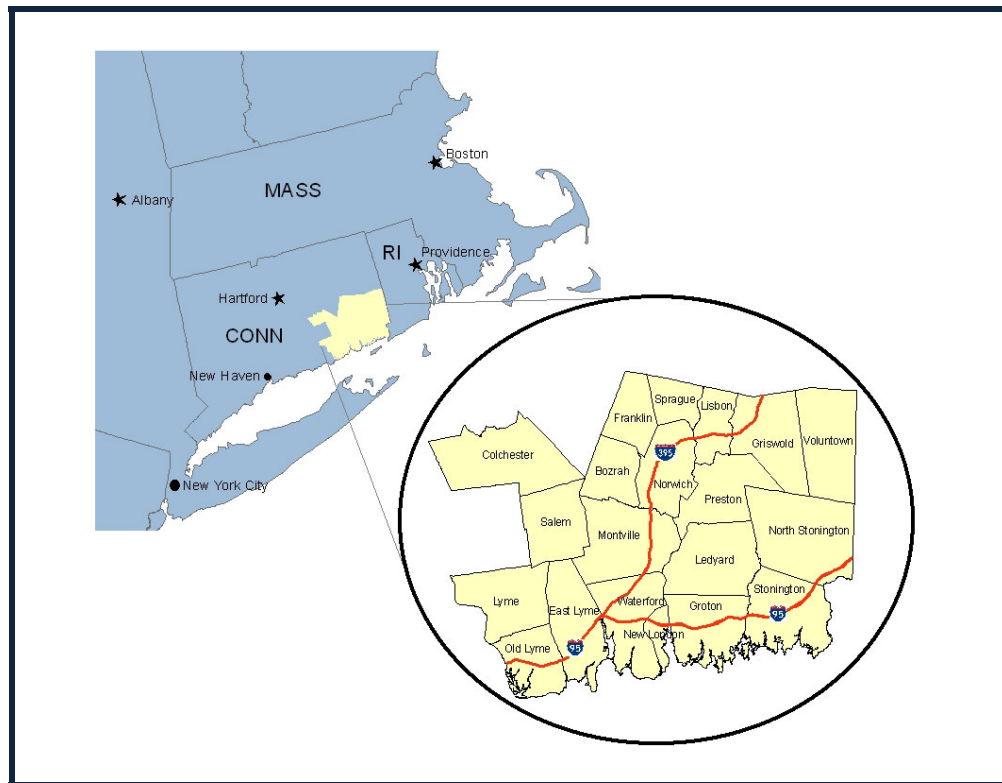


COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY 2011

SOUTHEASTERN CONNECTICUT



Southeastern Connecticut Enterprise Region Southeastern Connecticut Council of Governments



CEDS 2011

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TABLE OF CONTENTS

Executive Summary	iii
Chapter I: Introduction	
<i>Regional Definition and Basic Economic Situation since 2004</i>	1
<i>Organization and Staffing of CEDS Process</i>	3
<i>Organization of CEDS Document</i>	5
Chapter II: Background of Regional Economy	
<i>Introduction</i>	7
<i>Geography and History</i>	7
<i>Population and Labor Force</i>	12
<i>Industry Clusters</i>	16
Chapter III: Regional Assets, Challenges and Opportunities	
<i>Introduction</i>	39
<i>Location and Transportation</i>	39
<i>Education</i>	46
<i>Population Diversity</i>	49
<i>Civic Diversity and Regionalization</i>	51
<i>Economic Diversity</i>	54
<i>Quality of Life</i>	55
<i>Housing</i>	56
<i>Infrastructure and Development</i>	59
Chapter IV: Planning for the Future	
<i>Introduction</i>	63
<i>Vision Statement</i>	63
<i>Goals and Strategies to Achieve Vision</i>	63
<i>Action Plan and Implementation Priorities</i>	66
<i>Vital and Suggested Investment Projects for Region and Municipalities</i>	68
<i>Suggested Regional Programs and Action Items</i>	75
<i>Planning Grid</i>	78

Chapter V: Implementation and Reporting	
<i>Plan Oversight</i>	89
<i>Plan Implementation</i>	89
<i>Rating Projects Eligible for EDA and/or Other Funding</i>	90
<i>Project Measures Scoring Matrix</i>	91
<i>Reporting</i>	91
<i>Conclusion</i>	92
Attachment A: CEDS Strategy Committee List	95
Attachment B: CEDS Economic Development Committee List	96
Attachment C: List of Interviewees	97
Attachment D: Selected Reports and Plans Referenced	102
Attachment E: Project Review Form	104
Appendix A: seCTer CEDS Data Update – CERC	107
Appendix B: Additional Maps	182
<i>B.1 Watershed and Selected Significant Brownfields in New London Count</i>	182
<i>B.2 Broadband Coverage and Speed in Connecticut</i>	183
<i>B.3 Railroads in Eastern Connecticut</i>	184

EXECUTIVE SUMMARY

The Southeastern Connecticut region consists of the 21 municipalities and two Native American Sovereign Nations in New London County.

In 2004, the Southeastern Connecticut Council of Governments (SCCOG) and the Southeastern Connecticut Enterprise Region (seCTer) undertook the preparation of a Comprehensive Economic Development Strategy (CEDS) for the Southeastern Connecticut region. As the previous CEDS stressed, the region had undergone significant changes since 1992, when the SCCOG and seCTer were organized – from being one of the most defense-dependent areas of the U.S., with over 37,000 residents employed at submarine builder General Dynamics/Electric Boat (EB), and the U.S. Navy’s Subase New London, to one whose economy was increasingly tied to the tourism generated by two major native American casinos, Foxwoods and the Mohegan Sun. Both casinos had opened within the 12 years since 1992 and in 2004 employed over 20,000. Employment at EB and the U.S. Naval Submarine Base New London was still significant, even with downsizings at EB that had occurred in the decade of the ‘90s. Pharmaceutical giant Pfizer, located for decades in Groton, had recently expanded with a new \$300 million Global Research and Development Center in New London and was anticipated to play an ever increasing role in the health of the economy and in creating new job and business opportunities in the bio-science fields. At the same time, looming ominously on the horizon was the possible downsizing or closing of Subase New London by a federally mandated Base Realignment and Closure (BRAC) process, a closing that was averted in 2005 by the efforts of a dedicated group of local officials and businesses, spearheaded by seCTer.

In 2011, the outlook for the economy of New London County faces some major changes, both negative and positive. Many of these are being caused by factors outside of local control, including a major and on-going reorganization at Pfizer; a commitment by Congress to the building of two Virginia-class submarines annually starting in 2011; the approval of new casinos in New York and neighboring Massachusetts; the increasing globalization of the economy; and the 2007-2009 recession and general challenging economic conditions in the U.S. and the world.

Employment at the two casinos has been reduced by layoffs of up to 3000 employees, and expansion plans have been put on hold. Pfizer has downsized its employee base regionally to under 5000 in 2011 and has announced the relocation or laying off of 1100 more local employees in the next 18 months. Many of these employees will leave the region, others may attempt to open

discovery labs here or elsewhere if community support and available lab space is obtainable. As part of its corporate restructuring, Pfizer also closed its 750,000 square foot facility in New London.

On the positive side of the economic equation, the Pfizer New London property was purchased by EB to accommodate its needs for state-of-the-art space to house the skilled engineering, planning and design staff. Another positive development in southeastern Connecticut is that although, like most of the U.S. and the rest of the state, this region has an aging population, overall regional population growth from 2000 to 2010 was 5.8%, the fourth highest in the State of Connecticut, with much of the growth attributed to foreign born immigration. (CERC Analysis, Appendix 1, p. 14)

The 2011 CEDS for SECT is designed to address these changing conditions, as well as other issues and challenges facing the region. It will also build upon areas identified as economic opportunities existing regionally.

DEMOGRAPHIC AND LABOR TRENDS

Consistent with state and national trends the population of southeastern Connecticut is growing slowly and aging steadily, although in both cases less so than the state average. From 2000 to 2010, the Census shows the population has grown from 259,088 to 274,055, a 5.8% increase, the fourth highest in the State and better than the State's 4.9%. Much of the regional growth in population can be attributed, as in the nation, to immigration and the higher birthrates prevalent in the Hispanic immigrant population. In fact, the white population of southeastern CT showed a slight decrease in the last decade, the African-American population grew only 17% and the Hispanic and Asian populations grew by 75.4% and 117.8% respectively.

With the notable exception of its Hispanic population, the age of residents is increasing, again slightly less so than in the rest of the state. The median age of the White male population in the region is 40.4 years and that of the Hispanic male population is 23.4. The "graying" of the population presents a growing challenge to the region in respect to the labor force. Although the southeastern CT labor force grew by 7.4% during the last decade (higher than either national or state growth, 6.2% and 6.9% respectively), the workforce is growing increasingly older. The aging workforce is of major concern to employers in the region, particularly in manufacturing companies where skilled workers are reaching retirement age and there are fewer young workers available to replace them. However, Southeastern CT has a very high percentage of its population in the military. This, usually younger, military population, and the growing youthful Hispanic population, represent a

potential future workforce providing they stay in the region and have access to the educational and training resources necessary to fill jobs being vacated by the current workforce as it retires.

Over the past two decades, job growth in the Norwich-New London labor market area has tended to exceed the state average. Healthcare and Social Services, Professional Services and Accommodation and Food Services showed the largest increases, the latter primarily due to the opening of the two casinos in the region and the subsequent growth of tourism overall. But, during the recent recession the Norwich-New London labor market area has lost approximately 11,000 jobs, over 10% of them in the casinos. Pfizer's 2011 announcement of 1,100 layoffs has been somewhat offset by hiring in the design and engineering departments at EB, nonetheless, the unemployment rate in the region, which for most of the last decade was under 5% has been near or at 9% for the last year.

In planning for the future of the regional economy and the recovery of the national economy, the regional Workforce Investment Board (EWIB) undertook a study of Workforce Demand and the skill sets that currently exist in southeastern CT's workforce. The subsequent report identified "competency clusters" or skills that exist within the current workforce and that cross into multiple industries, both traditional and emerging. Competencies identified as current and long term drivers in the economy include engineering, measurement and manufacturing, defense and supply chain, energy management, software/IT/instrumentation and medical. These competencies and the skills sets they require – Science, Technology, Engineering and Math (STEM) will need to be cultivated in the region's schools, colleges and workplaces as a basis for growing new industries in the region and for strengthening existing industry clusters.

INDUSTRY CLUSTERS

The southeastern CT region has identified six industry groups or clusters that currently contribute most significantly to the economic base of the region: Defense, Tourism, Bioscience, Maritime Trades, Creative Technology and Agriculture. It is important to remember that neither these, nor any other, industries exist as discrete silos in the economy, but that component businesses within them frequently overlap into more than one cluster.

Defense

The Defense Cluster is anchored by the Naval Submarine Base New London in Groton, and manufacturer Electric Boat. The cluster employs over 20,000 military and civilian personnel and has

sales of approximately \$3.8 billion.¹ Other elements of the Defense Cluster include a significant Coast Guard presence, at the US Coast Guard Academy, Coast Guard Research and Development Center, International Ice Patrol and Coast Guard Station New London. Other military facilities include the State's National Guard Camp Niantic in East Lyme and the National Guard Aviation Classification and Repair Depot in Groton. Many smaller businesses support this cluster by providing material or technical consulting to the major defense industries. Many of these companies are spin-offs or were started by former military personnel. One such business is Sonalysts in Waterford where the sonar analysis skills of the founder have translated into a business that not only provides the Navy with training material, but is also a major creator of video games and operates a recording and film studio on its Waterford site. This cluster is highly dependent upon workers proficient in the STEM skills identified by the EWIB study.

Bio-Science

The Bio-Science Cluster consists primarily of Pfizer, which in 2011 employed approximately 4,500 but which is currently in a restructuring mode that will bring their local workforce to approximately 3,800 in the next year. There are other businesses in this cluster with long presences in the region including the 160 year-old Sheffield Pharmaceuticals, DeKalb Genetics, a Monsanto company, and several medical device companies. In addition there are a number of start-up firms that have originated with former Pfizer scientists, including Myometrics in New London, Constitution Bio-Fuels in Groton and Amarin in Mystic. The total employment in this cluster is over 5,000 and sales amount to over \$3.7 billion. The State of CT is seriously invested in growing the Bio-science cluster in Connecticut, but state focus is on other regions. They are investing millions in an expanded UConn Medical Center in Farmington and in incentives to Jackson Labs, which will build a new research facility, also in Farmington. The challenge to the southeastern CT region is to encourage scientists separating from Pfizer to stay in the southeastern CT region. To this end planning for provision of both incubator space and financial support, including venture capital, is a critical issue facing the region's economic developers.

Tourism

The most significant components of the Tourism Cluster are the region's two major casinos (Foxwoods and the Mohegan Sun), and marine related tourism activities that include both marine recreation (boating, beaches) and maritime history and science (Mystic Seaport, Mystic Aquarium).

¹ Employment and Sales figures referenced are based on IMPLAN input/output models, provided by CERC and found in "seCTer CEDS Data Update" in Appendix A of this report.

Approximately 26,000 are employed in regional tourism, and sales in this cluster are conservatively estimated at \$2.6 billion. In addition to the major players mentioned above, the cluster includes retailers and significant number of smaller historical and art museums.

Although the industry is perceived as offering only low paying jobs, what is less noted is that tourism provides jobs for less skilled workers, teenagers, college students, retirees, second income and entry level workers, and as such it plays an important role in the economy as a whole. Although the weak economy has resulted in job losses in excess of 2,000 at the casinos, the proximity of the region to the major marketplaces of New York, Boston and the rest of New England has shielded the regional tourism economy somewhat. Southeastern CT, or “Mystic Country,” is positioned as a short and “nearby” getaway destination, and is able to capitalize on the trend to short vacations forced upon the traveler by high costs of air travel and economic uncertainty. The tourism industry is “place” based and therefore not subject to moving offshore or out-of-state, and it supports high quality of life features for residents. The main challenges facing this cluster relate to transportation infrastructure to support ease of access and ease in getting around the region for visitors, identifying stable funding for consistent regional marketing efforts, and skills training for front line employees.

Maritime

The focus of the Maritime Cluster is on activity taking place on and under the waters of Long Island Sound. The region’s historic ties to the sea have been the foundation of its economic base for hundreds of years and the region remains a maritime center for a variety of commercial and recreational water dependent businesses and educational institutions, including Mystic Seaport, Mystic Aquarium and the University of CT at Avery Point Groton. The variety of maritime businesses creates a significant overlap in this cluster into several others including tourism, defense and agriculture, and bio-sciences. The Navy’s Submarine Base, EB, the U.S. Coast Guard Academy and activity tied to the deep water port of New London, including cargo and passenger shipping, underpin this cluster. It includes major passenger and commercial ferry service at Cross Sound Ferry, and the Thames Shipyard, which operates the largest repair facility between New York and Boston. Commercial fishing is also important in the region particularly in Stonington and New London, where scallops, fin fish, lobsters and shrimp are landed and processed for local and regional distribution. This cluster employs almost 10,000 (including the overlaps into other clusters) and has sales of approximately \$2.5 billion annually. A critical issue facing it is the underutilization of the State Pier in New London. A recent study prepared by the State of CT analyzes the potential of the

Pier, with its deep water access, rail connections to Northern England and Canada, and its recent history of successfully hosting cruise ships.

Creative/Technology

The industries in the Creative Cluster are as difficult to pin down as are those in tourism in their diversity. The Arts and Cultural activities in the region are widespread and a core asset to the regional quality of life. This cluster, however, includes more than the easily identified visual and performance arts, music and museums. It includes software publishers and designers of high technology devices, a small but growing group that includes major businesses like Sonalysts and others making their mark in the region such as Inncom, a designer and manufacturer of environmental controls for the worldwide hospitality industry, and JobTarget a designer of software platforms for human resource programs. A very conservative estimate of this cluster shows employment in excess of 5,000 and sales exceeding \$350 million. The purely artistic organizations in this cluster contribute immeasurably to the quality of life and to the educational enrichment of the population. The technology businesses represent a future direction for the region, taking advantage of the younger population drawn here both by the arts and by service in the Navy and Coast Guard. Harnessing the creative energy in this cluster and providing assistance to new businesses that arise from it is a major challenge to the region and will involve educational institutions as well as the business support services offered by seCTer, the Chambers of Commerce, and the CT Department of Economic and Community Development (DECD).

Agriculture

The smallest cluster, with the most longevity in the region, is the Agricultural Cluster. It employs less than 2,000, has sales of approximately \$119 million and includes a wide variety of businesses including dairy, fruit and produce farmers; poultry and egg producers; commercial greenhouses and nurseries; wineries; and aquaculture. The winery component of this cluster is growing as is the production of artisanal cheeses and other value-added dairy products. The challenges facing the farm community range from loss of farmland to development, to high fuel, utility and transportation costs, and to a shortage of labor. The good news for the cluster is a growing awareness among consumers of the benefits of buying locally grown food, and the importance of having local food sources from a “food security” standpoint. Major issues facing the cluster include a dearth of USDA certified dairy and meat processing plants within close range to local farms; a need for assistance to small value-added food producers; and a program to assist local farmers in selling their products to institutions, such as schools and hospitals. There is also an on-going tension

between advocates of agriculture and open space, and developer interests some of which might be alleviated with the creative of agricultural commissions in the region's suburban and rural towns.

REGIONAL ASSETS AND CHALLENGES

Location and Transportation

The southeastern Connecticut region enjoys an enviable geographic location, roughly half-way between the Boston and New York Metropolitan areas and within 500 miles of almost 1/3 of the entire population of the United States and 2/3 of the population of Canada. The region's location provides residents with access to the major cultural, retail and financial centers of the Northeast. The transportation infrastructure of southeastern Connecticut is impressive, with interstate highway, passenger and freight rail, passenger and cargo shipping facilities, and a State owned airport.

I-95 north/south, which runs east-west along the CT shoreline due to the state's alignment , and I-395 north/south from Waterford to Worcester, MA are the backbones of the regional highway system. I-95 is the most heavily traveled highway in the nation, a fact that is both a blessing to the region and a challenge, as seasonal and weekend traffic bottlenecks are common and accidents may tie up traffic for hours. Other state highways, Rte. 2 and Rte. 11 in particular, serve the region; but, Rte. 2, a local road from Norwich to Rhode Island, suffers from an enormous amount of casino traffic and Rte. 11, which begins at the divided highway portion of Rte. 2 in Colchester, dead ends at Salem. Plans to upgrade Rte. 2 and to complete Rte. 11 to I-95 have stalled over the years (decades in the case of Rte. 11) due to funding issues. Maintenance, upgrades and completions of these major thoroughfares in the region are ongoing priorities.

Parallel to I-95 and to I-395 are rail lines, which have the potential to relieve some pressure on the highway system in the region. Amtrak's Northeast passenger service runs along the shoreline connecting the region with Boston, New York and beyond. There is limited commuter rail service on Shoreline East to New Haven, connecting to Metro-North and a widespread desire in the region to increase this service and to address Amtrak's service and rates. Improved service by both Shoreline East and Amtrak would allow more local workers to commute by rail, and would encourage more tourists to travel to the region by rail, alleviating highway congestion.

The freight rail lines (Providence & Worcester, and New England Central Railroads) which run from State Pier north to Massachusetts and on to Canada are woefully underused. A plan is being considered to upgrade these lines and to create a "college corridor" passenger rail service at least as far north at Brattleboro, VT. In the meantime, both rail lines are addressing upgrades, as funding becomes available, to improve freight service from State Pier to the north. The rail lines provide

access to several Brownfield sites, notably in Sprague, Griswold and Norwich, and improvements to the rail and rail spurs are issues of some importance to the reuse of these sites. Concurrent with improvement to the freight rail lines are plans to make major improvements to State Pier, the terminus of the rail. These improvements include pier upgrades, dredging, warehouse construction and several other options including potentially building a Cruise Terminal at the Pier.

As mentioned in the definition of the Maritime Cluster, there is extensive ferry service from New London to Long Island and Fisher's Island NY and to Block Island, RI. The Long Island and Block Island services are run by Cross Sound Ferry, which carries millions of passengers and cars annually, as well as many thousands on their high-speed casino and Block Island services. Long haul trucks also use the ferries in traveling from New York to Northeast New England, avoiding the traffic congestion endemic to southwestern CT.

The final link in the intermodal transportation chain in southeastern CT is the Groton-New London Airport (GON). Commercial service at the airport ended in the early 2000's, but the facility continues to serve corporate travel and general aviation. The airport has recently completed a marketing study to consider the future of GON. For commercial air travelers in the region, the nearest major commercial airport is TF Green in Providence, RI, which is approximately 50 minutes away on average from towns on the shoreline, and Bradley International Airport in Hartford (Windsor Locks) which is closer to towns in the western and northern parts of the county. What is missing from this reasonably good availability of airline service is any public transportation to either Green or Bradley airports. Encouraging private sector investment in such service is a high priority for the region.

Intra-regional public transportation in southeastern CT is provided by Southeast Area Transit (SEAT), a public agency whose members are nine regional towns. SEAT provides transit service in and between member municipalities. Although the system is of critical importance for lower income and car-less residents, and could be a means of transportation for tourists, SEAT does have serious weaknesses including a limited schedule on weekends and at night; unclear or non-existent signage; and unavailability in non-participating communities.

There are many and extensive transportation planning documents available, many of which have been developed in the period since the 2004 CEDS. These plans will be critical in providing a framework for upgrades and improvements to all the modes of transportation in the region that are addressed in the 2011 CEDS.

Education

The level of education of residents of New London County is a significant asset for the area and directly reflects the capabilities of the workforce. The State of Connecticut has long led the U.S. in the educational level of its population and southeastern Connecticut is no exception to this position. The population of New London County exceeds both the national and state levels for High School Graduates, and for those with associate and advanced degrees.

The presence of an extremely strong set of institutions of higher learning, Pfizer, EB, Dominion Nuclear and a number of smaller high-technology manufacturers accounts for many of the advanced degrees. The region's five 4-year colleges (the Coast Guard Academy, Connecticut College, Mitchell College, UConn Avery Point and the Lyme Academy of Fine Arts), Three Rivers Community College, and a number of graduate school programs (Rensselaer Polytechnic Institute and the University of New Haven Graduate Center) influence the economic, cultural and intellectual character of the region. They not only provide residents of all ages with myriad opportunities to participate in credit, non-credit, and certificate courses fostering an atmosphere conducive to life-long learning and enrichment, but also produce a sizeable number of residents from their faculties who have advanced degrees. The students, faculty, staff, alumni and visitors associated with these institutions contribute millions annually to the regional economy. They are major employers and purchasers of goods and services from local suppliers. Students participate as interns and volunteers in local non-profits and as mentors in local public school systems. The value of these colleges to the quality of life and economy of southeastern Connecticut cannot be underestimated.

In spite of the high level of educational attainment of area residents, there are troubling and difficult challenges facing the region in the elementary, middle and high school populations. Education is administered by individual municipalities, although there are some regional high schools. Educational attainment among these municipal systems is inconsistent, with schools in the urban centers of Norwich and New London, and in some suburban towns, like Montville, struggling with language issues related to children of immigrant families, or with high levels of poverty. Over 80% of incoming students at Three Rivers Community College, who are recent High School graduates, require remedial Math and/or Reading courses. Students going directly to the workforce also face challenges in a lack of ability to read or do basic math. Often they do not have computer skills required in the high technology manufacturing environment either – including in Computer Assisted Design (CAD), Excel and basic programming. The region also continues to require access

to English as a Second Language programs for adults, students and recent High School graduates. Availability of these classes is widespread, but oversubscribed in many cases.

Another educational issue that is becoming more obvious regionally is a combination of the increasing costs of a college education, and the push to have all, or most, students attend college. This CEDS recognizes that there is a need to provide its youthful population with education and training options that might not lead to a traditional college education but will ready them for fulfilling and often high-paying jobs in trades such as plumbing, construction, culinary arts and others.

Diversity

One of the great strengths of the region is its diversity. This is noticeable in many areas: population, civic, institutional, cultural and economic. There are challenges associated with this diversity however, in issues of duplication of services, competition, and fragmentation.

The population of southeastern Connecticut is becoming increasingly diverse, with a marked increase in the last decade in the region's Hispanic (75.4%) and Asian (117.8%) populations, due in large part to recruitment and hiring efforts of the two casinos. This new population adds richness to the population of New London County as a whole, but also poses certain challenges to the education and health care systems in the region, mostly due to language and cultural issues. The growing cultural diversity of the region, particularly in the Chinese and Hispanic populations, does offer some interesting opportunities for southeastern Connecticut with several towns establishing "sister city" relationships with Chinese communities, and, with the support of local Chinese residents, encouraging foreign investment in the region. The presence of residents of diverse cultures who are increasingly engaged in the community enhances the region's ability to understand and to compete in the global economy.

The diversity of communities in the region is also an important strength. The 21 municipalities of the region include small rural towns and villages; mid-sized and small suburban communities; and three urban centers. Residents are able to choose their lifestyle from these three options, most of which include a range of housing types and costs that allow for diverse populations within each municipality. Outside of the immediate region, and within one or two hours drive, the diversity continues with both major and mid-sized cities, and rural open spaces.

The challenge posed by a small region composed of 21 towns resides in the inefficiencies and expenses that ensue from providing similar or identical services among these towns. Competition among the towns for commercial development to alleviate the residential tax burden is also an issue, as is the need for workforce (or affordable) housing in towns outside the urban areas. The heavy

concentration of social service agencies and services in the urban centers, and the concomitant concentration of populations in need, including the homeless, in those communities is an area of particular regional stress.

In addition to the diversity of municipalities in southeastern Connecticut, there are several regional agencies which act, both separately and together, to promote the regional economy. These include seCTer, several Chambers of Commerce, and two tourism marketing organizations. While these organizations work together on many issues, there is some overlap in programs here, as there is in municipal services and social services.

The diversity of the economy of Southeastern Connecticut is also one of its significant assets. The real strength of this business diversity lies in an ability to absorb a variety of workers, from professionals and entrepreneurs to students and second job seekers; from entry level and less skilled workers to highly skilled trades and technology workers. The job market in southeastern Connecticut is able to provide work for both nuclear engineers and hotel housekeepers and for a huge range of jobs in between. Although recently the economy overall has been negatively impacted by national and worldwide issues, with the regional unemployment rate rising from 4.3% in June 2007 to 9% in June 2011, the basic economic structure of the regional economy remains diverse enough to continue to accommodate a variety of jobs as the national situation improves. Identifying worker skills required by employers in both existing and emerging businesses, particularly in the fields of technology and alternative energy, is one of the overriding issues that the region needs to address.

Quality of Life

Quality of life is one of the most important assets of the region, and one that makes this place most attractive both to visitors and to new businesses and potential residents. Some of the assets encompassed in New London County's quality of life include the many marine resources of the region, both for business and recreation; the rich regional history and heritage organizations; the amount and diversity of quality cultural and arts opportunities; the health care system; the generally low crime rate; and the beauty of the region in its open spaces, hills, beaches and climate. Other assets include the depth and breadth of human and social service agencies that exist to serve increasing populations in need, which, because of the on-going weakness in the economy, are becoming ever larger.

A challenge facing all of the non-profits in the region, from arts, heritage and cultural organizations, to social and human service agencies, is the competition for funding and the need to quantify the results of funding in the form of grants and donations. The SCCOG recently

established, under their auspices, the SCCOG Regional Human Services Coordinating Council. This group meets regularly to discuss and coordinate the activities of the human/social services agencies in the region. There are plans to create a Regional Arts Council; and the Heritage Community has on-going plans for joint exhibits, programs, marketing and educational opportunities. Other programs identified to create efficiencies in delivery of services should be fully supported as a quality of life issue.

One of the regional strengths widely lauded during the CEDS process was the quality of health care available to residents of New London County. Two excellent community hospitals in the region, William W. Backus of Norwich (Backus) and Lawrence and Memorial of New London (L&M), provide almost 450 beds and a complete range of medical and surgical services to the region. A third hospital in nearby Westerly RI, which recently opened an out-patient and re-habilitation center in North Stonington adds an additional layer of health care to area residents. Access to health care for all is an issue, with language and cultural hurdles, and to some extent transportation availability needing to be addressed in the region. Other challenges include the necessity for on-going education for health care professionals, and recruitment and retention of more primary care physicians for the region.

A critical contribution to a region's quality of life and its economic health is housing for all residents. A 2004 report concluded that there were serious issues related to the availability and affordability of housing in the region and that the region would fall short of meeting the balance between owner-occupied housing and rental units given the then current construction trends. The recent recession has changed this picture somewhat. Prices of housing have fallen dramatically, as have foreclosures, but the supply of affordable housing remains problematic, the ability of residents to find financing to purchase homes is difficult, and convenient available rentals are still hard to find. Although housing is not as acute an issue as it was before the 2008 recession, it is still an issue, mostly affecting the low and middle income worker, entry level workers, young families, and the elderly. There is a need for the region to address housing issues forcefully if it is to retain and attract the labor force needed by its economy. The Southeastern CT Regional Housing Alliance (SECHA) is an important agency in providing the leadership and direction to the region is addressing housing issues.

Infrastructure and Development

There are daily challenges faced by both businesses and development offices in local and regional municipalities. Some are beyond the control of municipalities and businesses, others require

strong advocacy efforts on the part of the business community, others may be addressed by development of new programs, or obtaining funds to develop infrastructure and remediate Brownfields.

There is a shortage of available “shovel ready” and “green” land for development, and there are a number of Brownfields that require high levels of remediation and infrastructure upgrades, including transportation infrastructure, in order to make them developable. What “green” land there is often lacks necessary infrastructure to attract investment. While southeastern Connecticut has a robust utility infrastructure, water and sewer lines and natural gas are not available in some areas and municipalities, hindering commercial growth. The region is projected to experience a severe water deficit in the next three decades. Waste water treatment facility construction or upgrades will also be necessary in order to build out sewer and water lines in areas where they do not exist.

Regulatory and permitting processes for development can be lengthy, confusing and onerous, or are perceived to be so by developers, both large and small. A specific area that could benefit from improved permitting relates to Brownfield sites, including closed, abandoned and underused factories, and aging commercial buildings in downtowns. Providing streamlined procedures for bringing such sites into productive reuse is a method that local commissions and the State of Connecticut should and could adopt to foster sustainable development, reduce sprawl and protect the environment.

