐ Long-term	☑ Continuing
(1-2 years) For establishment of the EDO.	(3-5 years)	(5+ years)	

Additional Information

SWC Regional CEDS

Objective #1B: Establishment of an Economic Development District

Objective Elements

This Objective is comprised of the following elements:

- Establishment of an Economic Development Organization within the region – accomplished in Objective #1 – that will apply to the Economic Development Administration recognition as an Economic Development District.
- Identify the region that will comprise the EDD.
- Apply to the EDA for EDD designation.

Supports Goals:

Goal 1: Create and operate a robust regional economic development program.

Rationale for Objective and Background Information

There is no recognized or designated Economic Development District (EDD) in the region and therefore access to additional and available funds for key projects does not exist. Once an Economic Development Organization (EDO) is formed for the region, an EDD designation will be sought as the second priority.

Objective #1B Major Action Steps and Schedule

Action Steps	Schedule
1. Identification of economic distress within the region that meets the EDA criteria.	October 2019 to December 2019
2. Determination of the geographic region that will comprise the EDD.	October 2019 to December 2019
3. Gathering additional necessary material and supporting documents required by the EDA in applying for an EDD designation.	December 2019 to February 2020
4. Submit an official request to EDA for establishment of an EDD.	February 2020 to February 2021

Responsibility

Primary:	Support:
• The EDO established as part of Objective #1.	• Key stakeholder organizations that contributed to the establishment of the EDO. • Municipalities in the SWC CEDS region

Resources Needed

	Item	Amount	Possible Sources
Funding:	• EDO staff time for the work on this Objective	$ Budget for staff time included in Objective 1A EDO budget	
Other:	• Technical assistance and guidance from EDA on the proper steps to compile the necessary information for a comprehensive request submission.		

Performance Measures

- Approval by the EDA of the request for EDD designation.

Timeframe

This Objective is:

☑ Short-term (1-2 years)	☐ Intermediate-term (3-5 years)	☐ Long-term (5+ years)	☑ Continuing

Additional Information

SWC Regional CEDS

Objective #2A: Infrastructure Development

Objective Elements

This Objective is comprised of the following elements:

- Identify needed infrastructure for a developable site.
- Identify a funding program or source for funds to build out needed infrastructure.

Supports Goals:

Goal 2: Site Availability, Development and Support Infrastructure

Rationale for Objective and Background Information

There are sites within the region that would be marketable to developers but for a lack of utility infrastructure – water, sewer, natural gas, sufficient electrical power and voice/data telecommunications – as well as ensuring road access is adequate for the use envisioned for the property. This could also include adding rail access if sites are located adjacent to an existing freight rail line but lack the siding access needed to activate the parcel.

Objective #2A Major Action Steps and Schedule

Action Steps	Schedule
1. Communicate with municipalities regarding the priority level for development or redevelopment of sites identified during CEDS outreach process, as well as those identified through other priority development designation processes.	January 2020 – April 2020
2. Identify, in coordination with the Municipality where the parcel is located, the desired use for the parcel to be redeveloped and then assess the infrastructure needs associated with that use of the parcel.	January 2020 – April 2020
3. Identify existing funds and programs to provide financial support for infrastructure projects.	April 2020 – June 2020
4. Prepare a regional Master Plan and Capital Improvement Program to provide necessary infrastructure improvements.	June 2020 – June 2021

Responsibility

Primary:	Support:
• The municipalities in the region • The established EDO	• State and Federal Agencies for funding sources • Private developers – to aid in identifying appropriate and adequate reuse of the parcel in question • Other infrastructure partners, such as freight rail companies and utility companies • Central Mass Regional Planning Commission

Resources Needed

	Item	Amount	Possible Sources
Funding:	• EDO staff time for the work on this Objective and preparation of a master plan. • Ongoing funding will be needed to implement the Master Plan and complete the infrastructure projects.	• Budget for staff time included in Objective 1A EDO budget • $TBD – funding will vary by project	Infrastructure funding can come from a combination of: state infrastructure grant programs, such as MassWorks; municipal funds; potential federal funding; private funds.
Other:	•		

Performance Measures

- A working list of sites for redevelopment, within the region, listed by priority for redevelopment need based upon criteria established during action steps 1 and 2, posted and housed in an accessible location, the EDO website by April 2020.
- Development of a Master Plan for the marketing, redevelopment and activation of the sites identified to be completed by June 2021.
- Implementation of the Master Plan to begin in June of 2021.

Timeframe

This Objective is:

☐ Short-term (1-2 years)	☑Intermediate-term (3-5 years)	☐ Long-term (5+ years)	☑ Continuing

Additional Information

SWC Regional CEDS

Objective #2B: Brownfield Remediation

Objective Elements

This Objective is comprised of the following elements:

- Identification of existing brownfield sites targeted for remediation
- Assessment of level of contamination
- Remediate the site in preparation of redevelopment or establishing it as a pad ready location.

