2016
Positioning Higher Education as the Cornerstone to New Hampshire’s Future

A Candidate’s Briefing Document
Executive Summary & Recommendations

Positioning Higher Education as the Cornerstone to New Hampshire’s Future

The New Hampshire College & University Council (NHCUC) has developed this white paper as an outline of key higher education issues and possible actions that New Hampshire’s next Governor and Legislature should seriously consider as an agenda for action and implementation. This document proposes that it is time for New Hampshire to promote a new and more collaborative partnership between public policy, education and business leaders. Proposals included in this report recommend that a new and aggressive economic development and higher education agenda be developed to secure New Hampshire’s future.

Action Steps:

1. Advocate for increased access to higher education
   * Reinvest in NH’s public higher education systems
   * Strive to move NH away from a “high student debt”/“low state support model”
   * Re-establish general fund scholarships for college students
2. Endorse and support the rigorous academic standards of New Hampshire Scholars
3. Endorse and support the 65 x 25 Initiative of the New Hampshire Coalition for Business and Education
4. Work with New Hampshire’s public and private colleges and universities to determine an appropriate level of state investment

2016 Report Card

New Hampshire received a failing report card from ‘YI’ (Young Invincibles, see page 2) because we spend the least amount of money per student than any other state in the country.

The report also cites that New Hampshire provides zero financial aid to students and their higher education spending makes up only 2% of the state budget.

NH ranks 1st in the nation on student debt with $31,048, 23% more than the national average.
We suggest, with the obvious importance of an educated workforce, that New Hampshire’s number one industry cluster is its higher education sector. Other industry clusters (high tech, finance, health care, advanced manufacturing, energy, others) all depend on access to a talented and high skilled workforce.

Effectively capitalizing on New Hampshire’s clusters will require new partnerships in dynamic ways to ensure that our state is prepared to respond to emerging demands and needs, and to develop a clear plan for bringing new businesses to the State and retaining those businesses already here.

The figures to the right add up to an essential foundation for the future of our state.

### NH’s Higher Education is a Major Economic Force
- $5.8 billion Industry
- $2.2 billion in annual operating budgets
- $1.2 billion in salaries, wages & benefits
- 26,600 jobs (direct and indirect)
- $278 million on Research & Development
- 15,200 degrees awarded
- 73,700 students served
- $231 million on capital expending
- 5 million community service hours for a total impact of $95 million
- $55,275 million spent by students/families
- $912M spent by employees on local economy
- $441 million of institutional financial aid received by 51,700 students
- $13 million tax payment from institutions

2015 NHCUC Higher Education Economic Impact Report

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**College Bound Students Are Leaving The State For Higher Education. New Hampshire is the second highest exporter in the U.S. (see figure 8).**

Of the **10,015** high school graduates who attended college, only **5,204** stayed in New Hampshire for college (52%). Which means that **4,811** high school graduates left New Hampshire for college (48%).

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**Scholarships**

For many years the State recognized the need to provide some general funds for scholarship support to needy New Hampshire students. Historically, higher education institutions granted scholarship funds that far exceeded those provided by the State. In 2011 nearly all general funds for scholarships were eliminated. The State’s departure from this role endangers the future of New Hampshire by reducing access to a postsecondary degree.

This agenda will demonstrate a commitment to advancing greater access to higher education, enhanced alignment of business and higher education interests to ensure New Hampshire’s economic future, while encouraging greater efficiencies, rigor and academic preparation for all New Hampshire students. The next governor’s and legislature’s goal, in partnership with New Hampshire’s business community, should be to make New Hampshire a recognized leader in access, readiness, completion, workforce development and economic prosperity.
Positioning Higher Education as The Cornerstone to New Hampshire’s Future

Higher Education: The Vehicle for A New Economy

This White Paper has been developed by the New Hampshire College & University Council (NHCUC) in an effort to highlight some of the challenges confronting higher education in New Hampshire, potential impacts on our State’s economic future and to offer a few key suggestions for possible action by the next Governor and New Hampshire General Court.