In addition to the “hard” issues relating to development, there is an ongoing “soft” issue, that of the recognition of the region’s “Brand.” In 2005 the “*Governor’s Commission for the Economic Diversification of Southeastern Connecticut*,” produced a “Brand Platform” for the region, which has not been fully adopted, as it was perceived as somewhat unclear. There is a continued desire on the part of the business, arts, heritage, agriculture, and maritime communities to clarify for outsiders, and for those within the region, just what makes southeastern Connecticut such a good place in which to do business and to live. Developing a coherent brand and a marketing plan that encompasses the diversity of the economy and the quality of life is a regional priority.



MISSION STATEMENT AND GOALS SUMMARY

Following the process of eliciting stakeholder input into the assets, challenges and opportunities facing economic development in southeastern Connecticut, the CEDS Strategy Committee formulated a vision statement for the region that will be the basis for future regional development. This vision recognizes the importance of the individual and the community in any plan for growth, and appreciates the importance of the region's natural advantages in contributing to overall quality of life.

Vision Statement

Southeastern Connecticut will have balanced, diversified, and sustainable regional economic growth that produces shared prosperity, encourages continuous individual achievement, and conserves our existing natural resources.

This vision, and input from stakeholders, informed the formulation of five goals that will guide activities to achieve that vision; strategies and actions within each goal; and a list of both capital projects and program investments identified by stakeholders as actions to be taken in building the southeastern Connecticut economy. The Goals and Objectives of the plan are:

GOAL ONE: *Promote a regional collaboration around economic development that unites the region behind this common vision*

- A. Establish a CEDS Implementation Committee
- B. Foster partnerships and collaboration to create efficiencies in regional organizations and municipalities
- C. Increase awareness of residents and municipal leaders of benefits of regional identity and organizational activities
- D. Build a more diverse leadership base

GOAL TWO: *Ensure the continued strength of existing economic base while seeking to diversify the economy through the development of the region's core competencies.*

- A. Promote Small Business Development and New Entrepreneurship
- B. Support Creative Strategies for Business Investment and Market Development
- C. Support the Vitality of the Regional Manufacturing Base
- D. Ensure the Continued Strength of the Region's Defense-related Facilities and Companies
- E. Support the Sustainable Development of the Region's Tourism Industry
- F. Support the Growth of the Maritime Cluster

- G. Promote the Region's Arts and Cultural Organizations as an Economic Engine
- H. Support New Economic Opportunities in the Agricultural Cluster

GOAL THREE: Enhance the physical infrastructure needed to support the region's development

- A. Strengthen the region's intermodal transportation system
- B. Provide Sites and Utilities needed to support the region's economic development priorities
- C. Support State of Connecticut Plans for improvements at State Pier New London
- D. Support implementation of the Southeastern CT Housing Alliance Strategic Plan

GOAL FOUR: Promote Education and Training Opportunities that Create and Sustain Careers

- A. Further enhance the Positive Relationships among the Workforce Development System, Educational Institutions and the Business Community
- B. Establish a regional Initiative to Attract and Retain Workers
- C. Develop Tourism career initiative
- D. Develop STEM Skills training and core educational competencies in region's high schools to meet needs of all businesses
- E. Maintain and augment the capacity to produce a highly-skilled workforce
- F. Engage Regional Economic Development Organizations in Critical Regional Education and Workforce Development

GOAL FIVE: Enhance the regional quality of life, in urban centers, rural areas and suburban communities

- A. Enhance the downtowns in region
- B. Support activities of regional health care providers
- C. Support coordinated, collaborative and effective services to at-risk populations to help them achieve productive, fulfilling lives
- D. Promote regional sustainable land use policies
- E. Protect water quality and recreation

PROJECTS AND PROGRAMS AND IMPLEMENTING CEDS

Achieving the goals and implementing the objectives outlined above will take a concerted effort by agencies, municipalities and organizations, all of whom have different roles to play to advance the economy of southeastern CT. During the CEDS process projects and programs to accomplish these goals were identified by all the stakeholders who participated in interviews conducted by the staff and Economic Development Committee of seCTer. All Projects and Programs

contribute to, or are vital to, the fulfillment of regional Goals identified in the CEDS and to achievement of the regional Vision. Pages 78-87 in the CEDS expand the strategic Goals by assigning action items in the form of projects and programs to each goal and strategy. All action items are coded: “VRP” indicates a Vital Regional Project; “VMP” indicates a Vital Municipal Project; “FSP” stands for Future Suggested Projects; “A” indicates a program action. The CEDS Strategy Committee carefully reviewed these projects and assigned them priorities based on guidelines outlined by EDA and on the Committee’s judgment as to their importance in improving the current economic landscape and planning for future growth. Complete lists and rankings of all projects and programs are also in the body of this document in Chapter IV, “Planning for the Future,” pages 68-77. The lists provide, based on best approximations, information on investments required, jobs created or retained, and funding sources that might be available to carry out these projects.

The municipal and regional projects identified in the CEDS may be candidates for EDA or other Federal or State funding. Possibilities include: the State of CT Brownfield Remediation Fund; the Environment Protection Agency (EPA); the U.S. Department of Agriculture (USDA) and State of CT Department of Agriculture (CTDOA); EDA programs including Revolving Loan Funds, Global Climate Change Mitigation Investment Fund and Infrastructure investment funds and others.

The endorsement of any project for submission to funding agencies will be the responsibility of the CEDS Strategy Committee. A Project Review Form will be completed by the appropriate municipality, or sponsor, for any project that has advanced to the point where it may be eligible for funding consideration. The CEDS Strategy Committee will review these forms and score them prior to submission to specific funding agencies. The project’s score will consider consistency of the project with CEDS Goals, EDA investment priorities, State of CT Economic Development Plans and SCCOG regional plans. Points will also be given to projects based on their economic impact on the region: jobs created or retained, leverage of public and private investment, contribution to the region’s economic development, and tax base increase or stabilization. The feasibility of projects will also be taken into consideration with the Committee reviewing financial commitment, sustainability and municipal and legal approvals. In reviewing the projects, linkage must be clearly demonstrated among the project, regional or municipal needs, and one or more strategies of the CEDS.

While implementation of the goals, projects and actions of the CEDS are spread among municipalities, regional agencies, organizations and private businesses, it will be the role of the CEDS Strategy Committee and the seCTer Economic Development Committee, to monitor progress

on these projects and actions. The seCTer Economic Development Committee will provide guidance to municipalities and organizations in accomplishing their programs and will be responsible for developing an Economic Gardening Program that will undertake action items relating to growing and strengthening new and small businesses. This committee will regularly report to the CEDS Strategy Committee progress to date on achieving milestones identified on the implementation matrix. The CEDS Strategy Committee assisted by seCTer Staff will submit an annual report to EDA reviewing the status of the Action Plan/Implementation matrix and identifying any additions or changes to the plan based on circumstances. This report will include details on the progress being made on Vital projects and on Action items in the CEDS. If changes are made to the project lists in regard to feasibility, funding availability or sustainability, these will also be reported.

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native American casinos, Foxwoods and the Mohegan Sun. Both casinos had opened within the 12 years since 1992 and in 2004 employed over 20,000.¹ Plans were underway in 2004 for major expansions of both casino resorts, five new hotels had either recently opened or were under construction, and overall tourism was growing steadily. Notwithstanding the loss of over 17,000 defense positions during the previous decade, employment at EB and the U.S. Naval Submarine Base New London was still significant, as it was at pharmaceutical giant Pfizer, a business located in Groton since the mid-20th century. In 2004, Pfizer had recently built and moved into a new \$300 million Global Research and Development Center in New London and was anticipated to play an ever increasing role in the health of the economy and in creating new job and business opportunities in the bio-science fields. At the same time, looming ominously on the horizon was the possible downsizing or closing of Subase New London by a federally mandated Base Realignment and Closure (BRAC) process, a closing that was averted in 2005 by the efforts of a dedicated group of local officials and businesses, spearheaded by seCTer.

In 2011, the outlook for the economy of New London County again faces some major changes, both negative and positive. Many of these are being caused by factors outside of local control, including a major and on-going reorganization at Pfizer; a commitment by Congress to the building of two Virginia-class submarines annually starting in 2011; the approval of new casinos in New York and pending approvals in neighboring Massachusetts; and the 2007-2009 recession and general challenging economic conditions in the U.S. and the world.

Employment at the two casinos has been reduced by layoffs of up to 3000 employees, and expansion plans at Mohegan Sun have been put on hold due to a decrease in revenues that began in 2008, a trend only now beginning to slowly reverse.² Pfizer has downsized its employee base regionally from over 6000 in 2004 to under 5000 in 2011 and has announced the relocation or laying off of 1100 more employees regionally in the next 18 months.³ Many of these employees will leave the region, others may attempt to open discovery labs here or elsewhere if community support and available lab space is obtainable. As part of its corporate restructuring, Pfizer also closed its 750,000 square foot facility in New London.

¹ Comprehensive Economic Development Strategy for Southeastern Connecticut, 2004, p. iv

² “Casino Slots Continue to Slide,” New London, CT, *The Day*, 5/16/2008; “Slot Takes Down at Both Casinos,” New London, CT, *The Day*, 8/16/2011.

³ “Pfizer Layoff off 1,100 Locally As It Cuts R&D Expenses,” New London, CT, *The Day*, 2/1/2011

On the positive side of the economic equation, the Pfizer New London property, built in 2001, was purchased by EB to accommodate its needs for state-of-the-art space to house the skilled engineering, planning and design staff it will need for development of advanced submarine technologies for current and future undersea platforms. Another positive development in southeastern Connecticut is that although, like most of the U.S. and the rest of the state, this region has an aging population, overall regional population growth from 2000 to 2010 was 5.8%, the fourth highest in the State of Connecticut, with much of the growth attributed to foreign born immigration. (CERC Analysis, Appendix 1, p. 14)

The 2011 CEDS for SECT is designed to address these changing conditions, as well as other issues and challenges facing the region. It will also build upon areas identified as economic opportunities existing regionally.

Organization and Staffing of CEDS Process

Following the approval of a CEDS planning grant from the EDA in October 2010, seCTer began the process of organizing committees, outside consultants, and staff to prepare the document. The seCTer Board of Directors was named the CEDS Strategy Committee, as its organization includes all the relevant and required representation necessary for the CEDS process. Its regularly scheduled bi-monthly meetings would also easily accommodate additional time to discuss and evaluate the CEDS process as it proceeded. seCTer's Economic Development Committee, staffed by Ms. Deborah Donovan, Director of Economic Development/Marketing, and chaired by board member Ms. Tricia Cunningham, President of the Greater Mystic Chamber of Commerce, was charged with organizing the details of the CEDS process. This committee assisted the CEDS staff with preparing lists of interviewees, contacting individuals and organizations for input, and attending interview sessions as schedules permitted. The committee also reviewed interview notes and offered suggestions for organization and summarization of these notes into the final CEDS document.

With funding provided by the State of Connecticut Department of Economic and Community Development (DECD), seCTer contracted with the Connecticut Economic Resource Center (CERC) to prepare a data analysis of the region as of spring 2011, which includes current census, economic, labor and employment data. (See Appendix A.) This document was used as a discussion guideline for over 50 interviews with over 200 people representing a wide range of stakeholder organizations, businesses, agencies and municipalities from the region. As the

interviews proceeded, it became apparent that most regional interests, groups and individuals identified similar issues, assets, and opportunities facing New London County, which will be discussed in Chapter III of this document. And, while several seem unrelated to each other, they usually are consistent with an overarching theme -- that development of, preparation for and accessibility to good jobs for all residents is of paramount concern to regional businesses and cultural and municipal leaders.

While the interview process proceeded, the CEDS Strategy Committee reviewed the previous CEDS 2004, comparing it with issues currently facing the region that were identified in the CERC report and in on-going stakeholder discussions. Recognizing that long-term skills development for workers would be a critical issue facing the region, and that support and advancement of local entrepreneurs and existing small businesses are effective means of building a viable economy, they devoted two regular meetings to educational sessions on programs addressing these issues. At the January 2011 meeting the Eastern Connecticut Workforce Investment Board (EWIB) presented a unique way to categorize the underlying skills needed for specific occupations. EWIB is working with local schools and universities to develop and to enhance existing skills in students and workers in preparation for their successful employment in both current and pioneering 21st century jobs. In March, Chris Gibbons of Littleton CO gave the committee a presentation on “Economic Gardening.” This program, developed by Mr. Gibbons and his community, addresses the needs of existing businesses and through Littleton’s Economic Development Commission, provides these, as well as new enterprises, with tools needed to grow their enterprises. This assistance takes in elements such as market analyses, supplier identification, international sales, and worker growth. The Strategy Committee agreed to consider inclusion of both of these programs, “Competency Clusters” and “Economic Gardening,” in the strategic goals programs identified in the CEDS.

The Strategy Committee and the Economic Development Committee continued throughout the process to propose and discuss goals for addressing issues raised, and projects and programs to implement solutions. Most programs proposed were evaluated by considering solutions that have been successfully implemented elsewhere. Capital projects that were identified were prioritized by the CEDS Strategy Committee, based on municipal and regional needs; status of projects relative to existing planning and funding; and prospects for contributing to the overall economic development of the region in a timely fashion.

Organization of CEDS Document

The balance of this report is organized as follows: Chapter II of the report will discuss the regional economic background of southeastern Connecticut, including a short review of the geography, history and resources of the region; a summary from the CERC Analysis report of population numbers, age, education, and other demographic information; and an analysis of the region's main Industry Clusters, or economic drivers. Challenges facing these clusters, both from outside forces and regional issues will be addressed in this chapter as well as future opportunities for their continued success.

The third chapter of the CEDS will discuss additional assets, challenges and opportunities facing the region, all of which relate in some way to the strength of the economy and the quality of life that southeastern Connecticut enjoys. These were all identified during the interview process and in on-going committee discussions and analysis.

Chapter IV will present the Goals, Objectives, Strategies and Actions that the CEDS Strategy Committee proposes as a framework to address challenges and to exploit opportunities identified and discussed in Chapters II and III. This section of the document will also include priority lists of Vital and Suggested investment projects, and programs that will direct regional growth and development in the next five years and that are the Action items necessary to carry out Goals.

Chapter V will outline how implementation of the plan will be administered by the CEDS Strategy committee, and how progress will be reported to the Economic Development Administration (EDA) and the State of Connecticut Department of Economic and Community Development (DECD).

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CHAPTER II -- Background of Regional Economy

Introduction

Appendix A accompanying this CEDS, prepared by the Connecticut Economic Resource Center (CERC), contains a thorough data update as of April 2011 for southeastern Connecticut. This report outlines and analyzes demographic, labor force, employment, income, housing and quality of life data for the region and discusses industry clusters and linkages. This chapter will provide an overview of the region's economic history, additional background to supplement CERC's data, and will visit a number of their key data points which will, or may, prove influential in the growth of the regional economy. It will also review the industry clusters identified both in the CERC report and the previous 2004 CEDS and identify challenges and opportunities confronting those clusters relative to the overall economy of southeastern Connecticut.

Geography and History

New London County comprises a 21 town region in the southeastern corner of Connecticut, bounded by the Connecticut River to the west, Rhode Island to the east and Long Island Sound to the south. The northernmost towns in the region border on adjacent Tolland and Windham Counties. Thirty per cent of the population of the region resides in the three major urban areas of New London, Norwich, and Groton with the balance of the population in less densely populated rural and suburban communities. Both New London and Norwich, and the rural town of Sprague, meeting certain criteria of high unemployment, persistent poverty and lower than average per capita income, are defined as distressed communities by State of Connecticut.⁴ The "distressed" designation provides these communities with specific tools for offering business incentives and fostering job creation through the State's Enterprise Zone (EZ) program. In addition, the town of Groton and portions of Griswold and Lisbon also include EZ designation; in both cases due either to significant downsizing (EB), or closing of (Triangle Wire in Griswold) manufacturing facilities in those communities and the accompanying loss of jobs.

The current economy, and to some extent the current development issues facing southeastern Connecticut, are both informed by the region's geography and history. New London County is bisected by the Thames and Shetucket Rivers, and bounded by the Pawcatuck River on its southeastern side and Connecticut River on the west; Long Island Sound forms its southern border

⁴ These three communities are ranked 7th, 14th and 22nd respectively in the State's "distressed" list – out of 169 municipalities. List and criteria used may be found in Appendix B.

from the Connecticut River to the Pawcatuck River, and provides easy access to the shipping lanes of the Atlantic Ocean. These marine resources have influenced the types of economic growth on which the region has depended since the 1600's.

Industrial activity has taken place along the watershed comprising the Connecticut, Thames, Mystic, and Pawcatuck Rivers since the region's settlement in the mid 17th century, with factories and mills a prominent feature of the large and small towns along the rivers: Sprague, Griswold, Lisbon, Norwich, Montville, New London, Ledyard, Groton and Stonington. The first industrial site in the region was a grain mill located on a short tributary of the Thames in New London, built by founder and future Connecticut Governor, John Winthrop, Jr. During the 19th century, textile and other mills flourished, particularly in Norwich, where the industrial economy created a merchant class of great wealth and an architecturally striking city. In the late 20th century most of these mills were closed as the textile and clothing industry moved to the south, and eventually off-shore; some have been converted to other uses, have been restored or are in the planning stages of restoration; others have fallen into disrepair; and several have succumbed to spectacular fires. The remediation of the remaining buildings such as the Connecticut Castings Mill (Pawcatuck Landing, LLC) in Stonington, the mills in the waterfront areas of Norwich, and the Triangle Wire and Cable Mill in Griswold, or now vacant sites like that of the fire-ravaged Baltic Mill in Sprague, represent an enormous challenge, as well as development opportunities for the region. Several of these buildings and sites have been identified as potential Vital projects during the process of preparing this CEDS.



Ruins of Baltic Mill, Sept. 2003 D. Donovan

Proximity to rivers extending far inland and to Long Island Sound also fostered a robust maritime industry in southeastern Connecticut, again beginning in the mid-17th century. Coastal shipping and trade between the region and the West Indies was the basis of the economy well into the revolutionary era. Most of the trade originating in southeastern Connecticut was in shipments of food and livestock, particularly horses, bound for the West Indian Island possessions of France and Britain that were so overly dependent on sugar production that they had little available land for growing food or raising animals. The agricultural industry of the region has changed considerably since colonial days, as the already scarce cultivatable land has been given over to ever more

residential and commercial development. However, southeastern Connecticut still remains relatively rural, and at a 5% loss between 1995 and 2006, is losing agricultural land at a slower pace than is the rest of the State.⁵ Regional farmers, like their counterparts throughout the northeast, are turning to Community Supported Agriculture (CSA), dairy cooperatives, hydroponic vegetable cultivation,⁶ wineries, value added food production such as cheese and juices, and agri-tourism in an attempt to keep their segment of the economy relevant. Their efforts offer some creative opportunities both for enhancing tourism and for dealing with food security issues in the region.

Over the years, the maritime agricultural trade morphed into whaling and sealing, ship and yacht building, commercial fin and lobster fishing, and ultimately to maritime related tourism and water-dependent recreation, the last of which continues to be a mainstay of the tourism industry in the region. Commercial fisheries, coping with depleted stocks of fin fish, are turning to shellfish aquaculture, which is a growing piece of the regional economy. Boat building and the associated businesses that supply parts -- from precision instruments and coatings, to canvas sails and sailing hardware -- still flourish in the region, exemplified at their most significant by EB's submarine manufacturing, and including wooden boat building, most notably at the Shipyard at Mystic Seaport Museum.

The deep water Port of New London also enticed other business to the region during the 19th and 20th centuries, most notably the U.S. Navy, the U.S. Coast Guard, and Pfizer, Inc. The harbor, encompassing the shores of both Groton and New London, and extending up the Thames River to Norwich, with its depth, its proximity to the Atlantic, and its sheltered moorings recommended the area to the U.S. Navy in the 1860's when a coaling station was

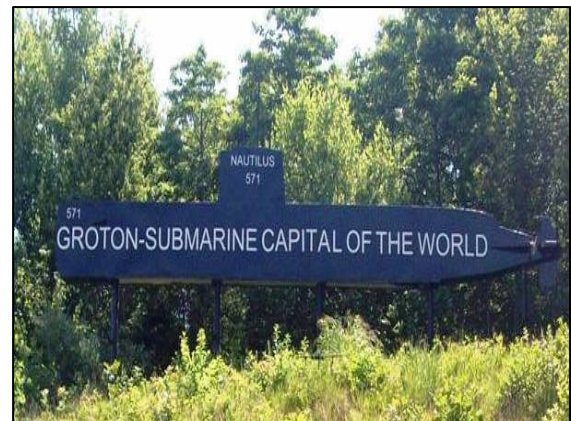


Photo Courtesy of Groton Utilities

established on the banks of the Thames. Shortly thereafter, the State of Connecticut, encouraged and financially supported by business interests in New London and Groton, offered land in Groton and Ledyard to the Federal Government for the establishment of a full-fledged Navy Base. By 1916, Subase New London (actually in Groton) was located in the region, where it has remained arguably the center of both the region's economic health and its identity. The synergy between the

⁵ See Figure 11.4, "seCTer CEDS Data Update," Appendix A, p. 73

⁶ "A Wet Thumb: Hydroponics help Maple Lane expand its offerings," New London, [The Day](#), 5/15/2011

Subase and EB's submarine manufacturing just a mile away were specifically cited during the 2005 BRAC process as one of the main reasons for keeping Subase New London open and active.

When the government appropriated funding in 1901 to establish a permanent training facility for the U.S. Revenue Cutter Service, Fort Trumbull, an obsolete Army site overlooking New London since the Revolutionary War, was turned over to Revenue Cutter Service for this new use.

*"The New London location offered easy access to the sea. The protected waters off Long Island were well suited for training."*⁷ By 1925, with new missions and old training facilities straining the service, funding was again allocated for a new school to train leaders for what was now the U.S. Coast Guard. As had happened in the previous century with the Navy, business leaders and residents of New London stepped forward and assisted in locating and partially donating land within the City and overlooking the Thames River for the new Coast Guard Academy. This highly regarded service academy continues to play a prominent role in the educational, economic and cultural landscape of New London County.

New London Harbor and the availability of a former industrial site on the river was also the attraction to Pfizer, Inc., which in 1946 purchased a surplus WWII submarine shipyard along the Thames River in Groton to develop as a manufacturing site for increased production of its wildly successful antibiotic, *Terramycin*. Not only the availability of this surplus Brownfield site, but also access to the Atlantic and a deep water port into which shipments of raw materials could flow, brought southeastern Connecticut what would become one of the major drivers of its economy for decades to come. In 1960 Pfizer furthered its growth in the region when it consolidated *"its U.S. research operations...into modern laboratories in Groton...,making that site its center of medicinal research."*⁸

Tourism, which is currently one of the major drivers of the regional economy, has also historically been tied to the region's marine environment. In the mid to late 19th century, New London became a resort community for the more affluent of the middle class, from the urban areas of New York City, Hartford, Albany and Springfield. Transportation was provided by a robust steamship system, and on the railroads from New York and north. Smaller resorts also sprang up in other towns which became hosts to different classes of city dwellers: immigrants from the Lower East Side who frequented the boarding houses of Chesterfield (Montville) and Colchester, and

⁷ "The United States Coast Guard Academy: *A Brief History*."

http://www.uscg.mil/history/uscghist/uscga_history_final.pdf, 8/18/2011

⁸ Ogden Tanner, *25 Years of Innovation: The Story of Pfizer Central Research*. (Lyme, CT: Greenwich Publishing Group, Inc., 1996) 26-27, 32

middle class families who built cottages and summer homes in East Lyme, Old Lyme, and Groton. Although the boarding house vacation culture has mostly disappeared, the beach communities in coastal communities still attract vacationers throughout the summer season. Other tourists in the late 19th and early 20th centuries were artists, who founded summer art colonies in Old Lyme and Mystic, laying foundations for the Florence Griswold Museum and Mystic Art Association, both mainstays of the cultural and tourism sectors of today's economy.

By 1929, as the region's traditional seafaring businesses of shipbuilding and fishing began to disappear, the Marine Historical Association, today known as Mystic Seaport, was founded in Stonington as a dynamic, educational institution to preserve America's maritime culture.⁹ In 1941 the last remaining wooden whaling ship, the then 100 year old *Charles W. Morgan*, was purchased by Mystic Seaport and brought from New Bedford, MA to CT where it became the centerpiece of its collection. Mystic Seaport, the largest institution of its kind in North America attracts over 350,000 visitors and researchers a year to the region. It also operates a shipyard specializing in the traditional Mystic region trade of wooden ship building. A replica of the *Amistad* was built at their shipyard, and currently the *Charles W. Morgan* is being totally overhauled with the intent of taking her to sea again in 2014.¹⁰ Also in Mystic is the Mystic Aquarium, one of the nation's leading aquariums and the host organization for Dr. Robert Ballard's Institute for Exploration. The Aquarium boasts over 650,000 visitors a year, making it the region's most visited non-gaming attraction. In Groton the Submarine Force Museum is the home port of the Historic Ship *Nautilus*, the world's first nuclear powered submarine, built at nearby EB.



Mohegan Sun from Thames River

Maritime related tourism businesses were joined in the early 1990's by new attractions, the Native American-owned Foxwoods Resort and Mohegan Sun Casinos, which have changed the landscape, literally and figuratively, of southeastern Connecticut and which are responsible for most of the economy's growth in the last two decades. The advent of the casinos, not only bolstered the tourism industry and changed it from its traditional maritime roots, but also was instrumental in halting the downward slide in employment caused by downsizing at Electric Boat occasioned by the end of the Cold War. Currently, although economic conditions

⁹ "Celebrating 75 Years as America's Leading Maritime Museum," About U.S.:History of Mystic Seaport, www.mysticseaport.org, 8/24/2011

¹⁰ "Portal into the Past," New London, *Sound and Country Magazine*, Fall 2011. Pp. 10-11, 32

have caused a slowdown in gaming growth in southeastern Connecticut, the two casinos are still the largest employers in the region.

In this very brief review of the economic history New London County, it is important to observe that for over three hundred years the region's business community and population have shown a noteworthy ability to adapt to changing conditions, to take advantage of the area's natural resources, and to cooperate in attracting businesses to regional locations. Challenges face the community now in determining how best to build on the existing economic drivers of the maritime industries, defense, tourism, bio-science, creative businesses and agriculture; to harness and enhance the skills of the workforce; and to make use of existing but outdated buildings and contaminated sites, in order to build a new economic future for the region.

Population and Labor Force

Within New London County there is considerable diversity of population, which is consistent with its economic history. Over the 300+ years since the first European settlers arrived in New London County and began the displacement of the existing native populations, successive waves of immigrant populations have come to the region, driven by the current economies. The maritime trades brought African and West Indian slaves and free workers; the whaling era brought islanders from the Pacific, the Cape Verdes and the Azores; the mills were populated successively by Irish, Germans, Italians and French Canadians; home-based textile work, and later farms, brought Eastern Europeans; Pfizer brought, and continues to bring scientists from around the world; and Foxwoods and the Mohegan Sun's employment needs have attracted significant numbers of immigrants from Central and South America, the Caribbean, and Asia, particularly China. Some of these latter immigrants moved to the region for casino jobs after the attacks of September 11, 2001, which had an outsized impact on business and life in New York City's Chinatown.¹¹ The presence of a major military base in the region, Subase New London, also contributes to a dynamic and cosmopolitan population.

Consistent with trends in the State and U.S., the population of southeastern Connecticut is both growing slowly and aging steadily, although less so than in the rest of the state. Much of the regional growth in population can be attributed, as in the nation, to immigration¹² and the higher birthrates prevalent in the Hispanic immigrant population. Not differentiating from these

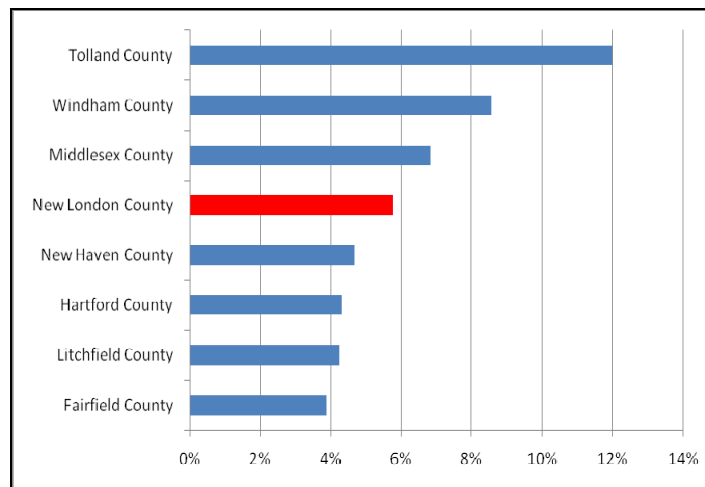
¹¹ Jonh Wong, President, Chinese & American Cultural Assistance Association, 7/27/2011

¹² Pasell, Jeffrey S. and Cohn, D'Avera, "U.S. Population Projections: 2005-2050," Pew Research Center, (Washington, DC: 2008). www.pewresearch.org.

larger trends, southeastern Connecticut’s inflow of immigrants from emerging economy nations has kept the population growing, albeit slowing. And with the notable exception of its Hispanic population, the age of residents is increasing, again slightly less so than in the rest of the state.

From the 2000 to 2010, the Census shows the population has grown from 259,088 to 274,055, a 5.8% increase, the fourth highest in the State and better than the State average of 4.9%.

