

*Greater Worcester Area
Comprehensive Economic Development Strategy
(CEDS)*

2010 Regional Update

*Submitted by:
The Greater Worcester Area
Comprehensive Economic Development Strategy Committee*

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INTRODUCTION

This Plan is intended to satisfy the requirements for an Annual Update of the Comprehensive Economic Development Strategy (CEDS) Report for the Greater Worcester Area, and is accordingly submitted to the US Economic Development Administration (EDA)

A CEDS is a plan that emerges from a broad-based continuous planning process addressing the economic opportunities and constraints of a region. The guidelines for developing a CEDS include effective general planning practices that can be used by any community to design and implement a plan to guide its economic growth. An acceptable CEDS is a prerequisite for eligibility to receive funds under most EDA programs, including the Public Works Program, the Economic Adjustment Program, and Planning Grants.

The CEDS-development process provides a forum to ensure regional coordination and consistency of economic development efforts within and among the 40-community region. This FY '10 Update is submitted to the EDA in order to document the strength and value our member communities in the Central Massachusetts CEDS region.

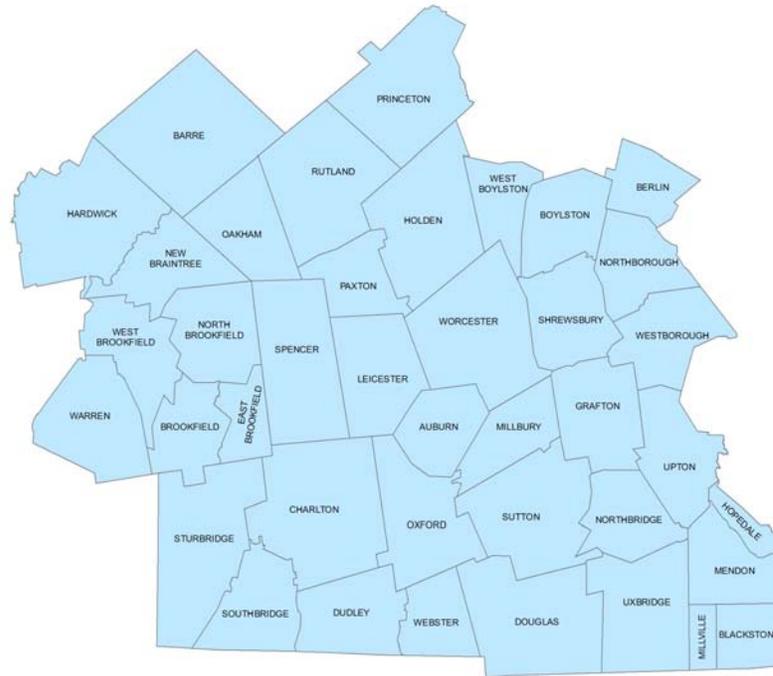
The Greater Worcester Area CEDS Committee meets periodically throughout the year to review ongoing economic planning and development projects in the region, to update the prior year's CEDS Project List and prepare a current project list, and to evaluate the CEDS process and goals. Subsequent to these meetings, the support staff prepares the Annual Report for submission to the EDA. The work of CEDS Committee was supported by representatives of the Central Massachusetts Regional Planning Commission (CMRPC), and the City of Worcester's Executive Office of Economic and Neighborhood Development.

The 2010 Annual Report is an update to the previous, 2009, Annual Report. This 2010 Annual Report provides updates on the CEDS Planning Process, information about the Greater Worcester Region, and a description of the Priority Projects as of July 1, 2010. The goals, objectives, and CEDS analysis were also reviewed and updated where appropriate.

THE CEDS PLANNING PROCESS

THE GREATER WORCESTER REGION

The Greater Worcester Region consists of the City of Worcester and 39 area communities that are within CMRPC’s service area.



Greater Worcester Area CEDS Communities (listed alphabetically):

- | | | | |
|-----------------|------------------|-------------|-----------------|
| Auburn | Holden | Paxton | Westborough |
| Barre | Hopedale | Princeton | West Boylston |
| Berlin | Leicester | Rutland | West Brookfield |
| Blackstone | Mendon | Shrewsbury | Worcester |
| Boylston | Millbury | Southbridge | |
| Brookfield | Millville | Spencer | |
| Charlton | New Braintree | Sturbridge | |
| Douglas | Northborough | Sutton | |
| Dudley | Northbridge | Upton | |
| East Brookfield | North Brookfield | Uxbridge | |
| Grafton | Oakham | Warren | |
| Hardwick | Oxford | Webster | |

Economic Issues

In every region there are key factors that influence the health of the economy. In the Greater Worcester Area, the following factors have had and will continue to have a significant impact on this regional economy:

- ◆ Supply of affordable housing
- ◆ Transportation network as it relates to east-west connectivity, the local airport, and public transit
- ◆ Production and/or use of renewable energy
- ◆ Marketing/branding of the region to attract businesses and tourists
- ◆ Workforce retention/attraction

Affordable Housing

Historically, real estate prices in the Greater Worcester region have been lower than the Greater Boston region. While the demand for lower cost real estate has certainly driven the demand for housing in the Metro Worcester Area, other factors such as the quality of life and the availability of jobs have also contributed to the recent population surge in the region. This increase in population has naturally led to an increase in residential real estate prices, especially during the first half of this decade. Though the real estate market has cooled over the last year (along with that of the state and nation), housing prices remain high, creating a significant need for more affordable housing.

According to *MassBenchmarks*, the high cost of home prices are a key factor in triggering individuals to move out of Massachusetts. A survey conducted at University of Massachusetts revealed that more than half of the respondents between 18 and 34 years old (53.2%) and those earning under \$40,000 a year (51.1%) said that they were considering leaving the state due to high housing prices. Businesses may therefore find it difficult to attract employees.

Massachusetts has established a goal for communities to ensure that at least 10% of their housing stock as Affordable units. The Massachusetts Comprehensive Permitting Law (Mass General Laws Chapter 40B) was designed to help communities reach the 10% goal. This law allows developers to override local zoning bylaws and regulations if they agree to sell or rent 25% of a project's housing units at prices that are affordable to moderate income households (households earning no more than 80% of the Area Median Income). Question 2 on the November 2, 2010 state election ballot, placed on the ballot by initiative petition, called for the repeal of Chapter 40B. If successful, the repeal would have taken effect on January 1, 2011, but would not have stopped or otherwise affected any proposed housing that had already received both a comprehensive permit and a building permit for at least one unit. The question failed at the election by a margin of 58% - 42%.

One tool that communities can use to exert some control over Chapter 40B developments and guide their community toward attaining this housing goal is to develop a Housing Production Plan (HPP). This plan must meet minimum standards of the Massachusetts Department of Housing and Community Development (DHCD), and demonstrate how a community will achieve the 10% affordable housing goal. A community with a valid HPP may have more flexibility in reviewing applications for approval of affordable housing developments.

Other tools available to communities to assist in creating more affordable housing units are: the Housing Development Support Program (HDSP), Local Initiative Program (LIP), housing rehabilitation programs, and other DHCD programs. The objective is that all communities should offer a variety of housing stock in order to accommodate existing and potential new residents whose income may not keep pace with the real estate market; providing housing stability in turn supports a stable community work force.

As an example of community-supported affordable housing, the Town of Paxton is currently working with a developer to construct fifty (50) units of affordable rental apartments for seniors. The Town donated the land for the project and, with a combination of Low Income Housing Tax Credits, various DHCD affordable housing funds, and MassHousing Priority Development Funds, the project is now in the design stage.

Transportation

Worcester Regional Mobility Study

The Worcester Regional Mobility Study is a comprehensive study of the multimodal movement of people and goods within Worcester and the surrounding urban area. The study is analyzing ways to improve mobility by enhancing the existing infrastructure and planning for new infrastructure. Although the majority of work has been completed, the study is not expected to be concluded until the first quarter of FY'11. Subsequent to the completion of the study, staff will begin the process of planning for implementation of recommendations.

The Study Process includes:

- Basic examination of existing mobility conditions
- Assessment of potential major infrastructure improvements that were recommended for further study in the 2007 RTP. A number of these recommendations addressed access from the urban core and Interstate System to the communities west of Worcester, as well as the west side of Worcester including Tatnuck Square, Webster Square, and the Worcester Regional Airport.
- Recommendations of short-term and long-term mobility improvements

- Development of a process for on-going coordination of operations and management of the intermodal system, including continuous review and implementation of improvement strategies.

The Central Massachusetts Metropolitan Planning Organization (CMMPO) is responsible for ensuring that the study is conducted with extensive feedback from all potential stakeholders. For additional information on the study please visit the following website: www.vhb.com/worcesterregionalmobility

Airport

As of 2010, the Worcester Regional Airport is owned and operated by the Massachusetts Port Authority (MassPort). It came into service in 1946 with the objective of serving the City's growing industrial base. The 1,300 acre airport property is located on a hill overlooking the Greater Worcester area at an elevation of 1,009 feet above sea level. It contains two runways (7,000 and 5,000 feet in length), a 59,000 square-foot terminal building with four jet-way gates, two ramp level gates, two baggage carousels and a TSA-installed passenger and baggage screening system. Additionally, there is a large fuel farm that provides fuel for jet and piston-fired aircraft, a maintenance facility, a radio shop, a flight school, hangars, and other airport-related facilities.

The City and MassPort have approved an Airport Master Plan identifying opportunities for aviation and non-aviation development of the facility. The proposed development sites are designed for new aircraft hangars and aviation-related activity on the airfield proper and non-aviation development in the Airport Industrial Park and other locations outside the "secure" areas of the airfield. In November 2008, a public charter air service called Direct Air started running flights from Worcester to Punta Gorda, FL and Orlando/Sanford, FL. In March 2009, Direct Air expanded their Worcester service, adding flights between Worcester to Myrtle Beach, SC.

Although the City of Worcester transferred ownership of the Worcester Regional Airport to MassPort, the City remains an active partner and will continue to review all options for further development of the site.

Commuter Rail

When Commuter Rail service between Worcester and Boston was reinstated by the Mass Bay Transportation Authority (MBTA) in 1994, initial service consisted of three round trips per day. By 2001 the number of train trips had increased to 10 and in October of 2008 the number of trips was increased again to 13. Supporters of expanded service, particularly the City of Worcester, continue to emphasize the need for a "full" schedule of 20 round trips per day. Citing continually increasing ridership, economic development prospects, and the potential for reverse commute, Worcester officials have looked to EOT to address the need for expanded service.

During May 2008, Lieutenant Governor Timothy Murray hosted a major rail summit in Worcester to further the discussion on the expansion of commuter rail. National rail advocates, railroad companies, transportation experts, and elected officials headlined the summit. The event was a valuable education in the complexity of the commuter rail issue as well as its connection to freight rail issues. The summit culminated with a call to action for all levels of government to work with the private rail companies to resolve differences and advance the critical initiative of expanding commuter rail service in this region.

In November 2009, the Patrick-Murray Administration announced that the Commonwealth's comprehensive multi-year rail transportation agreement with CSX Transportation (CSXT), the national freight carrier serving Massachusetts, had been submitted for federal review with the Surface Transportation Board. Filing with the Surface Transportation Board represents another major milestone in the agreement completed in June 2010.

The Commonwealth will purchase the property rights of the Boston to Worcester rail line from CSXT, increasing the potential for additional commuter service while also taking control of dispatching and maintenance on the line. Through the development of this agreement, the MBTA has already been able to add five (5) Framingham-Boston commuter trains to Worcester on CSX Transportation's Boston line.

CSX has taken steps to make Worcester its new freight hub for New England by expanding its current 28-acre freight yard to 52 acres. To accomplish that, CSX must acquire 14 properties abutting the freight yard. CSX filed a petition with the state Department of Public Utilities on August 12, 2010 to obtain authorization to proceed with the eminent domain process. To date, CSX has negotiated purchase-and-sales agreements for just two of the properties — 340 Franklin St. and 205 Grafton St. — and has reached an agreement in principle with the owner of 165 Grafton St.

The \$100 million expansion project is part of a private-public partnership between the state and CSX so the rail line between Worcester and Boston can be opened to more commuter trains, with a goal of eventually reaching 20 to 25 commuter trains per day. Without the expansion, there is not sufficient track capacity to accommodate the additional commuter trains.

The following passenger rail issues were listed in the Central Massachusetts Metropolitan Planning Organization's (CMMPO) Regional Transportation Plan:

- Competing needs between the movement of freight and the accommodation of expanded Commuter Rail service. The frequency of mid-day service is limited due to conflicts with freight staging movements at the CSX rail yards in Worcester and Framingham. EOT officials have indicated their commitment to continue working with CSX.

- Between July 2004 and June 2005, commuter trains on the Worcester line were on time an average of just under 87% of the time, the *lowest* on-time performance rate of all the lines in the Commuter Rail system.
- There is a need for feeder bus service to MBTA Commuter Rail stations as well as WRTA connections with the intercity bus station at Worcester's Union Station that serves both Greyhound and Peter Pan Intercity service.
- The existing service schedule allows limited opportunity for reverse commute. Service increases could start to address this situation.
- There have been ongoing, system-wide equipment problems, particularly air conditioning malfunctions. Equipment must be reliable.
- In general, there is a need for increased parking capacity at MBTA Commuter Rail stations serving Central Massachusetts and the Greater Worcester Area CEDS region.

Also being considered is the potential for future potential for the Worcester to Providence (RI) passenger rail service through the Blackstone River Valley on tracks owned by the Providence & Worcester Railroad (P&W RR). Lieutenant Governor Murray has indicated his support for a feasibility study of commuter rail on this line. This would emulate a similar initiative in Rhode Island where the city of Woonsocket, RI recently completed a passenger rail feasibility study which indicated surprisingly high demand for such a commuter rail/transportation opportunity.

A future vision for passenger and rail freight in the Greater Worcester region continues to be discussed through the CMRPC and the Central Mass Metropolitan Planning Organization.

Renewable Energy

There is a growing need to assess the region's ability to produce and utilize renewable energy. The factors driving the urgency and importance of this need include:

- As the demand for oil increases exponentially throughout the world, the price of oil for energy production continues to rise. Supplies are finite, and there are environmental impacts to the utilization of any fossil fuels.
- Dramatic increases in asthma rates and lung cancer are a growing concern. The majority of air pollutants are emitted from the burning of fossil fuels to produce energy and to operate motor vehicles. Increasing development that is not designed to reduce the need for, or conserve, energy coupled with a growing dependence on personal transportation ultimately have a significant negative effect on air quality and public health.
- The communities within the CMRPC region are all faced with rising municipal budgets, and many look to economic development as a means to increase their tax revenues in order to stabilize or even reduce the burden of the rising costs of municipal services. A locally-produced and predictable energy supply will likely

encourage businesses to locate and maintain employment opportunities within this region.



In 2008, Governor Deval Patrick signed the Green Communities Act, a comprehensive energy reform bill. Under the new law, the state will make energy efficiency programs compete in the market with traditional energy supply. Utility companies will be required to purchase all available energy efficiency improvements that cost less than it does to generate power, ultimately saving money on consumers' electricity bills.

Utility companies will offer rebates and other incentives for customers to upgrade lighting, air conditioning, and industrial equipment to more efficient models, whenever those incentives cost less than generating the electricity it would take to power their older, less-efficient equipment. Existing efficiency programs have already shown savings at 3 cents per kilowatt-hour versus 9 cents for power generation. Customers who take advantage of these incentives will save money as they reduce how much energy they use. The incentives will encourage more efficient energy use, lowering the overall demand on the system and reducing greenhouse gas emissions.

The Green Communities Act promotes renewable energy in a number of ways. The law requires utility companies to enter into 10- to 15-year contracts with renewable energy developers to help developers of clean energy technology obtain financing to build their projects. The agreements will target Massachusetts-based projects. The law also makes it possible for people who own wind turbines and solar-generated power to sell their excess electricity into the grid ("net-metering") at favorable rates, for installations of up to two (2) megawatts (up from 60 kilowatts currently).

The measure also authorizes utility companies to own solar electric installations they put on their customers' roofs – a practice that was previously prohibited – up to 50 MW apiece after two years. If utilities take full advantage of this new opportunity, it will poise Massachusetts to meet Governor Patrick's goal to harness 250 megawatts of installed solar power by 2017.