Supports Goals:

Goal 2: Site Availability, Development and Support Infrastructure

Rationale for Objective and Background Information

New England, and especially the CEDS region, is host to a number of former industrial or manufacturing sites that have been abandoned and are environmentally contaminated. In order to make these properties marketable the brownfield contamination must be remediated before a suitable redevelopment can occur.

Objective #2B Major Action Steps and Schedule

Action Steps	Schedule
1. Consolidate available lists of identified brownfield sites and partner with regional municipalities to identify any additional sites not already known.	January 2020 – April 2020
2. Gauge level of interest of the municipality in redevelopment of brownfield sites and potential purpose for reuse.	April 2020 – July 2020
3. Coordinate with host municipality and/or property owner/interested developer on the process to remediate the site and prepare it for redevelopment.	July 2020 and ongoing

Responsibility

Primary:	Support:
• Worcester Business Development Corporation (WBDC) • Established EDO • Municipality • Interested developers if identified	• EPA – brownfields remediation program • State Environmental Agencies – brownfields remediation program • Mass Development • Central Massachusetts Regional Planning Commission

Resources Needed

	Item	Amount	Possible Sources
Funding:	• Remediation monies	Remediation money will be determined on	Remediation money would be sought through state and federal programs.

		a parcel-by-parcel basis	
Other:	•		

Performance Measures

- A comprehensive list of brownfield sites for remediation completed by April 2020.
- Determination by the host municipality of their interest to remediate the site for marketing as pad-ready or to find an interested developer for reactivation, completed by July 2020.
- Identification of funds for remediation and schedule for remediation work should begin once a municipality has identified a site for remediation (either to be pad-ready or with a developer interested) and should be ongoing until all sites identified for remediation have been addressed.

Timeframe

This Objective is:

☐Short-term (1-2 years)	☑ Intermediate-term (3-5 years)	☐ Long-term (5+ years)	☑ Continuing

Additional Information

The Worcester Business Development Corporation (WBDC) should take a prominent role in coordinating the remediation work given their successful track record in remediating brownfield sites within the region. WBDC should, at the very least, be considered a consultant to any municipality looking to undertake a brownfields project as they are recognized as the leading organization for remediation in the region and have significant expertise with regards to large scale projects of this nature.

SWC Regional CEDS

Objective #2C: Coordination of Site Information and Establishment of a Centralized Databank of Available Business Sites

Objective Elements

This Objective is comprised of the following elements:

- Collection of a listing of available business sites (both land and buildings) within the region, currently being marketed for development, or redevelopment.
- Identify a centralized location, the EDO website, where this information will be stored for access by all communities in the region.
- Convene regular meetings of economic development professionals from each community for the purpose of sharing information on developers and site selectors who have shown an interest in their community but no suitable site available.

Supports Goals:

Goal 2: Site Availability, Development and Support Infrastructure

Rationale for Objective and Background Information

Each municipality receives inquiries from site selectors, developers, or investors interested in relocating or building a business in the community or redeveloping a parcel. However, there is no regional coordination of the requests that cannot be fulfilled, and a potential economic develoment opportunity is lost. Better coordination of these unfulfilled requests and a centralized sharing of available sites could allow for the ease in attracting business within our target industries and referral of the interested party to a neighboring community, keeping the development regionally, instead of losing it altogether.

Objective #2C Major Action Steps and Schedule

Action Steps	Schedule
1. Identify the appropriate point person for economic development in each of the communities in the CEDS region.	January 2020
2. Identify, through the EDO, each municipality, and CMRPC all available and marketable sites within the region.	January 2020 to April 2020
3. Create a centralized listing, available on the EDO website that contains information on all sites and is a ready reference for municipalities when they are unable to fulfill a request.	April 2020 to August 2020
4. Coordinated through the EDO, establish bi-annual meetings of the identified economic development contact within each community for the exchange of information and inquiries to ensure the region is capitalizing on all economic development opportunities.	August 2020 and ongoing
5. Provide regular maintenance and updates to the EDO website listing the available parcels in the region.	May 2020 and ongoing

Responsibility

Primary:	Support:
• EDO • Municipalities	• Central Massachusetts Regional Planning Commission • Worcester Business Development Corporation • Chamber of Commerce in the SWC CEDS region • 495/MetroWest Partnership

Resources Needed

Funding:	Item	Amount	Possible Sources
	•		•
Other:	• Assistance may be required for the creation of a host website, along with populating the necessary information, and ongoing maintenance.		

Performance Measures

- Identification and creation of a master list of at least one economic development professional from each community within the region completed by January 2020.
- Creation of the master list of available sites, including relevant and pertinent information to aid in the proper marketing of the sites completed by August 2020.
- Convening of bi-annual meetings of economic development personnel should begin in August of 2020 and continue ongoing.