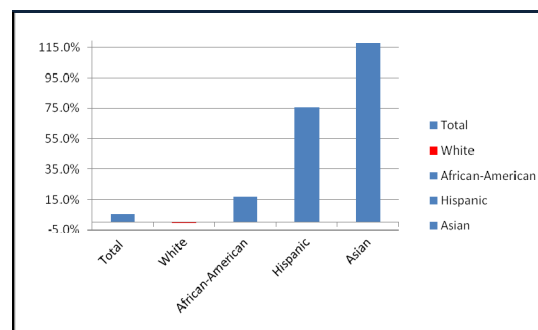
Fig. 2.2 Population Growth by County 2000-2010



Source: U.S. Census

This growth reflects a positive number of in-bound international migrants (+2,947) vs. a negative domestic in-migration (-2,329).¹³ Much of this in-migration population is Asian and Hispanic, drawn, as noted above, mostly by the casinos, and to some extent by Pfizer’s hiring during the decade. Noticeably, while the White population of New London County fell from 2000 to 2010, and the African-American grew only 17%, the area’s Hispanic population increased by 75.4% and the Asian population by 117.8%.

Fig. 2.3 New London County Population Growth by Race/Ethnicity

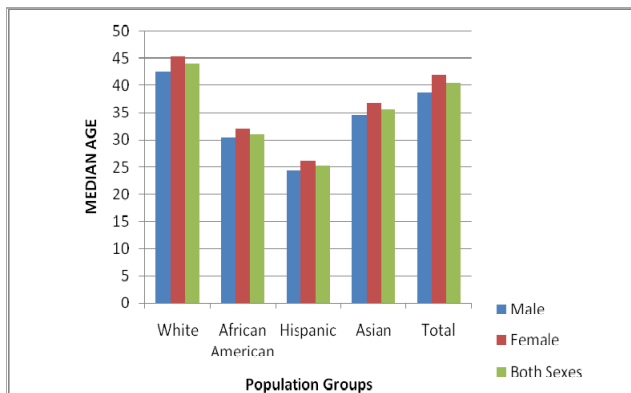


Source: U.S. Census 2010

¹³ Figure 1.12, “seCTer CEDS Data Analysis,” Appendix A, p. 14

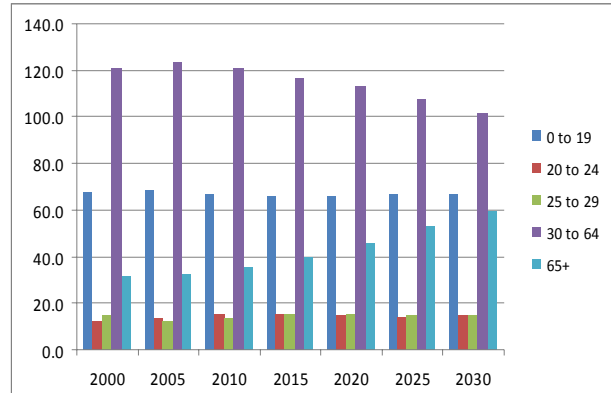
Most of this latter growth took place in Norwich and Montville, which saw Asian populations soar by 300% and 250% respectively. This immigration surge provides both opportunities and challenges for the region. Language issues from both groups present an ongoing test for local schools, businesses and the health care system; while the younger age and normally higher birth rate of the Hispanic population¹⁴ suggests that the problem of an aging workforce facing the region may be ameliorated, if these new residents remain in southeastern Connecticut and are integrated into the language and culture of the dominant population.

Fig. 2.4 2010 Median Age of Select Population Groups



Source: U.S. Census 2010

Fig. 2.5 Projected Decrease in Working Population



Source: CERC DataFinder

The two charts above graphically illustrate both the challenge of the aging workforce, and the potential opportunity to address this challenge if the already younger Hispanic population continues its regional growth. Other Census data indicates that currently southeastern Connecticut has a slightly higher population than the State of Connecticut in the 20-44 age bracket, and a slightly lower population in the 45-65+ range. Clearly an enormous challenge facing the region in the future is to continue to grow the younger working class population. This necessitates creating an attractive and dynamic job market in both old and new industries, and ensuring that the labor force, including immigrant residents, has the skills necessary to meet the demands of these industries.

As the CERC report points out, the labor force in New London County grew from 140,688 in 2002 to 151,123 by 2010. This increase of 7.4 percent compares favorably with Connecticut's rate of 6.9 percent and the U.S. rate 6.2 percent. The region also has more of the labor force in both blue collar occupations and in the military than does the State. The former data point reflects the

¹⁴ "The Fertility of American Women 2004," <http://www.census.gov/population/www/pop-profile/files/dynamic/Fertility.pdf>. 8/18/2011

still strong manufacturing base of the region; the latter the presence of the U.S. Subase New London, and a number of Coast Guard facilities including the U.S. Coast Guard Academy and the Coast Guard Research and Development Center. The table below shows employment at top manufacturing businesses in the region, which together employ almost 11,000 workers.

Table 2.1 Top 20 Manufacturers in Southeast CT

General Dynamics/Electric Boat	8,300	Manufacturing -- Defense	Groton
Davis Standard	410	Manufacturing -- Extrusion Systems	Stonington
Faria	350	Manufacturing -- Precision instruments	Montville
PCC Structurals	265	Manufacturing -- Castings	Groton
Gilman Bros.	250	Manufacturing ---Foam Board /Signs	Bozrah
Yardney Electric/Lithion	172	Manufacturing -- Batteries	Stonington
Freeport - McMoRan	150	Manufacturing -- Copper Wire	Norwich
Triumph Actuation Systems,.	135	Manufacturing-- Airplane landing gear	East Lyme
DonCasters Precision Casting	132	Manufacturing -- Castings	Groton
Sheffield Manufacturing	123	Manufacturing -- OTC Pharmaceuticals	New London
Gunther International, Ltd.	110	Manufacturing -- Mailing machinery	Norwich
Plas Pak Industries Inc.	110	Manufacturing -- Plastic injection molding	Norwich
Dow Chemical	110	Manufacturing -- Styrofoam	Ledyard
Smurfit Stone Container	84	Manufacturing -- Cardboard	Montville
SeConn Fabrication	85	Manufacturing -- Metal fabrication	Waterford
Rand Whitney	75	Manufacturing -- Cardboard	Montville
Alpha Q Inc.	70	Manufacturing --Aerospace Machine Parts	Colchester
Cable Components Group	63	Manufacturing -- Fiber Cable	Stonington
Birk Mfg. Inc.	60	Manufacturing -- Electric Heating Elements	East Lyme
Design Label Mfg. Inc.	60	Manufacturing -- Labels	East Lyme

Source: seCTer, August 2011

New London County also has an impressive 2.7 times as many residents in the Armed Forces as does the nation as a whole (based on population). Many military retirees make the region their home, and traditionally have found employment using the skills and expertise associated with their service. Submarine manufacturer EB is a major employer of former submariners for obvious reasons, and other local industries also capitalize on workers with technical, engineering and nuclear power skills, including: Sonalysts, an engineering firm which designs high-tech software applications for both the military and commercial customers; Dominion Corporation's Millstone Nuclear Power Plant; and Zachary Nuclear Engineering. During the CEDS process stakeholder groups and the CEDS Strategy Committee identified the talent pool at the Subase as a potential target for further growth of technology industries, old and new in the area. The challenge is not only to keep military retirees in the region, but also to keep younger, highly skilled, enlisted personnel as they separate from the service. This is especially important for building the workforce

at EB, which requires not only specialized skills, but also a labor force which meets requirements for working in a high security defense facility.

Industry Clusters

In the previous 2004 CEDS, and included in the CERC analysis for this CEDS, the economy of the region was viewed through the lens of Industry Clusters, or linkages. Identified for the region were four main clusters: Maritime Trades, Tourism, Defense, and Bio-Science; and two additional smaller clusters that were and are developing and changing noticeably: Creative/Technology and Agriculture. In southeastern Connecticut, these six clusters account for more than \$10.5 billion in industry sales, more than \$3.4 billion in employee wages and compensations, and nearly 35,200 jobs.

Table 2.2 Six Clusters' Share of Regional Economic Activity

	Cluster Sales		Cluster Employment	
	Total (\$Mil)	Regional Percent	Total	Regional Percent
Defense	\$3,873	16.4%	19,008	11.7%
Bio-Science	\$3,708	15.7%	5,129	3.1%
Tourism	\$2,580	10.9%	25,843	15.9%
Maritime	\$2,500	10.6%	8,963	5.5%
Creative	\$323	1.4%	4,927	3.0%
Agriculture	\$119	0.5%	1,454	0.9%

Source: IMPLAN Input/Output model 2009 data. Revised by seCTer.\

Casino Sales of \$2.1 Billion is included in all metrics

Expanding upon the idea of industry clusters to identify actual skills found in the regional economy and to project both future growth and future needs, in 2009 the Eastern Connecticut Workforce Investment Board (EWIB), using a Regional Innovation Grant (RIG), performed a SWOT (Strength, Weakness, Opportunity, Threats) analysis of Workforce Demand in the region. Similar to the CERC Analysis, this report examined the changing demographics of the region's workforce, wages, employment and changing growth patterns in its existing industries. The SWOT Analysis also examined external forces that will continue to have an impact on the regional economy into this century, including increasing globalization and global competitiveness; the stresses currently facing the national economy; and the ever exploding pace of technological change. From this SWOT analysis, the report identified skill sets that currently exist in the regional workplace and those that will be needed to position the economy for future technological advances both in existing industries and in emerging new industries.

These skill sets, or Competency Clusters, must inform regional initiatives in education and training in order to build the region's workforce for future occupations. The Competency Clusters model recognizes that skills or competencies can cross into multiple industries, and that new opportunities in new industries can be developed from competencies in another industry. To transform the employment base from traditional industry clusters to occupational clusters, a first step is to group occupations along skill sets, not industries, and then to determine how to cultivate these skill sets as a basis for growing both old and new industries.

Competencies identified for the southeastern Connecticut RIG region as both current strengths and long-term drivers of the high-wage, knowledge economy include: Engineering, Measurement and Manufacturing, Defense and Supply Chain, Energy Management, Software/IT/Instrumentation, and Medical.¹⁵ As shown in Figure 2.7, these are also strengths for Norwich-New London.

Table 2.3 Occupational Clusters in New London County 2009

Description	Occupation Cluster Employment	Occupational. Cluster Share of Total Employment.	Occupation Cluster Employment LQ
Primary/Secondary and Vocational Education, Remediation & Social Services	16,450	9.70%	1.81
Public Safety and Domestic Security	3,378	2.00%	1.66
Building, Landscape and Construction Design	1,289	0.80%	1.60
Postsecondary Education and Knowledge Creation	2,756	1.60%	1.36
Engineering and Related Sciences	2,295	1.40%	1.33
Natural Sciences and Environmental Management	1,020	0.60%	1.31
Health Care and Medical Science (Aggregate)	10,497	6.20%	1.10
Skilled Production Workers: Technicians, Operators, Trades, Installers & Repairers	13,041	7.70%	1.08
Technology-Based Knowledge Clusters	15,062	8.90%	1.05
Mathematics, Statistics, Data and Accounting	3,838	2.30%	0.92
Managerial, Sales, Marketing and HR	13,713	8.10%	0.91
Arts, Entertainment, Publishing, Broadcasting	3,061	1.80%	0.86
Information Technology (IT)	2,726	1.60%	0.80
Agri-business and Food Technology	1,618	1.00%	0.63

Source: *StatsAmerica.org* a U.S. Department of Commerce Economic Development Administration project

The following targeted industries were identified for the Eastern Connecticut RIG region:

- Legacy/Foundation Industries: Shipbuilding, Gaming, Logistics, Healthcare, and Professional Services

¹⁵ "Regional Innovation Grant SWOT Analysis Final Report: Recommendations," August 2009, Prepared for the Eastern Connecticut Workforce Investment Board Northern and Southern RIG Advisory Committees by New Economy Strategies, LLC and Council for Adult and Experiential Learning

- Driver Industries: Aerospace and Defense, Design & Engineering, Energy, Electronics Manufacturing, and Materials

These target industries informed an occupational analysis, which identified the following professions as critical, high growth, transformative, and priorities for the region's target knowledge industries:

- Engineering (Aerospace, Biomedical, Chemical, Civil, Industrial/Mechanical/Nuclear);
- Computer systems/software/information/databases;
- Biochemistry/Biology/Biophysics; Materials; and Technical writing.

These priority professions and the primary occupational clusters identified in Figure 2.3 group occupations along skills sets, not industries. The skill sets that drive these occupations and will continue to do so are Science, Technology, Engineering and Math, or STEM, skills. Both Legacy industries and Driver industries represented in the region's existing Industry Clusters already depend heavily on these skills. The challenge facing the region in keeping the current economic base strong and in developing a future base is to ensure that these skills receive a solid focus in educational and on-the-job training programs.

Following is a brief description of the six identified Industry Clusters and the current strengths and challenges facing them, with emphasis on their relationship to the occupational competencies of the current and future labor force in the region, and with some possible opportunities available for addressing challenges facing these sectors of the economy. Notice must be taken of some anomalies when looking at the businesses that form the region's clusters. All workers in the area casinos, numbering close to 20,000, are counted in most data sources as "government" employees because the casinos are on sovereign Native American reservations. In fact, these employees are primarily in the Tourism sector and to some extent the Creative sector. Another factor to remember in looking at clusters is that seldom do businesses exist solely in one cluster but often overlap into two or more clusters. For example, commercial fishing data is used in the Tourism, Maritime and Agricultural clusters models; the performing arts in both the Creative and Tourism clusters; even a very specific industry such as submarine manufacturing falls into both Maritime and Defense clusters. This inter-weaving of businesses among local clusters represents strength for each, and allows for a cross-pollination of skills.

Defense

The Navy's Subase New London and Electric Boat's submarine manufacturing facilities are the most significant elements of the regional defense cluster, with approximately 20,000 employees

between them. Also included in this cluster are the U.S. Coast Guard Academy, the Coast Guard Research and Development Center, and the International Ice Patrol, as well as Coast Guard Station New London. Two other elements of the Defense sector in Groton are the Connecticut National Guards Aviation Classification and Repair Depot (AVCRAD), which is one of only four facilities of its type in the U.S. Army and Army National Guard. Survival Systems, Inc. provides training in vessel and aircraft evacuation and other safety issues to private and government entities throughout the Northeast. Although this cluster has shrunk somewhat from its peak during the Cold War years, when employment at EB alone was over 20,000, the sector is still of critical importance to the region. In late 2005, the region's political and business leaders rallied to reverse a decision to close Subase New London, made by the congressional Base Realignment and Closure Commission. Failure in this endeavor could have resulted in further downsizing or relocation of EB, a scenario with devastating consequences for the region.

After the success of this effort, the State of Connecticut stepped up efforts to prevent any future possible attempts to close or downsize the Subase. In 2005 then-Governor M. Jodi Rell convened a group of business and community leaders from around the State, the *Governor's Commission to Diversify the Economy of Southeastern Connecticut*, to explore avenues both to decrease dependence on this one major sector and to device programs to support financially the Navy's investments at the Subase. Following publication of the Commission's report, in 2009 the State Legislature allocated almost \$8 million for construction projects at the Base, with an additional \$3.22 million in 2010.¹⁶ Other components of the report, including development of a Brand for the region have been less successful.

Table 2.4 Industry Composition of Regional Defense Cluster

Description	Sales (\$Mil)	Employment
Ship Building & Repairing	\$2,246.4	8,304
Federal Govt. Military	\$1,229.2	8,639
Federal Govt. Non-Military	\$207.4	1,705
Aircraft Engine & Engine Parts Mfg.	\$129.4	187
Parts & auxiliary equipment manufacturing	\$61.0	174
TOTAL	\$3,873.4	19,008

Source: IMPLAN Input/Output Model 2009 data

Table 2.4 shows the composition of the Defense cluster, in both sales and employment. Some other Defense related businesses in the region include [DDL Omni Engineering](#) in Norwich;

¹⁶ "Navy Chief Touts State Investment at Subase," New London, *The Day*, 9/24/2009. "State Bond Commission Approves \$3.22 Million for Sub Base," New London, *The Day*, 8/23/2010.

[McLaughlin Research](#) in New London and [Sonalysts](#) in Waterford. The first two provide technical consulting to the Defense sector, while the third creates technology products for the Navy, among other customers, many of whom are non-military. Sonalysts is an example of a business that grew from the technical needs of the Navy as well as the technical skills of retired Navy personnel, one of whom was its founder who brought his sonar analysis skills to a new business. Today, while still engaged in military work, Sonalysts is also engaged in the entertainment, gaming, and video educational fields, illustrating another cross-over of both industry clusters and competencies.

After September 11, 2001 the Coast Guard was absorbed into the new Department of Homeland Security (from Transportation), and increasingly is engaged in security issues nationally. The Coast Guard Research and Development Center, headquartered in a recently renovated former Navy building in New London, is engaged in cutting edge research on port security. In the same area of New London, in the former Pfizer Research and Development Headquarters on the Fort Trumbull peninsula, EB is locating its Engineering and Research & Development staff, creating a physical cluster of high technology Research & Development workers and those with STEM skills.

The Defense Cluster is highly dependent on the skills and competencies identified in the RIG analysis. Offshoot businesses, such as Sonalysts, also require a workforce with these competencies in order to survive and to grow their business in areas beyond defense. A challenge they face is finding local entry level and mid-level workers not only with these high skills, but also with basic proficiencies such as Math, Reading, Computer programs like CAD and Excel, and English as a Second Language (ESL). Often, workers entering the labor force from high school are found deficient in these most basic skills. This is an issue that is addressed in Chapter III of this report in more detail. EB works with Three Rivers Community College to develop internship and apprenticeship programs to address some of the technical skills required in their employees; but they also offer in-house remedial training in the basics of reading, math and ESL. This situation is a costly diversion for companies and requires a serious commitment on the part of the community as a whole to address K-12 education in the region, as well as focusing on STEM skills.

In addition to manufacturing employees, most of these companies retain sizeable numbers of engineers. In interviews conducted with both defense companies and other technology dependent regional businesses, note has been made that although they are able to find the best engineers they need (EB hires only the top 5% of engineering graduates), they often have to cast a wide net, and often outside of Connecticut. While recognizing the excellent engineering school(s) at UConn they

acknowledge hiring as many, or more, graduates from out-of-state schools, such as Northeastern University in Boston, MIT in Cambridge, MA, and RPI in Troy, NY. Attracting local students to begin their professional careers in southeastern Connecticut, and to keep them in the area is a challenge to be addressed, very similar to the challenge identified earlier in how to keep younger Navy personnel in the region.

Bio-Science

The 2004 CEDS noted that “while there is considerable interest in the state of Connecticut in developing its bioscience cluster, much of that activity remains centered in the New Haven region....bioscience is not really an industry cluster in the region at all, but a concentration of employment in one firm [Pfizer].”¹⁷ Nevertheless, it concluded, since Pfizer’s presence in Groton and New London was so substantial, with, at the time, over 6000 employees and an investment of \$300 million in a new Global Research & Development Headquarters in New London, it could fairly be called a regional Industry Cluster. The 2004 CEDS did not point out that in spite of Pfizer’s overwhelming presence in this cluster, there were, and are still, several other bioscience companies in the region including: New London’s 160 year old [Sheffield Pharmaceuticals](#), contract manufacturers of over-the-counter (OTC) creams, ointments and toothpastes; [Dekalb Genetics](#) a division of Monsanto, located in Mystic; and several medical device companies. Table 2.5 below details the composition of the regional bio-science cluster.

Table 2.5 Industry Composition of the Regional Bioscience Cluster

Description	Sales (\$Mil)	Employment
Pharmaceutical preparation manufacturing	\$2,217.5	1,700
Scientific research & development services	\$556.1	2,255
Medicinal & botanical manufacturing	\$435.0	653
Plastics material & resin manufacturing	\$315.2	217
Fertilizer manufacturing	\$129.0	79
Surgical & medical instrument-labs	\$29.6	115
Surgical appliance & supplies manufacturing	\$25.5	111
TOTAL	\$3,707.9	5,129

Source: IMPLAN Input/Output Model 2009 data

Since 2004, the Bioscience cluster in southeastern Connecticut has weakened considerably. Pfizer closed its manufacturing facility in Groton, where it established its southeastern Connecticut presence in 1946; has closed and sold its Global Headquarters building in New London; has eliminated over 1,000 jobs and will be eliminating an additional 1,100 by the middle of 2012. An

¹⁷ “Comprehensive Economic Development Strategy for Southeastern Connecticut 2004,” p. 19

estimated 400 of these latest jobs will be transferred to Cambridge, MA, and the balance will be layoffs, resulting in an estimated workforce in the area of under 3,800. At the same time, the State of Connecticut remains committed to the Bioscience cluster. In May of this year, Governor Dannel Malloy announced a proposal to make the University of Connecticut (UConn) Health Center in Farmington a hub of research/clinical work in bioscience and to position Connecticut to lead the way in the industry.¹⁸ This major investment in bio-science outside of southeastern Connecticut presents a challenge to the region where approximately 700 laid off Pfizer employees, many of them scientists, are currently located.

Previous restructurings at Pfizer have resulted in some local bursts of entrepreneurial activity, including a bio-diesel manufacturing firm, [Constitution Bio-Fuels](#); a research firm studying diseases of the neuromuscular and skeletal systems, [Myometrics](#); a clinical-stage biopharmaceutical company focused on improving the treatment of cardiovascular disease, [Amarin](#); and at least one retailer, [Flavours of Life](#). The current restructuring could also create a number of small firms developed from the talent that exists at Pfizer and that has a desire or need to remain in the region.

The regional challenge is to create a coherent plan to assist both former Pfizer scientists, and others, including graduates in the sciences from Connecticut College and UConn in particular, in setting up laboratories and finding investors or other funding sources to develop their ideas. UConn Avery Point has an incubator on-site that is tied to research in the Marine Sciences. Discussions have been held on developing other locations for lab incubators including un-used or closed space at Pfizer in Groton, and a former Brownfield building in New London, owned by Sheffield Pharmaceuticals, that needs an unknown amount of remediation as well as significant renovation.

In addition to buildings, or a building, to accommodate bioscience research, investment sources need to be addressed. Sustainability of research is an issue that confronts existing small bioscience firms as well as those that might be established in the future. While grants are often forthcoming from both foundations and government agencies for scientific research, it is of some concern that other capital be available when grant opportunities are not sufficient, or when they end. There is sobering information on the StatsAmerica web site's innovation index for southeastern Connecticut,¹⁹ relating both to patents filed and to venture capital invested. It can be seen in the

¹⁸ "Gov. Malloy: New Bioscience Connecticut Initiative Will Create Thousands Of New Jobs, Sustain Economic Growth Going Forward, Spur Innovation In The Future" www.governor.ct.gov/malloy/cwp/view.asp?A=4010&Q=479424, 5/17/2011

¹⁹ www.statsamerica.org, is a service of the Indiana Business Research Center at Indiana University's Kelley School of Business: www.ibrc.indiana.edu. The initiative is funded in part by the U.S. Commerce Department's Economic Development Administration and Indiana University.

two figures below. Note that the “custom region” on these charts is New London County, which is compared to all of Connecticut and to the U.S.:

Fig.2.6 Patents per 1000 Workers

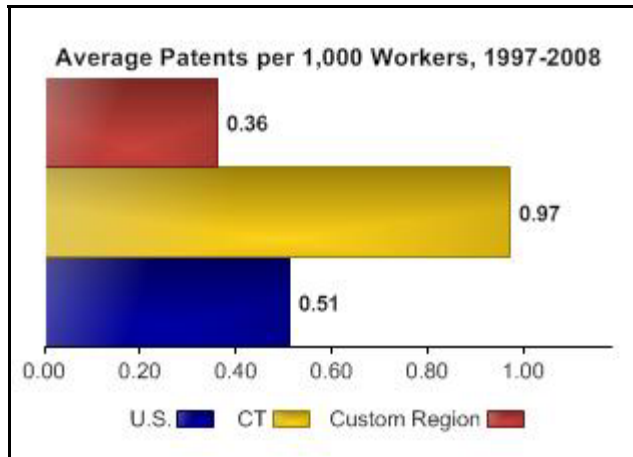
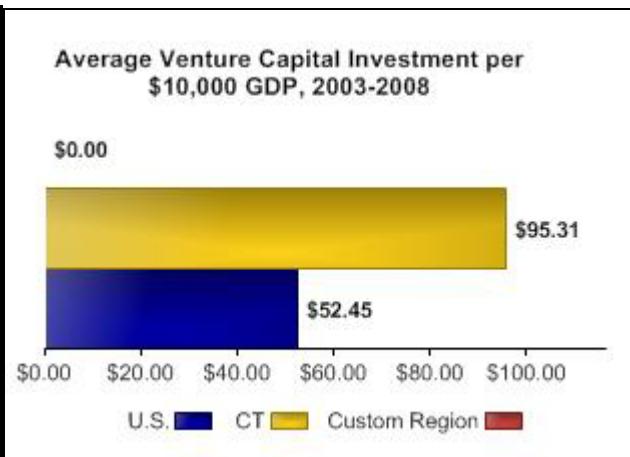


Fig. 2.7 Venture Capital Investment



Source: StatsAmerica.org, Innovation Index (August 2011)

A dearth of venture capital investment as shown in the five year period from 2003-2008 is not a positive omen for entrepreneurial development in the region. The small number of patents filed for the region relative to Connecticut and the U.S. is also troubling given the high level of education in the region. (See Fig. 3.1 in Chapter III)

Since the RIG identifies competencies in the sciences, and bioscience/biology and biochemistry as targeted professions, the region’s economic development strategy must include planning both for keeping existing bioscience businesses, small and large, in the region, and for growing new bioscience businesses from the foundation laid by Pfizer’s presence.

Tourism

As noted in the CERC analysis, quantifying the tourism cluster is challenging at best. There are many businesses that contribute to a tourist economy, a fact that is one of the strengths of this sector. The base of the industry and perhaps easiest to count are casinos, hotels, attractions, retailers and restaurants all of which draw and service visitors from outside of the region. These businesses also serve the local population, but their number and their economic well-being would be significantly impaired were their audience and customer base only local. It is also important to note that a region’s attraction to tourists usually reflects certain qualities of life present to residents – particularly cultural and recreational.

Another strength of the industry and one that cannot be overlooked is its relation to place. While businesses within other industry sectors may move to another region, state or country for cost

issues, tax incentives, market accessibility, or other reasons usually beyond the control of any regional or state agency, the place in which tourism businesses are located is essential to their existence. Although tourism is a traded industry -- one that sells products and services across regions, not just locally, and thus injects new or outside money into an economy -- its market comes to the product, which is place specific. In the case of New London County, a significant component of “place” rests in the history and heritage of the area. This heritage is certainly part of the draw that brings visitors to the region, most notably to visit the major heritage museums of Mystic Seaport, the Submarine Force and Historic Ship Nautilus Museum and the Mashantucket Pequot Museum. Other smaller organizations and sites throughout the region draw on the Heritage Visitor as well. The need to foster more heritage tourism in the region was identified by both the tourist industry and the heritage interests; for example, by creating one or more themed “trails” in the region.

For tourism activities most dependent on enjoyment of the natural environment, particularly surrounding recreation on and around the water, there is a growing awareness of the need to protect the quality of the regional watershed and Long Island Sound, into which those waters flow. There has been identification of some waterways with impaired quality due to pollution from both urban and agricultural runoff. The sustainability of these resources is essential in maintaining their attraction to tourists and the quality of life for residents. To that end, a study such as the Niantic River Watershed Study, which resulted in a four town (East Lyme, Montville, Salem, and Waterford) advisory committee to oversee watershed approaches recommended by the Environmental Protection Agency (EPA) and the State Department of Energy and the Environment (DEEP), should be supported for additional watersheds. Such sub-regional programs have long term impacts on improving public awareness of water quality issues and the economic benefit which accrues to the region with clean water.

While jobs in tourism tend to be, on average, of lower pay than those in manufacturing – a fact noted in the CERC report on pages 33-34 – tourism absorbs a large segment of the labor market that might not be prepared for or able to engage in more highly-skilled occupations. This includes full-time, part-time and seasonal work for military spouses, retirees, high school and college students, for new immigrant groups with limited English language skills, for necessary second jobs in a household, and jobs for various disadvantaged individuals entering or re-entering the workforce. There are also many skilled management and financial positions available in tourism, as

well as arts and cultural occupations. The spectrum of businesses and of job opportunities is very wide in this sector as detailed in the following Table 2.6.

Table 2.6 Industry Composition of the Regional Tourism Cluster

Description	Sales (\$Mil)	Employment
Accommodations including Casino hotels	\$2,145.5	19,388
Food services and drinking places	\$134.2	2,170
Museums, historical sites, zoos & parks	\$53.2	494
Transport by water	\$44.3	73
Automotive equipment rental & leasing	\$41.0	54
Promoters of performing arts & sports	\$39.8	1,049
Amusement parks, arcades, gambling	\$31.4	469
Performing arts companies	\$28.4	1,374
Independent artists, writers, performers	\$20.0	79
Transport by rail	\$14.3	16
Travel arrangement & reservation services	\$10.1	87
Spectator Sports Companies	\$9.9	539
Wineries	\$3.9	12
Transport by air	\$3.2	10
Commercial/recreational fishing	\$1.2	30
TOTAL	\$2,580.2	25,843

Source: IMPLAN Input/Output Model 2009 data

In southeastern Connecticut the foundations of the tourism industry are the two Native American Casino Resorts: [Foxwoods](#) and [Mohegan Sun](#); [Mystic Seaport Museum](#); [Mystic Aquarium](#); and the [Submarine Force Museum & Historic Ship Nautilus](#). The [Florence Griswold Museum](#) in Old Lyme is also a major cultural draw, as are other regional art museums and galleries, historic sites that are widespread throughout the region, and the state parks and beaches. There is also one major for-profit attraction, new to the area in the last decade, [The Dinosaur Place](#), in Montville, which annually averages approximately 100,000 visitors to their multi-faceted attraction. Together, the attractions of southeastern Connecticut draw an estimated over 10 million+ visitors per year. Since this number includes casino visitors, many of whom are from Connecticut, conservatively one may estimate that 50% of those 10 million guests are from out of region and out of state.²⁰

There are several challenges facing the Tourism Cluster that were identified in interviews with those in the industry. These include both hard and soft infrastructure issues, the latter being of equal or greater importance to the long term health of this industry sector. Participants in the CEDS

²⁰ For a detailed analysis of the regional tourism market see “Visitor Analysis”, [Intermodal Connections Study Southeast](#), Southeastern CT Council of Governments (SCCOG), February 2005, Chapter 3

process pointed out that signage in the region, both on and off the major highways and intersections is not user friendly to visitors even where it exists; there are not enough prominently located full service visitor centers in the region to assist tourists with information, rest rooms and last minute reservations; the availability of public restrooms is limited; there is not good public transportation and there are limited bicycle or boat rentals for visitors who would/could use them. All of these issues will take a coordinated plan and development of funding sources to address appropriately. The State of Connecticut proposed legislation some years ago for a signage program statewide, which was never fully implemented.²¹ Currently state statutes provide that the “Commission on Culture and Tourism, established under section 10-392, in consultation with the Department of Transportation, shall develop plans for (A) consistent signage for the visitor welcome centers, and (B) highway signage regulations for privately operated centers.”²² Even assuming full implementation of such a plan, it does not include signage other than to identify state and private visitor centers.