A new Green Communities program comes into effect under the new law, offering benefits to municipalities that make a commitment to efficiency and renewable energy. The state Division of Energy Resources, which is expanded and elevated into the Department of Energy Resources, will now include a Green Communities Division to provide technical and financial assistance to municipalities for energy efficiency and renewable energy efforts. The program will receive \$10 million in funding from a variety of sources, including emissions allowance trading programs, utility efficiency charges, alternative compliance payments generated by the Renewable Portfolio Standard, and the Renewable Energy Trust Fund.

The signature program of the landmark Green Communities Act, the Green Communities Grant Program, uses funding from auctions of carbon emissions permits under the Regional Greenhouse Gas Initiative to reward communities that win Green Communities designation by meeting five clean energy benchmarks:

- Adopting local zoning bylaw or ordinance that allows "as-of-right-siting" of renewable energy projects;
- Adopting an expedited permitting process related to the as-of-right facilities;
- Establishing a municipal energy use baseline and a program designed to reduce use by 20 percent within five years;
- Purchasing only fuel-efficient vehicles for municipal use, whenever such vehicles are commercially available and practicable; and
- Requiring all new residential construction over 3,000 square feet and all new commercial and industrial real estate construction to reduce lifecycle energy costs (i.e., adoption of an energy-saving building "stretch code").

May 2010 was the deadline for municipalities to apply for Green Community designation in order to qualify for the first round of \$8.1 million in Green Communities grants. The City of Worcester received Green Community designation and is now moving forward with renewable energy projects, including a residential "stretch code implementation grant program.



Since the release of its Climate Action plan in January 2007, the City of Worcester has aggressively pursued becoming more sustainable as an organization. Shortly after the release of its Action Plan, the City formed an Energy Efficiency and Conservation Program within its Division of Planning & Regulatory Services. The organization's initial goal was to lead by example through the implementation of energy efficiency and conservation measures in City-owned facilities. Initial efforts included lighting projects with high rates

of return while the City selected an energy services provider to identify and evaluate a comprehensive set of more complex projects through an investment grade energy audit of 171 City-owned facilities.

The City's adoption of the Energy Stretch Code, effective January 1, 2011 with a mandatory compliance date of July 1, 2011, was the City's first step in engaging the broader community in reducing its energy use. The City is functioning under the fundamental premise that the long-term competitiveness of the City of Worcester is, in part, based on its ability to increase the efficiency of its existing housing stock. The City, by setting higher building standards, informing the community of the benefits of these higher standards, and spurring voluntary investment to meet these standards, will ultimately create jobs in an area of the economy with a high potential to deliver not only economic benefits, but also, the societal benefits associated with reduced pollution, greater energy security and less waste.

The overarching goal of the stretch code implementation project is to upgrade residential buildings to the stretch code. This will dovetail well with the City's current efforts and will advance the goal of reducing fossil fuel use, lowering carbon emissions, and encouraging the development of green jobs, technology and expertise within the State of Massachusetts.

In October 2010, the City of Worcester was awarded a grant of \$852,083 to fund a residential building code program that will provide funding for property owners to upgrade existing buildings to make them more energy efficient, and for an outreach program to market and educate residents.

Brownfields Program

In 2009, CMRPC started a Brownfields program initiative for the Region. CMRPC was awarded two EPA grants, totaling \$400,000 for hazardous and petroleum site assessments throughout the Region. During Fiscal Year 2010, CMRPC recruited an environmental consultant, Fuss and O'Neil, to conduct the Phase I and Phase II assessments. To help make this happen, CMRPC designed and implemented an extensive community outreach program to prioritize the sites and educate the public regarding the program's environmental, health and economic objectives. In addition to working with affected and neighboring property owners and local decision makers, state and federal legislative and congressional delegations are included in the discussion to maximize the cost-benefit value of the program.

Brownfields Program Objectives:

- Balance Priorities of Multiple Communities
- Promote Long-Term Regional Planning Goals
- Petroleum & Hazardous Materials Grants Allocation

- Maximize Real Estate Redevelopment Value

The scope of the Brownfields project entails two steps of analysis: Phase I and Phase II Environmental Site Assessments (ESA). The Phase I ESA is generally considered the first step in the process of environmental due diligence. Historically this was referred to as a “21e” study. It recognizes the environmental conditions of a site by identifying, defining, assessing, and evaluating potentially harmful/hazardous characteristics of a property. The duties of an engineer conducting a phase I ESA may involve reviewing historical aerial photographs and topography, visually observing the interior and exterior of the site building, and researching databases for records of contamination.

Physical collection of material and chemical analysis is typically reserved for a Phase II ESA. Duties during a Phase II ESA may involve sampling of soil, air, groundwater and/or building materials. Phase II ESA's are more extensive and produce a much longer report. Soil samples are collected using hand augers or drilling rig. Soil borings are collected in suspect locations. Samples are collected, Ground water samples are collected from the borings or permanent monitoring wells located on the property.



The Brownfields Program has potential to be extremely effective in aiding communities with their planning and economic development efforts. The program can provide cost savings, permitting efficiency, assessments for financing, minimize liability, and maximize real estate redevelopment value.

In FY 2010, the CMRPC Brownfields Steering Committee received a total of eleven (11) site nominations. Fuss and O’Neil completed one (1) Phase I ESA in June, 2010 while many more are in development. Considering the extensive outreach and overwhelming support, ultimately, it is anticipated that a total of 20 Phase I assessments and up to six (6) Phase II evaluations will be completed.

Regional Marketing/Branding

Below are the recent actions undertaken by the Central Massachusetts Convention and Visitors Bureau (CMCVB) to develop a new brand for the Central Massachusetts region.

Step 1 – Brand Analysis and Research – Formal brand research of visitors/non-visitors and stakeholder interviews. Review of existing Brand position.

Step 2 – Brand Benchmark – Review of research data to determine key destination attributes and emotional connections among visitors and stakeholders. Development of “the adjective consensus.”

Step 3 – Brand Commitment – A clear definition and description of the destination’s emotional and functional benefits that will serve as the “Guiding Star” for all future brand development and marketing efforts.

Step 4 – Brand Action – Creation of the specific steps necessary to bring the destination brand to life. This will include working with the ad agency on logo and tagline development as well as recommending possible service training programs or infrastructure development.

Step 5 – Brand Future – Suggestion of strategic partnerships that can leverage the destination brand among the community and grow its brand equity.

Step 6 – Brand Blueprint – Development of a formal working document that highlights all of the activities described above and will serve as the reference tool for all community presentations and for staff referral.

Step 7 – Brand Evaluation – Within a two-year period, a brand evaluation should be conducted to measure the effectiveness of the whether the brand is bring adequately communicated and experienced by the visitor. (Not included in this phase of the project)

Under the guidance of Gary Sherwin, author of *Believable Brands* and an authority on destination brand development, several summits and workshops were held with traditional and non-traditional stakeholders. Information was gathered through these channels and also through a survey conducted with Don Anderson of Purdue University, to assess the information and perceptions provided. Mr. Sherwin and Mr. Anderson took this information and research and then created the following “Brand Blueprint”:

“The Central Massachusetts region offers the visitor a classic New England experience through a collection of affordable, accessible and unique communities (near Boston) which offer an intellectually and culturally vibrant environment, a step back into historic Americana and superb outdoor recreation—all embraced in a beautiful and relaxing scenic location.”

The tagline below was drawn from the Brand Blueprint.



The end product of this effort will help create a stronger and more unified marketing approach, increasing awareness, interest and visitation for the region.

Workforce Attraction/Retention

The retention and attraction of a skilled workforce is one of the important issues facing the region. Many of the current efforts are coordinated through the Central Massachusetts Regional Employment Board (CMREB). The role of the CMREB is to act as both a magnet and an anchor.

The magnet is used to attract new businesses into the area and to help expand those that are already here. In this capacity, the CMREB serves as a type of employment agency for local companies, providing them with qualified candidates to fill their workforce needs. Data indicate that approximately 16,000 people utilizing the services of the Workforce Central Job Center on an annual basis. CMREB is capable of researching candidates with the required knowledge, skills, and abilities that meet the profile of skills requirements that the companies need. CMREB also works closely with Worcester’s Economic Development Division to host job-filling seminars with new businesses that are considering whether to locate in the city. In addition, CMREB hosts job fairs at Workforce Central for both specific industry sectors and for general employment.

The anchor role of CMREB is similar, yet a bit more challenging. In this capacity, the Board collaborates with companies that are considering whether to "outsource" or relocate their employment needs. CMREB must be adept at showcasing the region’s high-quality labor force. CMREB’s success demonstrates that the state-of-the-art skills offered in the training programs will make for a greater long-term investment and, consequently, a greater return on the investment.

In both cases, strong training programs with the latest technological applications are the key to success. Thus, the new Central Massachusetts Institute for Workforce Development, located at the new Worcester Technical High School, as well as other innovative programs, are integral in developing and maintaining a skilled workforce that must compete with the greater global workforce.

The CMREB is receiving approximately \$4.3 million from the American Recovery and Reinvestment Act of 2009 (ARRA). Most of the ARRA training funds available will be used through the Individual Training Account (ITA) contracting process and a youth employment program. Customer demand for ITAs remains very strong. As part of its strategic planning process, the CMREB utilized additional Labor Market Information (LMI) to identify regional areas of industrial growth and decline, ability of skilled workforce to meet industry demand, availability of training and education, and capacity of educational institutions to provide training and education to meet this demand.

THE CEDS PLANNING STRUCTURE

The CEDS Committee consists of representatives from both the public and private sector segments of the economy throughout the Greater Worcester region. This committee functions as a strategic regional planning vehicle under the guidelines established by EDA.

This is the tenth year that the CEDS Committee has been staffed and administered through a public-private partnership. The Central Massachusetts Regional Planning Commission (CMRPC), along with the City of Worcester, partnered with the Worcester Regional Chamber of Commerce in the CEDS planning and development process. CMRPC provides municipal and regional planning for Land Use and Transportation policy issues, as well as a variety of Community Development services. This agency collaborates with local, regional, state and federal officials to bring a regional perspective and a coordinated approach to the planning and development that occurs in this region. Because of this continuing mission, CMRPC is well positioned to facilitate community involvement and recommend public sector policies designed to support and strengthen economic development initiatives in the Greater Worcester Area.

The City of Worcester is a major economic engine in the region, and their involvement is critical to the success of the CEDS Planning Process. Many of the regionally-significant projects are located in the City, and the state of its economy reverberates throughout the region. Accordingly there is great value in the expertise, knowledge and perspective of the staff of the City's Executive Office of Economic and Neighborhood Development relative to the CEDS planning process.

The Worcester Regional Chamber of Commerce is also an important partner in the CEDS development process. The Chamber and its affiliates primarily serve the CEDS area, although it has members from more than 100 communities. This organization acts as an advocate for the business community within the region and is instrumental in ensuring that business concerns are addressed in any economic development strategies that were developed by the CEDS Committee.

The structure of this collaboration has ensured that the region's cities and towns are adequately represented in all matters related to CEDS and that the many economic development and planning activities at both the City and town level are well coordinated with those of other communities in the region. The CEDS Committee serves an extremely important function in facilitating communication relative to regional economic development activities that are either planned or on-going at both the state and local levels. In addition, the CEDS Committee and the process it developed provide an important vehicle through which member communities can plan for the promotion of job creation and regional economic growth.

The list of contributors to this year's CEDS process is included in Appendix B and it includes each person's affiliation and position. These individuals discussed the overall

CEDS process and the need to encourage greater participation by the member communities, agencies, and organizations in order to ensure that the process, and the resulting reports and evaluations, are inclusive of the entire CEDS area and are representative of the region's economic development activities as they pertain to the CEDS goals. The pending economic development projects and the prior year's projects were reviewed to ensure that the Project List contains all active and important regional projects that significantly impact the regional economy.

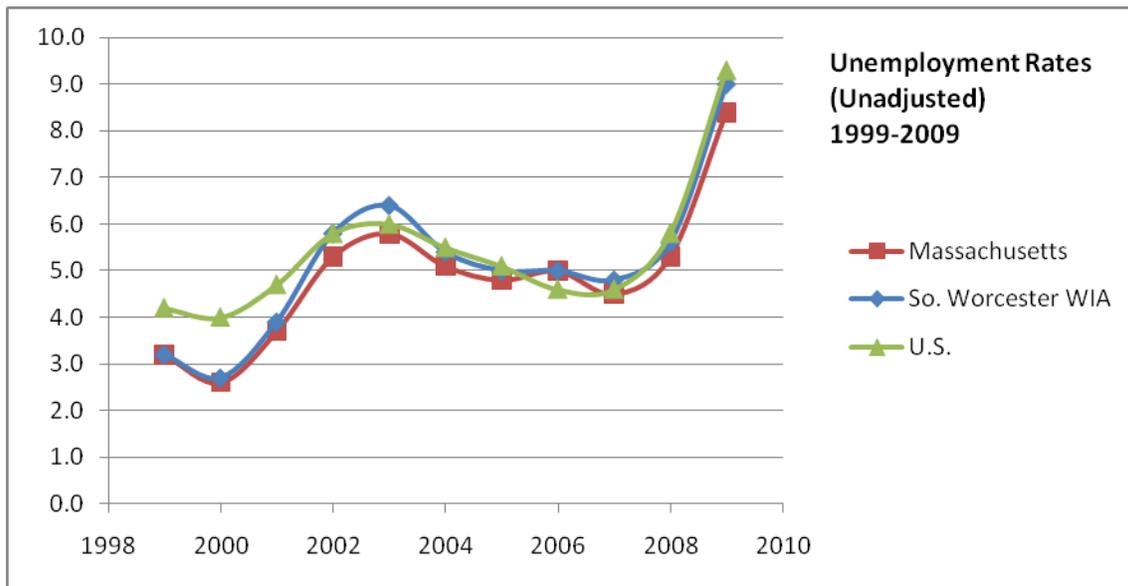
The report also contains updated data that was collected and prepared by the CMRPC on the regional economy and discussion of significant development activities that have occurred during the past year or which are planned for the upcoming year.

THE CEDS ANALYSIS

CHANGES IN THE CENTRAL MASSACHUSETTS ECONOMY

Presented on the following pages are a series of charts and graphs indicating changes that have occurred in the economy of Worcester County during the past year. The graphics were prepared using data from the Bureau of Labor Statistics and the Massachusetts Division of Unemployment Assistance.

The data and analysis refer to the overall economies of the Commonwealth of Massachusetts and the Southern Worcester Workforce Investment Area (SWWIA).



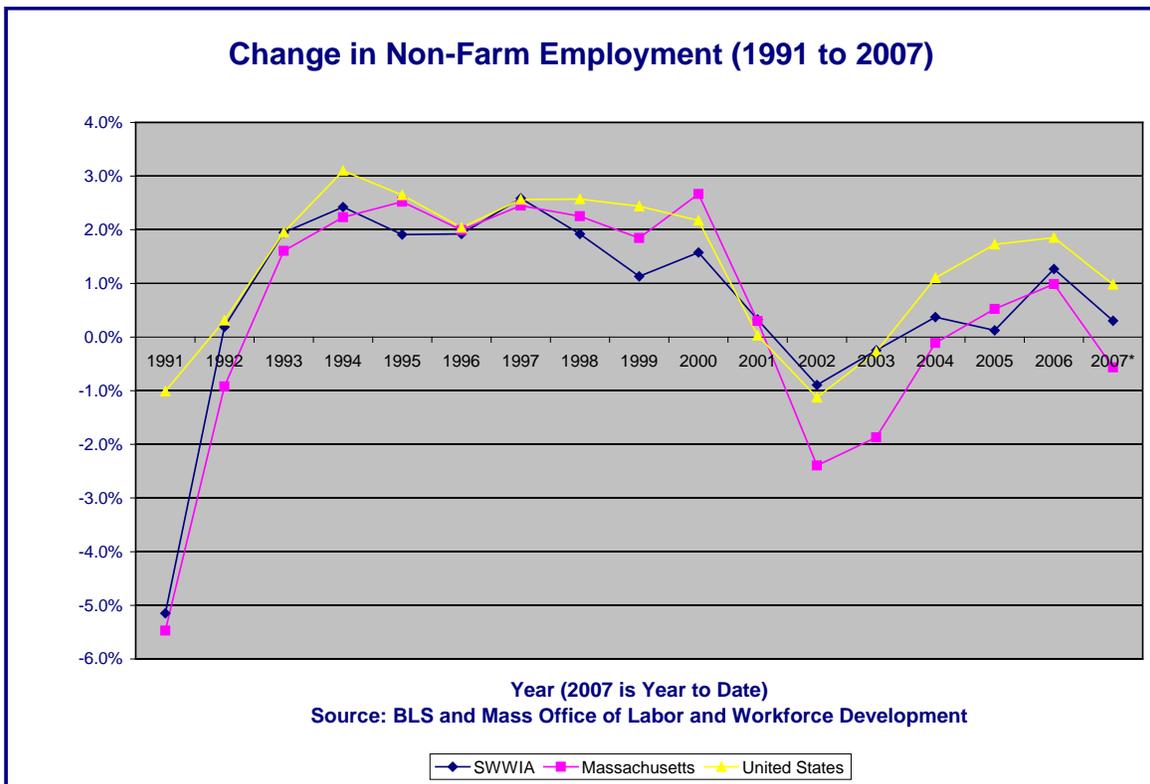
- The above graph compares the seasonally unadjusted employment rates between the SWWIA, Massachusetts, and the United States. While the unemployment rate is considered a good indicator of the overall health of an economy, there are several factors that should be considered while viewing and comparing this data. One is that the unemployment data only shows employment rates for those that wish to report their job status. People that are involved in the underground economy or work “under the table” typically hide their employment status due to concerns over immigration, legal, taxation, and various other issues. Consequently, the economic impacts of these groups on the larger “visible” economy are hard to quantify and thus affect the accuracy of the unemployment rates shown above. Also, unemployment rates do not consider that some people are underemployed, that is working in a job that they are overqualified for because they are unable or unwilling to find a job that matches their specific talents. The effects of underemployment should be considered as well when analyzing the rate of reported unemployment, even when it has been adjusted for seasonal variations in the workforce.