Timeframe

This Objective is:

☑Short-term (1-2 years)	☐Intermediate-term (3-5 years)	☐ Long-term (5+ years)	☑ Continuing

Additional Information

SWC Regional CEDS

Objective #3A: Identification of skills gaps and creation of targeted training programs

Objective Elements

This Objective is comprised of the following elements:

- Identify the skills gaps and areas of need for employers in the region, by job sector.
- Identify appropriate training partners and curriculum to provide adequate training to individuals to meet the requirements of the employer industry.

Supports Goals:

Goal 3: Creation of a Steady and Robust Talent Turnpike

Rationale for Objective and Background Information

There are pockets within the region where employers, local training partners, and the Workforce Investment Board are all working collaboratively to training potential candidates for employment in specific industries. With some additional resources, attention, and coordination these trainings can be part of a larger regional training program to create skilled, ready-to-hire individuals that employers across the region can access for job openings.

Objective #3A Major Action Steps and Schedule

Action Steps	Schedule
1. Coordinate with business sectors to identify skills gaps.	August 2020 to May 2020
2. Identify training partners, within the region, with expertise in the desired sector.	August 2020 to May 2020
3. Develop curriculum in coordination with training partners and business sectors and make sure these training opportunities are communicated to the region's workforce.	May 2020 to September 2020

Responsibility

Primary:	Support:
• EDO • Worcester Regional Chamber of Commerce • Central Massachusetts Workforce Investment Board • Workforce Central Career Center • Business Sectors	• Training organizations such as MassMEP, and the American Red Cross • Public school systems, particularly Vocational/Technical Education facilities • Community Colleges

Resources Needed

	Item	Amount	Possible Sources
Funding:	• Training program – including materials, instructors, facilities, equipment	$TBD – each training program	Training programs should be funded

		will require a different level of funding based upon the depth and breadth of the training	by a combination of grants and private investment from the business sector
Other:	•		

Performance Measures

- Identification of skills gaps, to be accomplished by May 2020.
- Recruitment of training partners to organization and conduct training should be accomplished by May 2020.
- Creation of a training curriculum and identification of needed materials and training equipment should be accomplished by September 2020.

Timeframe

This Objective is:

☐Short-term (1-2 years)	☑ Intermediate-term (3-5 years)	☐ Long-term (5+ years)	☑ Continuing

Additional Information

SWC Regional CEDS

Objective #3B: Recruitment of participants for training programs

Objective Elements

This Objective is comprised of the following elements:

- Coordination of regional partners and organizations to identify qualified candidates to participate in training programs.
- Work with the public school systems to identify specific students who have not determined a career pathway and would benefit from training.
- Work with regional training partners to identify members of their client base for recruitment into the programs.

Supports Goals:

Goal 3: Creation of a Steady and Robust Talent Turnpike.

Rationale for Objective and Background Information

A partner to Objective #3A, in order for the trainings to be successful, qualified and motivated candidates must be recruited to participate. These candidates should be broadly sourced to capture the needed number of trainees. The regional Workforce Investment Board and Career Center, along with social service organizations that take part in job placement activities, and the public school system should all play a role in cultivating qualified participants who are motivated to complete the training.

Objective #3B Major Action Steps and Schedule

Action Steps	Schedule
1. Coordinated outreach among appropriate partners to educate interested individuals on the availability of training.	September 2020 to November 2020 and continual as each training cycle completes
2. Screening of candidates to ensure candidates have necessary pre-qualifications to take part in the training.	September 2020 to November 2020
3. See Objective 3A for information on the creation and delivery of training programs.	

Responsibility

Primary:	Support:
• Central Massachusetts Workforce Investment Board • Workforce Central Career Center • Public School Systems in the region • Vocational/Technical education facilities in the region	• Worcester Regional Chamber of Commerce and Affiliated Chambers • Private business community from within the sector targeted for training • Regional Municipalities

• Social Service agencies engaged in job placement – such as Worcester Community Action Council, Ascentria Care Alliance, Centro	

Resources Needed

	Item	Amount	Possible Sources
Funding:	• EDO staff time for the work on this Objective	$ Budget for staff time included in Objective 1A EDO budget	
Other:	•		

Performance Measures

- Recruitment of qualified cohorts to fill training classes offered to be accomplished by November 2020.
- Completion rates of training cohorts greater than 75%.

Timeframe

This Objective is:

☐Short-term (1-2 years)	☑ Intermediate-term (3-5 years)	☐ Long-term (5+ years)	☑ Continuing

Additional Information

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SWC Regional CEDS

Objective #3C: Collaboration on Training Program Marketing

Objective Elements

This Objective is comprised of the following elements:

- Work with the public school systems to market training options to all students.
- Work with regional training partners to market the training options to their client base
- Market the training programs available to businesses who may have hiring needs or want to offer training opportunities to their employees

Supports Goals:

Goal 3: Creation of a Steady and Robust Talent Turnpike.