A “Tourism Loop” transportation system was proposed by the SCCOG in 2005, but has been tabled for lack of funding to sustain the system over time. A non-profit group in Mystic has established a no-charge bike share system, but once again, the sustainability of this system is dependent on donated funds and grants. Possibly a system such as that developed by [Alta Bike Share](#) which can be found in places as diverse as Washington DC, Boston MA and Melbourne, Australia might be considered as a model for southeastern CT.²³ This type of system depends upon a combination of fares, grants and corporate sponsorships for its sustainability.



AltaBike Share bike stand in Melbourne, D. Donovan 11/2010

²¹ Ed Dombroskas, Executive Director, Eastern CT Tourism District, e-mail 8/30/2011

²² CT Public Statutes, Chapter 184B, Section 10-399 (b) (2). <http://search.cga.state.ct.us/>

²³ Alta Bikes was recently chosen by New York City to install a bike share system. “New York Chooses Company to Run Bike Share System,” New York, NY, [NY Times](#), 9/14/2011

On the soft infrastructure needs of the Tourism sector, participants identified employee training and regional marketing; the latter directed both to potential visitors and to the resident population. The technical high schools, Three Rivers Community College and Mitchell College all offer classes and concentrations in hospitality. That being said, there was some feeling expressed by interviewees within the tourism industry that many students graduating from these programs, as well as those who come straight into the industry without any tourism specific education, do not have appropriate customer service and hospitality skills. Some businesses, including the Dinosaur Place and Mohegan Sun, provide their own, fairly rigorous, in-house training in these skills; however, for many small businesses the time, expense and expertise necessary to institute such training for their own staff are limiting factors. Several states and organizations which do have such programs might be considered as a model for creating such programs in the region, including, but not limited to, [North Dakota Tourism](#) and the [Disney Institute's Quality Service Program](#). These types of programs might be established in the region to serve as vehicles to “train the trainers” in local tourism businesses.

Tourism marketing is another issue of great importance to the region and is currently enduring some stress. During the last CEDS process in 2004, there were two strong tourism marketing agencies: Mystic & More!, funded by a percentage of the state hotel sales tax, and representing all tourism entities, and Mystic Coast & Country, a private sector agency funded by membership dues, grants, advertising and other fund raising efforts. In 2011 the situation has changed with Mystic Coast & Country no longer active and funding streams cut to Mystic & More!, which has been expanded and renamed the Eastern Connecticut Tourism District (ECTD). At present, it is not clear how much funding will be made available to ECTD for the next fiscal year, but it appears that there will be at least a 5% reduction from their previous budget. In 2010, major participants in tourism (the Casinos, Olde Mistick Village, Waterford Hotel Group, Mystic Seaport and Mystic Aquarium), with others, created the Greater Mystic Visitor Bureau to act as a self-organized marketing arm of the ECTD, which recently began operating as an independent entity. For the tourism businesses, which play such an important role in southeastern Connecticut, a situation in which their ability to market the region inclusively and cohesively is uncertain is, arguably, the most important challenge facing this cluster. Advocacy with the State of Connecticut to restore a coherent and sustainable funding source is critical as is cultivating public support for State funding.

Also, stressed by more than a few participants in the interview process, is the need to create a serious public relations and communication plan directed at residents of southeastern Connecticut to educate them on the role of and importance of tourism both to the economy and to the quality of life in the region. Without the support of the community, tourism funding will continue to be erratic; with community support, advocacy with funding agencies will be far more persuasive. Not coincidentally, by creating local support for tourism, one might expect to see a more welcoming environment for tourists by local residents. There are a number of Tourism Advocacy programs available on which to model such a program in southeastern Connecticut; including those of [Chicago's Northwest](#) region, and [Hershey PA](#).

Maritime

The Maritime Cluster is probably the one with the most overlap into other clusters, relating to defense, tourism, and agriculture and to some extent bio and other sciences due to the emphasis on marine sciences at UConn Avery Point. Maritime activities also include design and Internet Technology (IT) that relate to and are included in the Creative Cluster. The main business activity of this sector of the economy relates to activity taking place on and under the waters of Long Island Sound. As was pointed out in the historic overview of the area, the region's historic ties to the sea have been the foundation of its economic base for hundreds of years and the region remains a maritime center for a variety of commercial and recreational water dependent businesses. Major operations include the Navy's Submarine Base, EB and the U.S. Coast Guard Academy. Other maritime activity is tied to the deep water port of New London, one of only three in the state and arguably the one with the best features, including a deep water channel maintained by the Navy; two rail lines connecting the port north to Norwich, Worcester and beyond, and south and east to New York and Boston; and adjacent interstate highway access. The Admiral Shear State Pier in New London receives cargoes of lumber and some copper, and has hosted cruise ships of Princess and Holland America Lines, carrying thousands of passengers into the region. Adjacent to State Pier is the passenger, car and truck ferry service operated by Cross Sound Ferry, (CSF) that carries passengers and commercial trucks between New England and Long Island NY. CSF also operates high speed passenger ferries to Long Island and Block Island RI, the former heavily used by New York State patrons of the Casinos. CSF is one of the largest employers in the region with over 300 full time employees, and more hired seasonally. The company also operates the Thames Shipyard, which is the largest repair facility between New York and Boston, servicing, besides their own ferry fleet, boats from a number of commercial ferries up and down the Northeast Coast. Thames

Shipyard is one of three commercial shipyards in the region, a significant number for a small region. The others are EB, building and repairing nuclear submarines, and Mystic Seaport, which builds, maintains and repairs both modern and historic wooden sailing vessels.

Commercial fishing is also still important in the region particularly in Stonington and New London, where scallops, fin fish, lobsters and shrimp are landed and processed for local and regional distribution.

Table 2.7 Partial Industry Composition of Regional Maritime Cluster

Description	Sales (\$Mil)	Employment
Ship building and repairing	\$2,246.4	8,304
Transport by water	\$221.4	367
Boat Building	\$10.1	43
Commercial & industrial machinery & Equipment rental and leasing	\$8.4	12
Retail Stores - Motor vehicle parts	\$7.0	88
Commercial fishing	\$6.2	148
Seafood Production, preparation, packaging	\$0.4	1
TOTAL	\$2,499.9	8,963

Source: IMPLAN Input/Output Model 2009 data

The numbers above do not include recreational boating, fishing, and water dependent sports, which are included in the Tourism Cluster, nor are they fully representative of other maritime activities, businesses and maritime educational opportunities. Aquaculture, a growing Maritime/Agricultural enterprise, is represented in the Agricultural sector, but is also an activity dependent upon proximity to Long Island Sound. Mystic Seaport, UConn Avery Point and the Mystic Aquarium are all centers of maritime education. Mystic Seaport is the largest such Maritime Museum in North America with a research department in American maritime history that is second to none, as well as an affiliation with Williams College that provides students a semester experience of in-depth study of maritime history and science. UConn focuses both on Maritime Sciences and American Studies with an emphasis on maritime history. Mystic Aquarium hosts the Institute for Exploration (IFE) which is dedicated to research in the aquatic sciences, especially pertaining to human and natural history in the oceans. Under the direction of [Dr. Robert Ballard](#), IFE develops advanced [deep-sea vehicle systems](#) to conduct this research, as well as to educate students and the general public about their work.

seCTer has long hosted the Thames Maritime Coalition (TMC), a group of loosely affiliated maritime interests, which meets several times a year to address issues of concern to the maritime

community including port security, cruise ship marketing, marina issues, impacts of rail improvements on river traffic, State Pier improvements, dredging, and environmental and boating issues raised by the National Oceanographic and Atmospheric Administration (NOAA) and the Connecticut Department of Energy and the Environment Protection (DEEP). This group provided input for the CEDS process. One of the issues or challenges they identified as significant to their industry sector is very similar to that uncovered by tourism stakeholders: there is not a good understanding of the breadth, depth and value of the maritime industry by local residents, or by those outside the region. The latter group might choose to locate maritime businesses in southeastern Connecticut if they were aware of the region's resources of similar businesses and a workforce skilled in marine trades. The TMC suggested a need to brand the region, highlighting all local marine assets particularly including educational assets, and they pointed to the Regional Marine Magnet High School opening in Groton in August 2011 as a new and significant opportunity for the region to capitalize on its Maritime strengths.

Additional issues facing this sector involve State Pier, which is recognized widely as being underutilized and in need of improvements to its rail connections and warehousing facilities, and for dredging in the Pier area. The situation at State Pier is being considered by the State of CT, which has recently issued a summary study of conditions at the Pier and conceptual designs for adapting the property for enhanced use. One particular problem that might be addressed is the type of cargo off-loaded at the Pier, primarily building lumber in the last few years. As the market for new housing starts has collapsed, so too has the need for lumber coming into State Pier.²⁴ There have also been efforts made locally to attract more cruise ships to New London, efforts which have met with mixed success. The charts below show the changed situation in activity at the Port.

Table 2.8 Activity at State Pier New London 2004-2010

Year	Cargo Ships	Forest Products	Copper/Steel	Total Tonnage	Passenger Ships	Number of Passengers
2010	13	0	46,391	54,097.00	2	6,059
2009	5	30,139.00	0	30,139.00	0	0
2008	14	99,216.24	6,677.80	105,894.04	9	11,535
2007	37	81,420.72	89,352.90	170,773.62	7	15,640
2006	10	34,154.57	14,217.12	48,371.69		
2005	41	28,143.51	10,157.81	38,301.32		
2004	52	136,945.22	82,931.80	219,877.02	3	2,700 Est.

Source: Port Operator, Logistec USA

²⁴ "Weak Lumber Market Slows New London Port This Year," New London, The Day, 9/19/2009

Maritime stakeholders were unanimous in their desire for a feasibility study for bringing a consistent schedule of cruise ships to the Port of New London with the possibility of building a cruise ship terminal at the Pier. Such a project would also add an additional dimension to the Tourism industry, potentially bringing thousands of new visitors to the region. Maritime interests also are strong advocates for communicating with the National Oceanographic and Atmospheric Administration (NOAA) the benefits of home-porting a NOAA research vessel in New London. One such recently constructed vessel, the *Bigelow*, is a possible target for locating in southeastern Connecticut, as its current port at Woods Hole, MA presents access issues. Having a research ship in the region would add to the base of maritime research and development currently being pursued by both EB and the Coast Guard R&D Center and would provide an additional opportunity for local residents trained in STEM skills to find valuable employment.

Creative Cluster

As the CERC analysis points out, the Creative industries are as diverse and thus as difficult to quantify as are those in Tourism. They range from highly technical businesses such as Sonalysts to individual visual artists. The cluster includes film makers, software publishers and designers of technology devices, a small but growing group that can be an important part of growing the high-technology businesses of the future in the region. Named as one of the top 40 fastest growing technology firms in the state, [JobTarget](#), the largest third-party operator of niche job boards in the world now employs almost 100 people from its New London headquarters. [Inncom](#) of East Lyme designs and manufactures energy management systems for the hospitality industry worldwide.²⁵ A conservative estimate shows that the creative industries account for almost 5,000 jobs in the region, generating over \$350 million in annual sales.

²⁵ “Three Local Businesses in State Top 40 For Growth,” New London, [The Day](#), 9/16/2010

Table 2.9 Partial Industry Composition of Regional Creative Cluster

Description	Sales (\$Mil)	Employment
Publishers, Newspapers, Periodicals, Books	\$73.3	502
Museums, Historical Sites, Zoos, Parks	\$53.2	494
Promoters of Performing Arts, Sports	\$39.8	1,049
Amusement Parks, Arcades	\$31.4	469
Performing Arts Companies	\$28.4	1,374
Motion Picture, Video, Sound Recording	\$24.8	220
Radio and Television Broadcasting	\$22.4	125
Independent artists, writers & performers	\$20.0	79
Spectator Sports	\$9.9	539
Directory, Mailing List, other publishers	\$8.8	25
Software publishers	\$7.7	18
Specialized Design services	\$2.9	33
TOTAL	\$322.5	4,927

Source: IMPLAN Input/Output model 2009 data

Creative organizations provide not only entertainment options for residents and tourists, but also a diverse and robust calendar of educational programming for local students, both within and outside of formal school settings. The Flock Theatre provides in-school drama programs for elementary school students and tracks reading skills before and after student participation. The educational department at the [Florence Griswold Museum](#) in Old Lyme provides in house and on-line educational opportunities for teachers and students focusing on art, history and natural sciences. In New London two after school writing programs guide students in producing creative writing projects: “[The Writer’s Block](#)” and “Do the Write Thing.”²⁶ Both of these programs use creative writing as a tool to improve the core curriculum skills of reading and writing and to engage students in community action and responsible behavior.

Another creative economy organization whose programs bring in students and practitioners from around the world is the Tony Award winning [Eugene O’Neill Theatre Center](#) in Waterford. With programs throughout the year in play and musical theatre development, dramatic criticism and acting, the O’Neill contributes immeasurably to the cultural and educational dynamic in southeastern CT. Founded in 1970, their National Theatre Institute trains young theatre artists through an intensive conservatory curriculum taught by professional artists and master teachers from the U.S. and abroad. The O’Neill, in conjunction with Connecticut College in New London, is currently undertaking a physical expansion of their facilities that will allow them to add additional students and programs to their offerings.

²⁶ “ ‘Do the WriteThing’ Enters Sixth Year,” New London Patch, <http://newlondon.patch.com>, 8/24/2011

In discussion with creative organizations, a number of regional challenges were raised that cross over into various facets of life and the economy in southeastern Connecticut. Most of these will be discussed in Chapter III of this report which looks at these macro issues, such as transportation and fragmentation of organizations. Some arts specific issues were also addressed, which affect the ability of this sector to be recognized as a crucial part of the economy, the regional quality of life, and as an important partner in addressing the skills that need to be nurtured in the student population in order for them to provide the workforce of the future.

One issue identified by cultural organizations is their increasing difficulty in working with school districts and teachers on cultural educational programming, notwithstanding that research indicates that students who are involved in arts programming, whether it be music, drama or visual arts, may have increased tests scores on core curriculum items and lower dropout rates overall.²⁷ Because of rising costs in municipal education, arts (and sports) are frequently the first programs in a school system to face cut backs or eliminations and teachers are under pressure to improve test scores in the core curriculum subjects -- reading, math and science. In southeastern Connecticut, schools do take advantage of programming offered by arts and heritage organizations, but they are often constrained by costs and must find outside funding from donations or grants in order to take advantage of these opportunities. They also must spend much time and energy in communicating the availability of their programs to schools and teachers, an activity that might be more efficient if better coordinated among these groups.

The need for outside funding in order to provide arts education to students brings up another issue of great importance to southeastern Connecticut's arts and donor communities: how does one determine the real outcomes of arts programming to the education of a K-12 student? Few if any models for quantifying the results of these programs exist. As the need for outside funding for educational programming in the arts becomes more acute with tightening budgets, granting agencies and foundations are also becoming more alert to the need for real results, not simply anecdotal opinions. Fostering imagination in students through the arts may translate into strengthening critical thinking skills in other disciplines such as math and science, and exposure to great drama may help in reading and writing skills but systems to provide hard data to support such assumptions are needed by the regional creative community to keep their educational contributions viable.

²⁷ "Critical Links: Learning in the Arts and Student Academic and Social Achievement," Arts Education Partnership, Washington, DC: 2002. <http://www.aep-arts.org/files/publications/CriticalLinks.pdf> 8/30/2011

In addition to proving the value of their programming to educators, the creative community also expressed a need to foster a more entrepreneurial spirit in their ranks. As the CERC Analysis revealed, many members of the creative community are independent artists with little or no business experience. The nature of their solo endeavors is not conducive to growing a business or adding to the economic wealth of the region and creative individuals often have little insight into operating as a business. A plan has been drawn up by the Hygienic Artists Cooperative to create a year-long “Artist Entrepreneurial Academy,” with the goal of graduating one hundred artists in a variety of disciplines. They anticipate this plan will create a new core of small creative businesses that would, it is hoped, grow and become obvious contributors to the regional economy as well as providing their owners with a more solid income base.

Agriculture

The smallest of the region’s industry clusters, but the one with the longest history in the region, is agriculture. The figure below shows 11 major industries within the cluster, along with a number of smaller miscellaneous industries. The cluster overlaps with tourism, with a growing network of wineries making up a strong component of the Connecticut Wine Trail. It also includes a marine activity, aquaculture, which uses the briny waters of the Thames, Mystic and Niantic Rivers to harvest shellfish, particularly oysters. Table 2.10, following, identifies some of the components of the region’s agricultural cluster.

Table 2.10 Partial Industry Composition of Regional Agricultural Cluster

Description	Sales (\$Mil)	Employment
Greenhouse, nursery & Floriculture	\$45.8	824
Fertilizer Manufacturing	\$32.2	20
Commercial Logging	\$7.6	79
Poultry and Egg Production	\$6.6	27
Commercial fishing and aquaculture	\$6.2	148
Breweries	\$4.5	7
Fruit Farming	\$4.2	53
Wineries	\$3.9	12
Animal production	\$2.2	159
Cattle ranching and farming	\$2.0	30
Support activities for agriculture &forestry	\$1.5	75
All other	\$2.3	21
TOTAL	\$119.0	1,475

Source IMPLAN Input/Output model 2009 data

Agriculture in southeastern Connecticut is experiencing many stresses including loss of farmland to development, mostly residential; high costs of fuel and transportation; utility costs; and a shortage of labor. The last item is noticeably acute in some of the larger nursery operations, many of whose workers have limited options in transportation to the job site. Encroaching development is also an issue for the region's farmers as even communities that like the "idea" of farms and the open space associated with them, do not always establish farmer-friendly zoning and land use regulations.

The good news for local agriculture is a growing "locavore" movement and the desire of many residents to buy and consume locally produced food products, both organic and non-organic. The challenges in taking advantage of this movement are several, including the logistics of getting food to markets, lack of regional USDA certified processing facilities for meat and dairy processing, higher costs of production for small farmers and consequent high costs for institutions that might purchase local food.

There are some very specific challenges facing farmers affecting their growth and prosperity which involve food processing. Many small fruit and vegetable producers process small batches of jams and condiments, but the regulations and requirements for commercial kitchens are a major hindrance to the expansion of selling their products, particularly to retailers and to institutions. The Town of Ledyard is considering the creation of a regional Kitchen Incubator at a town owned former school to service these small producers throughout the region and provide them with assistance to aid their desired growth into viable small businesses.

Retail and institutional sales (schools, hospitals, prisons, etc.) are also hampered for dairy, meat, and poultry producers by regulations and insufficient or non-existent processing facilities. Such sales would satisfy any desire to "Buy CT Grown" of consumers and institutions and would increase profitability for the farmer. The expense for the institutions and wholesalers of buying locally grown products from small farmers, and other issues, constrain growth of these purchases. The [Farmer's Cow](#), a cooperative of six farms in Eastern Connecticut, two of them in New London County, sells milk, cream, half and half, eggs and ice cream throughout the state, but depends upon the single plant in Connecticut for their milk processing needs, a processor in Central Connecticut. The growth of this local group is hampered by their dependence on one processor outside of the region. Another issue encumbering local farmers involves meat and poultry processing. Institutions and retailers require that meat be processed in USDA certified abattoirs or slaughterhouses. In

eastern Connecticut these facilities are limited, in fact there are only three USDA slaughterhouses in the state, necessitating transporting of animals some distance to processing plants and then back to local markets. The processing issue was very serious for poultry processors until recent state legislation was passed establishing a state inspection system allowing poultry farmers to sell directly to consumers, restaurants and hotels, although still not to wholesalers or institutions.²⁸ The Connecticut Department of Agriculture is currently participating in a study to address the entire issue of local meat production and marketing in New England. “The goal of the study is to investigate the bottlenecks, explore processing and capacity, and subsequently create a marketing plan for New England-grown ground beef for various channels, with special emphasis on local schools and institutions.”²⁹ The results of this study may be used in this region to determine the feasibility and return on investment possibilities were a processing facility to be established in one of New London County’s municipalities.

Because the agricultural sector is tied into tourism, the decrease in funding for tourism marketing in the region, and the inadequate signage indicating locations of farms open for public visits and events, has a direct impact on farmers as well. Although the Wine Trail, previously mentioned, is well marketed and well marked, and the ECTD recently published an “Ice Cream” Trail brochure, Agri-tourism as a whole is woefully underserved in southeastern Connecticut.

Summary

The above discussion of the existing Industry Clusters, or sectors, in southeastern Connecticut illustrates a variety of issues that must be addressed in order to keep existing businesses healthy and growing and to leverage the skills existing in different sectors towards creation of new businesses.

Focusing on STEM skills in the region’s K-12 and Community College environments are essential to the Defense, Bio-Science, Maritime and Creative Clusters. Developing incubator space for bio-science research will keep dislocated employees in the region and strengthen the overall Bio-science environment in Connecticut. A regional kitchen incubator will provide growing opportunities for small food producers and could include a culinary arts teaching facility to supplement programs offered at the technical high schools and to generate skilled culinary workers

²⁸ “Rules and Reality Test Chefs Who Think Locally,” New York, The New York Times, 5/7/2011

²⁹ “New England Regional Beef-to-Institution Marketing Study Announced,” Hartford, CT Department of Agriculture, 4/15/2011.

for the Tourism sector. A coherent marketing plan for the region, stressing the diversity, creativity and intelligence of the region's businesses and workers would impact all sectors, as would implementing the many transportation recommendations and plans that the SCCOG has developed in the last five years. Creation of a well organized plan to provide research, marketing, and planning assistance to growing businesses in all sectors is also critical to sustaining the economic health of the region.

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CHAPTER III – Assets, Challenges and Opportunities

Introduction

The April 2011 “seCTer CEDS Data Update” of southeastern Connecticut’s basic economy prepared by CERC, contains detail on which this report and the interviews and meetings conducted in conjunction with this report, are based. These include demographic, land use, labor, industry, and program details. The complete report is found in Appendix A. Both the CERC data update and the many group and individual interviews conducted during the CEDS process identified a range of assets and challenges that characterize the region. In many cases, assets and challenges are coexistent. For example, most stakeholders cite as a regional asset the regional diversity of small towns, urban centers and suburban municipalities and yet acknowledge that these political divisions also create duplication and cost inefficiencies in services and tend both to foster competition among communities in business growth and to create inequities in caring for populations in need.

Following the discovery process involved in preparation of this document, the primary goal in preparing this CEDS was to identify, discuss and suggest projects and programs that would build upon regional assets and exploit existing opportunities to solve or alleviate the challenges inhibiting growth and the achievement of a regional vision. Some of these have already been addressed in Chapter II’s review of regional industry clusters. Others cross over clusters and were seen by a majority of stakeholders as issues that must be addressed both to grow the economy and to retain the region’s quality of life.

This section will review some key assets and challenges defining the region and economy, as well as both potential opportunities and plans currently underway that address these challenges. It forms the basis for the goals and strategies and the programs and projects identified to assist the region in achieving full economic potential and in maintaining and improving citizens’ valued quality of life.

Location and Transportation

The southeastern Connecticut region, as described in Chapter II, enjoys an enviable geographic location, roughly half-way between the Boston and New York Metropolitan areas and within 500 miles of almost 1/3 of the entire population of the United States and 2/3 of the population of Canada. The region’s location also provides residents with access to the major cultural, retail and financial centers of the Northeast.

The transportation infrastructure of southeastern Connecticut is impressive, with interstate highway, passenger and freight rail, passenger and cargo shipping facilities, and a State owned airport.³⁰ I- 95 traverses the region from west to east and I- 395 bi-sects the region north/south connecting to Worcester, MA and I-90. Within the region, public transportation is available via Southeast Area Transit (SEAT), a public agency whose members are nine regional towns, and which offers transit bus service in and between those member municipalities. Funding for SEAT is provided by fares and contributions from the State of Connecticut and member municipalities. Federal funds provide for capital investment in equipment.

Fig. 3.1 Port of New London



Port of New London showing variety of transportation infrastructure

The southern border of the area is Long Island Sound, with close proximity to the shipping lanes of the Atlantic Ocean, the fishing grounds of southern New England and the recreational opportunities of beaches and boating. There is frequent ferry service from New London to Fisher's Island, NY for commuters and island workers. Cross Sound Ferry also operates frequent service to the eastern end of Long Island offering tourists, commuters and long and short haul truckers an alternate means of access to metropolitan New York, avoiding highway congestion regularly encountered on I-95 south of New Haven.

The Thames River, which also bi-sects the region, is navigable from New London to Norwich, with a channel depth of up to 40 feet, with most sections of the river at approximately 20-35 feet. At the southern end of the Thames, the Admiral Shear State Pier facility in New London, currently operated by Logistec, Inc. receives cargoes of wood and copper and an occasional

³⁰ Figure 11.1, "seCTer CEDS Data Update," Appendix A, p. 70. Map of transportation linkages in SECT.

passenger cruise ship. (See Fig. 2.12) The adjacent Vermont Central Pier, where several commercial fishing vessels are berthed, and the State Pier, have on-site freight rail connections to the north, east and west by way of the Providence & Worcester and New England Central (Rail America) Railroads. These two rail lines, on opposite sides of the Thames, diverge when they reach Norwich and continue north to Worcester and Palmer, MA respectively. Amtrak's Northeast Corridor provides passenger service through New London and Mystic to Boston, New York and south; and Shoreline East offers some commuter rail service to New Haven.

In addition to the highway, rail and marine transportation systems in the region, the State of Connecticut owned Groton/New London Airport (GON) in Groton hosts two general aviation companies, and is heavily used for corporate air travel, particularly by the area casinos. Commercial passenger service, which had been declining for over a decade, has not been available at GON since 2001. Commercial air service is available at Connecticut's Bradley International Airport (BDL) in Windsor Locks, Tweed New Haven Airport (HVN), and TF Green Airport (PVD) in Warwick, RI.

The location of southeastern Connecticut for businesses, whether existing, relocating or start-ups, coupled with the transportation infrastructure, is positive, with access both to major markets, and to a population of educated, youthful workers and potential entrepreneurs from the urban centers of the Northeast. For businesses looking for sites to locate in the Northeast Corridor several developable properties with access to the region's highways, rail and deep-water port are available. Infrastructure is in place for some of these sites, others will require investments in one or more utilities in order to become "shovel ready." A number of these are also Brownfields, requiring varying degrees of remediation to become viable developments. Recently "*the State of Connecticut adopted a new and innovative Brownfields clean-up program, PA no. 11-141; sec. 17, that incentivizes expedited redevelopment of sustainable projects on Brownfields sites. The new program is intended to help Connecticut be a leader in the Brownfields redevelopment marketplace. [It] provides liability relief and expedited regulatory review.*"³¹ Several of the Brownfields identified below in Table 3.1 and in the Project list in Chapter IV may be eligible for this expedited process.

³¹ "Connecticut Brownfield Remediation and Revitalization Program," Dave Hurley, Fuss & O'Neill, Inc., Hartford, CT 8/11.

Table 3.1 A Selection of Regional Brownfield Sites with Development Potential

NAME	TOWN	SIZE	FORMER USE	STATUS
Triangle Wire & Cable	Griswold	15.5 Acres (buildings demolished) and 2.3 acres with 48K sq. ft. building	Wire/Cable Mfg.	Phase I & II ESA complete and buildings demolished on 15.5 acres of property. Phase III required. 2.3 acres Phase III ESA complete and approved by CT DEEP. Town needs additional \$230K to demolish building. Has existing \$200K EPA grant for remediation
Wyre-Wynd	Griswold	62 acres, 152K Sq. Ft. +/- in three buildings	Textile and subsequently Wire/Cable Mfg.	CT DEEP and EPA in process of public comment to determine remediation needs, environmental restrictions for reuse.
Slater Mill	Griswold	17 Acres, 112K Sq. Ft.	Textile Mill	Unknown
99 Garfield Street	New London	60K Sq. Ft.	Various	Partial use for storage for Sheffield Pharmaceuticals. Building is available for sale, unknown amount of remediation and re-use
Shipping Street	Norwich	36 acres and numerous buildings, with several owners	Multiple	Norwich Harbor Management Commission Plan prepared; City is investigating bond issue to proceed with acquisition, infrastructure improvements and remediation (as of 8/2011)
Preston Riverwalk	Preston	390 acres, and several buildings		Conceptual Plan Prepared; remediation and demolition of some buildings underway; Development RFP issued and responses due 9/15/2011
Baltic Mill	Sprague	16 acres; 56K Sq. Ft. building, gutted by fire remains on site	Textile Mill	Phase II remediation complete; 2009 Feasibility Study complete
Pawcatuck Landing LLC	Stonington	12K Sq. Ft.	Castings Mill	Requires Soil Cleanup, Lead removal, Asbestos Abatement, Re-use plan
Waterford Airport	Waterford	300+ Acres	General Aviation Airport	Property has been purchased and new owners are reviewing remediation and re-use plans with Town, DECD, NU, and seCTer.

Source: CEDS Municipal Interviews March 2011 and www.epa.gov

Other sites ready to develop include:

- The Fort Trumbull Peninsula in New London on which remediation is complete and utilities are installed,
- Several large tracts of land on and near Rte. 117 in Groton, needing utilities (water/sewer),
- Flanders Rd. in Groton, with a small existing business park, needing utility build out and road improvements.
- The “Gateway” area at exit 74 off I-95 in East Lyme requiring utility infrastructure and some road and intersection improvements for access.