- The unemployment rate in Central Massachusetts peaked in 2009 at 9%, higher than the state rate of 8.4 %, but lower than both the national rate and that of Worcester County, at 9.3% and 9.2% respectively. Overall, the regional unemployment rates of the Worcester area and Commonwealth of Massachusetts remained relatively equal with small fluctuations. This trend indicates that Worcester’s economy is influenced by many of the same factors that affect the larger economy of Massachusetts.

- Every Workforce Area in the state experienced substantial increases in unemployment during the past year. Between the first quarters of 2009 and 2010, the seasonally unadjusted unemployment rate in the Central Mass Workforce Area increased from 8.4% to 10.3%. A total of 29,939 Central Mass residents were unemployed in first quarter 2010, an increase of 5,556 (22.8%) over the year. During this same period, the seasonally unadjusted unemployment rate in Massachusetts increased from 8.2% to 9.9%, representing 342,133 unemployed residents statewide, an increase of 62,477 (22.3%) over the year.

- ◆ From 1993 to 2003, the state and regional economies have had unemployment rates that were an average of a half percentage point lower than the national economy. Throughout the 1980s this difference was even more pronounced. During this time, the economy of Massachusetts was buoyed by the micro-computer and defenses industries leading to an economic boom termed “Massachusetts Miracle”. Consequently, the Commonwealth’s and Worcester’s unemployment rate was 2 to 4 points lower than the national average. During the early 1990s this situation was reversed as the micro-computer industry collapsed and defense budgets were cut which greatly affected the state and regional economies. Only in 1995 did the economy of Worcester and Massachusetts in general recover to such an extent that their unemployment rates slipped below that of the national economy. Interestingly enough, in 2006 and 2007, the unemployment rate of the Worcester region and Massachusetts again slipped below the national rate.

- ◆ National unemployment peaked at 10.2% in October 2009. It rose steadily from its low of 4.4% in March 2007. It did not really become a concern until a year later when it broke above 5% in March 2008. By then, the economy had contracted .7%. Unemployment rose rapidly, breaking 6.2% in August 2008, 7.2% by November 2008, 8.1% by February 2009, 9.4% three months later, finally reaching 10.2% in October. Unemployment hadn't been so high since the 1983 recession, when it above 10% for 10 months. During the 2001 recession, the unemployment rate peaked at 6.3% in June 2003. With less people employed, wages and demands for goods and services fall, leading to a decline in economic activity. As indicated by the unemployment rates, the overall economies of Worcester and Massachusetts have been relatively healthy until the national downturn. However, Worcester and Massachusetts have fared slightly better than the nation overall.



- ◆ The above graph illustrates the annual change in non-farm workforce from 1991 to 2007. The non-farm workforce is impacted by several factors including layoffs, in-migration, and out-migration. While the total workforces of SWWIA, Massachusetts, and the United States vary dramatically, the resulting percentage change in non-farm employment can be used to compare the three different but related economies of SWWIA, Massachusetts, and the United States.
- ◆ Overall, non-farm employment within the United States had greater rates of growth and smaller declines than that of the SWWIA and Massachusetts.
- ◆ Overall, the total number of jobs in the SWWIA, Massachusetts, and the United States has grown 11.74%, 8.56%, and 24.37% respectively from 1990 to 2006. As of 2006, the total non-farm workforce of SWWIA, Massachusetts, and the United States was 247,400, 3,224,880, and 137,507,000 respectively. By 2009, the total number of non-farm workforce of SWWIA decreased to 237,800. What this data indicates is that the economies of Worcester and Massachusetts are adding jobs at a slower rate than that of the United States. This data is consistent with the economic slowdown occurring in the Northeastern United States and rapid growth in the Southern and Western United States. On a regional level, the metropolitan Boston area has seen its economic growth slowed by the rising cost of real estate and so it is no surprise that Worcester is adding jobs at a faster rate than the Massachusetts economy as a whole. The

Worcester area has both a favorable business climate and affordable housing rates, both which are conducive to economic expansion and job creation.

EMPLOYMENT BY SECTOR 2001-2006

The Standard Industrial Classification (SIC) code has been replaced by the North American Industry Classification System (NAICS) code. Many of the new NAICS employment sectors reflect portions of the previous SIC divisions. For example, the Utilities and Transportation sectors were formerly parts of the SIC division Transportation, Communications and Utilities. The SIC division for Service Industries has been subdivided into several additional sectors. Other NAICS sectors represent portions from several former SIC divisions. The new Information sector includes components from Transportation, Communications and Utilities (broadcasting and telecommunications), Manufacturing (publishing), and Service Industries (software publishing, data processing, information services, motion picture and sound recording). The Accommodation and Food Services sector combines hotels and other lodging places from Service Industries and eating and drinking places from Retail Trade. While analyzing employment data, only the years of 2001 to 2006/2007 were used. Due to the change from SIC to NAICS codes, the Bureau of Labor Statistics and the Massachusetts Office of Labor and Workforce Development does not have comparable data prior to 2001 available.

Business Changes and Growth Sectors

- ◆ From 2001 to 2006, the number of businesses in the SWWIA increased by approximately 10%. Within the respective industries, there were substantial changes. These changes are discussed below.

Using 2 Digit NAICS Code
Largest Numerical Change

	2001	2002	2003	2004	2005	2006*	Change	% Change	% of Economy	% of Economy
									2001	2006
Total, All Industries	13,428	13,969	14,392	14,823	14,702	14,780	1,352	10%		
81 - Other Services, Ex. Public Admin	1,609	1,712	1,815	1,921	2,030	2,117	508	32%	12%	14%
23 - Construction	1,402	1,512	1,623	1,761	1,760	1,772	370	26%	10%	12%
54 - Professional and Technical Services	1,370	1,464	1,522	1,602	1,574	1,565	195	14%	10%	11%
72 - Accommodation and Food Services	1,039	1,093	1,137	1,158	1,122	1,145	106	10%	8%	8%
52 - Finance and Insurance	595	613	647	667	666	689	94	16%	4%	5%
56 - Administrative and Waste Services	719	756	796	793	760	771	52	7%	5%	5%
53 - Real Estate and Rental and Leasing	423	433	447	464	476	467	44	10%	3%	3%
92 - Public Administration	305	305	315	334	335	349	44	14%	2%	2%
71 - Arts, Entertainment, and Recreation	161	184	194	204	196	200	39	24%	1%	1%
61 - Educational Services	191	201	223	233	222	225	34	18%	1%	2%
62 - Health Care and Social Assistance	1,206	1,226	1,228	1,233	1,233	1,235	29	2%	9%	8%
48-49 - Transportation and Warehousing	361	377	372	376	370	379	18	5%	3%	3%
21 - Mining	10	10	12	14	13	13	3	30%	0%	0%
44-45 - Retail Trade	1,857	1,891	1,910	1,937	1,886	1,860	3	0%	14%	13%
22 - Utilities	45	46	43	47	44	43	-2	-4%	0%	0%
55 - Management of Companies and Enterprises	68	69	67	67	71	66	-2	-3%	1%	0%
11 - Agriculture, Forestry, Fishing & Hunting	44	42	43	45	42	38	-6	-14%	0%	0%
42 - Wholesale Trade	907	949	935	939	925	899	-8	-1%	7%	6%
51 - Information	252	248	244	236	227	220	-32	-13%	2%	1%
NONDUR - Non-Durable Goods Manufacturing	280	269	260	243	235	233	-47	-17%	2%	2%
DUR - Durable Goods Manufacturing	584	569	559	549	515	494	-90	-15%	4%	3%
31-33 - Manufacturing	864	838	819	792	750	727	-137	-16%	6%	5%

Only includes data for the third quarter of 2006
Source Bureau of Labor Statistics

- During 2001 to 2006, services (excluding public administration), construction, professional services, accommodation, and finance and insurance not only were the largest group of industries in SWWIA but also had the greatest numerical change, adding over 2,500 new firms to the regional economy. These five industries now account for over 50% of the firms in the Metropolitan Worcester Area. On the other hand, the region saw 274 manufacturing firms close, consolidate, or disappear from the regional economy.
- In 2001, manufacturing firms comprised 16% of the companies in the regional economy. In 2006, they comprised 10%. This data is consistent with the trend of deindustrialization occurring within New England, specifically Massachusetts. With the high cost of labor, energy, and land, many manufacturing firms have either moved to the southern United States or to offshore locations to remain competitive. As these jobs have left, new industries such as professional services have taken their place. Data indicates that the economy of SWWIA is now a primarily service-based economy.
- The rapid loss of manufacturing jobs is of particular concern to the local economy for several reasons. One is that manufacturing jobs typically pay above average-wages for a blue collar workforce. In addition, one manufacturing job often supports two additional service sector jobs. Thus a loss of one manufacturing jobs really means the loss of three jobs. Most importantly, manufacturers are needed to support emerging and established professional service firms within the economy. For instance, the plastics industry in Leominster and Fitchburg is involved in creating prototypes and products for Boston’s biomedical industry. Similarly, Springfield’s metalworking industry supports various defense firms located in the Connecticut River Valley.
- Manufacturing experienced the largest losses in employment including:

computer and electronic product manufacturing	-2,089	(-29.7%)
nonmetallic mineral product manufacturing	-1,121	(-31.1%)
machinery manufacturing	-1,093	(-28.9%)
fabricated metal product manufacturing	-1,022	(-17.4%)
primary metal manufacturing	-371	(-37.4%)
plastics & rubber products manufacturing	-415	(-15.0%)
paper manufacturing	-302	(-24.5%)
printing and related support activities	-301	(-22.1%)

**Southern Workforce Investment Area
Number of Establishments
Using 2 Digit NAICS Code
Largest Percentage Change**

	2001	2002	2003	2004	2005	2006*	Change	% Change
Total, All Industries	13,428	13,969	14,392	14,823	14,702	14,780	1,352	10%
81 - Other Services, Ex. Public Admin	1,609	1,712	1,815	1,921	2,030	2,117	508	32%
21 - Mining	10	10	12	14	13	13	3	30%
23 - Construction	1,402	1,512	1,623	1,761	1,760	1,772	370	26%
71 - Arts, Entertainment, and Recreation	161	184	194	204	196	200	39	24%
61 - Educational Services	191	201	223	233	222	225	34	18%
52 - Finance and Insurance	595	613	647	667	666	689	94	16%
92 - Public Administration	305	305	315	334	335	349	44	14%
54 - Professional and Technical Services	1,370	1,464	1,522	1,602	1,574	1,565	195	14%
53 - Real Estate and Rental and Leasing	423	433	447	464	476	467	44	10%
72 - Accommodation and Food Services	1,039	1,093	1,137	1,158	1,122	1,145	106	10%
56 - Administrative and Waste Services	719	756	796	793	760	771	52	7%
48-49 - Transportation and Warehousing	361	377	372	376	370	379	18	5%
62 - Health Care and Social Assistance	1,206	1,226	1,228	1,233	1,233	1,235	29	2%
44-45 - Retail Trade	1,857	1,891	1,910	1,937	1,886	1,860	3	0%
42 - Wholesale Trade	907	949	935	939	925	899	-8	-1%
55 - Management of Companies and Enterprises	68	69	67	67	71	66	-2	-3%
22 - Utilities	45	46	43	47	44	43	-2	-4%
51 - Information	252	248	244	236	227	220	-32	-13%
11 - Agriculture, Forestry, Fishing & Hunting	44	42	43	45	42	38	-6	-14%
DUR - Durable Goods Manufacturing	584	569	559	549	515	494	-90	-15%
31-33 - Manufacturing	864	838	819	792	750	727	-137	-16%
NONDUR - Non-Durable Goods Manufacturing	280	269	260	243	235	233	-47	-17%

Employment and Wage Changes and Growth Sectors

- From 2001 to 2006 services, construction, technical services, accommodation, and finance and insurance added over 2,500 jobs to the regional economy. As the service professions have grown, so has a need to find workers to fill those positions. Agriculture, forestry, wholesale trade, information services, and manufacturing all saw large job losses as these industries continue to decline. Even with these declines, growth in the service sector was able to replace these jobs and drive economic growth in the Metropolitan Worcester Region.
- The loss of manufacturing is a concern for the regional economy of Worcester as noted above. As plants and factories close, the workforce employed there often relocates or retires. As positions open up in manufacturers that remain, there are fewer and fewer skilled workers to fill these positions. Without a workforce, firms often have to restrict their operations, pay to educate its workforce, or move away to an existing workforce. All of these activities impact a company's ability to compete and affect the overall economy if the problem is widespread.