Rationale for Objective and Background Information

A partner to Objectives #3A and #3B, in order for the trainings to be successful, the programs need to be marketed to trainees and businesses alike. The businesses can assist in job placement activities, as well as providing their current workforce with opportunities to enhance their skills through training.

Objective #3B Major Action Steps and Schedule

Action Steps	Schedule
1. Coordinated outreach among appropriate partners to market the program widely.	September 2020 to November 2020 and continual as each training cycle completes
2. Engage with Businesses to market the program for hiring opportunities to fill vacancies or offer as an advanced training option to current employees.	September 2020 to November 2020

Responsibility

Primary:	Support:
• Central Massachusetts Workforce Investment Board • Workforce Central Career Center • Public School Systems in the region • Vocational/Technical education facilities in the region • Social Service agencies engaged in job placement – such as Worcester Community Action Council, Ascentria Care Alliance, Centro	• Worcester Regional Chamber of Commerce and Affiliated Chambers • Private business community from within the sector targeted for training • Regional Municipalities

Resources Needed

	Item	Amount	Possible Sources
Funding:	• EDO staff time for the work on this Objective	$ Budget for staff time included in Objective 1A EDO budget	
Other:	•		

Performance Measures

- Marketed across the region to ensure saturation of information regarding opportunities.
- Engagement with businesses in regards to supporting the training through hiring trainees at the completion or sending their current workforce for retraining or advanced training.

Timeframe

This Objective is:

☐Short-term (1-2 years)	☑ Intermediate-term (3-5 years)	☐ Long-term (5+ years)	☑ Continuing

Additional Information

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SWC Regional CEDS

Objective #4A: Create an adaptive and flexible regulatory environment that fosters investment and growth.

Objective Elements

This Objective is comprised of the following elements:

- Through nationwide research identify regulatory best practices to be included in evaluation process
- Identification of metrics by which ordinances and statutes will be evaluated.
- Identification of municipal ordinances and state statutes that operate as a barrier to investment and development.
- Identification of municipal ordinances and state statutes that promote investment and development.
- Development of best practice recommendations that foster development to be marketed to communities in the region.

Supports Goals:

Goal 4: Regulatory Flexibility and Development Tools.

Rationale for Objective and Background Information

Developers and investors often come across local laws that can burden their efforts to develop or reactivate a property or establish or grow an existing business venture. By working with municipal officials, trade groups within our target industry clusters, and the business community to identify these obstacles, the possibility of removing, replacing or amending them can be considered. Conversely, there are also local laws that promote and enhance efforts for development and the identification of these programs as best practices can then be brought to other communities for adoption as policy.

Objective #4A Major Action Steps and Schedule

Action Steps	Schedule
1. Conduct research of counties and regions across the country that are noted for exemplary regulatory environments to develop a benchmark system for use in evaluation of local ordinances and statutes.	August 2020 to March 2021
2. Establish metrics by which municipal ordinances and state statutes will be evaluated for positive or negative effects on business development.	August 2020 – March 2021
3. Review, in coordination with local officials and business leaders, municipal ordinances and state programs in the region that pertain directly to economic development – including zoning bylaws, land use regulations, historic preservation policies, tax incentive policies – and assess for positive or negative effects.	March 2021 to March 2022

Responsibility

Primary:	Support:
• EDO • Worcester Regional Chamber of Commerce and	• Local developers and business community • Regional Municipalities

Affiliated Chambers of Commerce • Corridor Nine Chamber of Commerce • Worcester Business Development Corporation • 495/MetroWest Partnership • Central Mass Regional Planning Commission • Other regional development organizations	• Municipal Economic Development Personnel or Committees • Local Architects • Local Engineers • Commercial/Industrial Real Estate Brokers

Resources Needed

	Item	Amount	Possible Sources
Funding:	• EDO staff time for the work on this Objective	$ Budget for staff time included in Objective 1A EDO budget	
Other:	• Coordinated assistance will be required with municipalities in the region to aid in the identification of all ordinances/by-laws that intersect with economic development activities.		

Performance Measures

- Identification of ordinances/by-laws, with input from municipalities, developers, architects, engineers, commercial/industrial real estate brokers, and other experts from the business community specializing in commercial construction, that impact development efforts should be completed by March 2022.
- The creation of a roster of positive impact ordinances/by-laws to serve as best practices to foster development within the region should be completed by March 2022.

Timeframe

This Objective is:

☐ Short-term (1-2 years)	☐ Intermediate-term (3-5 years)	☑ Long-term (5+ years)	☑ Continuing

Additional Information

SWC Regional CEDS

Objective#4B: Creation of a listing of state and municipal incentive programs and policies that aid development.

Objective Elements

This Objective is comprised of the following elements:

- Establishment of a list of state incentive programs and policies that foster economic development.
- Establishment of a list of municipal incentive programs and policies from within the region that foster economic development.

Supports Goals:

Goal 4: Regulatory Flexibility and Development Tools.

Rationale for Objective and Background Information

Building upon objective #4A, a list of the municipal ordinances and state statutes that foster development and growth should be created and a coordinated effort should take place to make the list available to municipalities for their review to identify programs and policies they may wish to adopt.

Objective #4B Major Action Steps and Schedule

Action Steps	Schedule
1. Establishment of a list of municipal level programs, policies and incentives identified to foster development within the region.	August 2020 – March 2021
2. Establishment of a list of state level programs, policies and incentives identified to foster development and growth.	August 2020 – March 2021
3. Classify incentive programs and policies, within the established lists, by major type (e.g., housing, business construction, mixed use development categories, training, tax abatement, etc.) for quick reference and marketing purposes, including a summary of benefits and actions needed for adoption.	August 2020 – March 2021

Responsibility

Primary:	Support:
• EDO • Municipalities • Regional Economic Development organizations	• State economic development agencies • State economic development partners • Regional economic development partners

Resources Needed

	Item	Amount	Possible Sources
Funding:	• EDO staff time for the work on this Objective	$ Budget for staff time included in Objective 1A EDO budget	
Other:	•		

Performance Measures

- Ongoing adoption of policies and use of incentive programs within communities that have faced difficulty in attracting the type of investment and development they desire.

Timeframe

This Objective is:

☐Short-term (1-2 years)	☐ Intermediate-term (3-5 years)	☑ Long-term (5+ years)	☑ Continuing

Additional Information

SWC Regional CEDS

Objective#4C: Market comprehensive list of state and municipal incentive programs and policies that aid development to municipalities for adoption.

Objective Elements

This Objective is comprised of the following elements:

- Work with municipal level officials to identify their development needs and ambitions.
- Work with municipal officials to identify programs, policies and incentives from the lists created in Objective #4B that would address their development needs and ambitions.
- Work with municipal officials on actions steps needed to market and adopt the identified programs, policies, and incentives within their communities.
- Include information about available incentives programs and policies in the region's economic development marketing and prospect servicing.

Supports Goals:

Goal 4: Regulatory Flexibility and Development Tools.

Rationale for Objective and Background Information

Economic development is not a one-size fits all approach, and the review and adoption of available programs, policies, and incentives to foster business growth should take into account the specific needs of the individual community. By working with municipal officials to review their needs and desires with regard to development and growth in their community, a more comprehensive and tailored plan can be established to adopt the appropriate programs, policies, and incentives that will foster the type of growth the community seeks. Widespread marketing of the availability of these programs and policies can be an important element of the region's economic development marketing.

Objective #4C Major Action Steps and Schedule

Action Steps	Schedule
1. In coordination with municipal officials, identify the development needs and goals of each municipality.	March 2021 – August 2021
2. In coordination with municipal officials, review the comprehensive lists of programs, policies, and incentives established in objective #4B, and identify those that meet the recognized development needs of the community.	August 2021 – January 2022
3. Work with municipal officials to plan the steps necessary to adopt the programs, policies, and incentives identified by the community for adoption to foster development and growth.	January 2022 – January 2023
4. Develop and implement a plan for effective incorporation of information about available incentive programs and policies in the region's economic development marketing.	January 2022 – January 2023

Responsibility

Primary:	Support:
• EDO • Municipalities • Regional Economic Development organizations	• State economic development agencies • State economic development partners • Regional economic development partners

Resources Needed

	Item	Amount	Possible Sources
Funding:	• EDO staff time for the work on this Objective	$ Budget for staff time included in Objective 1A EDO budget	
Other:	•		

Performance Measures

- Ongoing adoption of policies and use of incentive programs within communities that have faced difficulty in attracting the type of investment and development they desire.

Timeframe

This Objective is:

☐Short-term (1-2 years)	☐ Intermediate-term (3-5 years)	☑ Long-term (5+ years)	☑ Continuing

Additional Information

SWC Regional CEDS

Objective #5A: Creation of creative space to foster entrepreneurial spirit and start-up companies.

Objective Elements

This Objective is comprised of the following elements:

- Identify existing creative space that fosters entrepreneurial development.
- Identify further and future need for space, including type of space and equipment necessary.

Supports Goals:

Goal 5: Enhancing the Entrepreneurial Spirit

Rationale for Objective and Background Information

Worcester has been recognized as a Top 10 emerging community for fostering a start-up friendly ecosystem. To capitalize on this designation and momentum there should be a proper assessment of existing facilities and spaces that cater to start-up companies, as well as an assessment of additional needs and projection of future needs.