If higher education is seen as the passport to a better life, many fear their visa is about to be cancelled. Parents and students are increasingly anxious about the opportunity to access and pay for higher education. Studies indicate that although expanded access to higher education is the best approach to ensuring workforce competitiveness, a majority of citizens believe their children will have only a moderate to no opportunity to pursue higher education.

There is general consensus among economists that investments in higher education are an important source of economic development and future economic and business success for any state. Although New Hampshire ranks last in state support to higher education (Table 1.) the Granite State clearly benefits from its ranking as one of the most highly educated states in the nation (Figure 1). Our citizens’ educational levels directly correlate with New Hampshire’s quality of life rankings (most livable state, safest state, best state to raise children) and our low unemployment rates.

Table 1. Percent State Fiscal Support/$1000 of Personal Income

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>State Fiscal Support (000)</th>
<th>State Fiscal Support /$1000 of Personal Income</th>
<th>State Rank</th>
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<td>2012</td>
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<td>$1.45</td>
<td>50</td>
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<td>2011</td>
<td>$141,870</td>
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<td>50</td>
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<tr>
<td>2010</td>
<td>$138,883</td>
<td>$2.39</td>
<td>49</td>
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<td>2009</td>
<td>$138,531</td>
<td>$2.46</td>
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<tr>
<td>2008</td>
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<tr>
<td>2007</td>
<td>$123,966</td>
<td>$2.48</td>
<td>50</td>
</tr>
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</table>

Source: postsecondary.org

Figure 1. Percent of People 25 Years and Over Who Have Completed High School (Includes Equivalency) and Bachelor’s Degree, Ranking by State, 2010

<table>
<thead>
<tr>
<th>HS Degree</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Hampshire</td>
<td>91.5%</td>
</tr>
<tr>
<td>Vermont</td>
<td>91.0%</td>
</tr>
<tr>
<td>Maine</td>
<td>90.3%</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>89.1%</td>
</tr>
<tr>
<td>Connecticut</td>
<td>88.6%</td>
</tr>
<tr>
<td>U.S.</td>
<td>85.6%</td>
</tr>
<tr>
<td>Rhode Island</td>
<td>83.5%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>BS Degree</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Massachusetts</td>
<td>39.0%</td>
</tr>
<tr>
<td>Connecticut</td>
<td>35.5%</td>
</tr>
<tr>
<td>Vermont</td>
<td>33.6%</td>
</tr>
<tr>
<td>New Hampshire</td>
<td>32.8%</td>
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<tr>
<td>Rhode Island</td>
<td>30.2%</td>
</tr>
<tr>
<td>U.S.</td>
<td>28.2%</td>
</tr>
<tr>
<td>Maine</td>
<td>26.8%</td>
</tr>
</tbody>
</table>

Source: U.S. Census
The National Perception Regarding NH’s Commitment to Higher Education

2016 Report Card

New Hampshire received a failing report card from ‘YI’ (Young Invincibles) because we spend the least amount of money per student than any other state in the country. The report also cites that New Hampshire provides zero financial aid to students and their higher education spending makes up only 2% of the state budget.

‘YI’ concludes that the proof is in the numbers thus the state is not concerned with students in their higher education system.

Young Invincibles is a national organization, working to engage young adults on issues, such as higher education, health care, and jobs. www.younginvincibles.org

Table 2

Student Impact Project Grades

The Student Impact Project, an initiative of Young Invincibles, is a college affordability campaign, that aims to equip students with the tools and resources to organize and advocate for state policies that support college access, affordability, and success. According to www.studentimpactproject.org, New Hampshire is not making the grade.

New Hampshire received failing grades in all of the following categories:

- Tuition costs
- State appropriations
- Burden on families
- Aid for students
- Higher education as a priority

Please see Table 2.
Higher education in New Hampshire is facing multiple challenges. Rising costs coupled with reduced financial resources threaten access to college at exactly the point in time in which our state needs to expand access most. By 2018 it is estimated that on the national level 13.8 million new jobs and 33 million replacement jobs will be available. Approximately 63 percent of these 46.8 million jobs are estimated to require workers with at least some college education. About 33 percent will require a Bachelor’s degree or better; another 30 percent will require some college or a two-year Associate’s degree, and only 36 percent will require workers with just a high school diploma or less. New Hampshire will likely see similar demands for educated workers.