Southern Workforce Investment Area
Average Number of Employees
Using 2 Digit NAICS Code
Largest Numerical Change

	2001	2002	2003	2004	2005	2006*	Change	% Change	% 2001%	% 2006
Total, All Industries	243,184	239,812	239,079	241,464	241,802	242,539	(645)	0%		
72 - Accommodation and Food Services	15,903	16,683	17,443	18,013	17,866	18,636	2,733	17%	7%	8%
56 - Administrative and Waste Services	12,205	11,251	12,176	13,924	13,783	14,515	2,310	19%	5%	6%
23 - Construction	11,248	10,912	11,273	11,892	12,062	13,033	1,785	16%	5%	5%
62 - Health Care and Social Assistance	38,316	37,687	37,560	37,542	38,394	39,549	1,234	3%	16%	16%
52 - Finance and Insurance	11,555	11,817	11,785	11,796	11,960	12,284	729	6%	5%	5%
81 - Other Services, Ex. Public Admin	8,479	8,855	8,648	9,074	9,280	9,206	727	9%	3%	4%
92 - Public Administration	9,026	9,153	8,981	9,001	9,136	9,752	726	8%	4%	4%
54 - Professional and Technical Services	11,516	11,587	10,891	11,201	11,673	12,084	568	5%	5%	5%
71 - Arts, Entertainment, and Recreation	3,280	3,517	3,603	3,571	3,380	3,793	513	16%	1%	2%
48-49 - Transportation and Warehousing	7,582	7,658	7,660	7,556	7,697	7,782	200	3%	3%	3%
21 - Mining	166	158	161	185	171	190	24	14%	0%	0%
11 - Agriculture, Forestry, Fishing & Hunting	228	215	246	224	210	223	(5)	-2%	0%	0%
22 - Utilities	1,597	1,628	1,548	1,761	1,339	1,379	(218)	-14%	1%	1%
53 - Real Estate and Rental and Leasing	2,378	2,416	2,420	2,294	2,230	2,125	(253)	-11%	1%	1%
44-45 - Retail Trade	28,793	28,405	28,347	28,737	29,164	28,440	(353)	-1%	12%	12%
42 - Wholesale Trade	10,361	10,235	10,478	9,838	9,685	9,998	(363)	-4%	4%	4%
51 - Information	4,947	4,836	4,441	4,412	4,191	4,247	(700)	-14%	2%	2%
61 - Educational Services	23,645	24,416	25,746	26,393	26,257	22,625	(1,020)	-4%	10%	9%
NONDUR - Non-Durable Goods Manufacturing	10,096	9,526	9,477	9,162	8,959	8,791	(1,305)	-13%	4%	4%
55 - Management of Companies and Enterprises	6,600	6,635	5,934	5,692	5,322	5,174	(1,426)	-22%	3%	2%
DUR - Durable Goods Manufacturing	25,263	22,223	20,262	19,200	19,045	18,713	(6,550)	-26%	10%	8%
31-33 - Manufacturing	35,358	31,748	29,740	28,362	28,003	27,503	(7,855)	-22%	15%	11%

*Only includes data for the third quarter of 2006
Source Bureau of Labor Statistics

Southern Workforce Investment Area
Average Number of Employees
Using 2 Digit NAICS Code
Largest Percentage Change

	2001	2002	2003	2004	2005	2006*	Change	% Change
Total, All Industries	243,184	239,812	239,079	241,464	241,802	242,539	(645)	0%
56 - Administrative and Waste Services	12,205	11,251	12,176	13,924	13,783	14,515	2,310	19%
72 - Accommodation and Food Services	15,903	16,683	17,443	18,013	17,866	18,636	2,733	17%
23 - Construction	11,248	10,912	11,273	11,892	12,062	13,033	1,785	16%
71 - Arts, Entertainment, and Recreation	3,280	3,517	3,603	3,571	3,380	3,793	513	16%
21 - Mining	166	158	161	185	171	190	24	14%
81 - Other Services, Ex. Public Admin	8,479	8,855	8,648	9,074	9,280	9,206	727	9%
92 - Public Administration	9,026	9,153	8,981	9,001	9,136	9,752	726	8%
52 - Finance and Insurance	11,555	11,817	11,785	11,796	11,960	12,284	729	6%
54 - Professional and Technical Services	11,516	11,587	10,891	11,201	11,673	12,084	568	5%
62 - Health Care and Social Assistance	38,316	37,687	37,560	37,542	38,394	39,549	1,234	3%
48-49 - Transportation and Warehousing	7,582	7,658	7,660	7,556	7,697	7,782	200	3%
44-45 - Retail Trade	28,793	28,405	28,347	28,737	29,164	28,440	(353)	-1%
11 - Agriculture, Forestry, Fishing & Hunting	228	215	246	224	210	223	(5)	-2%
42 - Wholesale Trade	10,361	10,235	10,478	9,838	9,685	9,998	(363)	-4%
61 - Educational Services	23,645	24,416	25,746	26,393	26,257	22,625	(1,020)	-4%
53 - Real Estate and Rental and Leasing	2,378	2,416	2,420	2,294	2,230	2,125	(253)	-11%
NONDUR - Non-Durable Goods Manufacturing	10,096	9,526	9,477	9,162	8,959	8,791	(1,305)	-13%
22 - Utilities	1,597	1,628	1,548	1,761	1,339	1,379	(218)	-14%
51 - Information	4,947	4,836	4,441	4,412	4,191	4,247	(700)	-14%
55 - Management of Companies and Enterprises	6,600	6,635	5,934	5,692	5,322	5,174	(1,426)	-22%
31-33 - Manufacturing	35,358	31,748	29,740	28,362	28,003	27,503	(7,855)	-22%
DUR - Durable Goods Manufacturing	25,263	22,223	20,262	19,200	19,045	18,713	(6,550)	-26%

*Only includes data for the third quarter of 2006
Source Bureau of Labor Statistics

- Between the third quarters of 2008 and 2009, the number of jobs in the Central Mass Workforce Area decreased by -10,934 or -4.5%. During the same period, the Massachusetts economy lost -6,044 jobs, a decrease of -0.2%.
- The three largest sectors in the Central Mass Workforce Area accounted for 43% of all jobs in 2008. The sectors included Health Care and Social

Assistance (16.6%), Government (14.9%), and Retail Trade (11.5%). Between the third quarters of 2008 and 2009, job growth occurred in Health Care and Social Assistance with the addition of 1,449 jobs (3.5%) while State component of Government added 195 (1.6%). In contrast, Retail Trade lost -1,669 jobs (-6.0%).

- Significant job losses also occurred in Manufacturing (-3,306, -12.4%), Professional and Business Services (-2,727, -9.6%), Construction (-1,699, -16.2), and Leisure and Hospitality (-850, -3.8).
- The only major industry to increase employment was Educational Services, which added 287 jobs, an increase of 4.2%.
- The 2008 annual average wage in Central Mass was \$47,369 which was below the statewide figure of \$56,759 by \$9,390. The annual average wage for six significant industries exceeded the overall average in Central Mass including Information (\$80,919), Professional, Scientific and Technical Services (\$72,412), Finance and Insurance (\$67,754), Manufacturing (\$64,949), Wholesale Trade (\$60,773), and Construction (\$54,952).
- Three sectors that account for a significant number of jobs had annual average wages that were well below the average for Central Mass, including Accommodation and Food Services (\$15,992), Retail Trade (\$26,160), and Administrative and Support Services (\$30,143). In addition, the area's largest sector, Health Care and Social Assistance (\$45,654), had an annual average wage that was slightly lower than the Central Mass average of \$47,369.
- A detailed breakdown of specific occupations and their average weekly wages can be found in Appendix B.

**Southern Workforce Investment Area
Average Number of Employees
Using 2 Digit NAICS Code
Average Weekly Wages
Largest Numerical Change**

	2001	2002	2003	2004	2005	2006*	Change	% Change	Adjusted for Inflation (16%)
Total, All Industries	\$735	\$743	\$774	\$799	\$808	\$809	74	10%	-6%
22 - Utilities	\$1,328	\$1,386	\$1,440	\$1,381	\$1,573	\$1,545	217	16%	0%
55 - Management of Companies and Enterprises	\$1,098	\$1,162	\$1,262	\$1,305	\$1,445	\$1,454	356	32%	16%
51 - Information	\$1,192	\$1,099	\$1,176	\$1,248	\$1,345	\$1,227	35	3%	-13%
54 - Professional and Technical Services	\$1,088	\$1,127	\$1,168	\$1,220	\$1,251	\$1,205	117	11%	-5%
DUR - Durable Goods Manufacturing	\$1,103	\$1,071	\$1,170	\$1,258	\$1,158	\$1,172	69	6%	-10%
52 - Finance and Insurance	\$966	\$967	\$1,045	\$1,139	\$1,176	\$1,115	149	15%	-1%
31-33 - Manufacturing	\$1,005	\$986	\$1,071	\$1,140	\$1,080	\$1,101	96	10%	-6%
42 - Wholesale Trade	\$888	\$903	\$919	\$955	\$1,061	\$1,054	166	19%	3%
NONDUR - Non-Durable Goods Manufacturing	\$762	\$789	\$860	\$893	\$914	\$950	188	25%	9%
21 - Mining	\$992	\$1,018	\$935	\$1,011	\$959	\$948	(44)	-4%	-20%
23 - Construction	\$859	\$857	\$870	\$923	\$899	\$922	63	7%	-9%
92 - Public Administration	\$768	\$806	\$823	\$877	\$873	\$904	136	18%	2%
48-49 - Transportation and Warehousing	\$691	\$710	\$721	\$763	\$784	\$836	145	21%	5%
61 - Educational Services	\$760	\$804	\$841	\$791	\$798	\$803	43	6%	-10%
53 - Real Estate and Rental and Leasing	\$653	\$682	\$712	\$734	\$780	\$794	141	22%	6%
62 - Health Care and Social Assistance	\$622	\$653	\$696	\$745	\$761	\$789	167	27%	11%
56 - Administrative and Waste Services	\$580	\$578	\$562	\$541	\$552	\$554	(26)	-4%	-20%
81 - Other Services, Ex. Public Admin	\$412	\$453	\$465	\$482	\$479	\$507	95	23%	7%
44-45 - Retail Trade	\$481	\$477	\$511	\$534	\$538	\$502	21	4%	-12%
11 - Agriculture, Forestry, Fishing & Hunting	\$273	\$324	\$320	\$351	\$375	\$326	53	19%	3%
71 - Arts, Entertainment, and Recreation	\$319	\$323	\$331	\$327	\$329	\$323	4	1%	-15%
72 - Accommodation and Food Services	\$260	\$264	\$267	\$273	\$280	\$291	31	12%	-4%

*Only includes data for the third quarter of 2006
Source Bureau of Labor Statistics

Job Growth and Development

- Going forward to 2016, three economic sectors are expected to generate the majority of jobs in the Metropolitan Worcester Region. The nursing field is expected to create over 16,000 jobs in the region with low skill and high skilled technical workers generating the rest. Overall, the demand for nurses is being driven by an aging population, increases in population and in-migration into the Worcester region, and retirements in the nursing field. Increases in low skilled professions can also be partially attributed to suburban growth and the need for workers to cater to new populations (fast food, landscaping, customer service representatives) outside the region's traditional urban core. Computer and software engineer positions are part of larger regional and national business trends that need these professionals to maintain increasingly sophisticated business computing networks.

Occupations Generating Nearly Half of Projected New Jobs
in the Greater Worcester Area, 2004 to 2014

Job Title	Number of Jobs
Registered Nurses	16,860
Retail Salespersons	10,390
Computer Software Engineers, Applications	8,760
Postsecondary Teachers	8,550
Janitors, Cleaners, and Maids	7,650
Computer Software Engineers, Software	7,420
Customer Service Representatives	6,470
Nursing Aids, Orderlies, and Attendants	6,430
Waiters and Wait Staff	6,190
"Fast Food Workers"	5,610
Home Health Aids	5,290
General and Operations Managers	5,210
Management Analysts	4,550
Accountants and Auditors	4,310
Computer Systems Analysts	4,030
Food Preparation Workers	3,850
Landscapers and Groundskeepers	3,820
Network Systems	3,540
Preschool Teachers	3,370
Sales Reps	3,050
Total	125,350

Source: BLS and Mass Office of Labor and Workforce Development

Industries Generating the Most Jobs
in the Greater Worcester Area, 2004 to 2014

Job Type	Number of Estimated Jobs
Food Service and Drinking Places	22,480
Private Hospital Staffing	22,320
Colleges, Universities, and Professional Schools	15,790
Management and Technical Consulting Services	14,510
Residential Care Facilities	12,950
Employment Services	12,930
Offices of Health Practitioners	12,680
Computer Systems Design and Related Services	10,920
Scientific Research and Development	9,790
Software Publishing	9,600
Services to Building and Dwellings	8,940
Elementary and Secondary Schools	8,010
Amusements, Gambling, and Recreation	7,460
Home Health Care Services	6,800
Child Day Care Services	6,370

Source: BLS and Mass Office of Labor and Workforce Development

Fastest Growing Industries
in the Greater Worcester Area, 2004 to 2014

Job Type	Projected Growth Rate
Software Publishers	49%
Management and Technical Consulting	46%
Residential Care Facilities	39%
Home Health Care Services	35%
Child Day Care Services	29%
Other Professional and Technical Services*	28%
Scientific Research and Development	27%
Computer Systems Design	25%
Office Administration Services	25%
Water Treatment and Disposal Services	25%
Accounting and Bookkeeping Services	23%
Amusements, Gambling, and Recreation	23%
Advertising and Related Services	23%
Internet and Other Information Services	23%
Employment Services	22%
Other Personal Services**	22%
Other Educational Services***	21%
Individual and Family Services	19%
Services to Buildings and Dwellings	18%
Warehousing and Storage	18%

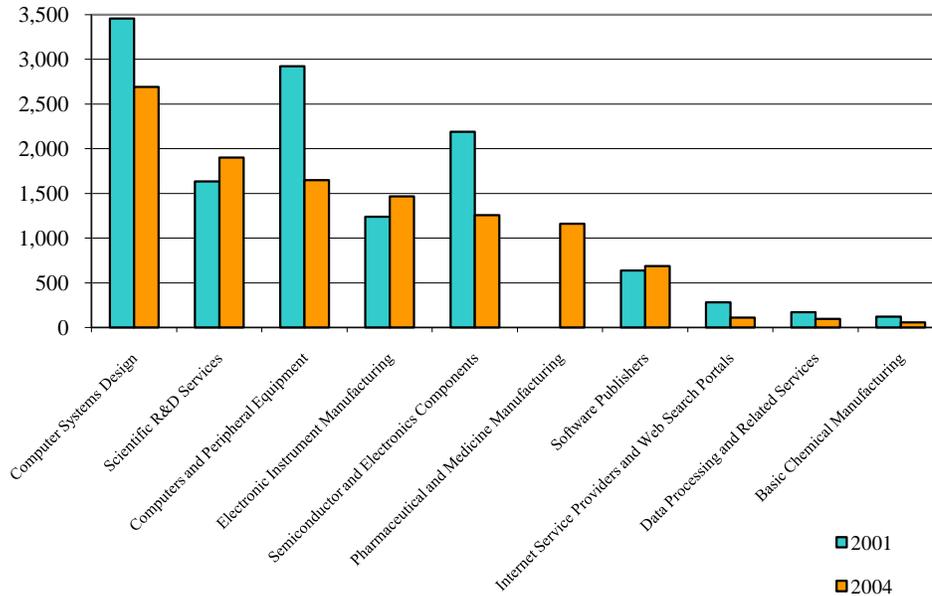
*veterinarians, market researchers, and opinion polling

** wedding planners, photo labs, parking lot attendents

*** exam preperation and tutoring

Source: BLS and Mass Office of Labor and Workforce Development

High Tech Intensive Industries 2001-2004



- The SWWIA has experienced significant declines in its overall employment in High Tech Intensive Industries. From 2001 to 2004, the Region lost 1,576 jobs in these fields. Nevertheless, in 2004 these industries accounted for 11,082 jobs.
- Fields that lost the greatest number of jobs were Computers and Peripheral Equipment (-1,274 jobs), Semiconductor and Electronics Components (-930 jobs), Computer Systems Design (-767 jobs), and Internet Service Providers and Web Search Portals (-171 jobs). These fields are those that one normally associates with software and computer hardware, traditionally a strength of the central Massachusetts economy.
- Fields that showed employment growth during the period include Scientific R&D Services (267 jobs) and Electronic Instrument Manufacturing (229 jobs).
- Jobs in High Tech Intensive Industries made up 4.1% of the SWWIA employed labor force in 2004.
- Job losses were not unique to the SWWIA. Massachusetts lost 51,220 jobs in High Tech Intensive Industries between 2001 and 2004, for a decline of -20.3%.
- In 2004, high tech jobs in the SWWIA comprised 5.5% of such jobs statewide.

- The Massachusetts economy is expected to generate 216,650 net new jobs between 2006 and 2016, an increase of 6.3%. An additional 768,330 job openings will result from the need to replace workers who retire, change industries or change occupations. In total, nearly one million jobs will need to be filled by 2016.
- The two fastest growing industry sectors, Professional, Technical, and Business Services (+18.1%) and Health and Educational Services (+16.8%) will also add the most jobs, expanding by 85,400 and 102,020 jobs respectively, and together will represent more than 86 percent of all net new jobs. Health Care alone will account for 64,630 jobs during the projection period. The third fastest growth is expected in Leisure and Hospitality (+9.2%), which is projected to add 27,160 jobs.
- On a more detailed basis, eight industries are expected to increase by more than 10,000 jobs. These include Private Hospitals (+23,530), Management and Technical Consulting (+19,100), Computer Systems Design (+17,600), Food Services and Drinking Places (+16,450), Individual and Family Services (+12,870), Residential Care Facilities (+11,320), Offices of Health Practitioners (+10,510), and Colleges and Universities (+10,300). Collectively, these eight industries account for nearly 121,680 or 56.2% of the 216,650 projected net new jobs.
- Among the 30 fastest growing occupations, 13 are in either Health Care or Information Technology. In terms of education and training, 23 of these fast growing occupations require at least an Associate's Degree. The top five fastest growing occupations include Network Systems Analysts (+50%), Personal and Home Care Aides (+36%), Computer Applications Engineers (+35%), Home Health Aides (+34%), and Veterinary Technologists and Technicians (+33%).
- Twenty occupations will account for more than half the net new jobs created through 2016. Many are large occupations concentrated in industries such as Retail Trade and Hospitality. The five occupations generating the most new jobs are expected to include Registered Nurses (+16,110), Customer Service Representatives (+8,390), Computer Software Applications Engineers (+8,260), Combined Food Preparation and Serving Workers (+7,760), and Home Health Aides (+5,820).
- While the focus is often on new job growth, it is important to remember that most job openings will be the result of replacement demand and not growth. In fact, 78% of the nearly one million projected net new job openings statewide will occur because of replacement associated with retirement, labor force withdrawal, and occupational changes. For example, total projected net new openings for Registered Nurses are expected to be 29,050, with 12,940 replacement jobs and 16,110 new jobs. Replacement needs tend to be greatest in occupations with high proportions of workers nearing retirement (teachers, machinists) or occupations with large

concentrations of young and part-time workers (waiters and waitresses, retail salespersons).