- Sites at the intersection of I-395 and Rte. 164 in Griswold requiring utility infrastructure to support commercial development

Although southeastern Connecticut's transportation infrastructure is extensive, it still presents operational challenges that surfaced in almost every interview conducted during the CEDS process. Many of these issues have been and are still being discussed in planning studies done in the last decade, and may receive additional emphasis based on CEDS identified needs. Some of these issues relate to interstate and inter-region travel:

- The State Pier is underutilized for both cargo and passengers
- Weekend and summer bottlenecks on I-95 threaten the free flow of goods and tourists,
- There is lack of consistent, affordable, convenient commuter rail service on the east-west corridor, and no passenger service on the northern rail corridor
- There are issues with cost and decrease in frequency of stops on Amtrak's Northeast Corridor service in southeastern Connecticut
- Rail lines northbound to the east-west rail corridor in MA are under-used or un-used and need upgrading in order to accommodate increases in Freight and passenger service
- Groton/New London Airport has no commercial passenger service
- The region has no public transportation options available to nearby Commercial Airports

Other issues raised involve intra-regional transportation, most relating to the SEAT system and its importance to the workforce, and others to the lack of a good tourist transportation system within the region for visitors without cars or who prefer to use a public system to get around the region. Interview sessions with many groups raised the following weaknesses:

- SEAT service does not cover the entire region and is spotty or non-existent in rural areas
- SEAT service is difficult to use, with non-existent or unclear signage, and confusing and inaccessible schedules
- SEAT buses do not run late enough or frequently enough, and have reduced weekend schedules, all contributing to a failure to accommodate tourists and third shift workers (this is particularly true for hospitality and health care workers)
- Local roads around casinos are stressed and require improvements
- Downtowns (Norwich and New London) have confusing road systems
- Directional signage from interstates and on local roads is deficient
- There is a lack of coordination of various transportation modes, including signage and information provided through internet or wireless communication
- For visiting tourists without cars it is extremely difficult to get around

- Availability of alternate transportation modes, particularly bicycles and marine transportation, is inadequate and underutilized

Although some of these issues are directed to those who have to navigate roads by car, many of them affect the population without cars, which admittedly is not huge but which also includes some of the visitor population and potentially could include more. The average number of cars per household (CPH) in southeastern Connecticut is 2; however, in the two distressed urban centers of Norwich and New London, where the June 2011 unemployment rate was 10.1% and 12.4% respectively, the average CPH is under two. Norwich's average CPH is 1.7, with 11% of households carless; in New London the average CPH is 1.4 and 15.9% of households have no vehicle.³² Many of the workers in these communities depend upon public transportation to get to work, and many of them work in the hospitality and health care industries, which operate 365 days a year, 7 days a week and 24 hours a day; not on a 5 day, 9am to 5pm schedule. If transportation were available, some of these workers would also be able to find jobs at farms and nurseries in rural areas where labor shortages are an issue as mentioned in Chapter II. Although there have been, and continue to be, attempts to accommodate those who depend upon public transportation using, for example, taxis or special needs vans, these efforts are expensive and cumbersome.

From the standpoint of the tourism industry, lack of an extensive and easy to use transportation system, while it may not seem a critical issue, does create a potential obstacle to growth. The same problems with the SEAT system identified for the local workforce apply to the tourist: inadequate coverage, user confusion and times of operation. The geographic target market for the southeastern Connecticut region has long been the New York City Metro area. In that market the average number of CPH is 0.07 and 54% of households do not have a car. Although there is relatively easy, if expensive, access to the region from this target market by rail, there is neither a good local transit system to serve these visitors on arrival, nor any rental car agencies at the train stations in Mystic or New London. Plans for improving this situation through establishing an Intermodal Transportation Center in New London have been made, but require funding.

The issue of bicycles and boats as alternative means of transportation was also cited by many during the CEDS interview process. Both of these types of transportation might offer opportunities for private sector businesses, such as AltaBike referenced in Chapter 2; however, the infrastructure to support both or either would have to be addressed by the public sector, for example,

³² CERC Datafinder, and "The Connecticut Economic Digest" (June 2011)

by providing bike paths and racks, and docks or public boat launches. The public sector should also be enlisted, along with groups such as the sierra Club, Nature Conservancy and local Land Trusts, in developing a system of trails throughout the region, both for walking and biking. One such trail is being explored from Preston to Bluff Point State Park in Groton, and another, the Vista Walking in New London, has been proposed. Both are encountering difficulties with funding and right-of-way issues, which may be resolved as public demand for such recreational amenities grows.

As was mentioned earlier, many of the transportation issues raised during the CEDS process are under discussion. The primary regional transportation planning agency is the Southeastern Connecticut Council of Governments (SCCOG), which recently completed a Regional Transportation Plan for the period 2010-2040 that considers and proposes solutions to many of the issues mentioned above. In recent years a number of other plans have been completed to deal with issues and several more are underway, but funding from the federal and state governments and private sector commitment will be necessary to complete most, if not all, of these transportation projects. Implementation of these plans should be integrated into the goals and projects of the CEDS and should be the basis for transportation project prioritization. Following is a partial list of plans with the authoring agency, date and link to the full plan where available:

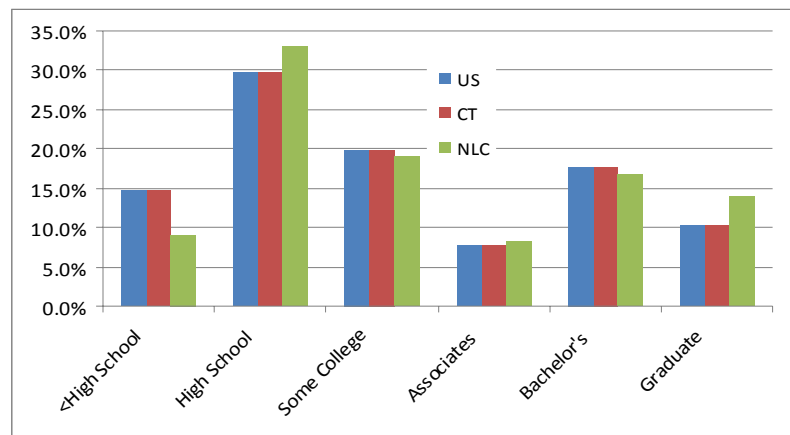
- [Regional Transportation Plan: 2011-2040](#) (SCCOG, 2011); addresses all modes of transportation in region with particular attention on road and highway improvements necessary to facilitate traffic flows and safety,
- [Regional Intermodal Transportation Master Plan and Efficiency Study](#) (RITC) (SCCOG, March 2010); addresses the need for a coordinated transportation center focused on the Union Station area in New London,
- [State Pier Needs and Deficiencies Planning Study](#). (CONNDOT, March 2011); addresses possible scenarios for short, medium and long-term improvements to State Pier in New London, including rail line upgrades.
- [Intermodal Connections Study Southeast](#) (SCCOG, February 2005); addresses the creation of a seamless transportation loop system to service regional tourists.
- [Mystic Mobility Study](#) (Town of Stonington & Partners, May 2011); this study developed conceptual plans that detail potential streetscape and roadway improvements in Mystic to service residents and visitors, including bike paths, and pedestrian and roadway improvements.
- [I-95 Branford to Rhode Island Feasibility Study](#) (State of CT DOT December 2004); this study developed by Clough, Harbour & Associates LLP for the Connecticut Department of Transportation reviews the needs, actions and costs of improvements to I-95 in southeastern CT.

- [Groton-New London Airport Master Plan](#) (Connecticut Department of Transportation (CONNDOT), in process): will provide plans for future use and development of GON
- The City of New London is applying for a Transit Oriented Development (TOD) grant to implement some of the recommendations of the RITC.

Education

The level of education of residents of New London County is a significant asset for the area and directly reflects the capabilities of the workforce. The State of Connecticut has long led the U.S. in the educational level of its population, including that of southeastern Connecticut. Fig. 3.3 graphically indicates the educational position of New London County, which exceeds both the national and state levels for High School Graduates, and for those with associate and advanced degrees. Maintaining, and building upon, this educational level will be necessary to ensure the success of the southeastern Connecticut workforce going forward.

Fig. 3.2 Educational Attainment of the Adult Population (25 years+)



Source: CERC DataFinder 2010

The high number of graduate degrees in the region may be attributed to the presence of companies requiring advanced educations, such as Pfizer, EB and Dominion Nuclear, and to the fact that there is a density of institutions of higher education in the region. Southeastern Connecticut, with less than 675 square miles, is able to boast the presence of five four-year colleges (the U.S. Coast Guard Academy, the UConn at Avery Point, Connecticut College, Mitchell College, and the Lyme Academy of Fine Arts) and a thriving two-year college (Three Rivers Community College - TRCC). All of these schools together represent a significant strength for the regional economy. TRCC specifically is an enormous asset to the community in its responsiveness to the needs of regional businesses. The College provides academic /internship/workforce development programs for companies such as EB and Dominion Nuclear and has Nursing and Allied Health Programs, Engineering Technologies, and has recently added programs in Sustainable Studies.

Two additional educational assets in the region are local branches of Rensselaer Polytechnic Institute (RPI) and the University of New Haven both of which offer graduate level courses locally in Management, Business, Education, Mechanical and Electrical Engineering, Industrial Organization and Public Administration. In addition to these local institutions, which host students from around the world, the region is within 60 minutes or less of two Ivy League universities (Brown and Yale), four state universities (UConn, Eastern CT and Southern CT State Universities and the University of Rhode Island), and numerous private colleges.

The presence of these high quality academic institutions within the region, or nearby, influences the economic, cultural and intellectual character of the region. They not only provide residents of all ages with myriad opportunities to participate in credit, non-credit, and certificate courses fostering an atmosphere conducive to life-long learning and enrichment, but also produce a sizeable number of residents from their faculties who have advanced degrees. The students, faculty, staff, alumni and visitors associated with these institutions contribute millions annually to the regional economy. They are major employers and purchasers of goods and services from local suppliers. Students participate as interns and volunteers in local non-profits and as mentors in local public school systems. The value of these colleges to the quality of life and economy of southeastern Connecticut cannot be underestimated.

K-12 education in the region is administered by individual municipalities, although some towns do not have high schools and send their students to neighboring communities. One unique educational asset in the region is Norwich Free Academy (NFA), a privately endowed, independent, comprehensive high school that serves as a secondary school of choice to Norwich and seven surrounding communities (Bozrah, Canterbury, Franklin, Lisbon, Preston, Sprague, and Voluntown), as well as to tuition students from other districts. Several regional schools provide specialized programs in the K-12 system. The most significant from an economic and workforce viewpoint are the Interdistrict (Middle) School for Arts and Communication (ISAAC), and the Science and Technology Magnet High School, focusing on STEM skills, both in New London, and the recently opened (August 2011) Marine Science Magnet School in Groton, focusing on marine trades and education. All of these magnet schools are intended to address preparation of students in the skills necessary to succeed in filling the current and future labor needs of the region in creative, technologically focused, and maritime businesses. The region also has two technical high schools, Ella T. Grasso and Norwich Technical High Schools in Groton and Norwich respectively. The

technical high schools, which have combined enrollments of almost 1,100 students, prepare students in trades such as plumbing, electrical contracting, automotive mechanics, barbering and hair-dressing, culinary arts and hospitality, as well as providing traditional academics that prepare their students to go on to college.

Educational challenges raised by stakeholder groups and individuals, most importantly those from the business community, raise questions about future prospects for southeastern Connecticut's educational levels, and the skills of its workforce, even though it appears that education is a dependable regional asset. Some serious challenges that were raised in the CEDS process highlight areas which the regional leadership needs to address, if they are not already.

- Over 80% of incoming students at TRCC who are recent High School Graduates require remedial Math and Reading,
- Schools in towns with high numbers of immigrant students are financially challenged by the number of students who require English as a Second Language (ESL) classes in Spanish and Chinese dialects, and Haitian Creole in particular,
- There is a high dropout rate for Hispanic students,³³
- ESL classes for adult learners, while widespread, are oversubscribed,
- The Community College is enrolled beyond capacity and is experiencing budget constraints,
- There is too much emphasis on traditional college for all students and not enough on trade vocations,³⁴
- A multiplicity of school districts creates cost and time inefficiencies in such areas as transportation, teacher training, vacation coordination, and purchasing
- Students entering the workforce from High School have poor work skills and habits, and poor math, computer and reading skills,
- Early Childhood education is inadequate or inconsistent in the region,
- Businesses are not sufficiently engaged with the educational community in addressing issues that will foster a skilled future workforce,

Several opportunities are in place that will address some of these issues. There have also been suggestions made by business leaders to foster and to enhance existing relationships with the educational system, particularly in High Schools, Trade Schools and local colleges. One local

³³ "Latino Workers in the United States," Labor Council for Latin American Advancement (LCLAA), Washington, DC: 2011, p. 10. "Beyond High School, Before Baccalaureate: Meaningful Alternatives to a Four-Year Degree," Editorial Projects in Education, Bethesda, MD:2011, p. 2

³⁴ This issue was brought to the forefront in late August, 2011. A shortage of linemen at Connecticut Light and Power in the aftermath of Hurricane Irene contributed to long waits for power restoration. CL&P representatives have noted this shortage of an incoming cadre of trained linemen for some time.

technology business is formulating a plan to bring students into its facility for several days or a week, in order to introduce them to the many job opportunities and skills required in a high tech manufacturing and engineering environment. Other opportunities:

- The State of Connecticut recently adopted legislation (PA 11-181) to strengthen Early Childhood Education in the State,³⁵
- The City of New London has strengthened requirements for literacy in graduating 12th graders,³⁶
- School districts are working to develop a shared calendar to facilitate teacher training and coordination, and vacations

Diversity

Diversity in southeastern Connecticut was cited as a regional strength by many who participated in the CEDS process. This diversity was identified in many areas, among them: population, civic, institutions, cultural and economic. However, the flip side of regional diversity's strength is the challenge it presents of duplication, competition, and fragmentation.

Population Diversity

The population of southeastern Connecticut is becoming increasingly diverse, with a marked increase in the region's Hispanic (75.4%) and Asian (117.8%) populations, due in large part to recruitment and hiring efforts of the two casinos over the last decade. The growth in these two populations is spread across the region, with every town seeing an increase in Hispanic residents. The cities of Norwich and New London have seen the most significant changes in real numbers in the Hispanic population, and Norwich the most real growth in the Asian population. Table 3.2 illustrates the population growth, in numbers, of these two ethnic groups across regional municipalities. This new population adds richness to the population of New London County as a whole, which over the last three centuries has drawn other immigrant groups to the region to fill jobs in businesses thriving here in the 18th, 19th and 20th centuries. But, the influx of these new residents, as well as others such as Haitians, poses certain challenges to the education and health care systems in the region, mostly due to language and cultural issues.

³⁵ State of CT Public Act 11-18, "An Act Concerning Early Childhood Education and the Establishment of a Coordinated System of Early Care and Education and Childhood Development."

³⁶ "In New London, English Becomes a Student's Ticket to Graduation," New London, *The Day*, 5/15/2011

Table 3.2 Growth of Hispanic and Asian Populations 2000-2010 in SECT Towns

TOWN	HISPANIC			ASIAN		
	2000	2010	Increase / Decrease	2000	2010	Increase / Decrease
Voluntown	30	41	11	7	16	9
Lyme	23	41	18	27	23	-4
Franklin	22	43	21	2	22	20
Bozrah	42	91	49	13	13	0
Preston	66	115	49	55	101	46
N. Stonington	72	128	56	53	75	22
Salem	47	105	58	57	130	73
Lisbon	23	87	64	19	64	45
Lebanon	114	200	86	22	41	19
Sprague	33	138	105	42	33	-9
Old Lyme	70	184	114	87	155	68
East Lyme	832	1015	183	519	1036	517
Griswold	210	396	186	99	267	168
Stonington	233	436	203	234	344	110
Colchester	281	524	243	89	220	131
Montville	1010	1440	430	357	1248	891
Ledyard	401	835	434	331	530	199
Waterford	457	922	465	482	728	246
Groton	2001	3575	1574	1396	2502	1106
New London	5063	7815	2752	567	722	155
Norwich	2207	5083	2876	768	3113	2345
TOTAL	13237	23214	9977	5226	11383	6157

Source: U.S. Census 2010

Specific challenges facing the region in addressing population changes particularly in the area of languages are:

- Communication in health care delivery to non-English speakers requiring care,
- Need for increased staff in ESL in local schools, particularly in Norwich, New London and Montville as well as in businesses such as EB and Casinos that offer ESL classes
- Need for English proficiency in workforce at technically advanced businesses, particularly manufacturing

The EWIB has established partnerships with regional community colleges, adult education entities, Literacy Volunteers, the State of Connecticut Department of Education and the CTWorks-East Center to develop a regional Adult Literacy program that was submitted to the CT Employment & Training Commission as required by Executive Order 35. Although to date there is

no dedicated funding to implement this plan it can be available for addressing the needs of the non-English speaking population.

The growing cultural diversity of the region, particularly in the Chinese and Hispanic populations, does offer some interesting opportunities for southeastern Connecticut. Although it is essential that immigrant populations learn English in order to fully participate in the cultural, civic and economic life of southeastern Connecticut, having many speakers of two additional major language groups in the region suggests opportunities for students and adult learners, whose first language is English, to become more comfortable in an economy that is increasingly global. Organizations active in efforts not only to integrate immigrant groups into the predominant culture of the region, but also to promote cross-cultural learning, language, and understanding are emerging, such as the *Expressiones* Gallery in New London and the Chinese & American Cultural Assistance Association in Montville. These and other agencies' literacy and ESL programs can and should be leveraged both to integrate new populations into the existing culture and language and to facilitate local business's entry into the global economy.

With respect to the globalization of the economy, the City of Norwich has established a "sister city" relationship with Wuxi, China and in April, 2011 hosted a visit of that city's business and governmental leaders interested in potential investments in Norwich.³⁷ Recently the City of New London was approached by a local Chinese-American native of Shidao, China who was anxious to propose a similar relationship between New London and Shidao. Both of these initiatives were facilitated by the region's former Congressman, Robert Simmons, who is a fluent Chinese speaker and has traveled often to China. Taking advantages of business contacts such as these may help southeastern Connecticut succeed in the global economy. A specific action that might be taken in this regard is to investigate the feasibility of creating an [EB-5 Visa region](#) in New London County for immigrant investors. This program provides permanent residency status to foreign investors in new or distressed businesses. Guidelines include minimum financial investment and hiring of minimum numbers of American citizens.³⁸ This program has been very successful in other regions of the U.S., including in nearby [Vermont](#).

Civic Diversity and Regionalization

As mentioned in the introduction of this document, the civic diversity of the region and its

³⁷ "Chinese Delegates will Tour Norwich," Norwich, CT, [The Norwich Bulletin](#), 4/13/2011

³⁸ EB-5 Immigrant Investors, U.S.Department of Citizenship and Immigration Services, www.uscic.gov.

location are seen by residents as significant assets. The 21 municipalities of the region include small rural towns and villages; mid-sized and small suburban communities; and three urban centers. Residents are able to choose their lifestyle from these three options, most of which include a range of housing types and costs that allow for diverse populations within each municipality. Looking outside of the region within one or two hours drive, the diversity continues with both major and mid-sized cities, and rural open spaces.

The challenge posed by a small region composed of 21 towns resides in the inefficiencies and expenses that ensue from providing similar or identical services among these towns. Some instances cited in the interview process were the costs of maintaining 21 different school districts, 13 high schools, separate 911 systems, numerous dog pounds, and two regional health districts plus several municipal health districts. This diversity and its associated expenses creates a competitive atmosphere within the region as well, one that organizations such as SCCOG, seCTer and the ECTD address, but which continues to be a barrier to growth. Each town must scramble for commercial development in order to ease the property tax burden on its residents, which increases as the school population increases. Some believe the school issue is driven by moderate income and multi-unit housing, which is therefore undesired in rural and suburban areas and is concentrated in urban areas with little room for commercial development to grow their local tax base. Government buildings and land, institutions such as colleges and hospitals, and social service agencies are also concentrated in the urban areas, leading to burdens being placed on communities whose tax base can ill afford the strain. The presence in the urban centers of a concentration of agencies, particularly those serving the homeless, indigent and mentally ill populations, also is a barrier to development and growth in the urban cores.

In the previous 2004 CEDS the issue of regional cooperation was addressed in Goal One (B) to: *“Research and Design a Regional Fiscal Equity Initiative by (1) increasing awareness of residents and municipal leaders about benefits of regional action, (2) Identifying and implementing service sharing projects; and (3) Developing a pilot sharing project.”* The single most significant example of this goal’s implementation was the completion of the Thames River Regional Water Project, which was coordinated by the Mohegan Tribe. This project provided an integrated system for providing water from the Town of Groton on the east side of the Thames River, to Montville and other towns on the west side, whose water supply is not as abundant or consistent as is Groton’s.

The State of Connecticut's recent move to foster better planning through its Office of Responsible Growth under the Office of Policy and Management (OPM) is a step towards improving recognition on the part of local communities of their impact and role in the development of the state and the region. Efforts to create planning consistency between local, regional and state plans should be supported as they represent an opportunity for a more cooperative approach that recognizes the impact on regional and state programs of local actions.

Some activities to address regionalism are underway. A SCCOG committee has developed a regional water plan, presuming inter-municipal cooperation, that when fully implemented will address water needs of the region well into the 21st century. This plan is modeled on the successful Thames River Regional Water Project mentioned above. In 2008 a regional Drinking Water Quality Management Plan (DWQMP) was developed by Groton Utilities, in cooperation with the City and Town of Groton, and the towns of Ledyard, Montville, Preston, North Stonington, Waterford, and Norwich to achieve long-term preservation of safe and sustainable drinking water supplies through proactive watershed protection. SCCOG municipalities are also reviewing the possibility of creating a third regional Health District with participating SCCOG towns and regional school districts have discussed coordination of class schedules, teacher training days and vacations, which could create cost efficiencies in student transportation and teacher continuing education .

In addition to the diversity of municipalities in southeastern Connecticut, there are several regional agencies which act, both separately and together, to promote the regional economy. These include seCTer, several Chambers of Commerce, and two tourism marketing organizations.

The region has three local Chambers of Commerce and one regional Chamber. The Greater Mystic (GMCC), Greater Norwich (GNCC), and Westerly-Pawcatuck (WPCC) Chambers include members for specific towns and their surrounding areas. The Chamber of Commerce of Eastern Connecticut (CCCECT) is comprised of businesses in all of eastern Connecticut. Three of these Chambers of Commerce (CCCECT, GMCC, GNCC) are represented on the Board of Directors of seCTer and work closely with seCTer on economic development in the region. The Chambers have a variety of roles as representatives of the business community. They establish collaborative programs for their members, create networks to encourage involvement, such as the recently established Young Professionals Network of CCECT and provide education and professional development programs. They all also provide the critical function of advocating for a business environment in the State and region that is conducive to the development and growth of those

businesses. Actions identified in the CEDS project list that relate to advocacy and professional development may naturally fall to the Chambers.

As discussed in Chapter III, the tourism cluster is marketed aggressively by both the publicly funded Eastern CT Tourism District and the private sector funded Greater Mystic Visitor's Bureau. Both of these organizations work together on managing the regional tourism website, and on preparing and executing regional marketing plans. They also work with the Chamber of Commerce of Eastern CT and the Greater Mystic Chamber of Commerce to produce a tourism guide to the region, which is published by the local Day newspaper and distributed widely throughout the northeast and in selected international marketplaces. Since funding for both of the tourism marketing organizations is under some stress, particularly in respect to the publicly funded ECTD, advocacy with the State of Connecticut for a robust tourism budget is another area in which the Chambers of Commerce may play an important role in forwarding the regional tourism economy.

Economic Diversity

The diversity of the economy of Southeastern Connecticut is also one of its significant assets, which was addressed in Chapter II in the discussion of regional industry clusters. The four main drivers of the economy continue to be Defense, Tourism, Bio-Science, and Marine Industries (which overlaps both Defense and Tourism). Agriculture and the Creative Industries (including new communications technologies) are two segments of the economy which provide unique contributions to the overall quality of life and potentially future growth of the region respectively. The real strength of this business diversity lies in an ability to absorb a variety of workers, from professionals and entrepreneurs to students and second job seekers; from entry level and less skilled workers to highly skilled trades and technology workers. The job market in southeastern Connecticut is able to provide work for both nuclear engineers and hotel housekeepers and for a huge range of jobs in between. Although recently the economy overall has been negatively impacted by national and worldwide issues, with the regional unemployment rate rising from 4.3% in June 2007 to 9% in June 2011, the basic economic structure of the regional economy remains diverse enough to continue to accommodate a variety of jobs as the national situation improves. Identifying the needs of employers in regards to worker skills in both existing and emerging businesses, particularly in the fields of technology and alternative energy, is one of the overriding

issues that the region needs to address. STEM skills initiatives being advanced by the EWIB will support fulfillment of these needs as they are identified.

Quality of Life

Although quality of life means different things to different people, residents of southeastern Connecticut generally agree that their quality of life is one of the most important assets of the region, and one that makes this place most attractive to both visitors and to new businesses and potential residents. Some of the assets encompassed in New London County's quality of life include the many marine resources of the region, both for business and recreation; the rich regional history and heritage organizations; the amount and diversity of quality cultural and arts opportunities; the health care system; the generally low crime rate; and the beauty of the region in its open spaces, hills, beaches and climate. Other assets include the depth and breadth of human and social service agencies that exist to serve populations in need, which because of the on-going weakness in the economy are becoming ever larger.

A challenge facing all of the non-profits in the region, from arts, heritage and cultural organizations, to social and human service agencies, is the competition for funding and the need to quantify the results of funding in the form of grants and donations. All participants in the CEDS interview process identified this competition as a problem, although occasionally they saw it as someone else's problem, not their own.

It is apparent that there must be better coordination among cultural agencies in their programs and services offered to the public and to educators: by creating joint calendars, by cooperating and coordinating events and, whenever possible, by establishing partnerships in pursuing grants for their programs. An example of a successful partnership is that currently underway to mount an exhibit and to publish a book in 2012, on the role of New London County in the War of 1812. This project is being undertaken jointly by the Custom House Maritime Museum, the New London County and the Stonington Historical Societies, Mystic Seaport and the Lyman Allyn Art Museum. Funding for the project was favorably decided by the Connecticut Humanities Council based on the collaborative nature of the event.

The SCCOG recently established, under their auspices, the SCCOG Regional Human Services Coordinating Council. This group meets regularly to discuss and coordinate the activities of the human/social services agencies in the region, who deal with issues from housing to homelessness, food security to child care, job care to health care accessibility. Food security, mostly

a problem in rural areas and urban centers, was an issue noted specifically by this group, as were an efficient worker transportation system and affordable and accessible child care. Other programs identified to create efficiencies in delivery of services should be fully supported as a quality of life issue.

One of the regional strengths widely lauded during the CEDS process was the quality of health care available to residents of New London County. Two excellent community hospitals in the region, William W. Backus of Norwich (Backus) and Lawrence and Memorial of New London (L&M), provide almost 450 beds and a complete range of medical and surgical services to the region. A third hospital in nearby Westerly RI, which recently opened an out-patient and rehabilitation center in North Stonington adds an additional layer of health care to area residents. On August 31 of this year, an article in The Day of New London reported that Lawrence & Memorial Hospital (L&M) in New London and Westerly Hospital in Westerly RI had entered into “an exclusive non-binding letter of intent to explore a possible strategic alliance.”³⁹ Regional relationships such as this will only strengthen the quality of health care residents expect.

Access to health care is perceived as a challenge regionally, as many of stakeholders mentioned the language and cultural difficulties attendant upon providing care to immigrant residents, and the difficulty of getting to health care providers by those without cars and the elderly. A United Community and Family Services (UCFS) Mobile Dental that visits schools was cited as an example of a system that might be further developed to provide health services to those latter populations, including nursing homes.

Another issue regarding health care is the shortage of primary care physicians in the region, and the shortage of nursing teachers. Although TRCC and UConn Avery Point both have programs for Registered Nurses, there is a crucial shortage of teachers for these programs, bogging down the pipeline of new Nurses.

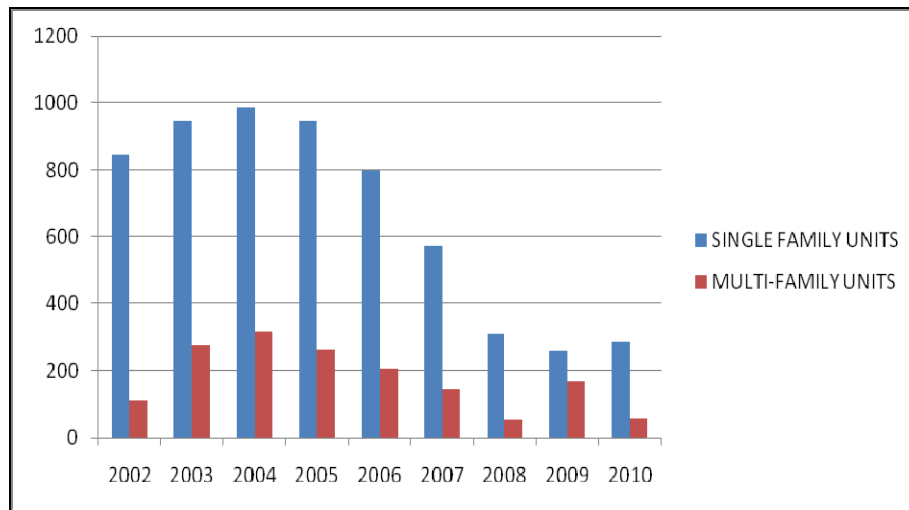
Housing

A critical contribution to a region’s quality of life and its economic health is housing for all residents. In 2002, the SCCOG issued a report *Housing a Region in Transition: An Analysis of Housing Needs in Southeastern Connecticut, 2000-2005*, which was updated in 2004. This report concluded that there were serious issues related to the availability and affordability of housing in the region and that the region would fall short of meeting the balance between owner-occupied housing

³⁹ “L&M and Westerly Hospital to explore potential alliance,” New London, The Day, 8/31/2011

and rental units given the then current construction trends. Even when building activity increased in the period of 2003-2005, the number of rental housing units fell far below activity in the construction of single family homes.

Fig. 3.3 - Building Permits Issued New London County 2003-2010

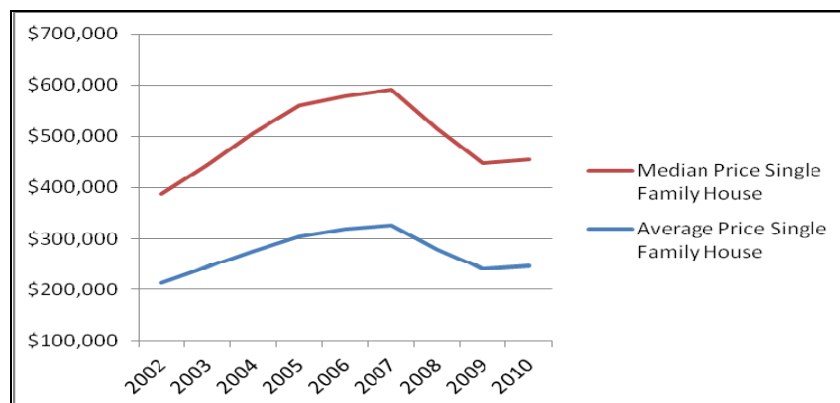


Source: U.S. Census Bureau

Most of the multi-family units that were built during this time period were built in Norwich and Groton, and according to the Census Bureau figures none were built in New London, a city with rentals comprising 50% of available housing units, most of which are aging multi-family homes and subsidized housing.

As in most of the country, housing costs climbed rapidly, and perhaps unrealistically, from the time of the 2002 report leading up to the recession that officially began in 2007, at which point they slid downwards, only stabilizing in the last year. Although housing prices in southeastern

Fig. 3.4 Housing Costs in New London County 2002-2009



Source: Eastern CT Realtors Inc. Information Service

Connecticut did not rise to quite the astronomical heights as they did in other areas of the state and

nation, nor did household incomes. Average per capita income in the region grew 33% from 2002 to 2009, but the median price of a single family home grew over 39% in that same time.⁴⁰

The CERC Analysis of the regional economy in Appendix A and a recent HUD report on regional housing in Appendix B, both discuss the housing situation in terms of foreclosures, the falling price of homes, and the current supply of available, if not new, housing resulting from these facts. Both note that the supply of rental housing in the region is stable, if not growing. Bankers and mortgage brokers interviewed during the CEDS process mentioned that there is a good supply of housing available now, and in many cases prices are affordable for first time buyers. However, credit issues and income levels still confront buyers. In the rental market the elderly and families often find incomes inadequate to rents. The conclusion that most of our interviewees reached was that although housing is not as acute an issue as it was in 2002, it is still an issue, mostly affecting the low and middle income worker, entry level workers such as recent college graduates and young families, and the elderly.

A recent discussion paper issued by the Federal Reserve Bank of Boston in June 2010 discusses these very points and concludes that "...owner-occupied housing continues to be less affordable in most New England States than in the nation as a whole....Potential first-time buyers in New England continue to face daunting marketing conditions...."⁴¹ The author also notes that "Owing to fairly stable media gross rents and household incomes, New England states have maintained their rental affordability relative to national markets." If, however, as Fig. 3.3 suggests, the construction of rental units in this region is weak relative to single family home construction, availability of housing remains an important challenge for those unable to afford to buy a home.

Given the previously discussed need for the region both to attract and to retain new and younger workers, particularly from the region's colleges and military personnel, the role of providing a good supply of affordable rental and owner-occupied housing is critical in meeting the labor needs of the region's economy. It is interesting that in New London, with a large supply of rental units, 35% of the population is between 20-40 years of age, compared to 25% in that age group regionally. There is obviously a necessity for the region to address housing issues forcefully if it is to retain and attract the labor force needed by its economy. The Southeastern CT Regional

⁴⁰ U.S. Census, and U.S. Department of Commerce Bureau of Economic Analysis

⁴¹ Clifford, Robert. "The Housing Bust and Housing Affordability in New England: An Update of Housing Affordability Measures." Federal Reserve Bank of Boston, New England Public Policy Center, June 2010. P. 6-12 <http://www.bostonfed.org/economic/neppc/dp/2010/neppcdp1001.pdf> accessed 9/15/2011

Housing Alliance (SECHA) is an important agency in providing the leadership and direction to the region is addressing housing issues.

Infrastructure and Development

Not least of the issues relating to regional economic development in southeastern Connecticut discussed during this process were the daily challenges that are faced by both businesses and development offices in local and regional municipalities. Some of these issues are beyond the control of municipalities and businesses, others require strong advocacy efforts on the part of the business community, others may be addressed by development of new programs, or obtaining funds to develop infrastructure and remediate Brownfields.

Issues that are difficult to address on a regional level but that are of utmost importance to local business involve the costs of doing business:

- Utility Costs in Connecticut are the highest in the nation, as are gasoline costs
- Health Care costs are high and exploding
- State and Federal Tax policies inhibit business growth
- State land use, transportation, and environmental permitting systems are cumbersome and not user friendly

The one issue here that cannot be changed by any proposal this CEDS may make, but that can be mitigated is that of high utility costs. Connecticut Light & Power (CLP), Norwich Public Utilities (NPU) and Groton Utilities (GU), all have energy efficiency programs available to local businesses. Many businesses are unaware of these programs and addressing this communication gap is easily included as part of any comprehensive “economic gardening” program.

The costs of health care and federal and state tax policies are in most cases beyond the scope of this CEDS to address; however, inclusion of a strong advocacy component in the goals of the document is possible to address these issues and should be considered. There are some federal tax and policy programs that actually represent opportunities, not barriers, for the region. One is the EB-5 Visa program that was discussed previously relative to several “Sister City” initiatives with China. The other is the federal Foreign Trade Zone (FTZ) program. The City of New London Office of Planning and Development administers a FTZ which is located at the State Pier area. Recent changes to this legislation allow flexibility in establishing sub-zones in the region, for example in a business park, or for a single business. A study to evaluate the import needs of local businesses that might be able to take advantage of the cost savings adhering to location in an FTZ is

critical in determining if this program can be expanded in the region to offer what may be considerable cost savings to local manufacturers.

The issue of permits and regulations is one that continues to frustrate businesses and developers, who consistently mention this as a problem for them in creating or growing a business in the state.⁴² The State of Connecticut has recently created the office of Ombudsman within the DECD. The role of this person will be to help developers efficiently navigate the maze of regulations and permits that must be addressed when working on projects in the state. It is hoped that this will be the beginning move in an overhaul of the state's system to simplify and speed up developments when they occur. This same issue of unclear and lengthy permitting processes confronts local governments. Businesses, developers, farmers and arts organizations, as well as the Economic Development Coordinators in area towns, pointed out that local permitting processes in almost every town seem to be interminable and confusing:

- Development offices in local communities are understaffed or non-staffed
- Local planning and zoning (P&Z) policies and procedures are perceived as too time consuming for businesses and developers
- Some local P&Z policies and regulations do not recognize work-from-home trends
- Some local environmental, land use and P&Z commissions are not friendly to needs of agriculture

A specific area that could benefit from improved permitting are those relating to Brownfield sites, both with and without buildings. Providing streamlined procedures for bringing such sites into productive reuse is a method to encourage local commissions to foster sustainable development, reduce sprawl and protect the environment. There is a need for local commissions to streamline all their systems, and for economic development staff, both local and regional, to assist small businesses and developers to the greatest extent possible in navigating the permitting processes in southeastern Connecticut. An example of an attempt to streamline permits was addressed by the Regional Film Commission that provided, courtesy of the State Film Commission, a sample form for use in setting up all permits required for filming in a location. This form might be used as a model for other types of economic developments that require multiple permits and approvals.

⁴² See the Connecticut Business and Industry Association (CBIA) web site for discussions of these issues: http://gov.cbiam.com/issues_policies and the Legislative Initiatives of the Chamber of Commerce of Eastern CT <http://chamberect.com/legislative-initiatives.html>.

Overall, southeastern Connecticut is blessed with robust utilities coverage. The problems that do exist are in the inconsistent availability of gas lines in areas that might support development; and in an inconsistent availability of water and sewer service in the region. This is noteworthy in places like Flanders Road in Groton, which has several small industrial sites that could be grown, but are constrained by lack of water and waste water systems; and along Rte. 12 in Ledyard between the Groton and Preston lines. The regional water plan, developed by the SCCOG, addresses some of these issues and should be implemented as expeditiously as possible pending the receipt of funding and approvals. There are also gaps in broadband coverage in the area, although this is not as acute as in 2004. However, one interviewee in the process pointed out that if the region is to grow its economy for the rest of the 21st century it should be prepared to build out a significant 3G or even 4G system of wireless communication. The State of Connecticut is addressing the broadband issue in a study that is scheduled for release in late 2011: *Guidelines for the Development of a Strategic Plan for Accessibility to and Adoption of Broadband Services in Connecticut*. The results of this report should be considered when addressing broadband needs in southeastern Connecticut.

Sites available for development are another issue of concern to the region. There is a shortage of available “shovel ready” and “green” land for development. There are a number of Brownfields, some of which were identified in Figure 3.2 that are possibly more immediate candidates for remediation and reuse. Some of these are well into planning and remediation efforts and should be a high priority on the regional project list. There are, in addition, many older downtown buildings in Norwich and New London, and outdated strip malls (Grayfields) in almost all area towns. These older buildings and strips could be re-used for housing, commercial and retail uses, but there is difficulty, particularly with multi-story downtown buildings, in adapting such sites. Besides issues of asbestos and lead removal and remediation, accessibility within the buildings to upper floors, and outside the buildings for parking and deliveries, is complicated and often seems impossible. In New London a recent grant was received that will identify all the issues connected to the rehabilitation of downtown buildings, often dating to the early 19th century. The study will then be used in creating action plans to address these issues. These plans could also apply to many of the buildings in Norwich as well, and the opportunity exists for a sharing of information and planning ideas between the two cities.

A final development issue that was raised by several stakeholder groups and business leaders during the CEDS process related to the region's Brand and Marketing position. In the process of developing this CEDS the following groups brought up the branding subject as follows:

- Thames Maritime Council – we are a center of marine trades and should be so branded
- Small manufacturers – we make things here and this should be the region's brand
- Arts groups – we are a region of ideas and we should sell ourselves as such
- Heritage groups – we are a center of United States history
- Commercial Brokers – we should be seen as a center of New England Tourism
- Farmers – we are a center for Connecticut Grown products
- Tourism – we are the most important part of the economy

In 2005, following the BRAC decision and concerned by dependence of the regional economy on the Subbase as the region's major (non-tourism) economic driver, then-Governor M. Jodi Rell convened the *Governor's Commission for the Economic Diversification of Southeastern Connecticut*, chaired by Douglas Fisher of Northeast Utilities. One of the results of this commission was the production of a "Brand Platform" for the region, which in the main has not been fully adopted, as it was perceived as somewhat unclear. With some review and clarification, this platform could be useful as a base for future branding and marketing efforts. Clearly there is a desire on the part of the community to clarify for outsiders and for those within the region just what makes southeastern Connecticut such a good place in which to do business and to live. Developing a marketing plan that encompasses the diversity of the economy and the quality of life appears to be a priority for this group.

CHAPTER IV: Planning for the Future

Introduction

Following the process of eliciting stakeholder input into the assets, challenges and opportunities facing economic development in southeastern Connecticut, the CEDS Strategy Committee formulated a vision statement for the region that will be the basis for future regional development. This vision recognizes the importance of the individual and the community in any plan for growth, and appreciates the importance of the region's natural advantages in contributing to overall quality of life. The vision and input from stakeholders informed the formulation of five goals that will guide activities to achieve that vision; strategies and actions within each goal; and a list of both capital projects and program investments identified by stakeholders as actions to be taken in building the southeastern Connecticut economy.

Vision Statement

Southeastern Connecticut will have balanced, diversified, and sustainable regional economic growth that produces shared prosperity, encourages continuous individual achievement, and conserves our existing natural resources.

Goals and Strategies to achieve Vision

GOAL ONE: *Promote a regional collaboration around economic development that unites the region behind this common vision*

- A. Establish a CEDS Implementation Committee
 - 1. Meet regularly to coordinate and assist in the implementation of region-wide objectives
- B. Foster partnerships and collaboration to create efficiencies in regional organizations and municipalities
 - 1. Identify and Implement service sharing projects
 - 2. Encourage coordinated business development activities among business development organizations and agencies
- C. Increase awareness of residents and municipal leaders of benefits of regional identity and organizational activities
 - 1. Develop a common theme and plan to communicate the region's assets both internally and externally
- D. Build a more diverse leadership base
 - 1. Encourage participation of community-based organizations and individuals representing various groups to engage in regional civic activities.

GOAL TWO: *Ensure the continued strength of existing economic base while seeking to diversify the economy through the development of the region's core competencies.*

- A. Promote Small Business Development and New Entrepreneurship
 - 1. Establish an Economic Gardening Program within seCTer
 - 2. Develop incubator space for research and business start ups
 - 3. Foster Regional Entrepreneurial Programs
- B. Support Creative Strategies for Business Investment and Market Development
- C. Support the Vitality of the Regional Manufacturing Base
- D. Ensure the Continued Strength of the Region's Defense-related Facilities and Companies
 - 1. Support the activities of the Subase Coalition
 - 2. Support continue State and Federal Infrastructure Improvements at Subase
- E. Support the Sustainable Development of the Region's Tourism Industry
 - 1. Support Public/Private coordination of Tourism
 - 2. Capitalize a regional tourism development Revolving Loan Fund
- F. Support the Growth of the Maritime Cluster
- G. Promote the Region's Arts and Cultural Organizations as an Economic Engine
- H. Support New Economic Opportunities in the Agricultural Cluster
 - 1. Establish Agricultural Commissions on Municipal Level
 - 2. Foster Development of Value-added agriculture
 - 3. Promote Institutional and Consumer purchasing of locally grown agricultural products

GOAL THREE: *Enhance the physical infrastructure needed to support the region's development*

- A. Strengthen the region's intermodal transportation system
 - 1. Fund and implement 2009 Intermodal Transportation Center in New London
 - 2. Provide Sustainable transportation system for tourists to and within region
 - 3. Improve SEAT System to provide sustainable and comprehensive transportation for workers.
 - 4. Improve road capacity
 - 5. Expand Passenger and Freight Rail service to and through region
 - 6. Improve transportation services to commercial airports
- B. Provide Sites and Utilities needed to support the region's economic development priorities

1. Expand availability of development sites with necessary access and utilities
 2. Expedite reuse of Brownfield sites
 3. Accomplish Full development of Regional Water Network
 4. Develop appropriate Waste Water Systems and facilities in Region
 5. Achieve 100% broadband coverage for the region
- C. Support State of Connecticut Plans for improvements at State Pier New London
1. Implement Improvements to State Pier as they are developed by CONNDOT
- D. Support implementation of the Southeastern CT Housing Alliance Strategic Plan

GOAL FOUR: Promote Education and Training Opportunities that Create and Sustain Careers

- A. Further enhance the Positive Relationships among Workforce Development System, Educational Institutions and Business Community
1. Support partnerships to provide career guidance ladder and skill sets to meet the needs of businesses and students
- B. Establish a regional Initiative to Attract and Retain Workers
1. Retain separating Navy and Coast Guard personnel and college graduates in region
 2. Support entry of immigrants into workforce and entrepreneurial initiatives
- C. Develop Tourism career initiative
1. Support enhanced hospitality training and tourism management programs
- D. Develop STEM Skills training and core educational competencies in region's high schools to meet needs of all businesses
- E. Maintain and augment the capacity to produce a highly-skilled workforce
1. Develop long-term strategies to replace highly skilled workers at defense and manufacturing firms
 2. Develop cooperative program among Educational services to provide adult and post-high-school technical training and career guidance.
- F. Engage Regional Economic Development Organizations in Critical Regional Education and Workforce Development
1. Promote Trades and Construction careers as attractive alternatives or supplements to college education
 2. Support Investments in early Childhood Education

GOAL FIVE: Enhance the regional quality of life, in urban centers, rural areas and suburban communities

- A. Enhance the downtowns in region
 - 1. Promote regional planning and assistance to alleviate the impact on urban core downtowns of disadvantaged populations and their service providers.
 - 2. Support and market Norwich and New London as living centers for young and creative populations by integrating arts, heritage and ethnic communities into all downtown planning
 - 3. Achieve downtown and village center improvements in suburban and rural communities
- B. Support activities of regional health care providers
 - 1. Promote and support regional partnerships among health care providers and agencies.
 - 2. Support retention and recruitment of skilled medical care workers
- C. Support coordinated, collaborative and effective services to at-risk populations to help them achieve productive, fulfilling lives
 - 1. Promote and support regional partnerships among human service agencies
 - 2. Increase availability of both foreign language training and ESL classes to address communication needs in all areas
- D. Promote regional sustainable land use policies
 - 1. Encourage smart and sustainable growth policies supporting and complementing regional economic development
 - 2. Encourage preservation and enhancement of the historic built environment
 - 3. Encourage protection and preservation of the region's rural places
 - 4. Support initiatives to preserve agricultural lands and other open space.
- E. Protect water quality and recreation
 - 1. Support and expand cooperative regional water quality initiatives
 - 2. Increase shoreline access and water dependent transportation and recreation

Action Plan, Projects and Programs

Achieving the goals and implementing the strategies outlined above will take a concerted effort by agencies, municipalities and organizations, all of whom have different roles to play in advancing the economy of southeastern CT. During the CEDS process projects and programs were identified by all the stakeholders who participated in interviews conducted by the staff and Economic Development Committee of seCTer. These were divided into “Vital” Investment Projects that are either regional or municipal in scope, and

other “Suggested” projects that should be pursued in the future. These projects are listed below in detail: Vital Regional Projects (Table 4.1), Vital Municipal Projects (Table 4.2), and other Future Suggested Projects (Table 4.3). These have all been prioritized and wherever possible assigned to responsible agencies or towns, and each identifies plans in existence, funding sources if known, timelines, and costs to accomplish. Appendix D lists all planning documents and reports that are associated with these projects and provides links to the reports on appropriate websites.

TABLE 4.1 VITAL REGIONAL PROJECTS

<i>Priority</i>	<i>Project Name</i>	<i>Responsibility</i>	<i>Cost</i>	<i>Time-line</i>	<i>Funding Source(s)</i>	<i>Description</i>	<i>Jobs</i>
1	Regional Water System	SCCOG Regional Water Committee	Phase 1 (East Lyme-New London) \$12 Mil.	Phase 1-7-2012/7-2013	TBD	Implement the Regional Water Plan developed by SCCOG. High and Medium priorities have been established and work has commenced on Phase connecting East Lyme and New London. Time sensitivity is also outlines. See Appendix D	62 new jobs in construction in 2012 & 60 in 2013. 87 total new jobs in 2012 & 83 in 2013. \$12 mil split 50-50 between 2012 & 2013
2	Mohegan – Pequot Bridge	CONNDOT; FHWA	\$100 Million	10-29 Years	CONNDOT; FHWA; Private sector possible (Casinos)	Build a second span of Rte. 2A Bridge between Preston and Montville to facilitate traffic to/from casinos and Preston Riverwalk Development and I-395. See SCCOG Regional Transportation Plan 2011-2040. Appendix D	Assume project spends \$8 mil for 10 yrs then \$4 mil for 5 years. Over this period, construction jobs increase on average each year by 50. Total jobs increase on average each year by 62.
3	State Pier	CONNDOT; CT DECD; Federal DOT; CT Cruise Commission; P&WRR; NECRR	\$30 Mil. Plus dredging cost	1-5 Years	\$24 Mil. From TIGER-3 Grant; \$24 Mil. CONNDOT match. Other possible private sector funding from RR's and Port Operator	Accomplish significant improvements to Admiral Shear State Pier in New London, including dredging, P&W and NEC Rail improvements, preparation of land and warehousing for better freight handling, potential short shipping and small container handling and possible Cruise Ship Terminal. See "State Pier Needs And Deficiencies Plan 2011" Appendix D.	Assume project spends \$12 mil for 4 yrs. Over this period, construction jobs increase on average each year by 117. Total jobs increase on average each year by 160.
4	Rail Improvements P&W and NECC Rail Lines	SCCOG; CONNDOT; Town of Sprague; Federal RR Administration; P&W RR; NECRR	Phase 1 P&W: \$6.8 Mil. Phase 2 P&W: tbd NECRR for "College Corridor" \$40 Mil.	Phase 1-3Years "College Corridor" 1-10 years	Federal RR Administration; P&WRR; NECRR; CONNDOT	Implement improvements to P&W Rail line for freight purposes from State Pier to Worcester MA including siding improvements in northern part of region; and on P&W and NECC Lines from State Pier to Palmer, Worcester MA and North for future passenger rail service on "College Corridor." Freight improvements on Willimantic Spur of P&W line recently funded by \$5.3 Million grant to Town of Sprague from FRRA and matched by private sector investment of P&W RR. The Freight improvements till support development of Baltic Mill Site, Norwich Waterfront District, Griswold sites and existing businesses such as Dow Chemical in Ledyard, as well as provide opportunities for new business at State Pier.	132 from initial investment on P&W Willimantic Spur

TABLE 4.1 VITAL REGIONAL PROJECTS (con't)							
<i>Priority</i>	<i>Project Name</i>	<i>Responsibility</i>	<i>Cost</i>	<i>Timeline</i>	<i>Funding Source(s)</i>	<i>Description</i>	<i>Jobs</i>
5	Regional Intermodal Transportation Center	SCCOG; CONNDOT; Private sector	\$4.7 million	1-10 Years	CONNDOT; Amtrak; Private sector including CSF and Union Station owner	Fund and implement the 2009 Intermodal Transportation Center plan for Union Station in New London. See SCCOG's 2010 "Regional Intermodal Transportation Master Plan and Efficiency Study"	Assume project spends \$0.47 mil for 10 yrs. Over this period, construction jobs increase on average each year by 4. Total jobs increase on average each year by 5.
6	I-95	SCCOG; CONNDOT; FHWA	\$765.5 MIL. (2004 estimated \$ not adjusted for inflation)	10+ Years	FHWA; CONNDOT	Fund and Complete I-95 improvements from East Lyme to Rhode Island border including interchange upgrades and road widening. See "I-95 Branford to Rhode Island Feasibility Study" CONNDOT 2004	Assume project spends \$50.033 mil for 15 yrs. Over this period, construction jobs increase on average each year by 380. Total jobs increase on average each year by 484.
7	Rte. 11	SCCOG; CONNDOT; FHWA	\$1 Bil.	10+ Years	CONNDOT; FHWA	Complete Rte. 11 from Salem to I-95 in East Lyme	Assume project spends \$66.67 mil for 15 yrs. Over this period, construction jobs increase on average each year by 496. Total jobs increase on average each year by 633.
8	Regional Investment Site	seCTer; SCCOG	\$10 Mil.	1-10 Years	Municipalities; EDA	Identify a site in the region that is appropriate for regional cost and revenue sharing plan, build out infrastructure, prepare permits and plans and market as shovel ready development site. Consider use as a business park to accommodate start up businesses as they expand and grow.	Assume project spends \$1 mil for 10 yrs. Over this period, construction jobs increase on average each year by 9. Total jobs increase on average each year by 12.

TABLE 4.2 VITAL MUNICIPAL PROJECTS							
Priority	Project Name	Respon- sibility	Cost	Timeline	Funding Source(s)	Description	Jobs
1	Preston Riverwalk (Brownfield)	Town of Preston;	\$30 MIL. For demolition and remediation	1-3 Years	CT DECD; CT Office of Brownfield Remediation; EPA; EDA; Private Sector	Environmental remediation, building demolition and infrastructure improvements on former State Hospital Site now owned by Town. Conceptual Plan is complete and RFP's being sought. See Appendix E.	Assume project spends \$10 mil for 3 yrs. Over this period, construction jobs increase on average each year by 100. Total jobs increase on average each year by 137.
2	East Lyme Gateway Project	Town of East Lyme; CONNDOT	\$14 Mil. For improvements to exits both north and southbound.	1-5 Years	FHWA; CONNDOT; STP-U; Private Sector	Infrastructure (Water) and Road improvements to land at exit 74 of I-95 and Rte. 161. Plans in place for Mixed Use Development.	Assume project spends \$14 mil for 5 yrs. Over this period, construction jobs increase on average each year by 30. Total jobs increase on average each year by 36.
3	Norwich Waterfront Re-Development (Brownfield)	City of Norwich	\$40 Mil. Estimated	1-5 years	City of Norwich Bond; EPA: CT DECD; CT Office of Brownfield Remediation; P&W RR; NECRR; Norwich Public Utilities	Implement the Norwich Waterfront Development Plan beginning with Shipping Street area and including both sides of Thames Norwich Harbor area. This includes land acquisition, utility upgrades, environmental remediation and Rail improvements. See Appendix E.	Assume project spends \$40 mil for 5 yrs. Over this period, construction jobs increase on average each year by 76. Total jobs increase on average each year by 103.
4	Waterford Roadway Improvements	Town of Waterford; CONNDOT	\$2 Million total. Phase 1 \$63,000 for design and intersection analysis.	July 2011- July 2014	Private sector -- Wal-Mart has contributed initial \$300K and Crystal Mall will provide additional match; CONNDOT; Town of Waterford	Extend Parkways North and South to connect with Rte. 85 facilitating traffic flow and access in the triangle formed by I-95, I-395 and Rte. 85 to retail developments and build new road to L&M Hospital's site from Boston Post Rd. This has significant private sector support.	Assume project spends \$2 mil for 3 yrs. Over this period, construction jobs increase on average each year by 7. Total jobs increase on average each year by 9.

TABLE 4. 2 VITAL MUNICIPAL PROJECTS

TABLE 4. 2 VITAL MUNICIPAL PROJECTS							
Priority	Project Name	Respon- sibility	Cost	Timeline	Funding Source(s)	Description	Jobs
5	Baltic Mill Remediation, Reuse	Town of Sprague and Private Sector Developer	\$40 Million in construction costs to build out for Clean Tech Oil, including design, planning, construction	1-3 years	State of CT Office of Brownfield Remediation; EDA Global Climate Change Mitigation Investment Fund; Private Sector; Town of Sprague; PWRR. \$200,000 to date from EPA for remediation. \$36,000 study done by CERC.	*BROWNFIELD* Remedial Action Plan October 2010. Interest in site from an Clean Tech Oil Corp. Supported by CT DECD letter of support for project dated 9/19/2011 and RR improvements by P&WRR. Needs to complete environmental studies, remediation and infrastructure upgrades at Baltic Mill site to develop to fullest potential for committed corporation. PH. 1, 2, 3 environmental assessments complete.	Assume project spends \$40 mil for 3 yrs. Over this period, construction jobs increase on average each year by 133. Total jobs increase on average each year by 183.
6	Adaptation/Re-use of Mystic Education Center (Brownfield)	Town of Groton; State of CT OPM	\$150,000 Re-use Assessment. Estimated \$5 Mil. To complete Project	1-10 Years	Town of Groton; CT Office of Brownfield Remediation; CT DEC; EDA	This property is slated to be put on Surplus Property List by State of CT. It is convenient to I-95 and could be converted to Mixed Use development possibly including an incubator	Assume project spends \$5 mil for 6 yrs. Over this period, construction jobs increase on average each year by 8. Total jobs increase on average each year by 10.
7	Adaptation / Reuse of 99 Garfield Street Property New London (Brownfield)	City of New London	TBD	1-10 Years	Possible CT Office of Brownfield Remediation; private Sector; EDA	Private owner will sell 60,000 square foot mill dating to 1920. In distressed census tract in New London. Will require remediation and development of a plan to adapt to new use. Possibilities are workforce housing and/or incubator space for start-up technology businesses or both.	Need funding estimate to calculate jobs (Stan McMillen).

TABLE 4. 2 VITAL MUNICIPAL PROJECTS (con't)							
Priority	Project Name	Respon- sibility	Cost	Timeline	Funding Source(s)	Description	Jobs
8	Regional Kitchen Incubator	Town of Ledyard	Phase 1: Feasibility Study defining scope, organization, financial requirements, and im- provements to building: \$80-120K. Implemented at \$1-2 Million	Phase 1: 6 months (Jan.-July 2012). Implementa tion 1 Year (July 2012-2103)	USDA; EDA; Town of Ledyard; UCONN; TRCC; Possible additional contributions from municipalities and private sector	Town owns a 22K square foot property currently vacant. Plans are underway to convert to a kitchen or food incubator to support early state catering, value-added agricultural products and possibly a culinary school.	Assume project spends \$2 mil for 2 yrs. Over this period, construction jobs increase on average each year by 14. Total jobs increase on average each year by 10.
9	Triangle and Wyre-Wynde Remediation and Re-use (Brownfields)	Town of Griswold	\$600 K to complete remediation of Triangle Wire Site, and \$1,061,000 in land and infrastructure support to leverage additional private investment	1-5 Years	MDP; DECD; SCBG; STEAP; EPA; CT DEEP	Funds to complete acquisition, final remediation and infrastructure improvements at former Triangle Wire and Wyre-Wynde sites in Jewett City (a distressed community). Sites have utilities; some water , co-generation plant and access to P&W RR spur.	Assume project spends \$1.661 mil for 5 yrs. Over this period, construction jobs increase on average each year by 3. Total jobs increase on average each year by 6.
10	Flanders Road infrastructure installation and improvements	Town of Groton	\$14 Million	January 2012- January 2015	Town of Groton; Tyaska Industries; EDA	Flanders Rd. currently has a small business park with small start up and second stage manufacturers and services businesses. Owner wishes to expand but is hindered by lack of water/sewer and needed road improvements including access to I-95.	Assume project spends \$14 mil over 3 yrs. Over this period, construction jobs increase on average each year by 46. Total jobs increase on average each year by 64.
11	Franklin Rte. 32 Infrastructure and SIP Construction	Town of Franklin;	Total Project \$11 Mil.; including \$1 Mil. private sector investment	Jan. 2012- July 2014	Town of Franklin;; EDA Global Climate Mitigation Investment Fund; seCTer; CT DECD; CI	SIP Energy Solutions plans to build “green” factory producing energy efficient building materials Will need assistance in building and infra-structure improvements	Assume project spends \$11 mil over 3 yrs. Over this period, construction jobs increase on average each year by 38. Total jobs increase on average each year by 53.

Table 4.3 OTHER SUGGESTED PROJECTS BY TOWN

Location	Description	Time To Accomplish	Existing Plans	Cost	Funding Sources	Jobs
Bozrah	Extend Sewer to Stockhouse Rd. Business Park				EDA	TBD
Bozrah	Rte. 32 improvements to spur development. Includes Curb Cuts	1-5 Years		TBD	CT DOT	TBD
Colchester	Fund final phase of extension of Water and Sewer to designated business park.	1-5 years		TBD	EDA; SCCOG	TBD
East Lyme	Build more affordable rental housing for senior citizens in Downtown	1-5 years		TBD	HUD; Town of East Lyme; Private Sector	TBD
Franklin	Extend water line from Bozrah to Franklin to support a proposed development	3 months		\$300K	Town Grants and Private Sector	TBD
Griswold	Implement infrastructure improvements to encourage commercial development on I-395/Rte 164 corridor. Road intersection improvement and Water/Sewer extensions.	5-10 years	Town of Griswold I-395/164 Corridor Study, Aug. 2000. Private Planning studies done in 2008 and 2011	\$6 Million	TBD. Private Developer; EDA; CONNDOT: USDA	TBD
Griswold	Continue to develop and implement Jewett City Main Street improvements: parking and road improvements; façade program, riverwalk to park	5-10 years	Town of Griswold Municipal Development Plan, Aug. 2010 and Main Street Corridor Streetscape Plan 2011	\$5 million	2011 Streetscape plan funded by STEAP grant. Other funding from MDP, STEAP, SCBG, DECD	TBD
Groton	Implement Downtown Gateway and Streetscapes Improvement Strategy	1-5 years	Town of Groton Economic Development Plan	TBD	TBD	TBD
Ledyard	Implement Town Center Enhancement Plan		Town Center Enhancement Plan Feb. 2007			TBD

Table 4.3 OTHER SUGGESTED PROJECTS BY TOWN (con't)

Location	Description	Time To Accomplish	Existing Plans	Cost	Funding Sources	Jobs
Ledyard	Extend sewer lines on Rte 12 north from Groton to Gales Ferry commercial Center. Approx. 11,000 LF	1-3 years, 1/2012-1/2015		\$2-3 million depending on funding available	EDA; Groton Utilities	TBD
Ledyard	Implement Town Center Enhancement Plan	1/2012-1/2017 (five years)	Town Center Enhancement Plan Feb. 2007	\$4.5 million to make traffic, pedestrian, sewer improvements	TBD	TBD
Montville	Develop road from Rte. 32 into 340 acre Job Investment Site along Thames	1-10 Years	Montville Targeted Industry and Feasibility Analyses, Jan. 2011	CONNDOT; Town of Montville	TBD	TBD
N. Stonington	Water Study for water/waste water system with Stonington to open up industrial zone at exit 92 of I-95 up to Rte. 2 Rotary	1-3 years	Plans required and await agreement between towns.	Town of Stonington; Town of N Stonington; EDA	\$200K is currently available	TBD
New London	Implement Downtown Hyett Palma Plan	1-5 years	2011 Hyett Palma Downtown Action Agenda			TBD
New London	Review/Revise Ft. Trumbull MDP based on Yale Urban Design Workshop Study	1-3 Years	Plan presentation made October 2011 to City Council and Residents	TBD	TBD	TBD
New London	Implement actions recommended for Neighborhood Planning	1-5 years	Choices for New London: Neighborhood Planning Strategy, Oct. 2010	City of New London: Private Sector; HUD; CONNDOT	TBD	TBD
Preston	Install sewer on Rte 2 in areas where there are gaps in coverage	1-5 years		TBD	TBD	TBD
Stonington	Build road into Industrial Zoned parcel off Taugwonk Rd and I-95 for future development	1-5 years		TBD	CONNDOT; Town of Stonington	TBD

Table 4.3 OTHER SUGGESTED PROJECTS BY TOWN (con't)						
Location	Description	Time To Accomplish	Existing Plans	Cost	Funding Sources	Jobs
Stonington	Develop plan for collaborative downtown improvements in Pawcatuck and Westerly	1-5 years		TBD	TBD	TBD
Waterford	Planning grant for Mago Point improvements and utility undergrounding.	1-5 years		TBD	TBD	TBD

In addition to the Vital and Suggested Projects for the region outlined above, a variety of Programs, which may be regional, municipal or organizational in scope, were identified. These often lie within the responsibility of non-profit agencies or organizations. Many of them involve planning and often require limited or no financial investment. Like the Projects lists, the Programs only include items that support regional goals. Although in some ways this list is unwieldy, the suggested ideas demonstrate the engagement of the entire community in the CEDS conversation and its commitment to the economic development of the region. They are listed below, organized roughly by theme.

TABLE 4.4 SUGGESTED PROGRAMS - ACTION ITEMS	
Type	Program
Agriculture Cluster	Prepare a feasibility study and cost analysis to establish of dairy processing facility in southeastern CT
Agriculture Cluster	Prepare a feasibility study for establishment of static or mobile USDA certified abattoir in southeastern CT (incorporate results of planning study being done by multi-state consortium of Departments of Agriculture.
Agriculture Cluster	Develop collaborative Plan for open space and agricultural development
Business Development	Support the establishment of the proposed Regional Arts Entrepreneurial academy
Business Development	Consider adding Junior Achievement programs to Middle and High Schools to encourage study, training and engagement in business and entrepreneurship
Creative Cluster	Establish a Regional Arts Council
Creative Cluster - Education	Find or develop template to qualitatively measure impact of arts/cultural programs on student achievement
Creative Cluster - Education	Develop a regional Educational calendar that establishes clear information on programs available to schools by all area cultural groups. (dates, prices, age cohorts, relationship to core curriculum etc.)
Creative Cluster	Institutionalize Five Rivers Consortium as Regional Heritage Council

TABLE 4.4 SUGGESTED PROGRAMS - ACTION ITEMS (con't)

<i>Type</i>	<i>Program</i>
Downtown Planning	Engage high school students with Main Street Programs to create downtown walking tours for residents and visitors with QR Codes for "talking" buildings, signage, smart phone technology
Downtown Planning	Explore strategies for Norwich and New London to cooperate on producing multicultural events, to engage all members of community
Economic Development	Develop a database and assessment of regional Brownfields including remedial actions required, costs, and plans for re-use
Economic Development	Support Expansion of Foreign Trade Zone within Region
Economic Development	Feasibility Study for establishing lab space incubator for bio-science research
Economic Development	Establish an Manufacturer's Council and an Emerging Technology Businesses Council
Economic Development	Develop a Business Calling Program
Economic Development	Develop a communication strategy to provide better knowledge and understanding of agency goals and missions.
Economic Development	Establish Southeastern CT as an EB-5 Visa region to encourage new investment and Job creation
Economic Development	Identify gaps in broadband coverage and develop plans to complete regional coverage
Education	Establish Full Day kindergartens in all communities to accommodate working parents and to give children a head start on success in school
Maritime Cluster	Advocate with NOAA for home porting of research vessel Bigelow in New London
Maritime Cluster	Prepare feasibility study for Cruise Ship Terminal at State Pier
Municipal Planning	Simplify planning/zoning regulations to streamline development
Municipal Planning	Norwich will apply for status as a Preserve America City
Municipal Planning	Participate in efforts to support consistency of local plans of development with regional and state plans of Conservation and Development.
Municipal Planning	Update Zoning Regulations to allow for "work from home" occupations
Municipal Planning	Develop plan to promote green technology businesses to locate in Preston Riverwalk
Municipal Planning	Develop long term plan for coastal security and climate change mitigation
Social Service Planning	Develop plan for recruitment of grocery services to urban and rural food 'deserts'
Tourism - Transportation	Prepare study of highway and secondary route information signage for upgrade and enhancements to better serve visitors.
Tourism - Creative Cluster	Develop one or more "Heritage Trails" in region attract heritage tourists and to foster a sense of place in residents
Tourism	Develop and provide on-going training to regional tourism businesses on use of cutting edge technology to promote businesses
Tourism - Maritime Cluster	Identify sustainable funding for Cruise Ship Commission
Tourism - Maritime Cluster	Support private sector investment in Thames River sightseeing and/ or ferry service

TABLE 4.4 SUGGESTED PROGRAMS - ACTION ITEMS (con')	
Type	Program
Tourism - Maritime Cluster	Develop and support new and improved recreational opportunities on rivers (Thames, Shetucket etc.)
Tourism - Economic Development	Capitalize a regional tourism development revolving loan fund to assist small tourism businesses in growth initiatives
Tourism - Agriculture	Develop plan for development and marketing of regional Agri-Tourism
Tourism	Develop a Concierge Program for hotels and businesses to assist all front line businesses in servicing tourists
Tourism	Develop a Hospitality Training Program for regional front line tourism employees using existing models
Tourism	Develop plan to build, staff and operate Visitor Centers (with rest rooms) throughout the region, preferably on year round basis.
Transportation	Encourage and support private sector transportation link between SECT, BDL and TF Green Airports, possibly using GON for terminal
Transportation - Workforce Development	Review all SEAT routes for timing, location and accessibility to better serve "carless"
Transportation – Downtown Planning	Develop a comprehensive circulation and Parking Strategy for NL and Norwich
Transportation - Tourism	Implement recommendations of Mystic Mobility Plan as priorities are determined
Workforce Development	Create regional leadership group to support college student and navy personnel in engaging with community organizations

All Projects and Programs in these tables contribute to, or are vital to, the fulfillment of regional Goals identified in the CEDS and to achievement of the regional Vision. The implementation matrix on the following pages incorporates the projects and programs specifics listed above into a CEDS action plan, identifying the responsible agencies for their implementation, a suggested time frame to complete, and a measurement standard and level of performance. The projects and action steps are coded in this matrix as:

VRP = Vital Regional Project

VMP = Vital Municipal Projects

FSP = Future Suggested Project

A= Action Item

As implementation of the CEDS proceeds, performance will be measured using the following metrics:

5 = Excellent – Completion Achieved

4 = Advanced Progress – Ahead of schedule

3 = Anticipate Progress – On course to completion

2 = Behind Schedule – More worked needed to catch up with goal

1 = Strategy/Action Steps should be abandoned due to changing circumstances

GOAL ONE: Promote a Regional Collaboration Around Economic Development that Unites the Region Behind this Common Vision					
Strategies, Objectives, Projects and Action Steps	Responsibility	Priority	Time Frame	Performance Measure	Status
A. Establish a CEDS Implementation Committee					
1. Meet Regularly to coordinate an assist in the implementation of region-wide objectives	CEDS Strategy Committee (CSC); seCTer Economic Development Committee (ECD)	High	On-going	Quarterly meetings ECD; Semi-Annual Meetings CSC;	
B. Foster Partnerships and collaboration to create efficiencies in regional organizations and municipalities					
1. Identify and Implement Service Sharing Projects					
a. Develop a Regional Investment Site with Cost/Revenue Sharing (VRP)	seCTer; SCCOG	High	Long-Term		
2. Encourage Coordination business development activities amount organizations and agencies					
a. Participate in efforts to support consistency of local plans of development with regional and state plans. (A)	Municipalities	Medium	On-going		
b. Simplify planning/zoning regulations to streamline development (A)	Municipalities	High	1-3 Years		
C. Increase awareness of residents & municipal leaders of benefits of regional identity and organizations' activities					
1. Develop a common theme and plan to communicate region's assets internally and externally					
a. Review Brand Platform prepared for 2005 Governor's Commission to Diversity Economy of SECT and plan implementation (A)	ECD	High	1 year	Establish Brand, and marketing plan	
b. Develop communication strategies to provide better recognition and understanding of organization and agency goals and missions. (A)	Individual regional agencies Including ECTD, EWIB, seCTer, TVCCA, UCFS, Arts Council etc.	High	1 Year	Prepare and implement regional communication plan	
D. Build a more diverse leadership base					
1. Encourage participation and engagement in regional civic activities by community based organizations and individuals					
a. Create a regional leadership group to encourage continued and expanded college student, Coast Guard, Navy personnel engagement in community activities and organizations (A)	Chambers of Commerce; colleges; USCGA; Subbase New London	High	1 year		
b. Encourage and engage with multi-cultural organizations to integrate new communities into civic participation (A)	Chambers of Commerce; seCTer; individual agencies; Municipalities; Ethnic organizations	High	On-going		

GOAL Two: Ensure the Continued Strength of the Existing Economic Base while Seeking to Diversify the Economy through the Development of the Region's Core Competencies and Resources.					
Strategies, Objectives, Projects and Action Steps	Responsibility	Priority	Time Frame	Performance Measure	Status
A. Promote Small Business Development and New Entrepreneurship					
1. Establish an Economic Gardening Program	seCTer EDC	High	6 Months	Prioritize business needs; required internal programs; funding	
a. Develop a Business Calling Program (A)	seCTer EDC	High	6 months	2 calls per week beginning 2/1/2012	
2. Develop incubator and other type space for research and business start ups.					
a. Convert former Gales Ferry Elementary School into Regional Kitchen Incubator (VMP)	Town of Ledyard; seCTer; USDA; UConn or TRCC; Private Sector	High	1-5 Years	Phase 1- Feasibility Study Phase 2 – Buildout Phase 3 - Opening	
b. Adapt Mystic Education Center for mixed use including possible incubator space (VMP)	Town of Groton; DECD; seCTer; Private Sector	Medium	1-10 Years	Phase 1 - Acquisition Phase 2- Feasibility Study	
c. Acquire, remediate, and develop plan for re-use of 99 Garfield Street New London (VMP)	City of New London; seCTer; DECD; Sheffield Pharmaceuticals	Medium	1-10 Years	Phase 1 – Feasibility Study	
d. Prepare a feasibility Study for establishing lab space incubator for bio-science research (A)	UConn; seCTer; TRCC; Pfizer	High	1-3 Years	Feasibility Study	
e. Encourage municipal zoning that facilitates home-based offices and businesses “as of right.” (A)	SCCOG; EWIB	High	1 Year	All SECT towns adjust zoning to accomplish	
3. Foster Regional Entrepreneurial Programs					
a. Establish Regional Arts Entrepreneur Academy (A)	Hygienic Artists' Cooperative	High	1 Year	Phase 1- Secure Funding Phase 2 – Opening Phase 3- Minimum of 3 new businesses licensed	
b. Add Junior Achievement Programs to Middle and High Schools in region to encourage training and engagement in economy, business and entrepreneurship (A)	Chambers of Commerce; regional business community; school systems; technical high schools	Medium	5 Years	Minimum of 1 School establishing Junior Achievement per year	
B. Support Creative Strategies for Business Investment and Market Development					
a. Expand Foreign Trade Zone to additional locations in region (A)	City of New London FTZ; seCTer EDC	High	1-5 Years	One additional FTZ per year	
b. Establish Southeastern CT as EB-5 Visa Region to encourage new investment and job creation (A)	seCTer EDC; NCDC; SCCOG	High	1-2 Years	Establishment of EB-5 Region	
c. Develop plan for green technology businesses to locate in Preston Riverwalk & elsewhere.	Town of Preston PRA	Medium	1-5 Years	Plan prepared	

GOAL Two: Ensure the Continued Strength of the Existing Economic Base while Seeking to Diversify the Economy through the Development of the Region's Core Competencies and Resources. (con't)					
Strategies, Objectives, Projects and Action Steps	Responsibility	Priority	Time Frame	Performance Measure	Status
C. Support the Vitality of the Regional Manufacturing Base					
a. Establish a Manufacturer's Council (A)	seCTer EDC; local manufacturers	High	6 months	Establish Council, hold first meeting	
b. Establish a Technology Business Council (A)	seCTer EDC; local technology companies	High	6 months	Establish Council; hold first meeting	
D. Ensure Continued Strength of Region's Defense-related companies and facilities					
1. Support activities of Subase Coalition (SbC) and Office of Military Affairs (OMA)	seCTer; SbC; DECD	High	On-going		
2. Continue support of State and Federal Infrastructure improvements at Subase NL	SbC; seCTer; OMA; State of CT; 2 nd Congressional District Representative	High	On-going		
E. Support the Sustainable Development of the Region's Tourism Industry					
1. Support Public/Private Coordination of Tourism					
a. Develop a Concierge Program for hotels and businesses to assist all front line businesses in servicing tourists (A)	ECTD	Medium	6 year	Program developed for 2012 tourism season (May-October)	
b. Develop and provide on-going training to regional tourism businesses on use of cutting edge technology to promote businesses (A)	ECTD; TRCC; private sector	High	On-going		
c. Develop plan to build, staff and operate Visitor Centers with Rest Rooms throughout the region, preferably on year round basis (A)	ECTD; Chambers of Commerce; Municipalities; regional hotels and attractions	High	1-3 Years	1-3 new visitor centers (including in Norwich)	
d. Develop "Heritage Trails" in region to attract heritage tourists and to foster a sense of place in residents (A)	Five Rivers Consortium; ECTD	High	1 year	2 themed Heritage Trails by 12/2012	
e. Identify sustainable funding for Cruise Ship Commission (A)	CT Cruise Ship Commission; ECTD	High	On-going		
f. Create plan for development and marketing of Agri-Tourism (A)	New London County Farm Bureau (NLCFB); ECTD	High	1 year	Plan & marketing campaign by 12/2012	
2. Capitalize a regional tourism development revolving loan fund	seCTer Loan Office; EDA; ECTD; DECD	Medium	1-3 years	RLF for Tourism funded	
F. Support the Growth of the Maritime Cluster					
a. Advocate with NOAA for home porting of research vessel <i>Bigelow</i> in New London (A)	TMC; seCTer; Congressional Delegation	Medium	1-5 years	New London becomes home port for <i>Bigelow</i>	

GOAL Two: Ensure the Continued Strength of the Existing Economic Base while Seeking to Diversify the Economy through the Strategies, Objectives, Projects and Action Steps					
Development of the Region's Core Competencies and Resources. (con't)					
Strategies, Objectives, Projects and Action Steps	Responsibility	Priority	Time Frame	Performance Measure	Status
G. Promote the Region's Arts and Heritage as Economic Drivers					
a. Establish a Regional Arts Council (A)	Arts Organizations including Garde Arts Center; Norwich Arts Council; Hygienic Artists Cooperative; ECSO; Others	High	1 Year	Formal Establishment of Inclusive Arts Council	
b. Formalize Five Rivers Consortium as Regional Heritage Council (A)	Heritage organization members of Five Rivers Consortium	High	1 Year		
H. Support New Economic Opportunities in Agriculture and Food Production					
1. Establish Agricultural Commissions on Municipal Level	NLCFB; Municipalities	Medium	On-going	Number of Commissions	
2. Foster development of value-added agriculture					
a. Prepare feasibility study for establishment of static or mobile USDA certified abattoir in SECT (A)	State of CT Department of Agriculture (CTDOA); NLCFB	High	1-5 years	Feasibility Study	
b. Prepare feasibility study and cost analysis of establishing dairy processing facility in SECT (A)	NLCFB	Medium	1-5 years	Feasibility Study	
3. Promote Institutional and consumer purchasing of locally grown agricultural products.	CTDOA; NLCFB	Medium	On-going	Number of institutions increasing purchases of local food products	

GOAL Three: Enhance the Physical Infrastructure Needed to Support the Region's Economy					
Strategies, Objectives, Projects and Action Steps	Responsibility	Priority	Time Frame	Performance Measure	Status
A. Strengthen the Region's Intermodal Transportation Systems					
1. Fund and implement 2009 Intermodal Transportation Center in New London (VRP)	SCCOG; State of CT DOT (CONNDOT); Private Sector	High	1-5 Years		
2. Provide Sustainable transportation system for tourists to and within the region					
a. Implement recommendations of Mystic Mobility Study as priorities are determined (A)	Town of Stonington; Town of Groton; Mystic Seaport; ECTD; other private sector interests	High	1-3 years	Phase 1 - Establishment of Mystic Trolley	
b. Prepare study of highway and secondary route and informational signage for upgrade and enhancements. (A)	ECTD	High	1 year	Study and presentation	
3. Improve SEAT System to provide sustainable and comprehensive transportation for workers.	SEAT; SCCOG; EWIB				
a. Review all SEAT routes for timing, location and accessibility and prepare plan for improvements	SEAT; SCCOG; EWIB; Private Sector Users; Employers	High	1 year	Increased use of system by workforce	
4. Improve Road Capacity					
a. Build second spa on Mohegan-Pequot 2A Bridge (VRP)	CONNDOT; FHWA	High	5-10 years	Funding committed	
b. Fund and complete I-95 improvements from East Lyme to Rhode Island Border (VRP)	CONNDOT; FHWA; SCCOG	High	10+ years	Funding committed	
c. Complete Rte. 11 from Salem to I-95 in East Lyme (VRP)	CONNDOT; FHWA; SCCOG	High	10+ years	Start date established	
d. Extend Parkway North & South to Rte. 85 and improvements to I-95, I-395, Rtes. 85 and 1 area (VMP)	Town of Waterford; CONNDOT; Private sector Partners	High	1-10 years	Timeline and start date established	
e. Make Road improvements on Rte. 82 in Bozrah including curb cuts (FSP)	Town of Bozrah; CONNDOT; private sector	Medium	1-5 years		
5. Expand Passenger and Freight rail service to and through region					
a. Make improvements to Providence & Worcester RR (PWRR) and Rail America Lines (NECRR) for freight and passenger service. (VRP)	CONNDOT; PWRR; NECRR; Town of Sprague; Federal RR Administration (FRA)	High	1-5 years	Phase 1 - Completion of Willimantic Spur	
6. Improve transportation services to commercial airports					
a. Encourage and support private sector transportation link(s) between SECT, Bradley(BLD),TF Green (PVD), & Tweed New Haven (NHV) Airports (A)	Private sector; Amtrak; Shoreline East (SLE); CONNDOT	Medium	1-5 years	Establishment of bus, train or limo service to BDL or PVD.	

GOAL Three: Enhance the Physical Infrastructure Needed to Support the Region's Economy (<i>con't</i>)					
Strategies, Objectives, Projects and Action Steps	Responsibility	Priority	Time Frame	Performance Measure	Status
B. Provide Sites and Utilities needed to Support the Region's Economic Development Priorities					
1. Expand availability of development sites with necessary access and utilities					
a. Develop Preston Riverwalk to fullest Potential (VMP)	Town of Preston; DECD; DEEP; private sector; EPA	High	1-10 years	Procure full funding for remediation and complete remediation.	
b. Complete utility and road improvements for Gateway Project in East Lyme at Exit 74 (VMP)	Town of East Lyme; CONNDOT; City of New London	High	1-5 years	Completion of NL – East Lyme Water connection	
c. Complete water/sewer/road improvements on Flanders Rd. Groton (VMP)	Town of Groton; Private sector	High	1-5 years	Completion of water/sewer infrastructure	
d. Extend water/sewer north on Rte. 32 and Franklin side of Norwich Business Park (VMP)	Town of Franklin; Norwich Public Utilities; NCDC	High	1-5	Connection of utilities from Norwich to Franklin	
e. Water study for water/waste water system connection between Stonington and N. Stonington (FSP)	Towns of Stonington and N. Stonington	Medium	1-10 years	Completion of Study	
f. Build road into land between Taugwonk Rd. and I-95 (FSP)	Town of Stonington	Medium	1-10 years	Planning study prepared	
g. Build road. into Job Investment Site off Rte. 32 (FSP)	Town of Montville	Low	10+	Planning study	
h. Extend water line from Bozrah to Franklin (FSP)	Towns of Franklin and Bozrah	High	< 1 year	Completion of connection	
i. Implement infrastructure improvements on I-395/Rte. 164 Corridor (FSP)	Town of Griswold; CONNDOT	Medium	1-10 years	Planning study	
2. Expedite Reuse of Brownfield Sites					
a. Develop Baltic Mill Site to fullest Potential (VMP)	Town of Sprague; private sector	High	1-10 years	Complete Remediation	
b. Complete Remediation/ Reuse of Triangle Wire & Wyre-Wynde sites (VMP)	Town of Griswold	High	1-5 years	Complete Remediation	
c. Implement Waterfront Development Plan (VMP)	City of Norwich	High	1-10 years	Phase 1 - Fund remediation for Shipping Street area	
d. Develop a database and assessment of regional Brownfields including remedial actions required, costs and planning for re-use (A)	seCTer; Municipalities	High	6 months-1 year	Database complete	
e. Support municipal efforts to obtain permits and funding for Brownfield remediation (A)	Municipalities; DECD	High	On-going		

GOAL Three: Enhance the Physical Infrastructure Needed to Support the Region's Economy (con't)						
Strategies, Objectives, Projects and Action Steps	Responsibility	Priority	Time Frame	Performance Measure	Status	
3. Accomplish full development of Regional Water Network						
a. Full build-out of Regional Water System (VRP)	SCCOG	High	1-10 years	Complete build-out		
4. Develop appropriate Waste Water Systems and facilities throughout Region						
a. Extend Sewer to Stockhouse Road Business Park (FSP)	Town of Bozrah	Medium	1 -10 years			
b. Fund final phase of extension of water and sewer to designated business park (FSP)	Town of Colchester	Medium	1 -10 years			
c. Extend sewer lines on Rte. 12 north to connect to Gales Ferry from Groton Town Line (FSP)	Town of Ledyard	Medium	1 -10 years			
d. Install sewer on Rte. 2 where there are gaps in coverage (FSP)	Town of Preston	Medium	1 -10 years			
5. Achieve 100% broadband coverage for region						
a. Identify gaps in broadband coverage and develop plans to complete regional coverage (A)	Private Sector	High	1-3 years	100% coverage achieved		
C. Support State of CT plan for improvements at State Pier New London						
1. Implement Improvements to State Pier Developed by CONNDOT						
a. Prepare feasibility study for Cruise Ship Terminal at State Pier (A)	CONNDOT CT Cruise Commission	High Medium	1-10 years 1 year	See State Pier Plan Study		
D. Support implementation of the Southeastern CT Housing Alliance Strategic Plan						
a. Build more affordable rental housing for senior citizens in Downtown Niantic (A)	Town of East Lyme	High	On-going			

GOAL Four: Promote Education and Training Opportunities that Create and Sustain Careers					
Strategies, Objectives, Projects and Action Steps	Responsibility	Priorit y	Time Frame	Performance Measure	Status
A. Further Enhance the Positive Relationships among Workforce Development System, Educational Institutions and Business Community					
1. Support partnerships to provide career guidance ladder and skill sets to meet the needs of businesses and students					
a. Develop (or find) template to qualitatively measure impact of arts/cultural/internship programs on student achievement in core skills (A)	Regional Arts Council; Five Rivers Consortium; Community Foundation	High	1 year	Development of template	
b. Create regional calendar with information for teachers and administrators on programs available by all area cultural organizations. (A)	Regional Arts Council; Five Rivers Consortium	High	By 9/2012	Calendar Development	
B. Establish a Regional Initiative to Attract and Retain Workers					
1. Retain separating Navy & Coast Guard Personnel and College Graduates in Region					
2. Support Entry of Immigrants into Workforce and Entrepreneurial Initiatives					
C. Develop Tourism Career Initiatives					
1. Support enhanced hospitality training and tourism management programs					
a. Strengthen tourism and hospitality training at regional colleges and trade schools (A)	TRCC; Mitchell College; ECTD; Grasso Tech; Norwich Tech	High	On-going	Increase in graduates hired in local tourism	
b. Develop a hospitality training program for front line tourism employees using existing models (A)	ECTD; seCTer; Private sector	High	1 year	Training Session	
D. Develop STEM Skills Training and Core Educational Competencies in Region's High Schools to Meet Needs of All Businesses					
E. Maintain and Augment the Capacity to Produce a Highly Skilled Workforce					
1. Develop long term strategies to replace highly skilled workers at defense and manufacturing firms	EWIB; seCTer; TRCC; other colleges; private sector	High	On-going		
2. Develop cooperative programs among educational services to provide adult and post-high school technical training and career guidance	EWIB; TRCC; OIC; Adult Ed Programs; Mitchell College; Technical High Schools	High	1 year		
F. Engage Regional Organizations in Critical Regional Education and Workforce Development					
1. Promote Trades and Construction Careers as attractive alternatives or supplements to College education					
a. Identify and fill gaps in career training & skill development at TRCC and Technical Schools (A)	EWIB; TRCC; Technical High Schools	High	1 year	Report	
2. Support Investments in Early Childhood Education					
a. Establish Full day Kindergartens in all towns (A)	State of CT DOE; Municipal Boards of Education	High	1 year		

GOAL Five: Enhance the Regional Quality of Life in our Urban Centers, Rural Areas, and Suburban Communities					
Strategies, Objectives, Projects and Action Steps	Responsibility	Priorit y	Time Frame	Performance Measure	Status
A. Enhance the Downtowns in the Region					
1. Promote regional planning and assistance to alleviate impact on urban core downtowns of disadvantaged populations and their service providers					
2. Support and market New London and Norwich as living centers for young and creative populations by integrating arts, heritage and ethnic communities into all downtown planning.					
a. Norwich will apply for status as Preserve America City (A)	City of Norwich	High	< 1 year	Designation	
b. Engage high school students in downtown tourism initiatives using model from Dorchester MA (A)	NLMS; Rose City Renaissance; NLCHS; NHS; Writer's Block; Chambers of Commerce	High	1 year	Downtown walking tours written and presented by students	
c. Explore strategies for Norwich and New London to produce joint multi-cultural events (A)	NLMS; Rose City Renaissance; Regional Arts Council; Ethnic Organizations	High	1-5 years	One joint event in second year	
3. Achieve desired downtown and village center improvements in suburban and rural communities					
a. Continue to implement Jewett City Main Street Improvements (FSP)	Town of Griswold	Medium	1-5 years		
b. Implement Town Center Enhancement Plan (FSP)	Town of Ledyard	High	1-5 years		
c. Implement Downtown Gateway and Streetscape Improvements Strategy (FSP)	Town of Groton	High	1-5 years		
d. Develop plan for collaborative downtown improvements in Pawcatuck & Westerly RI (FSP)	Town of Stonington; Town of Westerly; private Sector	Medium	1-5 Years		
e. Procure planning grant for Mago Point Improvements and utility undergrounding (FSP)	Town of Waterford	High	1 year	Planning Grant funded	
B. Support activities of Regional Health Care Providers					
1. Promote and support regional partnerships among health care providers and agencies					
2. Support retention and recruitment of skilled medical care workers					
C. Support Coordinated, Collaborative and Effective services to at risk populations to help them achieve productive, fulfilling lives.					
1. Promote and Support regional partnerships among human service agencies					
2. Increase availability of both foreign language training and ESL classes to address communications needs in all areas.					