For many years the State recognized the need to provide some general funds for scholarship support to needy New Hampshire students. Historically, higher education institutions granted scholarship funds that far exceeded those provided by the State. In 2011 nearly all general funds for scholarships were eliminated. The State’s departure from this role endangers the future of New Hampshire by reducing access to a postsecondary degree.

It is widely known that students who attend institutions of higher education obtain a wide range of personal, financial and other lifelong benefits. In fact the top 10 states, in terms of personal income per capita, are 18 percent above the national average in the share of their workforce with a Bachelor’s degree or higher — while the bottom 10 states, in terms of personal income, are 17 percent below the national average in the share of their workforce with a Bachelor’s degree or higher. New Hampshire is 16 percent above the national average in the share of its population with at least a Bachelor’s degree.

Having a highly educated citizenry is a tremendous advantage for New Hampshire, which results not only in increased per capita wealth, but also fewer demands on already stretched social services, lower crime rates, greater community involvement, healthier lifestyles and reduced health care costs.

How New Hampshire will grow and prosper over the next few years is a critical question that will confront our next governor and the Legislature. Typically, higher education would make the case for continued and expanded public dollar investments in both higher education institutions and the students they serve.

Clearly, we are living in new economic times and the “new normal” will likely require all colleges and universities to operate differently than in the past. General fund support for higher education is a wise and necessary investment. Both the public and private colleges and universities, who are members of the NHCUC, strongly believe that state support toward public higher education is critical to our state’s economic and cultural future. We welcome the opportunity to work with the next governor and the new legislature in setting a new agenda that will serve New Hampshire students, businesses, and citizens. Reinvesting in NH’s public university and community college system, and recognizing the

“It is time for New Hampshire’s elected leaders to consider promoting new and more collaborative engagements among our state, our educational institutions and our business community.”

Fred Kocher
Host, NH’s Business, WMUR
Trustee, NH High Technology Council

New Hampshire’s Knowledge Economy

If New Hampshire is going to participate in the next “new economy” while simultaneously maintaining our high quality of life, educating the next generation of citizens needs to be a top priority. And, if New Hampshire is to have an effective economic development strategy, one that yields the highest possible returns, developing New Hampshire’s human capital offers the best way of attracting and maintaining businesses in our state.

Unlike some other states, New Hampshire is not a state rich in recently discovered natural resources that will drive our 21st century economy.
What will set New Hampshire apart will be fulfilling its potential leadership in the new “knowledge economy.” A highly educated citizenry will result in continued demand for quality life/amenity opportunities, a business climate conducive to valued employment and a higher education system dedicated to quality teaching, learning and research.

**A Cluster Based Economy**

If New Hampshire is going to be engaged in the 21st century economy, our state, its businesses and higher education institutions, must be prepared to respond to new and emerging economic trends. Cluster-based economic development is the newest trend being promoted to advance regional economic growth. This theory was developed by Harvard Business School’s Michael Porter. According to this approach, the foundation of a regional economy is a group of clusters, not a collection of unrelated firms. Cluster analysis can help identify economic strengths and to help set an agenda for future economic growth and planning.

Some would argue that New Hampshire is culturally averse to statewide planning of any kind which, if accurate, may suggest a cluster approach actually might be more successful. What is currently not working is the lack of a strategic economic plan, little consensus for where New Hampshire is headed, how we might get there or strategies for bringing key players (business, higher education, policy makers) together to develop a new innovation focused economy.

We suggest, with the obvious importance of an educated workforce, that New Hampshire’s number one industry cluster is its higher education sector. Other industry clusters (high tech, finance, health care, advanced manufacturing, energy, others) all depend on access to a talented and high skilled workforce. Effectively capitalizing on New Hampshire’s clusters will require new partnerships in dynamic ways to ensure that our state is prepared to respond to emerging demands and needs, and to develop a clear plan for bringing new businesses to the State and retaining those businesses already here.