- Education and training will play an increasingly prominent role for both current and future job seekers. More than half (60%) of all new jobs related to growth will require an Associate's Degree or higher. While a Bachelor's Degree may be preferable, it is important to recognize that some form of post-secondary education will be essential for those seeking a rewarding career path with good pay and upward mobility.

THE CEDS VISION

The Comprehensive Economic Development Strategy Vision for Greater Worcester is to build upon the region's economic strengths to sustain positive economic momentum and help the region withstand inevitable economic downturns. The area is strong in several economic resources, including a skilled and educated workforce, intellectual capital available at 13 institutions of higher education, a variety of federal, state, and local development agencies, and infrastructure, including an excellent transportation network and a multi-million dollar fiber optic infrastructure network.

The 2010 Greater Worcester Area CEDS reflects the region's goal to implement a successful economic development planning process that utilizes its economic resources, addresses its economic problems, and fulfills its economic potential by building on its existing transportation network, especially rail connections, strengthening its industrial and commercial base, and providing an array of workforce development initiatives.

The annual Greater Worcester Area CEDS reflects, identifies, and facilitates the implementation of the projects and programs that complement the spirit of this vision statement. The CEDS Committee has identified three priority common issue areas: transportation, industrial and commercial development, and workforce development. These issues were selected based on careful consideration of the needs of the individual communities and how those needs were reflected in the overall regional outlook.

Updates and Changes

No changes have been made over the current year to the CEDS Vision. However, some goals and objectives have changed. The CEDS Committee's current goals and objectives are listed below.

CEDS GOALS & OBJECTIVES

The CEDS process is about balancing the needs of different actors and interests in different political jurisdictions within the same economic region. It requires the identification of common issues and a joint commitment to success.

Developing a Process

Three goals, one each for industrial and commercial development, transportation, and workforce development, were established along with associated objectives by the CEDS Committee as shown below.

1. Industrial and Commercial Development

Greater Worcester has a long history as an industrial and commercial leader, since its role as one of the earliest regions to embrace the Industrial Revolution. We look to build on that strength by continuing Greater Worcester's transformation into a 21st Century hub for science and innovation. In order to maintain a diverse economic base, however, efforts to encourage development must ensure that new business does not crowd out old business, and that growth is accommodated appropriately throughout the region so that it does not create undue pressure on existing systems.

Goal: To strengthen the industrial and commercial sectors within the CEDS Region.

Objectives:

- To engage regional business leaders in an active discussion about identifying growth industries and industries in decline, and the challenges all industries share in the short and long term.
- To identify undeveloped commercial and industrial-zoned areas with infrastructure in place and economic development potential (which includes community support for development).
- To work with the Transportation Subcommittee to identify high priority transportation corridors that coincide with areas identified with economic development potential.
- To use the information collected on areas with economic development potential and high priority transportation corridors to engage regional planners and town administrators in an ongoing consensus-building discussion regarding sustainable development, population trends, and brownfields redevelopment.
- To synthesize the process of pursuing these objectives into a mechanism by which all cities and towns in the region can evaluate the costs and benefits of proposed developments.
- To pursue consensus on a model for facilitating industrial and commercial growth that reflects the individual needs of the CEDS communities and their shared interest in regional competitiveness.
- To provide new space for incubator endeavors.
- To provide infrastructure for areas identified and actively pursued for commercial/industrial development.

2. Transportation

Greater Worcester 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 even air, Greater Worcester boasts quick connections beyond its borders for both people and goods. Yet Worcester is increasingly an option for residents and businesses seeking a lower-cost alternative to nearby Boston. The region must provide appropriate transportation improvements to avoid increased congestion and an overwhelmed network.

Goal: To play a part in establishing an expanded, integrated, coordinated, truly multi-modal regional transportation network.

Objectives:

- To actively support an increase in the use of alternative transportation modes (other than single-occupancy vehicles).
- To bring together key rail experts and stakeholders in the region for the purpose of establishing an ongoing regional strategy for rail use -- freight and passenger.
- To hold a regional transportation forum to present and create a broader dialogue once a cohesive vision for rail has been developed in the region.
- To ensure that a wide array of stakeholders, communities, and experts are represented on the Advisory Committee to the Central Massachusetts Metropolitan Planning Organization (CMMPO). The CMMPO makes decisions relative to how federal transportation funding is spent on the region's transportation network.

3. Workforce Development

Greater Worcester is experiencing a workforce transformation as the regional economy shifts to knowledge-based industries. Regional organizations are working hard to prepare residents for new employment opportunities and new employment competition through education and training. Workforce development initiatives are essential to ensuring that new businesses based on new technologies easily identify and connect to a skilled workforce.

Goal: To provide an array of workforce development initiatives (employment, education, and training) for corporate and private citizens throughout the CEDS Region.

Objectives:

- To further develop the Central Massachusetts Institute for Workforce Development at the Worcester Technical High School to provide an array of training for corporate and private citizens throughout the CEDS Region.
- To strengthen support for sole proprietorship businesses in the “Middle Main” economic development area by offering small business training in areas such as technology improvement, personnel management, business planning, tax preparation, inventory, and collective purchasing.
- To create continuing education programs through the regional colleges, universities, community colleges, and labor unions that will expand the skills of current employees and enhance the global competitiveness of the regional workforce in the fields of biotechnology, medicine, and manufacturing.

THE CEDS ACTION PLAN

The purpose of the CEDS Action Plan is to identify which projects and activities should be undertaken over the next year. The CEDS Action Plan reflects the goals and objectives of the CEDS Committee outlined in the previous section.

A. ONGOING ACTIVITIES

Goal 1: To strengthen the industrial and commercial sectors within the CEDS Region.

Activity Implementation Plan:

- ◆ CMRPC and the City of Worcester will continue to engage community and business leaders in furtherance of the objectives listed in the previous section. Specifically, the working partnerships established will be used to evaluate both industry sectors and potential development sites and achieve consensus on priority projects.

Goal 2: To play a part in establishing an expanded, integrated, coordinated, truly multi-modal regional transportation network.

Activity Implementation Plan:

- ◆ Establish a task force of key rail experts and stakeholders in the region for the purpose of establishing an ongoing regional strategy for rail use -- freight and passenger.
- ◆ Develop a new advisory committee for the CMMPO to ensure that a wide array of stakeholders, communities, and experts (i.e., economic development, environmental, bike and pedestrian) are represented in the transportation planning process. The CMMPO makes decisions regarding how federal transportation funds should be spent in the CEDS region.

Goal 3: To provide an array of workforce development initiatives (employment, education, and training) for corporate and private citizens throughout the CEDS Region.

Activity Implementation Plan:

- ◆ Focus on assisting businesses in the poorer neighborhoods of the city to ensure a greater rate of success.
- ◆ Engage in a dialogue with the colleges and universities in order develop skills for workers in the primary growth sectors of the regional economy.

B. PRIORITY PROJECTS

The Worcester region has experienced significant economic growth as developers and planners continue to work on important initiatives that will spur new development in numerous ways. A recent analysis of development in the Greater Worcester region indicates that a number of projects are proposed or underway that will stimulate private investment, create new jobs, and generate new tax revenues. Inquiries received from companies and individuals seeking to expand in or relocate their operations to this region remained relatively strong and stable throughout the past year. The greatest demand in the Worcester region has been for light manufacturing and distribution space.

Clearly, the human and physical infrastructure capacity of a region is critical to the ability of a company to sustain its operations, thrive, and prosper. While the region has the human infrastructure in place to attract new companies and to sustain the growth of existing companies, identifying available sites to accommodate the increased demand for large amounts of space remains one of our region's greatest challenges. To do so, the City of Worcester must continue to concentrate on redeveloping and assembling critical brownfield sites, while smaller communities in the region must address their lack of infrastructure to support major development projects. Communities in the region have dedicated much effort toward the development of this infrastructure, yet much work remains to be done to provide "pad-ready sites" for future development.

The City of Worcester is currently stimulating the cleanup of brownfield sites by administering a revolving loan fund for which they have received \$1.4 million since 2002. Since 1996, the City of Worcester has received over \$3 million in funding from EPA for brownfields assessment and remediation. Worcester's Mayor Joseph O'Brien has continued a public-private brownfields initiative called the Mayor's Brownfield Roundtable, designed to provide education and outreach assistance to property and business owners to encourage the redevelopment of brownfields sites. The City of Worcester also maintains a full-time Commercial and Industrial Development Manager on the staff of the Division of Business Assistance.

One of the Worcester area's greatest assets is its access to tremendous intellectual capital. The region has 36,000 students, faculty, and administrators at 16 colleges and universities, as well as a highly-skilled and educated workforce that enables the region to attract and retain emerging industry as well as traditional industry sectors. Technology, biomedical, pharmaceutical, and manufacturing companies thrive in environments rich in institutions of higher education and comprehensive employment and training networks. Further enhancing the region's appeal is its extensive transportation system, expansive fiber optic infrastructure network, affordable commercial and industrial space, and an enviable quality of life. A thriving arts and cultural community, a multitude of housing opportunities, and abundant recreational and leisure activities can be found in the Greater Worcester region.

The Greater Worcester region will likely continue to attract attention from companies seeking a competitive location, excellent transportation network, a trained and educated workforce, and an exceptional quality of life. The housing sector remained a strong point for the local economy as new home construction continued at a steady pace and housing prices continued to rise. There are a number of ongoing development projects underway in the City of Worcester.

PROGRESS REPORT

The following are active or proposed economic development projects in the Greater Worcester Region, along with a progress update. Some of these have been listed in previous years' CEDS reports and others are listed for the first time. They are listed in three separate categories: projects that are based in one of the region's towns, Worcester-based projects, and projects that are clearly regional in nature.

Town-Based Projects

Industrial facility, Auburn

An approximately 455,000 square foot facility located in Auburn, which is available for a vast array of commercial/industrial businesses.

NEW PROJECT

Riverbridge, Berlin

Riverbridge is a planned mixed-use village. The development site is located at the South Berlin rotary, where River Road West, Whitney Road and South Street converge near the junction of I-290 and I-495. This 114-acre property will be constructed on 26 acres close to the roads and rotary, leaving 88 acres of protected land and open space surrounding the new village. The development program includes a Smart Growth program of approximately 205 mixed-income housing units, 130,000 SF of commercial development, and a 75,000 SF continuing care facility. Construction on Phase I is expected to begin in Fall of 2010.

Gough House/Hillside Property, Boylston

The Town of Boylston is implementing a \$245,000 grant through the Department of Housing and Urban Development's Economic Development Initiative Special Projects program. The award is assisting the Town in its efforts to rehabilitate the John B. Gough House, a National Historic Landmark that is part of the Town's municipal complex at the Hillside property. Once habitable, the building is conceived as the focal point of new economic development activities, possibly serving as a conference center, museum, educational and/or office space. The Hillside Restoration Project, Inc. is a 501(c) 3 corporation whose mission is to see the building restored and returned to active use.

This project would build upon this and prior phases of work to complete the rehabilitation of the Gough House and to identify how it can best be complemented by other uses of

the overall Hillside property (220 acres total). Once conceived for office park use, Hillside is partially occupied by Town Hall, the Police Station and School Administration, and recreational fields. The Town is pursuing how Hillside might be more fully utilized to support economic development opportunities.

Route 140 (Main St) Corridor – Economic Development Implementation, Boylston

The Route 140 corridor is the focus of Boylston’s economic development future, with a potential build out of over 1.5 million square feet. Two sites along the corridor are designed as priority development (aka “43D”) sites (Map 11, Lot 2 and Map 17 Lot 40), which may benefit from an expedited permitting processes. The Town is working diligently to encourage business growth in this area.

Under the 43D program, Boylston conducted a comprehensive land use, regulatory, transportation, and fiscal impact analysis of the Route 140 corridor to promote economic development. This study recommends several ways to optimize future development along 140 and to enhance the Town’s competitive position in the regional economy. Town meeting approved comprehensive zoning changes along the corridor, as a result of this study. This project would complement these changes with infrastructure investments to prepare several sites for development. This project would assist in carrying forward recommendations of the completed analysis.

NEW PROJECT

Griffin Realty Trust Business Enterprise Park, Charlton

The proposed Griffin Realty Trust Business Enterprise Park is designed as a 6-lot business park on a new industrial park roadway to be developed on 12.69 acres of land zoned BEP and located northerly off of Route 20 in Charlton. The project has received Planning Board subdivision and special permit approvals. The site is located very advantageously within the interstate highway system, including the nearby Auburn and Sturbridge entrances/exits to the Mass. Pike, as well as I-84 south to Connecticut and New York.

Charlton Shopping Center, Charlton

97-acre site that is Community Business (CB) zoned along the northerly side of Route 20, at the northwest corner of the intersection of Route 20 and Center Depot Road. The Planning Board issued a site plan approval in late 2008 for the construction of twelve (12) retail buildings and 15 tenant spaces for a total of 515,762 square feet of retail space. The project received its Conservation Commission ANRAD approval and completed the MEPA EIS process. Due to the general economic slowdown commencement of site construction is on-hold at this time.

Green Hill Realty Trust, Charlton

98-acre site that is Business Enterprise Park-zoned along Route 20. Close access to I-90 and Route 84 to Connecticut.

Kaszowski Site, Charlton

98-acre site that is Business Enterprise Park-zoned, along Route 20, near intersection with Route 169.

Jaromis Property Trust Site, Charlton

138-acre site that is Business Enterprise Park-zoned along Route 20. Being marketed for business park development.

Douglas Business Park, Douglas

An approved 26-acre, 9-lot industrial subdivision located in Douglas, MA and is approximately 2.5 miles off Interstate 395. The Infrastructure is in the process of being constructed and five of the lots are currently pad-ready. Potential uses for these multi-acre lots include trade and building construction uses, small manufacturing, and warehousing, among others. The industrial roadway is the gateway to thousands of acres of industrially-zoned land in the northwest corner of Douglas.

Douglas Commerce Park/West Douglas

Douglas Commerce Park offers 216 acres of industrially zoned land that is designated as a Priority Development Site as part of the M.G.L. Chapter 43D Expedited Permitting program. An additional 120 acres may be available. Located south of Route 16 and 2.5 miles east of I- 395, potentially 1.5+/- million square feet can be developed in eight lots. Work needs to be done to connect to the Webster municipal waste water treatment facility.

Fisherville Mill Redevelopment, Grafton

This former mill site is a Smart Growth (Chapter 40R) District which includes up to 240 residential units and 60,000 square feet of commercial space on two parcels totaling 10 acres. The site has been selected as one of the pilot sites for the Lieutenant Governor's Brownfield Support Initiative. Through this designation the Town has received a "Coalition" grant of \$200,000.00 to conduct additional testing on the site, including the area being developed as a public park. In addition, the Lieutenant Governor announced the award of a \$1.2 million grant under the federal stimulus program which will be used to complete the outstanding remediation requirements for the entire site. The Town also received a \$671 thousand demonstration grant from USEPA for incorporating innovative technologies into the cleanup. The site is currently being marketed.

Grafton Science Park, Grafton (formerly called Tufts Science Park)

A 100-acre site located on the Cummings School of Veterinary Medicine at Tufts University campus near the Grafton MBTA commuter rail station, this park will be developed in two phases over the next 20 years. Phase I is being built on 35 acres and will contain up to seven buildings with 348,000 square feet of space. The use is planned for single-purpose or multi-tenanted research and development and manufacturing facilities for life sciences companies. The Massachusetts Secretary of Environmental Affairs has approved the Environmental Impact Report (EIR) for the project.