GOAL Five: Enhance the Regional Quality of Life in our Urban Centers, Rural Areas, and Suburban Communities (con't)					
Strategies, Objectives, Projects and Action Steps	Responsibility	Priorit y	Time Frame	Performance Measure	Status
D. Promote Regional Sustainable Land Use Policies and Open Space					
1. Encourage smart and sustainable growth policies supporting and complementing regional economic development					
a. Develop long term plan for climate change mitigation in coastal areas (A)	Municipalities; SCCOG	Medium	1-10 years	Plan	
2. Encourage preservation and enhancement of historic built environment					
a. Emphasize high and complementary design standards for all new development (A)	Municipalities; CT Office of Historic Preservation	Medium	On-going		
3. Encourage protection and Preservation of the region's rural places					
4. Support initiatives to preserve agricultural lands and other open space					
a. Develop collaborative plan for open space and agricultural development (A)	NLFB; Municipalities	Medium	1-5 years	Plan	
b. Improve existing, and develop new, regional recreational trails connecting urban, rural and suburban spaces	Municipalities	Medium	1-5 years	Completion of proposed trails (i.e. Preston to Groton; NL Vista Walkway) and development of at least one additional trail per two years.	
E. Protect Water Quality and Recreation					
1. Support and expand cooperative regional water quality initiatives					
2. Increase shoreline access and water dependent transportation and recreation					
a. Solicit Private Sector investment in sightseeing and/or Ferry Service on Thames and other regional waterways. (A)	TMC; ECTD; seCTer; Private Sector	High	1-5 years	Establishment of sightseeing service on Thames	
b. Develop and support new and improved recreational opportunities on rivers (Thames, Shetucket, Mystic, Pawcatuck, Niantic, Yantic etc.) (A)	Private sector; Municipalities; TMC; ECTD	High	1-5 years	Establishment of at least one new river outfitter or rental firm by year 2 on at least one river.	

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CHAPTER V: Implementation, Evaluation and Reporting

Plan Oversight

Goal 1, Strategy A defines the basis for southeastern CT’s implementation of this CEDS: “Establish a CEDS Implementation Committee.” The CEDS Strategy Committee, which is the seCTer Board of Directors, will be the CEDS Implementation Committee. seCTer staff will be the primary interface with the CEDS Strategy Committee: working with its chairperson, scheduling meetings, maintaining minutes, and reporting to the full committee. Staff will write and present to the Committee a semi-annual report on progress to date in reaching the performance milestones identified on the implementation matrix, using the measurement metrics discussed in the previous chapter of this report. Based on these reports, at semi-annual meetings, the committee will consider opportunities to add, modify or enhance projects, troubleshoot coordination issues, and to mobilize around any new economic development opportunity that arises in the region. Any changes in the CEDS priorities will require the consent of the CEDS Strategy Committee and the SCCOG Board of Directors.

The Committee will also host an annual meeting of all key stakeholders in the region to review progress and to solicit input on changing conditions and opportunities.

Goal 2 of the CEDS includes establishing an “Economic Gardening” program for the region within seCTer. The Economic Development Committee has been identified as responsible for this program, which will include providing assistance to small businesses, organizations and municipalities in forwarding their economic success. Since the Economic Development Committee of seCTer, which meets monthly, includes representatives from these stakeholder groups and municipalities, this committee will dedicate one meeting per quarter to review the status of action items identified in the CEDS and, in their role of implementing an Economic Gardening program, will also assist these stakeholders, whenever possible, in implementing their programs, including identifying funding sources as needed. The activities of this committee will be included in the semi-annual report presented to the CEDS Strategy Committee.

Plan Implementation

The capital projects, programs and actions listed in the previous chapter of this document all have been identified by various stakeholders as making critical contributions to the economic development and well being of New London County. Some of these projects are for infrastructure investments and/or planning and will require funding. The programs listed, in many cases, require a,

less costly investment, often not financial, but always of time and commitment on the part of responsible organizations and agencies. Some projects and programs will have a more immediate impact on job creation and retention than others. The implementation of this plan will move forward on several fronts because, although economic development is a long-term effort, short-term progress is very important in maintaining community support, particularly from those stakeholder groups who participated in the process but are not always included in economic development strategic planning.

This CEDS is comprehensive and engaged all relevant stakeholders in the southeastern Connecticut region during the preparation process. The collaboration was with the cities and towns, regional non-profit organizations, the business community, and the state of Connecticut. While seCTer and SCCOG are the lead agencies responsible for plan implementation, buy-in from all stakeholders needs to be attained. The first step in obtaining this buy-in will come from the 30-day Public Comment Period commencing in mid-October. The CEDS was posted on the seCTer web site during this period and comments were solicited via the web, email and at a public meeting held on November 17. Concurrently, the Regional Planning Organization (RPO), the Southeastern CT Council of Governments, reviewed the document and provided a letter of support to include with the document when it is submitted to EDA.

Following the public comment period, and approval of SCCOG, the CEDS will be forwarded to the Economic Development Administration (EDA) for review and approval. It will also be provided to the State of CT DECD and Office of Policy and Management (OPM) as a preliminary action to seCTer applying for Economic Development District (EDD).

Rating Projects Eligible for EDA and/or Other Funding

The list of Vital Projects for the region and its municipalities, identified in Tables 4.1 and 4.2, and included in the Action Plan Matrix, may be candidates for EDA or other Federal or State funding. Possibilities include: the State of CT Brownfield Remediation Fund; the Environment Protection Agency (EPA); the U.S. Department of Agriculture (USDA) and State of CT Department of Agriculture (CTDOA); EDA programs including Revolving Loan Funds, Global Climate Change Mitigation Investment Fund and Infrastructure investment funds and others.

The endorsement of any project for submission to EDA, DECD, or other agencies, should be the responsibility of the CEDS Strategy Committee. A Project Review Form (Attachment E) must be completed by the appropriate municipality, or sponsor, for any project that has advanced to the point where it may be eligible for funding consideration. The CEDS Strategy Committee will review these forms and score them according to the following “Scoring Matrix” prior to submission to specific funding agencies. In reviewing the projects, linkage must be clearly demonstrated among the

project, regional or municipal needs, and one or more strategies of the CEDS. The Committee will also evaluate infrastructure projects for consistency with EDA and State of CT goals and priorities.

Project Measures Scoring Matrix:

A. Project Measures — Consistency with Investment Priorities (20 POINTS):

- Consistency with Regional CEDS Strategies and Goals (5 points)
- Consistency with EDA Investment Priorities (5 points)
- Consistency With State of Connecticut Economic Development and Plan of Conservation and Development priorities (5 points)
- Consistency with SCCOG Regional Plans (5 points)

B. Direct Economic Impact (50 POINTS):

- Job Retention and Creation (10 points)
- Private Capital Leverage (10 points)
- Government Capital Leverage (10 points)
- Contribution to Diversification (10 points)
- Tax Base Increase/Stabilization (10 points)

C. Feasibility (30 POINTS):

- Municipal and Legal Approvals (10 points)
- Financial Status (10 points)
- Sustainability (10 points)

Once the CEDS Strategy Committee determines the regional value of a project, it shall be submitted through appropriate channels for funding.

Reporting

While implementation of the goals, projects and actions of the CEDS are spread among municipalities, regional agencies, organizations and private businesses, it will be the role of the CEDS Strategy Committee and the seCTer Economic Development Committee, to monitor progress on the projects and actions. The seCTer Economic Development Committee will provide guidance to municipalities and organizations in accomplishing their programs (identified in Table 4.4) and will be responsible for developing and Economic Gardening Program that will undertake action items relating to growing and strengthening new and small businesses. As detailed in the first section of this chapter, this committee will regularly report to the CEDS Strategy Committee on progress to date in achieving milestones identified on the implementation matrix. The CEDS Strategy Committee, assisted by seCTer Staff will submit an annual report to EDA reviewing the status of the Action

Plan/Implementation matrix and identifying any additions or changes to the plan based on existing circumstances. This report will include details on the progress being made on Vital projects and on Action items in the CEDS. If changes are made to the project lists in regard to feasibility funding availability or sustainability these will also be reported.

Conclusion

In 2005, one year after the publication of the previous regional CEDS, the southeastern CT region was faced with a major economic crisis, the closing of Subase New London. Preventing this situation had been the top priority goal in the 2004 CEDS, and the region came together at that time with great determination and cooperation to overturn the BRAC Commission’s initial recommendation for closure and to save the major economic engine of the regional economy.

In 2011 new challenges face the region as the economy suffers from the 2007-2009 national recession, on-going global economic crises, significant downsizing at Pfizer, the opening of casinos in neighboring states and a tourism industry that has suffered continued loss in marketing funds. Meanwhile challenges in education, transportation, housing, and development issues continue to claim the attention of regional leaders and residents. The CEDS process allowed the region to come together to reach consensus on a vision, to achieve a clear understanding of our assets and challenges, and to develop a plan and strategic responses to those challenges.

The CEDS is only a first step in this process. The region will need to take actions, some small and some bold in order to implement these strategies and to be successful in growing a stronger regional economy for the future.

ATTACHMENTS

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ATTACHMENT A: CEDS STRATEGY COMMITTEE LIST

CHAIRMAN

Mark Oefinger	Town Manager	Town of Groton
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COMMITTEE

Fred Allyn, Jr.	Mayor	Town of Ledyard
John Beauregard	Executive Director	Eastern CT Workforce Investment Board
H. Tucker Braddock	City Council	City of Norwich
James Butler	Executive Director	Southeastern CT Council of Govts.
Michael Caron	Associate	Camilliere, Cloud & Kennedy
Jennie Contois	District Director	Office of Congressman Joe Courtney
Tricia Cunningham	President	Greater Mystic Chamber of Commerce
John Dolan	Senior Vice President	Charter Oak Federal Credit Union
Ed Dombroskas	Executive Director	Eastern Connecticut Tourism District
Richard Erickson, AICP	Private Citizen	City of Norwich
Wayne Fraser	Development Project Manager	W. Fraser- Project Facilitator, LLC
Robert Giffen	Vice President	Dime Bank
Ed Haberek, Jr.	First Selectman	Town of Stonington
G. D. "Denny" Hicks	Director of Strategic Planning	Chamber of Commerce of Eastern CT
Thayne Hutchins, Jr.	Councilor	Mohegan Tribal Nation
Mary Ellen Jukoski	President	Mitchell College
Carmelina Kanzler	Private Citizen	City of New London
Jerry Lamb		Naval Submarine Medical Research Lab
Thomas Marano	Business Development Manager	Northeast Utilities
John Markowicz	Executive Director	seCTer
Richard Matters	First Selectman	Town of Franklin
Andrew Maynard	State Senator	18 th Connecticut Senate District
Frank McLaughlin	Owner	McLaughlin Companies LLC
Robert Mills	Executive Director	Norwich Community Development Corp.
Maria Miranda		Miranda Creative
Nicholas Mullane	First Selectman	Town of Stonington
Mel Olsson	Representative	Union Labor Council AFL-CIO
Naomi Otterness	Private Citizen	Town of Ledyard
Bob Ross	Military Affairs Advocate	State of Connecticut
Charles Seeman	Executive Director	United Community & Family Services
J.W. "Bill" Sheehan	Board of Finance	Town of Waterford
Donna Simpson	Community Liaison	Hospice of Southeastern Connecticut
Gabe Stern	Director Planning & Projects	CT Municipal Electric Energy Coop.
Andrea Stillman	State Senator	20 th Connecticut Senate District
Robert Tabor	Managing Partner	Stanton Day Capital LLC
Marjorie Valentin	Associate Dean Educational &	Three Rivers Community College
Tom Wagner	Town Planner	Town of Waterford

STAFF

Deborah Donovan	Director of Economic Development	seCTer
Patricia Glynn	Office Manager	seCTer

ATTACHMENT B: ECONOMIC DEVELOPMENT COMMITTEE

CHAIRMAN

Tricia	Cunningham	Greater Mystic Chamber of Commerce
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COMMITTEE

Fred	Allyn, Jr.	Town of Ledyard
Marcie	Boyer	CT Small Business Development Center
Tucker	Braddock	Greater Norwich Chamber of Commerce
Sheri	Cote	Chamber of Commerce Eastern CT
Bradford	Currier	N. Stonington Economic Development Commission
Laura	Dinan	Northeast Utilities
Ed	Dombroskas	Eastern CT Tourism District
Merrill	Gerber	Town of Preston Redevelopment Agency
Ed	Haberek, Jr.	Town of Stonington First Selectman
Ned	Hammond	City of New London
Denny	Hicks	Chamber of Commerce Eastern CT
Charles	Karno	Town of Ledyard Planner
Barbara	Lipsche	New London Main Street
Tom	Marano	Northeast Utilities
Frank	McLaughlin	Downtown Investment Development Coordinator New London
Bob	Mills	Norwich Community Development Corporation
Maria	Miranda	Miranda Creative
Ned	Moore	State of CT DECD
Michael	Murphy	Town of Groton Planner
Virginia	Sampietro	Eastern CT Workforce Development Board
J.W. "Bill"	Sheehan	Town of Waterford
Donna	Simpson	Hospice
Barbara	Strother	Town of Groton
Margaret	Stroup	Three Rivers Community College
Tom	Wagner	Town of Waterford Planner
Frank	Winkler	Groton Utilities

STAFF:

Deborah Donovan	Director Economic Development	seCTer
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ATTACHMENT C: LIST OF INTERVIEWEES

1.	Mike	Alfutis	UConn Avery Point
2.	Lewis	Allen	Science/Technology Magnet School
3.	Fred	Allyn	Mayor Town of Ledyard
4.	Lou	Allyn	Mystic River Historical Society
5.	Maria	Amparo Cruz-Saco	Connecticut College
6.	Jeff	Anderson	Florence Griswold Museum
7.	Brian	Andstrom	The Partner Network
8.	Kent	Baker	President- NCDC & Downtown Business Owner
9.	Edward	Baker	New London County Historical Society
10.	Mary Beth	Baker	Stonington Historical Society
11.	William	Ballinger	First Selectman Town of Bozrah
12.	Cindy	Barry	Ledge Light Health District
13.	Karen	Beasley	Norwich Arts Center
14.	Chuck	Beck	Connecticut Maritime Commission
15.	Andrew	Bell	New London Media
16.	Norm	Bender	UConn Cooperative Extension
17.	Alan	Bergren	City Manager, City of Norwich
18.	Jane P.H.	Bernoudy	Kente Cultural Center (Rhythm for Life)
19.	Mary	Berry	Norwich Adult Education
20.	Chris	Bourque	Birch Pond Farm
21.	Tim	Bowles	Southeastern CT Regional Human Services Council
22.	Marci	Boyer	Flavours of Life
23.	Tucker	Braddock	City Councilor City of Norwich
24.	Les	Bray	WPSIRR Real Estate
25.	Stephanie	Brown	United Way/NAACP
26.	Wayne	Budney	Four Winds Farm
27.	Nancy	Bulkeley	Dominion at Millstone Point
28.	Chuck	Bunnell	Mohegan Sun/MTN
29.	Karin	Burgess	ECTD PR Consultant/Whiting-Burgess Communications
30.	Sarah	Cahill	Mystic Seaport
31.	Rick	Calvert	Child & Family Agency
32.	Joe	Celli	Hygienic Artists Cooperative
33.	Sandra	Chalk	New London Landmarks
34.	Bill	Champagne	Norwich Historical Society
35.	Marc C.	Champaign	Louis Berger Group (Consultants Airport)
36.	Pam	Chapin	Five Rivers Consortium
37.	Hunter	Charnow	Cornerstone Productions
38.	Robin	Chesmer	Farmer's Cow & Graywall Farms
39.	Deborah	Childs	Brown Paper Bag Farms
40.	Chris	Clark	Mohegan Tribal Utility Authority

41.	Joan	Cohn	Indian & Colonial Research Center
42.	Kurt	Colella	US Coast Guard Academy
43.	Bob	Congdon	First Selectman Town of Preston
44.	Deborah	Connors	St. Mary Star of The Sea Church
45.	Jennie	Contois	Congressman Courtney's Office
46.	Sheri	Cote	Eastern CT Chamber of Commerce
47.	Nancy	Cowser	United Child and Family Services
48.	Maria	Cruz-Saco	Connecticut College
49.	Herb	Cummings	Groton Utilities
50.	Tricia	Cunningham	Greater Mystic Chamber of Commerce
51.	Peter	Davis	Planner City of Norwich
52.	Diane	DeLauro	Diamond Mortgage
53.	Rich	DeLorenz	Groton Utilities
54.	LuAnn	Dinihanian	Yankee Gas
55.	Ed	Dombroskas	Eastern CT Tourism District
56.	Gary	Evans	City of Norwich Economic Development Coordinator
57.	Leslie	Evans	Baker
58.	Sandy	Ewing	Preston Redevelopment Agency
59.	Gina	Fafard	Grasso Technical High School
60.	Corrina	Ferguson	Nature's Art/The Dinosaur Place
61.	Mary	Fitzgerald	Acme Wire
62.	Mike	Fitzgerald	Groton Historical Society
63.	Alice	Fitzpatrick	Community Foundation of SECT
64.	Tammi	Flynn	Florence Griswold Museum
65.	Keith	Fontaine	WW Backus Hospital
66.	Carl	Fontneau	Planner Town of Griswold
67.	Paul	Formica	First Selectman Town of East Lyme
68.	Larry	Fowler	Nationwide Insurance
69.	Rich	Froh	Mystic Community Bikes
70.	Larry	Gemma	Larry Gemma Realty
71.	Nancy	Gentes	Madonna Place
72.	Merrill	Gerber	Town of Preston
73.	Bob	Giffen	Dime Bank
74.	Lisa	Giordano	Writers Block
75.	Charles	Glew	Cable Components Group, Inc.
76.	Bev	Goulet	City of Norwich Social Service
77.	Jerry	Grabarek	Preston Farms
78.	Brian	Grabber	Grabber Construction
79.	Nancy	Gray	Greater Norwich Chamber of Commerce
80.	Ed	Haberek	First Selectman Town of Stonington
81.	Diane	Haberer	Tylaska Marine Hardware
82.	Bob	Hamilton	General Dynamics/Electric Boat

83.	Ned	Hammond	New London Economic Development & FTZ Coordinator
84.	Susan	Hendricks	Lyman Allyn Art Museum
85.	Connie	Hilbert	Health and Human Services Mohegan Tribe
86.	Alan	Holmberg	Full Bloom Apiaries
87.	Lori	Hopkins-Cavanagh	Shoreviews Real Estate LLC
88.	Susan	Howard	US Properties Inc.
89.	Mike	Hughes	Communications Director NPU
90.	Charles	Hunter	NEC RR
91.	Thayne	Hutchins	Mohegan Sun/MTN
92.	Dominic	Ianno	Pfizer
93.	Colin	Johnson	Peter Pan Bus Lines
94.	Mary Ellen	Jukoski	Mitchell College
95.	Tom	Kalal	Cranberry Meadow Farm
96.	Nancy	Kalal	Cranberry Meadow Farm
97.	Bill	Kane	Londregan Commercial Real Estate
98.	Charles	Karno	Planner Town of Ledyard
99.	Nancie	Keenan	Groton Inn & Suites/ERTD Board
100.	Karen	Kowalyszyn	New London County Farm Bureau
101.	Norm	Krayem	Prudential Connecticut Real Estate
102.	Michael	Langlois	Flock Theatre
103.	Mary	Lenzini	VNA of SECT
104.	Greg	Leonard	SE CT Water Authority
105.	Tim	Londregan	Londregan Commercial Real Estate
106.	Kevin	Lyden	First Selectman Town of Salem
107.	Ron	Lyman	Lyman Real Estate
108.	Oliver	Manning	New London County Farm Bureau
109.	Tom	Marano	Northeast Utilities
110.	Rob	Marelli	Seconn Fabrication
111.	Eleanor	Mariani	CT Dept. Energy & Environmental Protection
112.	John	Markowicz	seCTer
113.	Richard	Martin	Hygienic Artists Coop & NL Music Festivals
114.	Rich	Matters	First Selectman Town of Franklin
115.	Andrew	Maynard	State Senator
116.	Diane	McCall	New London County Farm Bureau
117.	Deborah	McCann Connors	St. Mary Star of The Sea Church
118.	Patrick	McCormack	Uncas Health District
119.	Dan	McFadden	Mystic Seaport
120.	Frank	McLaughlin	Downtown New London Investment Coordinator
121.	Alejandro	Melendez-Cooper	Community Health Center
122.	Bill	Mencer	Sheffield Pharmaceuticals
123.	JP	Mereen	Norwich Harbor Management Commission
124.	Stan	Mickus	Cross Sound Ferry

125.	Bob	Mills	Norwich Community Development Corporation
126.	Maria	Miranda	Miranda Creative
127.	Deb	Monahan	Thames Valley Council for Community Action
128.	Dave	Moorehead	Waterford Country School
129.	Nicholas	Mullane	Town of North Stonington
130.	Michael	Murphy	Town of Groton Planner
131.	Jeff	Nelson	Hospice
132.	Ernie	Norman	Normandry Farm
133.	Sean	Nugent	Preston Redevelopment Agency
134.	Peter	Nystrom	Mayor City of Norwich
135.	Todd	O'Donnell	Union Station
136.	Mark	Oefinger	Town Manager, Town of Groton
137.	Jim	O'Malley	Myometrics
138.	Cathy	Osten	First Selectman Town of Sprague
139.	David	Page III	US Properties Inc.
140.	Penny	Parsekian	New London Main Street
141.	Janet	Polaski	WW Backus Hospital
142.	Brent	Pounds	NOAA
143.	James	Rabbitt	Southeastern CT Council of Governments
144.	Teddy	Randall	New London County Farm Bureau
145.	Mike	Reigel	Nautilus Museum
146.	Jim	Repass	Railroad Coalition
147.	Jack	Ringelberg	JMS Naval Architects
148.	Rita	Rivers-Reimer	District Web Consultant/Little Print Communications
149.	Mark	Roberts	Tsetse Gallery
150.	John	Roode	Eastern CT Transportation Consortium
151.	Denise	Rose	City Manager, City of New London
152.	David	Rossiter	State of CT DOT State Pier
153.	Jackie	Roy	NCDC Downtown Program Manager
154.	Steve	Ruzzo	General Dynamics/Electric Boat
155.	Sally	Ryan	City Historian New London
156.	Migdalia	Salas	Isaac School
157.	Virginia	Sampietro	Eastern Connecticut Workforce Investment Board
158.	Debra	Sargent	Isaac School
159.	Bill	Satti	Foxwoods/MPTN
160.	Dean	Saucier	NBAA
161.	Julie	Savin	Neighbor Works/New Horizons
162.	Vinnie	Scarano	Photographer
163.	Peter	Schultheis	City of New London Community Outreach
164.	Dina	Sears-Graves	United Way of SECT
165.	Virginia	Seccombe	L.E.A.R.N.
166.	Chuck	Seeman	United Child and Family Services

167.	Jack	Shea	General Dynamics/Electric Boat
168.	Steve	Sigel	Garde Arts Center
169.	Jeanne	Sigel	Garde Arts Center
170.	Donna	Simpson	Hospice
171.	Isabelle	Singer	Eastern CT Symphony Orchestra
172.	Tom	Sparkman	First Selectman Town of Lisbon
173.	Ellen	Spring	Williams School
174.	Matt	Staebner	Blue Slope Farm
175.	Bill	Stanley	Lawrence & Memorial Hospital
176.	Mark	Stapleton	Stapleton Steel
177.	Gabe	Stern	CMEEC
178.	Dan	Steward	First Selectman Town of Waterford
179.	Andrea	Stillman	State Senator
180.	Barbara	Strother	Groton Economic Development Coordinator
181.	Peg	Stroup	Three Rivers Community College
182.	Rona	Stuller	New London Board of Ed
183.	Paul	Suprin	Savings Institute
184.	Henry	Talmage	Connecticut Farm Bureau Executive Director
185.	Susan	Tamulevitch	Custom House Museum and NL Maritime Society
186.	Theresa	Thesier	Mystic & Shoreline Visitor Information Center
187.	Adam	Turner	Planner- Town of Colchester
188.	Jose	Ulloa	Expressions Gallery
189.	Marcia	Vlaun	Planner- Town of Montville
190.	Tom	Wagner	Planner - Town of Waterford
191.	Fawn	Walker	Norwich Public Utilities
192.	Peter	Walsh	Londregan Commercial Real Estate
193.	Dan	Walsh	Smith Insurance
194.	Peter	Walsh	Sonalysts
195.	Herman	Weingart	New London County Farm Bureau
196.	Blunt	White	Stonington Economic Development Commission
197.	Preston	Whiteway	Eugene O'Neill Theatre Center
198.	Frank	Winkler	Groton Utilities
199.	John	Wong	Chinese and American Assistance Association
200.	Derron	Wood	Flock Theatre
201.	Andy	Wood	Mystic Aquarium
202.	Catherine	Young	Groton New London Airport
203.	Vivian	Zoe	Slater Museum

ATTACHMENT D: SELECTED REPORTS REFERENCED

Table A.1: Municipal Reports and Studies Referenced

Town	Report	Date
Colchester	Zoning Districts	March-11
Colchester	Zoning Map	December-10
East Lyme	Lands of Unique Value Study	Fall 2010
East Lyme	Plan of Conservation & Development	July-05
Franklin	Plan of Development	August-00
Franklin	Zoning Regulations	June-08
Griswold	Zoning Regulations for Borough of Jewett City	November-10
Griswold	Zoning Regulations	November-10
Griswold	Plan of Conservation & Development	January-07
Griswold	I-395/164 Corridor Study	August-00
Griswold	Municipal Development Plan	August-10
Griswold	Listings of Projects & Priorities	September-09
Groton	Report regarding Provision of Utilities to Flanders Rd. Industrial Area	February-08
Groton	Groton Strategic Economic Development Plan	July-06
Groton	Submarine Base Gateway & Multi-purpose Path Project	July-05
Groton	Plan of Conservation & Development	February-02
Groton	Zoning Regulations	March-10
Ledyard	Route 12 Corridor Study	November-98
Ledyard	Town Center Enhancement Plan	February-07
Lisbon	Zoning Regulations	August 2009 Rev.
Lisbon	Plan of Conservation & Development	February-04
Montville	Montville Targeted Industry & Feasibility Analyses	January-11
Montville	Plan of Conservation & Development - 2010	May-10
Montville	Zoning Regulations	October-08
New London	Choice for New London: Neighborhood Planning Strategy	October-10
North Stonington	Plan of Conservation & Development	September-09
Norwich	A Waterfront Vision	May-11
Norwich	Plan of Conservation & Development	October-02
Norwich	Zoning Regulations	June-05
Preston	Conceptual & Management Plan for Redevelopment of Preston Riverwalk	April-10
Preston	Zoning Regulations	June-08
Sprague	Water and Wastewater Capital Plan	December-10
Sprague	Remedial Action Plan Baltic Mills	October-10
Stonington	Pawcatuck Revitalization Strategies	April-05
Stonington	Plan of Conservation and Development	June-04
Waterford	Niantic River Watershed Plan	March-09
Waterford	Plan of Conservation & Development	August-98
Waterford	Zoning Regulations	August 2010 Rev.
Waterford	Traffic Evaluation Study-Parkway North Connector	August-09

Tabel A.2: Other Selected Reports and Plans Referenced

Agency	Report	Date
State of CT	Governor's Commission for the Economic Diversification of Southeastern CT	Dec-06
State of CT	Conservation & Development Policies Plan for Connecticut, 2005-2010	Jun-05
State of CT	Connecticut Economic Strategic Plan	Sep-09
SCCOG	Regional Transportation Plan: 2011-2040	2011
SCCOG	Regional Intermodal Transportation Master Plan & Efficiency Study (RITC)	Mar-11
SCCOG	Intermodal Connections Study Southeast	Feb-05
SECT Housing Alliance (SECHA)	Strategic Plan	2010, Revised March 2011
Eastern CT Workforce Investment Board (EWIB)	Regional Innovative Grant (RIG) SWOT Analysis Final Report	September-09
Stonington, Groton and Private Sector Partners	Mystic Mobility Study	May-11
CONNDOT	State Pier Needs & Deficiencies Planning Study	Mar-11
CONNDOT	I-95 Branford to Rhode Island Feasibility Study	Dec-04
CONNDOT	Groton-New London Airport Master Plan	In progress 2011
UConn Cooperative Extension	CT Agriculture and Resources: 21st Century Issues and Challenges	Apr-04

ATTACHMENT E: PROJECT REVIEW FORM

PROJECT REVIEW FORM: TO BE FILLED OUT BY MUNICIPALITY OR SPONSORING ORGANIZATION	
Consistency with CEDS Strategy and Goals	
Describe the relevance of the project to specific Goals, Strategies and/or Action Steps in the regional CEDS	
Describe the relevance and consistency of the project EDA Investment Priorities	
Discuss Project's consistency with State of Connecticut Responsible Growth Strategies in Plan of Conservation & Development, and CT Economic Strategic Plan	
Describe the project's consistency with the Southeastern CT Council of Governments Regional Plans	
Direct Economic Impacts	
How many jobs will be created or retained as a result of the project?	
What are total costs of project and how much private funding is being leveraged?	
How much in government funds are being leveraged?	
How does the project contribute to the economic diversification of the region?	
What will be the fiscal impact of the project or the total increase in state and local taxes?	
Feasibility of the Project	
Has the project received required municipal and state approvals?	
Describe the current funding status of the project	
Explain how project will be sustained	