Objective #5A Major Action Steps and Schedule

Action Steps	Schedule
1. Create a roster, broken out by category designation, of identified and existing creative space and facilities catering to start-ups and entrepreneurs, throughout the CEDS region.	August 2021 to November 2021
2. Convene focus groups from the start-up and entrepreneur communities to assess their currently unmet needs and help project future needs.	November 2021 to January 2022
3. Working with existing start-up and entrepreneur communities to identify potential locations and assess feasibility for establishing additional creative space.	January 2022 to August 2023
4. Pursue developers and funding opportunities to establish creative spaces in identified locations, giving preference or priority to those selected sites in outlying areas of the region to ensure all communities have access to services offered.	August 2023 to August 2024 and ongoing

Responsibility

Primary:	Support:
• EDO	• Current creative spaces • The start-up and entrepreneur communities • Massachusetts Biomedical Initiatives • Worcester Business Development Corporation

Resources Needed

Funding:	Item	Amount	Possible Sources

	• EDO staff time for the work on this Objective	$ Budget for staff time included in Objective 1A EDO budget	
Other:	•		

Performance Measures

- Create two additional creative spaces available within the CEDS region by August 2024.
- Growth of start-ups and entrepreneurs, by 10, throughout the CEDS region, completed by August 2024.

Timeframe

This Objective is:

☐Short-term (1-2 years)	☐ Intermediate-term (3-5 years)	☑ Long-term (5+ years)	☑ Continuing

Additional Information

See the March 2017 Progressive Policy Institute report: http://www.progressivepolicy.org/wp-content/uploads/2017/05/How-the-Startup-Economy-is-Spreading-Across-the-Country-%E2%80%94-and-How-It-Can-Be-Accelerate-final.pdf.

SWC Regional CEDS

Objective #5B: Establish a centralized listing of information regarding programs and other forms of assistance to assist start-ups and entrepreneurs in their development.

Objective Elements

This Objective is comprised of the following elements:

- Identify resources that cater to start-up companies and entrepreneurs.
- Establish a centralized listing of resources, including descriptions of the resource and pertinent contact information.
- Publish and regularly update the list of resources to ensure it is accurate and provides the greatest benefit to the start-ups and entrepreneurs.

Supports Goals:

Goal 5: Enhancing the Entrepreneurial Spirit

Rationale for Objective and Background Information

In coordination with objective #5A, having creative space to foster start-up and entrepreneur development is only part of the solution. These budding companies also require financial, technical, and legal assistance, as well. In an effort to provide access to those additional resources centralizing the information to a one-stop location, the EDO website, could be beneficial to the start-up and entrepreneur communities.

Objective #5B Major Action Steps and Schedule

Action Steps	Schedule
1. Engage with the start-up and entrepreneur communities to identify their needs and the resources that would best benefit their development.	November 2021 to January 2022
2. Contact identified resources to obtain summary and contact information to develop an appropriate list of resources.	January 2022 to April 2022
3. Publish the resource listing, potentially on the EDO website and in printed form, and market access to the start-up and entrepreneur communities.	April 2022 to September 2023

Responsibility

Primary:	Support:
• EDO • Start-up and entrepreneur partners • Creative economy partners	• Regional economic development partners • Municipalities • Finance and legal service providers

Resources Needed

	Item	Amount	Possible Sources
Funding:	• EDO staff time for the work on this Objective	$ Budget for staff time	

		included in Objective 1A EDO budget	
Other:	•		

Performance Measures

- The creation of a comprehensive resource roster that is utilized by the start-up and entrepreneur communities, completed by April 2022.

Timeframe

This Objective is:

☐Short-term (1-2 years)	☑ Intermediate-term (3-5 years)	☐ Long-term (5+ years)	☑ Continuing

Additional Information

Performance Measures and Evaluation

The following criteria will be used to measure the performance of the Southern Worcester County Regional CEDS:

- The establishment of an Economic Development Organization for the region recognized by the U.S. Economic Development Administration as an Economic Development District (EDD).
- The number of businesses recruited and amount of private investment realized by the region.
- The number of businesses within our target industry clusters that are recruited, expand, or incubate within the SWC region.
- The level of cross-municipal collaboration, particularly with regard to sharing development site information and inquiries.
- The level of participation by the business community in training programs and the number of trainees hired into full-time jobs.
- Development of a regional Infrastructure Master Plan and Capital Improvement Program.
- Development of a strategy to reduce the region's inventory of brownfields.
- Improvements in the region's perceived development regulatory climate.

We will continue to modify the evaluation metrics with each annual CEDS update to ensure they are appropriate and guiding the implementation process.