The park was designated a Priority Development Site under the Massachusetts Chapter 43D Expedited Permitting program in September 2007. Tufts also named California-based BioRealty, Inc. as the park's developer, in 2008. Phase I infrastructure is complete; water, sewer, power and natural gas serve this phase. While Phase II of Grafton Science Park is now served by public water, Phase II still requires sewer, power and natural gas infrastructure to accommodate the anticipated larger floor plate users, such as biomanufacturing firms.

The first building constructed in Phase I of Grafton Science Park was the 40,000 square foot New England Regional Biosafety Laboratory, funded by the National Institutes of Health and Tufts. This facility began operating in 2010.

Grafton Job Corps property -- conversion to TOD mixed-use development, Grafton

The former Grafton State Hospital site is comprised of 42+/- acres of agricultural land and facilities associated with the former hospital. The Commonwealth of Massachusetts Division of Capital Asset Management (DCAM), currently leases a portion of the former hospital facilities to the United States Department of Labor (DOL) for the Grafton Job Corps program. In addition to the Job Corps campus, the former hospital property contains three interconnected, vacant buildings and ancillary land totally 13.7 acres.

The WBDC has been working with MassDevelopment to determine the feasibility of developing the three interconnected buildings into a Transit-Oriented-Development (TOD), complementing the Grafton MBTA Commuter Rail station, CenTech Park, CenTech Park East, and the neighboring development of Tufts University.

A Transit-Oriented Development (TOD) of the former Grafton State Hospital property would provide the Town of Grafton and the Central Massachusetts Region with a unique, historical redevelopment of three vacant buildings in the Town of Grafton. As a TOD project, the redevelopment plan envisioned would rehabilitate the three vacant buildings on the property into approximately 100 residential units, and provide additional property to utilize for mixed-use and parking purposes. This redevelopment project could provide potential housing opportunities for students at the Tufts University campus, which currently has no existing dormitory space. Additionally, the Grafton MBTA Commuter Rail station provides greater incentive for commuter housing, as well as mixed-use development to cater towards those utilizing the commuter rail, as well as tenants within CenTech Park, CenTech Park East, and the Tufts Science Park.

Hardwick Knitters Mill, Hardwick

Redevelopment of a 113,584 square foot mill on 5 acres of land in Gilbertville, a low-to-moderate-income village of the Town of Hardwick. The Town Master Plan Committee and the Planning Board have been working with the current owner to develop a plan to redevelop this mill for a variety of uses, including small businesses. The town hosted a community charette in spring of 2009 that included a SWOT analysis for redeveloping this property. The Town has enlisted the help of CMRPC and the UMASS Planning Department to identify funding resources and assist with planning next steps. In support of future

planning and financing, a Phase I Environmental Site Assessment, dated October 2010, was performed by the CMRPC Brownfield Assessment Program.

Draper Factory Complex Redevelopment, Hopedale

The vacant mill complex consists of 1.1 million square feet of structure located on more than 80 acres. State funding has been received to help identify and plan reuse possibilities. In 2007, with the assistance of Concord Square Planning & Development, Inc., the Draper Complex Reuse Committee submitted a report to the Hopedale Board of Selectmen that included a redevelopment concept plan and recommendations. The concept plan calls for the redevelopment of the factory buildings into a variety of mixed use, including but not limited to residential, office, commercial and retail, and community / civic space. It envisions a pedestrian-oriented linear park along the entire length of the Mill River from Freedom Street to Route 16. It also suggests a retail and mixed-use Town Center development that extends from the proposed river park to Hopedale Street near Town Hall.

NEW PROJECT

Moose Hill Water District, Leicester

The primary objective of the Leicester Moose Hill Water Commission is to construct a 16-inch water transmission main line from the Moose Hill Reservoir to Route 9 (connecting to Leicester Water Supply District water lines). If approved as a public water supply, the Moose Hill Reservoir would have the potential to serve as a supply to the Leicester Water Supply District, Hillcrest Water District, and Cherry Valley Rochdale Water District. The Town of Leicester has undertaken efforts to promote economic development in Town, particularly on Routes 9 & 56. These efforts have been impeded by water supply concerns. Providing and adequate long-term water supply for Route 9, and throughout Leicester's commercial districts, would enhance economic development efforts.

NEW PROJECT

Route 9 West Water Capacity Improvement, Leicester

The project would proactively provide sufficient fire suppression capacity to potential developers of land in the western portion of Route 9. Providing water capacity improvements that would serve the entire Route 9 West corridor would help to attract additional development and provide additional employment opportunities.

NEW PROJECT

Route 56 South Economic Development, Leicester

The proposed Route 56 development at 92 Huntoon Memorial Highway is a 131,050 square foot structure with associated parking on a 49 acre parcel available for a variety of commercial uses. The project is located in the Highway Business Industrial 2 (HB-2) zoning district. The surrounding area has a variety of uses, including light manufacturing and warehousing.

NEW PROJECT

McCracken Road/Greenwood Street Improvement Project, Millbury

The proposed project includes a number of improvements that will enhance vehicular and pedestrian safety along portions of McCracken Road and Greenwood Street. These improvements are essential for attracting additional economic development opportunities to the corridor. The area is currently zoned Industrial I and Route 146 Overlay District, which enables the siting of a variety of commercial, research and development and industrial uses.

Millbury/Sutton Industrial Park

A 262-acre site located in the Towns of Millbury and Sutton. A 2002 study determined that this site can support 750,000 – 1,000,000 square feet of new development depending on the type and mix of uses. To be competitive with other business parks in the region, the study determined that water and sewer must be brought to the site. This study also determined that the infrastructure needs would include construction of 3,000 linear feet of boulevard and related infrastructure (curbing, sidewalks, street trees, street lights) to provide access to the site from Route 146, construction of 3,900 linear feet of regular type roadway and related infrastructure, and installation of utilities, including stormwater facilities, sewer and water lines, hydrants, telephone, CATV, and electric conduit and manholes. Total estimated 2002 infrastructure public costs were \$5,553,000.

National Grid at 55 Bearfoot Road, Northborough

Major renovation/remodel involving 3 phases of demolition and construction proposed. The first phase of construction is underway

Northborough Crossing, Northborough

This is a 630,000 sq ft retail development that is under construction and scheduled to open in September 2011.

Saint Gobain at 9 Goddard Road, Northborough

This company recently committed to full build-out on this site. The existing building is 96,918 sq. ft. and the Planning Board approved a master plan site plan review for build-out to 240,000 sq. ft. with 730 parking spaces. Phase 1, consisting of 76,400 sq. ft, has been constructed. Full build-out is expected to take 10-15 years.

Southwest Cutoff, Northborough

This is a 29-acre parcel that has an approved special permit and site plan for 154,000 sq. ft. of retail. It is the present site of East Coast Golf

Bartlett Street, Northborough

This is a 31-acre parcel with 220,106 sq. ft. of warehouse space that has an approved special permit and site plan.

Cedar Hill Road, Northborough

A special permit and site plan have been approved for construction of an 84,050 sq ft office building on this 6.4 acre parcel. A building permit application has not been filed for this site.

77 Main Street, Northborough

This is a 10-acre parcel, 4 lot subdivision, with 3 industrial zoned lots off of Hudson Street and 1 residential lot off of Main Street.

Stop & Shop, 77 Main Street, Northborough

A special permit and site plan were approved in January 2008. In 2010 Stop & Shop notified the Town of their plans to not build on this site.

34 Talbot Road, Northborough

This is a 4.2-acre site that was approved in April 2004 for 38,400 sq. ft. warehouse space.

Genzyme at 11 Forbes Road, Northborough

This complete buildingrenovation project is underway.

Matec at 56 Hudson Street, Northborough

A special permit was approved in 2010 for demolition of a portion of the building to add high bay for business expansion.

Hillside at 495 Center @ Bartlett Street, Northborough

This is a 146.37-acre parcel with the following proposed phases:

- Phase I at 55 Lyman Street for 260,000 sq. ft. warehouse and 260 parking spaces – built and occupied
- Phase II for Bartlett Street with 210 Bartlett Street already constructed for A. Duie Pyle – built and occupied
- Phase III includes 1.5 million sq. ft. of office space with 5,531 parking spaces or 1 million sq. ft. of warehouse/distribution facilities

75-83 West Main Street, Northborough

A special permit was approved for 18,000 sq. ft. of commercial space for retail/office. The building is under construction.

Linwood Mill Lofts, Northbridge

This former cotton mill complex has approximately 120,000 square feet of space and is comprised of one large main building, several outbuildings, a waterway and a dam. This 27-acre site is located in a National Register Historic District. This Priority Development Site under the Massachusetts 43D Expedited Permitting program received approvals from the Planning Board (Special Permit for Historic Mill Adaptive Reuse and Site Plan) and the Conservation Commission in 2009. This mixed-use project, to be known as the Linwood Mill Lofts, shall consist of up to 75 residential units and over 20,000 square-feet of

commercial/retail space. As part of the town's 43D initiatives a public sewer infrastructure assessment was prepared for the Linwood Village of Northbridge.

Pythian Building Redevelopment, Northbridge

This project involved the rehabilitation of an older building in historic Whitinsville for mixed uses that includes office and retail with a small restaurant. Construction has been completed, which included the installation of an elevator and building code updates, some tenant space remain available for occupancy.

CenTech Park North (formerly Allen Farm Property), Shrewsbury

In 2002, the Town of Shrewsbury acquired a 66-acre tract of land for the purposes of economic development. The site was designated a Priority Development Site under the Massachusetts 43D Expedited Permitting program and was re-zoned as an Office/Research District with a Flexible Development Overlay District, allowing manufacturing, warehousing and distribution, and medical offices, in addition to the office and research development.

Since obtaining the development parcel, the Town of Shrewsbury and the Shrewsbury Development Corporation (SDC) have conducted physical and environmental site studies, as well as creating a Master Plan for the 66-acre property. The master plan includes concept plans, traffic impact analysis, water & sewer alternatives analysis, and preliminary geotechnical evaluation. With the market study and Master Plan complete, the SDC is working with the WBDC to pursue various grant sources for the build-out of the roadway networks and sub-surface utilities necessary to create a viable development site. A \$1 million EDA public works grant application has been submitted by the Town. The SDC has also contracted with Cushman & Wakefield to assist with the marketing of the property.

Building 19/Former Spag's Retail Store, Shrewsbury

There are approximately 10 acres of underutilized land available for redevelopment using the Town's Lakeway Overlay district, which allows commercial & residential mixed-use development. Concept plans were submitted in 2007 for 430 apartment units, 120,000 square feet of retail and 40,000 square feet of office space.

CenTech Park East, Shrewsbury

CenTech Park East is a proposed technology park located in the Town of Shrewsbury. The WBDC purchased the 85+/- acres of surplus Grafton State Hospital property adjacent to the existing 121-acre CenTech Park for the purposes of constructing an industrial park. The development of CenTech Park East will yield complementary uses to CenTech Park, accommodating industrial and biotechnology industries, creating jobs and attracting substantial private investment to the Town of Shrewsbury and the surrounding communities.

The CenTech Park East development is located off of CenTech Boulevard, a 1.1 mile road which connects Route 20 to Route 30 in Grafton. In addition its close proximity to CenTech Park, the development is close to the Grafton MBTA Commuter Rail station and Tufts University Cummings School of Veterinary Medicine.

At the May 2009 Annual Town Meeting, the Town of Shrewsbury designated this project as a Priority Development Site under the M.G.L. Chapter 43D Expedited Permitting program, guaranteeing 180-day permitting at the local level. The WBDC has completed its permitting and the site is currently under construction.

The WBDC and the Town of Shrewsbury has been awarded a \$2,000,000 grant from the U.S. Department of Commerce, Economic Development Administration (EDA) Public Works and \$1,000,000 Public Works Economic Development (PWED) grant from the Commonwealth of Massachusetts to fund the construction of infrastructure, including a 1,800 linear foot access road to service the site. Construction of the infrastructure is ongoing and is expected to be complete in the Fall, 2010. Upon completion, the CenTech Park East development will provide pad-ready, build-to-suit space to support approximately 650,000 square feet of industrial space and create approximately 600 jobs, contributing to the community's overall tax base.

Charles River Labs, Shrewsbury

\$32 Million Phase 1 renovation (250,000 square foot office and lab space) of the former 400,000 Digital building located on South Street between Route 9 and Route 20 as a Biotech research facility with 300 employees in phase 1 and phase 2 and an additional 500 employees in Phase 2.

Route 9 and Maple Ave Bottling Plant/Spag's Warehouse, Shrewsbury

Approximately 27 acres available for redevelopment using the Town's Lakeway Overlay District, which allows commercial & residential mixed-use development. Concept plans were submitted in 2007 for 335 apartment units and 164,000 square feet of retail/office space.

Route 140 / I-290 Interchange Park, Shrewsbury/Boylston

200 acres in Shrewsbury, currently zoned office-research, additional 140 acres in Boylston. The property is currently being targeted as one of three priority economic development sites for the Town and will be considered for rezoning with a Flexible Development Overlay District at the May 2011 Annual Town Meeting.

Route 20 & Cherry St Industrial Park, Shrewsbury

This is a 26 acre site that has received Site Plan Approval from the Planning Board for 190,000 square feet of industrial or industrial-commercial mix.

Russell Industrial Park, Shrewsbury

Approved 7-lot subdivision, each 80,000 - 90,000+ square feet, zoned Limited-Industrial with commercial/office overlay zoning. Roadway construction is completed to the base pavement and the first lot is occupied with a 17,000 square foot building used as a contractor's office and warehouse. A 16,000 square foot office and warehouse building is currently being constructed on a second lot within the development.

Memorial Drive Business Park, Shrewsbury

Industrial-commercial park with 70,000 square foot expansion recently completed and an additional 24,000 square feet permitted.

The Shoppes at Harrington Farms, Route 9 & South Street, Shrewsbury

A 65,000 square foot Price Chopper supermarket opened in November 2010. The site has already completed MEPA review for a total of 103,000 square feet of retail and restaurant use on abutting property.

Wagner Dealerships, Route 9 & Chestnut Street, Shrewsbury

This is an approximately \$7 million expansion to an existing BMW dealership, including addition of a recently completed Mercedes Benz building, and permitting of a new Audi dealership.

Southbridge Industrial Park & Access Roads, Southbridge

The Environmental Industrial Park Access Road will connect an existing business enterprise that operates a recycling facility and landfill in Southbridge. The landfill acts as a regional site for construction and solid waste debris. There are over 150 acres adjacent to the proposed road, and these are all zoned for industry. The recycling and landfill company intends to pursue additional activities, two being trash to energy and gas to energy. The roadway is designed for industrial purposes and is 9,100 lineal feet in length. The Town has a Landfill Extension Agreement with Casella Inc. to fund \$7.2 million toward the Road project through General Obligation Bonds. Phase I of the roadway, from Route 169 to the Recycling Center, is nearing completion. The Town has received assistance from MA Development and is now working with Fuss and O'Neil to prepare a concept level evaluation and permitting review of the entire site and specific concepts and development options for 45 acres of Town-owned gateway parcels. The Town is now addressing zoning and developing a new comprehensive permitting guide in order to facilitate parcel sales and development along Phase I of the road as soon as it is complete. The second phase will loop the road to connect with Pleasant Street and include water and sewer infrastructure and will include both private and Town-owned parcels. The total project is \$17,600,000. The area of impact could be 500 plus acres and impact three Towns Southbridge, Charlton and Sturbridge. If the Environmental Industrial Park attracts future industries the impact could be even larger regionally.

NEW PROJECT

51 Technology Park Road, Sturbridge

This site is zoned Industrial Park and is designated as a Priority Development Site under the MGL chapter 43D Expedited Permitting Program. It is estimated that the site could accommodate 150,000 square feet of building. A new water line was installed in 2010 to service this and other adjacent sites via a MORE Jobs Grant. A 20,000-square foot building has been approved by the Town, leaving approximately 18 acres available for potential development.

NEW PROJECT

90 Charlton Road, Sturbridge

This site is zoned Industrial Park and is designated as a Priority Development Site under the MGL chapter 43D Expedited Permitting Program. It is estimated that the site could accommodate 75,000 square feet of building. A new water line was installed in 2010 to service this and other adjacent sites via a MORE Jobs Grant.

NEW PROJECT

198 Charlton Road, Sturbridge

This site is zoned Industrial Park and is designated as a Priority Development Site under the MGL chapter 43D Expedited Permitting Program. Adjoining parcels are developed for a variety of uses including professional services, manufacturing, and warehousing. It is estimated that the site could accommodate 50,000 square feet of building. A wetlands delineation has been completed as part of the 43D activities.