**Rigor, Relevance and Efficiencies**

It is estimated that remedial courses are costing New Hampshire’s economy more than $13 million on an annual basis. Eight million dollars is the direct cost of remediation and the remaining $5 million is the estimated loss in earnings potential because students drop out of college without a degree. *(Source: Paying Double: Inadequate High Schools and Community College Remediation.)*

Students who complete a rigorous Core Course of Study as prescribed by the New Hampshire Scholars Initiative likely will not need remedial coursework and will be better equipped to successfully complete credit bearing college level courses.

In today’s economy, where New Hampshire now ranks as having the highest student debt load in the country and providing the fewest state dollars toward financial aid, it is imperative for students to be academically prepared for college to maximize their college investment.

Only 45 percent of students enrolled in postsecondary education today will ultimately earn a bachelor’s degree. Far too many of our nation’s and New Hampshire’s students are unprepared to succeed in college due to lack of academic preparation in high school. The New Hampshire Community College System reports that 40 to 60 percent of students attending our community colleges need to take at least one remedial class during their college years.

**NH’s Higher Education is a Major Economic Force**

- $5.8 billion Industry
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2015 NHCUC Higher Education Economic Impact Report

**NH Scholar students, who complete rigorous high school courses, are prepared to succeed in college and the workforce.**
This lack of preparation results in far too many students having to take remedial classes in college. Rigorous course work in high school prepares students for postsecondary education and the workplace. New Hampshire Scholars is a program that encourages high school students, in partnership with high schools, colleges and businesses to ensure that students take a rigorous academic program to prepare them for college. The New Hampshire Scholars program strengthens high school students’ academic profile and creates significant efficiencies in the postsecondary system, allowing institutions of higher education to spend their scarce resources educating students and not on remediation.

**Proposed Action Steps**

Following are a few proposals for consideration in setting an economic development and higher education agenda for New Hampshire

1. **Advocate for Access to Higher Education**

Recognizing that cost and debt are seen as the major hurdles to accessing higher education, New Hampshire must invest in its public higher education institutions and get back in the financial aid business by partnering with New Hampshire’s public and private colleges and universities to provide student scholarships. Indeed, even during these difficult economic times, other states are making significant investments in scholarships for their citizens.

We strongly encourage our next governor and the new legislature to be an “advocate for access” by providing funds for needy New Hampshire students attending New Hampshire institutions. Additionally, some modest commitment of general fund dollars for merit-based scholarships to needy students should be considered in developing the next state budget.

New Hampshire cannot afford to be the only state in the country to provide no state scholarship funding to its citizens. Currently, New Hampshire students carry the second highest debt load in the country with an average debt of over $33,410, which is 15% above the national average ($28,950). New Hampshire students carry the highest proportion of debt at 76% (Source: Project on Student Debt 2014).

"New Hampshire cannot afford to be the only state in the country to provide virtually no state scholarship funding to any of its citizens."

Tom Raffio
President & CEO
Northeast Delta Dental

**NH ranks 1st in the nation on student debt with $31,048, 23% more than the national average. Likewise, 3 of every 4 students in the state is burdened by student loans, by contrast only 1 in 3 students carries debt in Nevada.**
II. Support and endorse the initiatives that move our state forward both educationally and economically

New Hampshire Coalition for Business and Education (NHCBE)
Education Driven Economic Development (ED²)

The Coalition is a non-partisan organization composed of leading business, education, philanthropic, and public policy leaders committed to improving the quality, access and relevance of education for New Hampshire citizens of all ages. As an advocacy group the NHCBE is prepared to support important goals and objectives in partnership with other action groups.

Goal:
*New Hampshire’s citizens have the education necessary to meet their life goals, as well as the current and future economic needs of the state.*

65x25 Attainment Target:
According to projections by researchers at Georgetown’s Center on Education and the Workforce, 68 percent of jobs in New Hampshire will require educational attainment beyond high school by 2020. However, present trajectories indicate that far less than 68 percent of New Hampshire’s workforce will reach that educational bar if the state does act to make it happen.

NHCBE has introduced 65 by 25, a goal to help ensure that 65 percent of adults 25 and older in New Hampshire will have some form of post-secondary education, from certificates to advanced degrees, by 2025. Achieving this goal moves New Hampshire much closer to the target cited in national research and positions New Hampshire to support a strong future economy. *The goal is for 65% of working age adults 25-64 years of age will hold a high-quality postsecondary credential of value or degree by 2025.*

Initiatives to Support Goal
Table 1 below represents the initiatives endorsed by the NHCBE as of January 2016 that will support the achievement of the overall goal. The specific emphasis on achieving the 65x25 target approved in July, 2015 will require particular attention to residents 15 years old (~10th graders) and older, while continuing to improve and support education for our younger population in order to sustain success into the future. Initiatives are slotted by the age/grade ranges they are intended to target, with the overarching 65x25 effort encompassing individuals who are currently in high school, postsecondary education, or of workforce age (25 to 64).

Table 3

<table>
<thead>
<tr>
<th>Early Childhood</th>
<th>Elementary School</th>
<th>Middle School</th>
<th>High School</th>
<th>Postsecondary</th>
<th>Workforce</th>
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<td>STEM – Smarter Pathways</td>
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<tr>
<td>Common Core Standards</td>
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<tr>
<td>New Hampshire Scholars</td>
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<td>STEAM AHEAD NH (Manchester Only)</td>
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<td>10,000 Mentors &amp; Competency-Based Learning</td>
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</table>
III. Emphasize the Relevance of Rigor

Recognizing the importance of academic rigor in higher education achievement our next governor and the new legislature should encourage each New Hampshire high school – both public and private – to become a New Hampshire Scholar School, ask every college/university and business in New Hampshire to become a state scholar partner, and place the New Hampshire Scholar program ($150,000 annually) into the state budget. New Hampshire Scholars has already secured commitments from more than 95% of New Hampshire’s public high schools as New Hampshire Scholars Schools. Nearly all NH Scholars graduates enroll in postsecondary education the following fall. In comparison, the state average for New Hampshire graduates immediately enrolling in college is only 59% . (Source: National Student Clearinghouse.)

A commitment to the relevance of rigor would be an important and significant message coming from New Hampshire’s public policy leaders. This program should become a national model for academic rigor, business/education partnerships, and strategy for developing New Hampshire’s highly skilled workforce. This program offers a platform for addressing the need for academic rigor and high standards with a minimal investment and with maximum management efficiency.

In 2015, the program launched two new achievement levels: STEM Pathway and Art Pathway. These areas of emphasis promote the need to increase the number of students and young professionals New Hampshire’s workforce needs in STEM fields (Science, Technology, Engineering, and Math).


Recognizing the lack of a current state plan for the future of New Hampshire, our next governor and the new legislature should convene a Summit on Aligning New Hampshire’s Business, Higher Education and Public Policy Priorities for the 21st Century. The outcome of the first summit should be a state plan for establishing priorities for advancing New Hampshire’s future in a strategic manner. This state summit should become an annual event that highlights opportunities to advance the interests and collaboration of New Hampshire businesses, higher education institutions and public policy leaders.

An annual report of new initiatives, profiles of collaborations and an update on the status of initiatives should be issued and promoted to encourage advancement of best practices. Without a state plan it’s hard to measure if we are making progress. This effort can set a new standard for ensuring New Hampshire is moving forward and making progress in educational attainment, workforce development and meeting benchmarks.

Summary & Recommendations

Action Steps:

1. Advocate for increased access to higher education
   * Reinvest in NH’s public higher education systems
   * Strive to move NH away from a “high student debt”/“low state support model”
   * Re-establish general fund scholarships for college students
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This agenda will demonstrate a commitment to advancing greater access to higher education, enhanced alignment of business and higher education interests to ensure New Hampshire’s economic future, while encouraging greater efficiencies, rigor and academic preparation for all New Hampshire students. The next governor’s and legislature’s goal, in partnership with New Hampshire’s business community, should be to make New Hampshire a recognized leader in access, readiness, completion, workforce.
APPENDIX—Additional Trends Important to Watch

Figure 2. NH’s Population Distribution by Age

![NH Population by Age, 2010](image)

Source: NH Center for Public Policy Studies

Figure 3. NH’s Population Change Pattern

![New Hampshire Population Components of Change](image)

Source: NH Center for Public Policy Studies
No state invests less in public higher education than New Hampshire, where the government spends an average of $2,591 per pupil annually. As is generally the case in states with low public higher education spending, out-of-pocket tuition costs are relatively high in New Hampshire. At $9,843 per student, out-of-pocket tuition costs are fifth highest nationwide.

The low public investment has not prevented greater numbers of students from enrolling in New Hampshire schools, however. Enrollment grew by 3.8% last year, the highest of all states and in stark contrast with the 1.1% nationwide enrollment decline.

In comparison, the top ranking New England state is Connecticut spending $8,090 per student annually for higher education. No state spends more per full time student on public higher education institutions than Wyoming. Wyoming invests the equivalent of $17,300 per student, more than double the $6,966 national average.

Figure 5. NH’s K-12 Enrollment

New Hampshire Total Public School Enrollment, 2001-02 to 2012-13

Source: NH Center for Public Policy Studies

Figure 6. NH’s Postsecondary Enrollment

Source: NH Department of Education
Figure 7. NH’s Migration Patterns for College Freshmen, 2014

College bound students are leaving the state for education.

Of the 10,015 high school graduates who attended college, only 5,204 stayed in New Hampshire for college (52%). Which means that 4,811 high school graduates left New Hampshire for college (48%).

Source: Postsecondary Education Opportunity

Figure 8. NH is 2nd Highest Exporter of College-Going Students

NH is the 2nd highest exporter of college-going high school graduates in the U.S.

Percent of college-going, newly graduated high school students leaving their state of residence to attend college

U.S. Average 18.9%

NH 46.1%

Data from U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS), Fall 2017, most recent available for public use. Students graduated from high school within 32 months prior to fall enrollment.
Figure 9. Projected Total Jobs in New Hampshire

![NH Total Jobs Chart](image)

- 783,160 Jobs in 2020

Figure 10. 68% of NH Jobs Will Require Postsecondary Education in 2020. Compared to the National Estimate of 65%

![Jobs Education Requirement Chart](image)

Source: The Georgetown University Center on Education and the Workforce
**Figure 11. Working Age Population Will Decline in Every NH Region**

<table>
<thead>
<tr>
<th>Working Age Population (age 25 to 64)</th>
<th>PctChange</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central NH Planning Commission</td>
<td>-6.8%</td>
</tr>
<tr>
<td>Lakes Region Planning Commission</td>
<td>-9.2%</td>
</tr>
<tr>
<td>Nashua Regional Planning Commission</td>
<td>-3.0%</td>
</tr>
<tr>
<td>North Country Council</td>
<td>-12.9%</td>
</tr>
<tr>
<td>Rockingham Planning Commission</td>
<td>-1.2%</td>
</tr>
<tr>
<td>Southern NH Planning Commission</td>
<td>-1.5%</td>
</tr>
<tr>
<td>Southwest Region Planning Commission</td>
<td>-4.1%</td>
</tr>
<tr>
<td>Strafford Regional Planning Commission</td>
<td>-0.5%</td>
</tr>
<tr>
<td>Upper Valley / Lake Sunapee Regional Planning</td>
<td>-6.8%</td>
</tr>
<tr>
<td>New Hampshire</td>
<td>-4.0%</td>
</tr>
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</table>

**Figure 12. While NH Department of Employment Expects Increasing Jobs**

<table>
<thead>
<tr>
<th>Change in Employment (ELMI Projection)</th>
<th>PctChange</th>
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</thead>
<tbody>
<tr>
<td>Central NH Planning Commission</td>
<td>9.2%</td>
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<tr>
<td>Lakes Region Planning Commission</td>
<td>6.3%</td>
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<td>Nashua Regional Planning Commission</td>
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<tr>
<td>North Country Council</td>
<td>4.8%</td>
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<td>Rockingham Planning Commission</td>
<td>14.7%</td>
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<td>Southern NH Planning Commission</td>
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Source: NH Center for Public Policy Studies
ABOUT THE NHCUC

The New Hampshire College & University Council (NHCUC) is a non-profit consortium of public and private, not-for-profit, institutions of higher education in the state of New Hampshire. These institutions are recognized and highly regarded for their outstanding teaching, research, and community service activities. They serve as major centers of activity that are vital to the economic development of the community and the state.

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