Regional Resilience

A region's economic success is synonymous with its ability to prevent, withstand and/or recover from major disruptions, both natural and "manufactured." As stated in EDA's CEDS Content Guidelines, establishing this type of resiliency at a local or regional level requires "the ability to anticipate risk, evaluate how that risk can impact key economic assets, and build a responsive capacity." Southern Worcester County has experienced a number of "events" that have tested the region's resiliency. From tornados, ice storms, power outages and droughts to the loss of businesses and the changing of industry-clusters, the region has proven its ability to withstand an economic hardship or "disaster" without deleterious effects on the overall economy.

This resilience is due, in part, to the region's ability to identify new opportunities for collaboration and build upon existing partnerships; the diversity in its industry-clusters that are spread throughout the region; and its ability to adapt and respond to problems, both market-related or naturally-occurring. The Economic Diversity in Appalachia tool is a tool for measuring diversity which includes data, indicators, and visuals for understanding economic diversity. The Economic Diversity in Appalachia tool measures diversity through industry, function, and occupation. Worcester County measures "High Diversity" for Industry Diversity, Function Diversity, and Occupation Diversity, implying employment is distributed relatively evenly across many industries, functions and occupations. The strengths of the region's resiliency can be categorized by the following:

DIVERSITY. From high-tech, bio-tech and manufacturing to agriculture, the Southern Worcester County region has a diverse mix of industries and businesses. This type of diversity allows for the region to not be dependent on the successes of a specific company or industry. Through focusing on recruiting from identified target clusters while simultaneously fostering a supportive business environment conducive to many industry sectors, the region will be able to continue its economic diversification.



PARTNERSHIPS & COLLABORATION. The success of a region does not lie within one community; it must be a collaborative effort. As the heart of the region, the City of Worcester has established an organization known as the Economic Development Coordinating Council (EDCC) that is comprised of various actors from the community that unite under one vision for the future development of the City of Worcester. Southern Worcester County is a large region that has benefited greatly from a number of collaborations and partnerships that have been established throughout the region. Regional organizations such as the Central Massachusetts Regional Planning Commission (CMRPC) have long served as a conduit for these collaborative opportunities. As an example, CMRPC provides assistance to municipalities in developing local hazard mitigation and/or resiliency plans. As part of this assistance, CMRPC is able to relay the information gathered from these local plans to be incorporated into the overall state-level "resiliency" plan.

ADAPTABILITY. Southern Worcester County is fortunate to have a significant number of institutions of higher education, ranging from community colleges to graduate level research universities. These institutions have become a consummate partner for our communities, willing to create new partnerships to pursue workforce training funds and address the regional skills needs through various programs. As new industry sectors emerge and business needs grow and change, these local partners have expressed a willingness to respond by evaluating their own curricula and course training to ensure the curriculum continues to meet the growing demands of these various sectors.

Despite the great strides that Worcester County has made in positioning itself to be resilient to market changes and/or natural disasters, the region must continue to be vigilant, proactively updating emergency preparedness plans, diversifying its industry clusters, improving and adequately maintaining its infrastructure – including information technology infrastructure to maintain adequate cybersecurity - and ensuring that all plans are being reviewed and implemented at a regional level.

CMRPC is an integral partner in the region in assisting municipalities on building environmental resiliency. CMRPC has assisted all 40 of the region's communities in preparing a FEMA approved Hazard Mitigation Plan (HMP). A HMP is required for towns to apply for grants that become available to assist communities in recovery efforts following declarations of natural disasters such as flooding, snow storms, ice storms, and tornadoes.

CMRPC is also currently in the process of assisting 15 communities in the creation and adoption of Municipal Vulnerability Preparedness Plans. These plans provide support for cities and towns in Massachusetts to begin planning for climate change resiliency and implementing priority projects. The state awards communities with funding allowing them to complete vulnerability assessments and develop action-oriented resiliency plans. The Massachusetts Municipal Vulnerability Preparedness (MVP) Program aims to assist communities in their efforts to plan for resiliency and to implement key climate change adaptation actions. Nine (9) of the regions 40 communities are well on their way to completing the Municipal Vulnerability Preparedness (MVP) Program. The MVP Program supports municipalities as they tackle the following tasks:

- Define extreme weather and natural and climate related hazards
- Understand how their community may be impacted by climate change with a Massachusetts specific climate change clearinghouse with the latest science and data
- Identify existing and future vulnerabilities and strengths
- Develop and prioritize actions for the community
- Identify opportunities to take action to reduce risk and build resilience
- Implement key actions identified through the planning process

These communities and others that will complete the program in future rounds, make our region strong and resilient, attributes that are very attractive for business development. Regional collaboration is increasing in the region. Whether it is two towns sharing an animal control officer or a larger effort to share regional dispatch and public safety services, municipal governments of all sizes and complexities are exploring opportunities to be more efficient in the procurement of goods and delivery of services.

Critical to SWC's ability to plan for and rebound from natural disasters and economic downturns is a continued and improved process of communications and collaboration. In times of crisis, communication is critical to connecting resources with needs and finding solutions to ongoing problems. Having a foundation of communication and collaboration in place prior to the occurrence of a disaster saves time, effort, and resources in the aftermath instead of trying to establish lines of communication after the fact. As an example, the City of Worcester establishes a command center in advance of large snowstorms and other weather occurrences when they are predicted. Establishing a centralized point of communication, along with pre-established procedures and response protocols, puts the City at an advantage when dealing with the multitude of inquiries and requests for assistance that follow an event such as a Nor'easter snowstorm. This type of well thought-out communications and collaboration network on a regional basis is a necessary component in SWC's resiliency efforts.

The EDA defines building economic resilience through a two-prong approach pre- and post-economic shock as steady-state and responsive initiatives. SWC participates diligently in the steady-state initiatives that require planning for long-term economic durability. Actors of steady-state initiatives range from the local, state, and federal level. The localized collaboration among the Central Massachusetts Workforce Investment Board, Worcester Regional Chamber of Commerce, Central Massachusetts Regional Planning Commission, and 495 Metrowest Partnership is critical for mitigating the effects on an economic downturn. Municipalities in the region have also shifted focus on economic development by either hiring professional staff or creating economic development committees or corporations. In the case of a major employer relocating or closing their plant, the Department of Career Services, a division of the Massachusetts Department of Workforce Development, provides Rapid Response services for the Commonwealth of Massachusetts. These services include assistance with unemployment benefits, career counseling, job assistance, and skill training.

Central Mass municipalities are responsible in large part for maintain the infrastructure that much of our economic development strategies rely upon. Each town's or city's ability to maintain records, election processes, maintain roads, host regular town meetings and civic events is important to our region's resiliency. To that end, state and regional agencies including CMRPC assist in supporting collaborations, regional shared services, joint procurements that make our municipalities more sustainable and viable. In some instances, towns become more effective and have better services for residents and business by shared town administration, sharing animal control, shared economic development coordinator, shared veteran's services, and collaborative public health, among others.

At the state level, Massworks grants provides a one-stop shop for municipalities and other eligible entities seeking public infrastructure funding to support economic development and job creation. They are routinely sought and awarded to Central Mass Communities for infrastructure planning and improvements that support Central Mass Economic Development both municipally and regionally. Examples include planning of intersection designs that support increased traffic resulting from new housing and economic development along route 140 in the town of Boylston. Governor Baker has also created Commonwealth Compact Commitments committing resources for municipalities to develop best practices, improve efficiency and regionalization opportunities, and enhance a town's Information Technology capacity. All 40 Central Mass Communities have taken advantage of this program toward between one and three "Best Practices". Commonwealth Compact communities may receive a wide array of assistance ranging infrastructure development to prepare site readiness and marketability, workforce development plans to securely backing town informational systems.

The Dukakis Institute at Northeastern University offers communities the opportunity to do an Economic Development Self-Assessment Tool (EDSAT). The EDSAT is a secure and confidential on-line assessment tool to help communities analyze their capacity for economic development. With over 250 questions, this rigorous examination helps public officials explore their community's' strengths, weaknesses and opportunities across 10 assess-

ment categories. Local officials receive specific feedback on each assessment category, which they can then include in their community's economic development strategy. To date five southern Worcester county towns have completed the EDSAT program, Grafton, Leicester, Westborough Worcester, and Shrewsbury.

One of the most prevalent resiliency issues facing the region is the competition to attract and retain commercial and retail uses within the individual communities. Many communities throughout the region have placed significant focus on their own commercial and retail development, including the development of larger commercial retail facilities. With the development of these new retail facilities, whether they are smaller "common-like" shopping centers or a larger shopping mall complex, the ability to attract and retain new retailers becomes cannibalized, harming each of the communities. The same issue has been seen in the individual community campaigns to attract various companies and industries. Collaborative efforts to develop more broadly shared successes are necessary.

Building upon the existing partnerships that have been forged, both public and private, the region should seek to establish a regional Economic Development Organization that would assist the various communities in identifying the priorities for the region and how each individual community can contribute to achieving these priorities. The Southern Worcester County region does not currently have an Economic Development District (EDD) designation from the U.S. Department of Commerce, Economic Development Administration (EDA). As the region pursues the adoption and implementation of an EDD, it is anticipated that some of the issues such as community-to-community competition of attracting and retaining businesses can be addressed.

Another advantage of having an EDD in place would be to continue the move towards regionalization of various municipal resources. Through these types of plans, regional communication channels can be established and opportunities for greater collaboration can be realized. Some communities within the region have recently begun to explore and implement regional dispatch services to coordinate first responders. This type of coordination can save time and financial resources for the communities while also ensuring a quality level of service.