NEW PROJECT

Sturbridge Business Park, 660 Main Street, Sturbridge

This site is zoned General Industrial and is designated as a Priority Development Site under the MGL chapter 43D Expedited Permitting Program. The site contains three existing buildings totaling 153,388 square feet and it is estimated that an additional 500,000 square feet could be accommodated on the site.

NEW PROJECT

The Sturbridge Arena, Sturbridge

Project proponents plan to construct an indoor sports arena, outdoor fields, disc golf course, and an adjacent building for concessions, restrooms, and retail on a 28.39-acre site.

NEW PROJECT

Commercial Tourist District Revitalization Plan, Sturbridge

This plan identifies improvements required in the corridor in an effort promote economic development and enhance the visitor experience in Sturbridge. In addition to zoning bylaw updates, the plan calls for many physical improvements, including sidewalk and other walkability improvements, crosswalks, public parking, streetscape improvements, and signage and façade improvements.

NEW PROJECT

Basketville Properties, Sturbridge

The site is located in the Route 20 Commercial Tourist Center within the Commercial Tourist District. A site plan was approved for the site in 2009 for a project that included a brew pub, coffeehouse and restaurant, but the property remains vacant and on the market.

Atlas Box Headquarters, Sutton

World headquarters for Atlas Box and Crating, with 226,000 square feet for manufacturing and 400,000 square feet of expansion potential. This site is located on the northbound side of Route 146 and should be fully occupied by November 2010.

Sutton Plaza Expansion, Sutton

Approximately 115,000 square foot expansion of the existing 40,000 square foot Sutton Plaza, to include a 65,000 square foot Stop & Shop, 40,000 square feet of undefined retail, and a 7,000 square foot restaurant. The grade-separated changes to the intersection of Boston Road and Route 146 may or may not render the existing Sutton Plaza un-useable or require a reduction in its footprint, which will not be known until detailed engineering drawings for that project are at least at 25% design stage. It is located on the south west corner of the Boston Road and Route 146 intersection.

Cold Spring Brook Place, Sutton

Approximately 240,000 square foot multi-use project, to include a 167,000 square foot Lowe's Home Improvement retail store, 7,000 square foot 99 Pub & Restaurant, 4,000 square foot McDonald's Restaurant, and 64,000 square feet of undefined retail. This site is located southeast of the Bank of America and Mobil Gas Station at the intersection of Boston Road and Route 146. It is being actively marketed by Millbury Credit Union.

Route 16 / Route 146 Site, Uxbridge

Town has received funding under MGL Chapter 43D. Approximately 500,000 square feet of land is zoned for retail, site currently being marketed to mid-range retailers.

Bernat Mill/Downtown Uxbridge

Until a devastating fire that destroyed this building on July 21, 2007 the owners were trying to add upscale condo units, and possibly a movie theater and health club to this mill that had housed over 60 small businesses for several years. The business owners lost millions of dollars worth of property and the Town of Uxbridge lost much tax revenue.

In 2008 MassDevelopment funded a study of the former Bernat Mill site and the downtown in order to develop recommendations for redevelopment, with specific ideas for linking the two to create a vital town center. Among the recommendations were infrastructure improvements in the downtown, including a potential pedestrian river crossing between South Main St and the Mill site, as well as the renovation of the railroad

overpass at this location. Streetscape and façade improvements were also mentioned. A Downtown Committee has been established to steer this study and to coordinate the implementation of as many of these recommendations as possible.

Stanley Woolen Mill Redevelopment, Uxbridge

100,000 square foot of space with visitor-oriented retail planned as the re-use. The owner/developer has invested \$1million so far in exterior rehabilitation and sandblasting the interior. He plans to rehabilitate the interior as he gets tenants, calling this “Bootstrap Leasing”. A leaky underground fuel tank has been removed, as has 150 cubic yards of contaminated soil. The total extent of the contamination still needs to be determined.

The Mill at West River Pond (Waucantuck Mill), Uxbridge

This is a brownfield site that has had a full assessment, and much remediation has been completed. The developer received a special permit to construct 140 residential units. There are plans to replace the main building, and tear down a faulty dam.

NEW PROJECT

Gerardo’s Bakery/Wedding Emporium, West Boylston

The property owner is renovating and constructing a five-unit retail space with Gerardo’s Bakery as the anchor, for a total of 20,000 square feet. The goal is to establish a “one-stop” wedding emporium for soon-to-be married couples to obtain needed wedding amenities such as tuxedo rentals, florists, stationery/printers, entertainment, etc. The project has received all necessary approvals and is located very advantageously on West Boylston Street (Route 12) very near to Exit 4 off I-290.

NEW PROJECT

West Boylston Limited Industrial Commercial Zone, West Boylston

This is a 352-acre area northwest of Interstate 190 and northwest of Raymond Huntington Highway in West Boylston. In 2007 the Town changed the zoning in this area from Single Residence to Commercial/Limited Industrial. Allowed uses include a host of commercial uses: retail, office, restaurant, personal services, wholesale businesses, business center, bank or financial service, research laboratories, manufacturing or industrial use, warehousing, and industrial park. The new commercial site is strategically located adjacent to Interstate Highway I-190 with easy access to the Massachusetts Turnpike and I-495.

NEW PROJECT

Worcester Corporate Center, West Boylston and Worcester

Worcester Corporate Center is an 87-acre business park located in Worcester and West Boylston. Access is provided to the site from East Mountain Street/Northeast Cutoff at Century Drive in Worcester. The park has five buildings totaling 238,000 SF in place with an additional 400,000 SF of development potential over 24 acres in West Boylston. State and local permits have been secured, including MEPA compliance through the issuance of

a Final Environmental Impact Report Certification to allow for up to 750,000 SF of office, manufacturing, R&D or bio-medical use. All utilities are in place including municipal sewer and water, electric, cable and natural gas. Currently, there are five, fully operating businesses in the park. All infrastructure improvements to service the existing buildings were completed initially through private financing by the owner and then later with state economic development grants applied for by the Town of West Boylston. To date, 3,300 linear feet of public roadway has been constructed. West Boylston is anxious to construct the final 700 feet of the roadway and related infrastructure improvements that will allow access to the “shovel ready” 24-acre parcel.

Worcester-based Projects

NEW PROJECT

Former Worcester Vocational High School, Worcester

The Former Worcester Vocational High School (“Voke School”) complex has remained vacant since the school moved to its new, more modern facility on Skyline Drive in Worcester. The property lies adjacent to Gateway Park, a mixed-use development focusing on biotechnology and life science manufacturing and research (see below). The Voke School was identified in the Gateway Park Master plan as an ideal location for housing to complement the adjacent development. Predevelopment work, including accessory building demolition and environmental work, is underway. The subsequent redevelopment will include approximately 67 units of mixed-income, rental housing preserving the historic structures.

Historic Blackstone Canal District

For the past several years, a grassroots movement has been working to raise awareness of the importance of the historic Blackstone Canal to the industrial growth of Worcester in the mid-1800s. There has been much private investment in this area that has been matched with public investment through the City of Worcester’s Façade & Awning Incentive Grant Program and Microloan Program. The City was able to secure approximately \$7.5 million of stimulus funding to complete targeted streetscape upgrades in the area to improve the pedestrian experience, including streets, sidewalks, trees, benches, trashcans, and street lights. The streetscape improvement project is scheduled to begin in the first quarter of 2011. The City also approved a parking overlay for the district to continue to encourage a business-friendly process and stimulate additional private investment and redevelopment in this area.

Blackstone Canal Reconstruction Project

State and federal funds are being pursued to construct a replication of the canal along Harding Street in Worcester, where the original canal still exists beneath the street and is used as part of the City’s sewer infrastructure. The first round of funding for design, in the amount of \$750,000, has been secured. The canal reconstruction will improve the aesthetic of Downtown Worcester, increase property values, pedestrian activity, small

business growth, tourism, and leverage additional activity within the Canal District and at the adjacent Union Station Intermodal Transportation Center.

CitySquare

CitySquare, a \$565 million multi-phased redevelopment project in the heart of Downtown Worcester, is the largest public-private development project in the Commonwealth outside of the Boston area. Upon completion, the project is anticipated to create more than 2.2 million square feet of commercial, medical, retail, entertainment, and residential space. The \$470 million private investment will be supported by a \$94 million public investment in the project area, which was designated as a District Improvement Financing District in 2005, the first such designation in the Commonwealth. This designation enables the City to utilize tax revenues generated from property within the DIF project area to fund public infrastructure and public project elements in support of this major and pivotal redevelopment project.

CitySquare II Development Co. LLC, an entity controlled by Opus Investment Management (an affiliate of Hanover Insurance Group) and under the development management of Leggat McCall Properties, has acquired much of the original development site from Berkeley Investments, Inc. and has executed a lease with Unum for approximately 195,000 square feet of commercial space, known as Building H. The groundbreaking for Building H was held in September, 2010.

The general development agreement that sets the framework for the development has recently been amended to be more flexible and meet the needs of a shifting market. The City has also received a Priority Development Site (PDS) designation for CitySquare, as part of M.G.L. Ch. 43D, an expedited permitting statute.

Exchange Place Promenade/DCU Center Renovations

As part of the multi-million dollar renovation plans for the DCU Center, the City of Worcester will explore alternatives for the adjacent streets to improve the pedestrian experience around the convention center. One of the primary options under consideration is installing infrastructure improvements to make Exchange Street a place for pedestrian activities during DCU events. These improvements would also make the redevelopment of a large surface parking lot next to the DCU Center more feasible and provide a vibrant pedestrian connection to Main Street. Renovations within the DCU Center include an expansion of the concourse area and fan amenities as well as better access in terms of ADA accessibility and pedestrian-friendly environment. Other upgrades include new levels of seating, restrooms, and infrastructure – electrical, heating/cooling, evacuation and emergency access routing.

Gardner, Kilby, Hammond Initiative

The Gardner, Kilby, Hammond Neighborhood Revitalization Project in Worcester is a \$32.5 million dollar project that is transforming a 30-acre site into affordable housing, outdoor recreational space, and a new Boys & Girls Club. This project is headed by the

Main South Community Development Corporation (CDC), in collaboration with the City of Worcester, the Boys & Girls Club, and Clark University.

Gateway Park

The 12-acre mixed-use development at the northern end of downtown Worcester is a destination for life sciences and biotech companies, as well as the people who work for them. The Gateway Park Master Plan envisions a mixed-use community based around life sciences and biotechnology research. The project includes five life sciences buildings totaling 500,000 square feet of flexible, adaptable lab space designed to meet the needs of research organizations; 241,000 sq. ft. of market-rate, loft condominiums; and several planned retail establishments. Plans for a new 88,000 square foot life sciences building are underway with construction expected to begin in the first quarter of 2011. The Gateway Park project demonstrates the possibilities for creative redevelopment in what has long been an underutilized and contaminated brownfield sites.

Greenwood Street Landfill Development/Quinsigamond Village Improvements

The City of Worcester's Department of Public Works and Parks (DPW&P) has been working to complete the fill and cap of the Greenwood Street landfill. As a part of this project, DPW&P has been working closely with the Greenwood Street Taskforce to calculate the full amount of the mitigation funds that will be made available to Quinsigamond Village area and to determine the potential development and its associated costs for this area. Streetscape improvements to portions of Blackstone River Road and Greenwood Street have been completed and a Façade and Storefront Improvement Grant Program has been implemented with the mitigation funds. A parking overlay district was adopted by the City for this area, in the hopes of encouraging private investment in the area to complement the public improvements that will be ongoing. In addition, the DPW&P is working to extend Nipp Napp Trail, a road that currently dead ends in the landfill, to allow future commercial development at the site.

Main Street Improvements

As part of a larger urban renewal effort, the City of Worcester is in the conceptual stages of drafting a downtown plan spanning from Federal Square to Washington Square to Lincoln Square. The City is committed to making its downtown a more pedestrian-friendly and aesthetically pleasing environment. The Main Street improvements include upgrades to streetscape, sidewalk, streets, and other infrastructure on Worcester's major downtown arterial, Main Street, as well as its other smaller connector streets. These improvements will create vehicular and pedestrian-friendly roadways, increasing activity and generating economic value in the downtown, thereby promoting business growth.

As part of this larger effort, the City will also focus on the creation of a Creative Economy Initiative to help revitalize a number of vacant and/or underutilized properties in a key sector of the downtown, the Portland Street/Federal Square area. The plan includes establishing a collaborative public-private partnership to revitalize the targeted area by providing a variety of financial tools to encourage eligible entrepreneurs and business

owners within the creative economy to establish business operation within the targeted area. It will also open up a dialogue among all stakeholders to identify additional incentives property owners can provide to eligible tenants. The Main Street Improvement program is currently in the conceptual phase. The City intends that this program will be completed through a phased approach.

Martin Luther King, Jr. Business Empowerment Center expansion

The Martin Luther King, Jr. Business Empowerment Center has been working to complete a \$1.2 million renovation project which involves the rehabilitation and modernization of approximately 27,131 square feet of new incubator space, creating approximately 25 new small businesses and representing over 60 new jobs, further assisting in the revitalization of the distressed Piedmont-Main Neighborhood.

Massachusetts Biotechnology Research Park

The center for Worcester's biotechnology and medical research facilities is home to over 1 million square feet of first class office and research space on 105 acres and more than 20 companies generating over 2,000 jobs and close to \$3 million in tax revenue to the City of Worcester. The City of Worcester looks to expand the park, soliciting new tenants and examining surrounding sites for potential development.

North Main Strategic Planning Area/Lincoln Square Improvements

The City of Worcester has completed an economic development strategy project to identify new opportunities for development and investment in the North Main/Lincoln Square area of the Downtown. As a part of this strategy process, the City and its consultant team considered transportation improvements and evaluated the revitalization of a number of public buildings, including the Worcester Memorial Auditorium and the former Worcester County Courthouse. With the development of the strategy completed, the City is focused on implementation of the plan. Lincoln Square improvements include improved access in and around the North Main/Lincoln Square area as well as between Downtown and Gateway Park.

Plantation Street

In 2007, special legislation authorized the Worcester Business Development Corporation (WBDC) to purchase an additional 35 acres of land on Plantation Street in Worcester from the Commonwealth of Massachusetts. The land lies adjacent to the current Massachusetts Biotechnology Park which the WBDC developed in the 1980's and 1990's.

The University of Massachusetts Medical School intends to purchase approximately 26 acres of the property to construct a 1,300 – 1,600 car parking garage to support the nearby development of the 400,000 SF Albert Sherman Center. The WBDC will retain the rights to develop Biotech VI, a 100,000 SF biotechnology research facility, and the rights to develop an additional 60,000 SF building in the rear of the parcel.

Pullman Street Industrial Park

One of the most important industrial centers in the City of Worcester, the Pullman Street Industrial Park is home to a number of successful companies and large industrial buildings. The Park is located along road and rail corridors, offering easy accessibility to Interstates 190, 290, and 495. In addition, the Park is also served by freight rail lines, offering accessibility to the Port of Worcester, one of the nation's largest inland container yards.

Quinsigamond Avenue

The City of Worcester is in the process of implementing the Quinsigamond Gateway 1 project, which has been designed and will include improved truck access and traffic patterns between Southbridge Street and Route 146 as well as accommodate increased traffic flow due to the Route 146 expansion. The current design also includes bicycle lanes in both directions and improves access between Downtown Worcester, the Port of Worcester, and Route 146/I-90.

Route 146 Corridor Parcels

The construction of Route 146 resulted in several new parcels of land that were not required for the right of way. Some of these parcels will be put to public use, including the Worcester Blackstone Visitor Center and the Blackstone Valley Bikeway. Other parcels offer exciting economic development opportunities that will stimulate growth along the new highway, serving as a southern gateway to Worcester.

South Worcester Industrial Park

The City of Worcester continues to make progress on the redevelopment of the 11-acre South Worcester Industrial Park (SWIP). This project involves the environmental remediation and redevelopment of a number of brownfield sites containing blighted and underutilized former industrial properties. The first Priority Development Site under M.G.L. Chapter 43D in the Commonwealth, 49 Canterbury Street, will be redeveloped by a start-up biotechnology company. Demolition of the underutilized industrial buildings within the project area has commenced. The City's goal is to create pad-ready parcels for light manufacturing reuse, with a focus on job creation and sustainable development.

TOD - Sensible (Sense Able) Bridges

The legacy of the railroads that fed Worcester's growth into a regional economic hub is visible in the viaducts that divide portions of the City. These separations, coupled with the automobile-focused development of the 20th century, have disconnected the downtown from Washington Square, the Canal District, and Shrewsbury Street. This project seeks to restore those connections by creating a unique pedestrian experience and attractive destination points for residents and visitors alike. To that end, the City developed the "Sensible (Sense-able) Bridges" concept that assigns one of the five (5) senses to each of the bridges. The project team has created a conceptual design that explores the application of the senses to the bridges while improving the physical condition of the bridges.

Union Station/Washington Square Project/Washington Square Utility Relocation

Dramatic progress continues on the Union Station/Washington Square Project. The \$32 million renovation of the historic Union Station was completed eight years ago and it now serves as a fully functioning intermodal transportation center. The Massachusetts Highway Department has completed work on the \$7.7 million reconfiguration project of Washington Square, which has created four new City-owned parcels that will be sold for economic development purposes.

In addition to roadway improvements, the \$21 million Union Station Parking Garage, with street-activating ground floor retail space, has been completed. The next phase of the project includes relocating utilities from underneath the new parcels that were created with the reconfiguration of Washington Square, to allow for pad-ready transit-oriented development.

Wayfinding

A City-wide wayfinding/signage initiative is underway that will guide more than two million visitors and countless business travelers along Worcester's roadway network. The wayfinding initiative will improve visitor navigation within the City, increase tourism, promote small business growth and improve urban design. The design work for this initiative has been completed, and the City continues to lobby for funding for installation.

Worcester Blackstone Visitor Center

The City of Worcester, in partnership with the Massachusetts Highway Department, the Blackstone River Valley Heritage Corridor Commission, the Worcester Historical Museum, and the Central Massachusetts Convention and Visitors Bureau, is in the process of creating a Worcester Blackstone Visitor Center. Once completed, the building will welcome visitors to the city from the south and be home to the both the Historical Museum and the Convention and Visitors Bureau.

Former Wyman-Gordon Company Property

This project involves the redevelopment of an approximately 15-acre brownfield site that formerly housed the Worcester offices and manufacturing facilities of the Wyman-Gordon Company. The Company demolished approximately 367,000 square feet of the building space and is aggressively marketing the site. The City of Worcester is prepared to work with interested developers on this important redevelopment effort.

Regional Projects

Blackstone Valley Bikeway

The Blackstone Valley Bikeway will stretch from Providence, RI to Worcester along the historic Blackstone River. A significant portion of the bikeway has been constructed and

planning is underway for the remaining portions. Once completed, the Bikeway will be an important recreational, as well as transportation, asset for the region.

Four-Town Group Collaboration adjacent to Route 146: Sutton, Northbridge, Douglas, and Uxbridge

These four communities are collaborating on establishing a single vision to develop 600+ acres adjacent to Route 146. To this end a consultant was hired to conduct a study to analyze development constraints and zoning and devise a conceptual plan. Utilizing the conceptual plan as a base, Douglas, Northbridge and Sutton applied for 43D funding to undertake further work that will promote development in this area dubbed “Valley Crossroads”. The following will result from this funding:

- Northbridge/Sutton – A sewer feasibility study is complete detailing the infrastructure necessary to tie Northbridge into Sutton’s sewer system and potentially service an East Side Route 146 parallel roadway.
- Northbridge/Sutton/Uxbridge - Conceptual layouts are being developed for the east side parallel connector roadway to access several hundred acres between Main Street in Northbridge and Lackey Dam Road in Uxbridge.
- Douglas – Water and sewer feasibility studies are complete detailing infrastructure and upgrades necessary to address service needs and concerns in Douglas.
- Douglas/Sutton/Northbridge – An RFP is expected to be released this fall to develop a definitive plan submission for a parallel connector road to access several hundred acres between Main Street/Whitins Road in Northbridge/Sutton and Lackey Dam Road in Douglas.
- Northbridge/Sutton – These towns have acquired spring 2009 high resolution aerial imagery and Sutton is putting out an RFP this fall for additional topography and pictometry work

Blackstone Parkway (Route 146)/Massachusetts Turnpike Interchange Project

The Blackstone Parkway/Route 146 Project has created significant improvements to the regional highway network when it was functionally completed at the end of 2007. Additional infrastructure improvements include the ongoing \$300 million Route 146/Massachusetts Turnpike connector project rebuilding Route 146 from a two-lane local road into a limited-access parkway. The project also includes the reconstruction of a mile and a half of local streets and the construction of three new bridges.

Worcester Airport/Airport Access Road

The Worcester Regional Airport, which was recently purchased by the Massachusetts Port Authority (MassPort), is located on 1,300 acres and comprised of two runways, a 59,000 square foot terminal building with four gates, apron areas that provide parking for general aviation aircraft and commercial aircraft, a multi-tenant fuel farm, hangars and other airport-related facilities. Massport intends to advertise an RFP for qualified, interested parties to enter into a Development and Lease Agreement for the development and operation of a first-class corporate/general aviation facility. The City will continue to review all options for further development of this site. Direct Air, an air

service out of Myrtle Beach, has now been flying from Worcester to Myrtle Beach and two destinations in Central Florida for almost three years, and Worcester remains one of their top cities of the seventeen they fly to/from. They have recently announced new service to West Palm Beach which will open up southern Florida (Ft. Lauderdale and Miami) to our market.

Worcester continues to remain an attractive venue for corporate and private aircraft with about 53,000 operations last year alone.

THE CEDS EVALUATION

The purpose of the CEDS evaluation component is to fortify the link between planning and implementation. The evaluation process is meant to encourage coordination and partnerships between stakeholders in both the short- and long-term. In 2007, the CEDS Committee continued the evolution of the regional strategy by focusing on a process-oriented plan. Specifically, the Committee sought to establish the continuing dialogue on CEDS, and other regional issues, as the strategy for the year.

Therefore, the measure of goal achievement, as described below, should be viewed in the context of process as opposed to completion. Substantial Progress toward the continuation of the CEDS discussion is ultimately the goal of the Committee, so that is the standard by which the process was measured.

Status Category	Definition
Objectives Achieved	Activities led to overall accomplishment of goals and objectives.
Substantial Progress	Activities helped progress toward reaching the objectives, but the goal was not fully accomplished.
Re-evaluate and Revise New Initiative	Increased focus is needed. Activities did not achieve objectives, and strategy needs to be assessed and redeveloped.
On Hold	Evaluations cannot be ascertained at this time.

Goal 1: To strengthen the industrial and commercial sectors within the CEDS Region.

Substantial Progress. In 2007, the CEDS effort targeted community leaders and regional planners to solicit input on how economic development should be approached regionally. The outreach to the CEDS communities was extensive and the priority project list was updated and enhanced for the report. Additionally, regional planners were engaged on matters that are strongly connected to the health of the regional economy, such as water resource management, streamlined permitting, and transportation priorities. A similar effort continued in 2008.

Goal 2: To play a part in establishing an expanded, integrated, coordinated, truly multi-modal regional transportation network.

Substantial Progress.

- CMRPC staff has created a Rail Task Force comprised of a number of rail stakeholders in the region. Materials pertaining to passenger rail news events and studies in 2006, 2007, and 2008 were compiled and passenger and freight rail summits were convened in June 2007 and 2008.

- A new advisory committee was formed in 2007, the members of which were selected by the Central MA Metropolitan Planning Organization. This committee is comprised of local government officials, transportation professionals, transportation providers, and individuals experienced in economic development, freight, commuter rail, smart growth, environmental issues, regional planning, or other interest groups, ensuring broad representation and a geographical balance of its participants. This group has met almost monthly since its initial meeting in January, 2008.

Goal 3: Provide an array of workforce development initiatives (employment, education, and training) for corporate and private citizens throughout the CEDS Region.

Substantial Progress

- The Central Massachusetts Institute for Workforce Development completed its first year of operations on June 30, 2008. This program is funded by a 3-year, \$500,000 Workforce Competitiveness Trust Fund grant by Commonwealth Corporation to the Skyline Technical Fund. The program has been very successful: it has already exceeded its 3-year goal of training 400 workers over the course of the program. At the end of the first year, 412 incumbent, unemployed and underemployed individuals have been trained in manufacturing skills.
- Renewed focus has been given to assisting businesses in one of the poorer neighborhoods of the city to ensure a greater rate of success.
- A dialogue with the colleges and universities has been started that is intended to result in skills development for workers in the primary growth sectors of the regional economy.

APPENDIX A

Meeting Agenda



Lawrence B. Adams	Executive Director
Mary Ellen Blunt	Transportation
Megan T. DiPrete	Regional Services & Community Development
Janet A. Pierce	Business Manager
James R. Bates, Jr.	Commission Chair

Greater Worcester Area Comprehensive Economic Development Strategy (CEDS) 2010 Regional Update

CEDS Committee Meeting September 8, 2010
Agenda

1. Introductions
2. Discussion of purpose/goals
3. Review current project list
4. Discuss plan of attack – (appropriate municipal officials and private sector participants)
5. Set next meeting date
6. Set deadline for submittal of project updates/additions
7. Lunch



Lawrence B. Adams	Executive Director
Mary Ellen Blunt	Transportation
Megan T. DiPrete	Regional Services & Community Development
Janet A. Pierce	Business Manager
James R. Bates, Jr.	Commission Chair

**Greater Worcester Area
Comprehensive Economic Development Strategy (CEDS)
2010 Regional Update**

CEDS Committee Meeting November 3, 2010
Agenda

1. Introductions
2. Review updated document text, including project updates
3. Review submitted Priority Project Nominations
4. Vote on final text and project nominations to be included in final submittal
5. Lunch

APPENDIX B

Support Staff

The Support Staff for the 2010 CEDS Planning Process included:

- Vera Kolias, AICP, Principal Planner, CMRPC
- Megan T. DiPrete, AICP, Manager, Community Development and Planning Program, CMRPC

APPENDIX C

Other Participants in the 2010 CEDS Process

Cassandra Acly	Economic Development Coordinator	Town of Southbridge, MA
Gary Bechtholdt	Town Planner	Town of Northbridge, MA
Charlie Blanchard	Town Administrator	Town of Paxton, MA
Jean Bubon	Town Planner	Town of Sturbridge, MA
Nancy Colbert	Town Administrator	Town Of Boylston, MA
Kristen Wilson	Principal Planner/Economic Development Coordinator	Town of Shrewsbury, MA
Leon Gaumond	Town Administrator	Town of West Boylston, MA
Alan Gordon	Town Planner	Town of Charlton, MA
Jennifer Hager	Planning Coordinator	Town of Sutton, MA
Pam Harding	Town Planner	Town of Holden, MA
Julie Holstrom	Project Manager	Worcester Business Development Corporation
Kathy Joubert	Town Planner	Town of Northborough, MA
Dennis Lipka	Director of Growth Management	Town of Holden, MA
Alexandra McNitt	Executive Director	Central Mass South Chamber of Commerce
Paul Morano	Business Assistance Director	City of Worcester
Kathleen Polanowicz	Staff	Congressman James McGovern

APPENDIX D

Email Outreach for Project Updates

From: Vera Kalias

Sent: Thursday, September 09, 2010 11:27 AM

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Cc: Megan DiPrete

Subject: Economic Development Project Funding - CEDS 2010

Good morning everyone,

As some of you may know, each year a list of economic development projects which might qualify for funding support from the U.S. Economic Development Administration (EDA) are included as part of the annual Comprehensive Economic Development Strategy (CEDS). We are currently in the process of updating the 2009 Greater Worcester CEDS for submission to the EDA for 2010.

(To review the 2009 CEDS report please go to:

<http://www.cmrpc.org/files/Greater%20Worcester%20MA%20CEDS%202009%20Update.pdf>)

The EDA will partially fund public works projects and planning projects with demonstrated economic development benefits. For example, EDA has funded the development of water and sewer facilities, roadway infrastructure construction, technology infrastructure, training facilities, and even capitalized wastewater revolving loan funds.

Projects that are more likely to be considered for EDA funding are projects that are:

- Market-based
- Innovative/proactive
- Broadly supported

- Promote economic diversification
- Leverage private investment
- Support the creation of high-wage, high skill jobs
- Maximize return on taxpayer investment

This program requires regional involvement in order to bring funding into the region for economic development projects. Since inclusion of a project on the CEDS can open many funding opportunities, **your input is critical**. Please provide nominations and updates as described so that the 2010 Greater Worcester Comprehensive Economic Development Strategy is up to date.

Update CEDS Project List from 2009 Report

With the assistance of the CEDS Committee, CMRPC is currently compiling a list of economic development projects for inclusion in the 2010 Greater Worcester CEDS report. Please take a moment to review the 2009 CEDS project list (see attached) and provide me with any updates by email **no later than October 8, 2010**.

Priority Project Nomination Form

To submit a new project for consideration for EDA funding, please complete the Priority Project Nomination Form (see attached) and email or fax it to me **no later than October 8, 2010**. This form provides a detailed explanation of the seven EDA criteria listed above.

All project updates and new project nominations are due October 8, 2010. The CEDS committee will be meeting on November 3, 2010 to review the project list and to adopt the 2010 CEDS for submission to the US EDA.

Thank you very much for your valuable assistance in this regional economic development effort. Please feel free to contact me with any questions.

-Vera

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APPENDIX E

PRIORITY PROJECT NOMINATION FORM (FORM B)

A “Priority Project” is defined as a project that might qualify for funding support from the U.S. Economic Development Administration (EDA), for which the CEDS reports are prepared. The EDA will partially fund public works projects and planning projects with demonstrated economic development benefits. For example, EDA has funded the development of water and sewer facilities, technology infrastructure, training facilities, and even capitalized wastewater revolving loan funds. On the planning side, EDA has funded revitalization plans, feasibility studies, and development strategies for tourism, among other things related to increasing participation in planning and the implementation of plans.

The purpose of this form is to develop a list of projects that are either currently being considered in our region or may be in the future, which might qualify for funding support from EDA. It is standard for regions to include such a list in their CEDS report as the first step towards requesting funding from EDA. This is an effort to begin to develop a priority project list for the Greater Worcester Area.

Thanks for your help and ideas! If you would like further information on EDA funding options and parameters feel free to peruse their website: <http://www.doc.gov/eda>.

Name of Organization:		
Completed by:	<i>Name</i>	<i>Title</i>
Date Completed:		

Project Name:		
Location:	<i>Complete Address</i>	

Lead Organization:	
Contact Person:	
Brief Description of the Project:	
Estimated Cost(s):	
Potential Funding Sources:	
Status: <i>(planned; underway; etc)</i>	

Linkage to CEDS Goals: *Please place an X next to the CEDS Goal(s) that will be supported and advanced by the priority project proposed.*

CEDS Goal	X
Goal 1: To increase the overall participation, commitment, and contribution of Committee members involved in the CEDS Planning Process.	
Goal 2: To establish subcommittees to ensure the goals and objectives of the CEDS Committee are being addressed, achieved, and evaluated.	
Goal 3: To play a part in establishing an expanded, integrated, coordinated, truly multi-modal regional transportation network.	
Goal 4: To strengthen the industrial and commercial sectors within the CEDS Region.	
Goal 5: To provide an array of workforce development initiatives (employment, education, and training) for corporate and private citizens throughout the CEDS Region.	

Linkage to EDA Investment Goals: *The EDA has seven criteria that they use in evaluating projects for funding. The tables below list these criteria with a brief description. Please explain, to the best of your ability, how the proposed priority project would meet these criteria.*

Projects should be...		
1)	Market-based	Build on the competitive advantages and assets of the region
2)	Innovative/Proactive	Support and advance innovation, productivity, and help improve the standard of living in the community
3)	Broadly Supported	Supported financially and politically by local, state, and private sector groups and benefits from a strong leadership structure

Explain how your proposed project fits these criteria:

Projects should...		
4)	Promote Economic Diversification	Relates to expanding existing industry clusters and emerging clusters and creates conditions for sustained productivity
5)	Leverage Private Investment	Requires public funds to leverage private investment due to conditions of distress within the community
6)	Support the creation of high-wage, high-skill jobs	Will result in wages that are above the regional average so as to improve the overall standard of living in the area
7)	Maximize return on taxpayer investment	Should generate return on public dollars by attracting private investment and high wage jobs

Explain how your proposed project fits these criteria: