

Northeastern University
Dukakis Center *for* Urban & Regional Policy

ECONOMIC DEVELOPMENT SELF-ASSESSMENT TOOL (EDSAT)

**EDSAT REPORT FOR THE TOWN OF
LEICESTER, MASSACHUSETTS
DECEMBER 2015**



THE PARTNERS

About the Kitty and Michael Dukakis Center for Urban and Regional Policy

The Kitty and Michael Dukakis Center for Urban and Regional Policy at Northeastern University conducts interdisciplinary research, in collaboration with civic leaders and scholars both within and beyond Northeastern University, to identify and implement real solutions to the critical challenges facing urban areas throughout Greater Boston, the Commonwealth of Massachusetts, and the nation. Founded in 1999 as a “think and do” tank, the Dukakis Center’s collaborative research and problem-solving model applies powerful data analysis, a bevy of multidisciplinary research and evaluation techniques, and a policy-driven perspective to address a wide range of issues facing cities and towns. These issues include affordable housing, local economic development, workforce development, transportation, public finance, and environmental sustainability. The staff of the Dukakis Center works to catalyze broad-based efforts to solve urban problems, acting as both a convener and a trusted and committed partner to local, state, and national agencies and organizations. The Dukakis Center is housed within Northeastern University’s School of Public Policy and Urban Affairs.

About the National League of Cities

The National League of Cities is the nation’s oldest and largest organization devoted to strengthening and promoting cities as centers of opportunity, leadership, and governance. NLC is a resource and advocate for more than 1,600 member cities and the 49 state municipal leagues, representing 19,000 cities and towns and more than 218 million Americans. Through its Center for Research and Innovation, NLC provides research and analysis on key topics and trends important to cities, creative solutions to improve the quality of life in communities, inspiration and ideas for local officials to use in tackling tough issues and opportunities for city leaders to connect with peers, share experiences, and learn about innovative approaches to urban governance.

For additional information about the Economic Development Self-Assessment Tool (EDSAT), please visit <http://www.northeastern.edu/dukakiscenter/econdev/edsat> or contact:

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INTRODUCTION

A robust, sustainable, and adaptable local economy depends heavily on public officials who can lead in forming and implementing an economic development strategy. A thorough strategy is developed with an understanding of local business interests and regional resource availability, and a careful assessment of the community's ability to attract new business investment and jobs. Participating in the Economic Development Self-Assessment Tool (EDSAT) is an important step public officials can take to assess their jurisdictions'¹ strengths and weaknesses for the purpose of planning for viable, long-term economic growth. Through EDSAT, public officials and business leaders collaborate as a team, assessing each of their roles in creating a business-friendly climate.

By participating in this self-assessment, Leicester will not simply better understand its economic development assets and challenges, but learn to build upon strengths and overcome weaknesses. This report contains a thorough analysis of the responses provided by Leicester to the EDSAT questionnaire.

The Dukakis Center for Urban and Regional Policy will keep all individual-municipality results in this report strictly confidential.

Project Overview

Since 2005, Northeastern University's Dukakis Center for Urban and Regional Affairs (Dukakis Center) has sought to identify the "deal-breakers" that impede private investment in local municipalities. Based upon research on the resurgence of older industrial cities, the Dukakis Center has identified two crucial elements in economic development. First is a municipality's ability to respond opportunely to ever-changing market forces. Second is local government's skill in working collaboratively with regional agencies, business leaders, and academic institutions to lessen municipal weaknesses and market the city or town's strengths. These conclusions led to the development of EDSAT, an analytical framework for providing practical, actionable feedback to public officials. In its current form, EDSAT resulted from a partnership between the Dukakis Center and the National League of Cities (NLC).

Methodology

The foundation for the 200-plus questions that make up the EDSAT questionnaire was established when the Dukakis Center surveyed more than 240 members of the National Association of Industrial and Office Properties, now known as NAIOP and CoreNet Global. These leading professional associations represent site and location experts, whose members research new sites for businesses and other institutions. Members were asked to identify those factors that are most important to businesses and developers when evaluating locations. This process generated a set of 38 broad factors relevant to economic growth and development. Examples include highway access, available workforce, and the timeliness of permit reviews. Based on rankings by these location experts, EDSAT factors are identified as *Very Important*, *Important*, or *Less Important* to businesses and developers. We denote these rankings as follows: A filled circle (●) indicates *Very Important*, a half-filled circle (◐) indicates *Important*, and an unfilled circle (○) indicates *Less Important*.

¹ Jurisdictions are usually categorized as individual towns and/or cities. A "jurisdiction" can also consist of several small municipalities, a geographic region, or a county—as long as each plans and strategizes its economic development efforts as a single entity.

RELATIVE IMPORTANCE OF EDSAT LOCATION FACTORS

| | | |
|---|--|---|
| <p>Very Important ●</p> <ul style="list-style-type: none"> • Highway Access • Parking • Traffic • Infrastructure • Rents • Workforce Composition • Timeliness of Approvals • Website/Access to Information | <ul style="list-style-type: none"> • Quality of Available Space • Land • Labor Cost • Industry Sensitivity • Sites Available • Predictable Permits • Fast Track Permits • Citizen Participation in the Review Process • Cultural and Recreational Amenities • Crime • Housing • Local Schools • Amenities • State Business Incentives • Local Business Incentives • Local Tax Rates • Tax Delinquency | <p>Less Important ○</p> <ul style="list-style-type: none"> • Airports • Rail • Water Transportation • Proximity to Universities and Research • Unions • Workforce Training • Permitting Ombudsman |
| <p>Important ◐</p> <ul style="list-style-type: none"> • Public Transit • Physical Attractiveness • Complementary / Supplemental Business Services • Critical Mass Firms • Cross Marketing • Marketing Follow-Up | | |

Each question in EDSAT addresses a particular location factor and provides three ways to interpret that factor relative to the response in your own community:

1. The level of importance businesses and developers place on that location factor
2. How other jurisdictions participating in EDSAT have typically responded to that question
3. How your jurisdiction's response compares to the typical response and the importance of the location factor

The EDSAT analysis compares your jurisdiction's responses with those of Comparison Group Municipalities (CGM)—that is, all of the jurisdictions that have completed the EDSAT questionnaire. With regard to the Permitting Process, for example, your jurisdiction may offer significantly shorter review times than the CGM. In this case, the EDSAT analysis suggests that on this measure your jurisdiction may possess a relative advantage in what is a *Very Important* location factor. However, if permit reviews take significantly longer, then your jurisdiction may be at a disadvantage, because businesses are interested in "time-to-market"—the time it takes to get up and running in an ever-increasingly competitive environment.

EDSAT assigns a color code to highlight the results of your jurisdiction compared to the median response among the CGM. Colors—green, yellow, and red—indicate a municipality's relative strength on each specific location factor. Green indicates that your jurisdiction is quantitatively or qualitatively stronger than the CGM response; yellow indicates that your jurisdiction is average or typical; and red indicates a relative deficiency.

SAMPLE RESULT, DRAWN FROM SECTION 1: ACCESS TO MARKETS/CUSTOMERS

| | | | |
|--|------------|---|-------------------------|
| <input type="radio"/> E. Airports | | | |
| Report of [REDACTED] as compared to all jurisdictions | | | |
| <i>Question</i> | [REDACTED] | | <i>Comparison Group</i> |
| 27: Do you have a local (municipal/ general aviation) airport? | yes |  | no |

The interaction between the importance of a location factor and your jurisdiction’s relative strength yields powerful information. With respect to businesses and developers, a comparison yielding “red” for a *Very Important* factor represents the potential for a “deal-breaker,” while a comparison resulting in “green” for a *Very Important* factor represents the likelihood of a “deal-maker.” There are several important considerations to keep in mind when reviewing a jurisdiction’s EDSAT results:

1. If your jurisdiction is at a disadvantage in certain *Very Important* location factors, such as possessing a slow permitting process, a workforce that lacks necessary skills, and infrastructure that lacks the capacity to support growth, it is considered to have three distinct “deal-breakers,” regardless of its geographic location.
2. Your jurisdiction should look at its EDSAT results as an overview, and not focus on a particular location factor. One “deal-breaker” does not mean that your jurisdiction should abandon its economic development efforts. At the same time, your jurisdiction cannot rely solely on one or two “deal-makers.” Economic development is a dynamic process and should be managed in such a way that a community continually responds to the changing needs of local and prospective businesses.
3. The interpretation of comparisons and color assignments depends on your jurisdiction’s context in answering the question and its objectives for economic development. For example, if there are significantly more square feet of vacant commercial space than the CGM median, EDSAT assigns “red” because large amounts of space may indicate outdated facilities in a stagnant local economy. However, the empty space may actually be an asset if your jurisdiction is focusing on attracting businesses that would benefit from large spaces, such as a creative mixed-use complex. Thus, your jurisdiction’s context is important in understanding EDSAT results.

For some questions, the red and green color assignments serve to highlight the response for further consideration within the context of your jurisdiction’s objectives and circumstances. Several questions have no comparison at all. They tend to be lists of potential incentives, resources, or regulations associated with the municipality and will be discussed in corresponding sections of the report.

SUMMARY OF RELATIVE STRENGTHS AND WEAKNESSES

This section summarizes Leicester’s primary strengths and weaknesses in the realm of economic development. EDSAT does not provide an overall grade for a jurisdiction, but rather assesses a jurisdiction’s unique set of strengths, weaknesses, and economic development objectives.

The Dukakis Center staff create a list of significant or notable responses for each of the *Very Important*, *Important*, and *Less Important* location factors, emphasizing strengths and “deal-makers,” which are not organized in any particular order of importance. Dukakis Center staff suggests that your municipality review these lists and use them to highlight, enhance, and market your town’s strengths.

Tasks on the weakness and “deal-breaker” lists, however, are prioritized to emphasize the importance of their mitigation. The Dukakis Center staff arranges the tasks according to feasibility, with consideration of the latitude and abilities of local, county, or regional levels of government. For example, in a jurisdiction with limited highway access, building a new highway interchange or connector would likely be cost-prohibitive, time-consuming, and an inefficient use of local resources. However, other tasks are more feasible with modest investments in time and resources. For example, streamlining the permitting process and making related development information readily accessible to both location experts and businesses could be accomplished without significant capital investments. Although location experts rank both highway access and the timeliness of permitting as *Very Important* location factors, in the prioritized list of potential “deal-breakers,” the permitting process is given a higher priority due to its feasibility in implementation.

Leicester’s Strengths and Potential “Deal-Makers”

The following three lists of Leicester’s strengths are its powerful economic development assets. The town should build upon these assets and promote them to prospective businesses and developers. Leicester should first consider those in the *Very Important* group, then the *Important*, and finally the *Less Important* group. Please note that strengths are **not listed in any particular order** within each list.

Strengths among *Very Important* Location Factors

WEBSITE: Leicester lists all of its jurisdiction’s local development policies and procedures, and posts pending applications on the town’s website. The site is updated weekly, provides updated versions of applications and forms, and contains links to the local business association, public schools, and public library.

PARKING: Leicester offers as many parking advantages as the CGM, with most available sites for office, retail, and manufacturing use featuring on-site parking.

TRAFFIC: In comparison with the CGM, Leicester’s commuter traffic flows reasonably well, with the town experiencing higher traffic speeds during rush hour congestion. Although Leicester does not use the services of both a traffic consultant and traffic planner, that is appropriate for a town its size.

WORKFORCE COMPOSITION: Although the proportion of Leicester’s unskilled workforce is relatively high, so too is its proportion of those in professional workforce—which throws the composition into balance.

Strengths among *Important* Location Factors

LAND: Leicester currently has a large proportion of vacant developable land that is zoned for commercial and industrial uses.

LOCAL TAX RATES: Your town outperforms the CGM by maintaining a unified tax on residential, industrial, and commercial properties, which is preferred by location specialists. In addition, it diversifies sources of public revenue by collecting meals tax.

QUALITY OF AVAILABLE SPACE: Leicester has a low number of vacant or severely underutilized shopping centers, and a large portion of its available sites would be considered unused open land or greenfield sites.

LABOR COST: Although the town’s wage rate for mid-level clerical workers is higher than the CGM, salaries for public high school teachers are also high, and reflect how much the community values an educated workforce.

HOUSING: Leicester’s housing is affordable, with the median sale price of a single-family home and the median rent for a two-bedroom apartment significantly lower than the CGM.

CRIME RATES: Across all categories, crime rates for Leicester are extremely low in comparison with the CGM.

Strengths among *Less Important* Location Factors

PROXIMITY TO UNIVERSITIES & RESEARCH: Leicester could draw on the nearby network of educational institutions in Worcester, as well as Becker College, as resources for economic development.

Leicester’s Weaknesses and Potential “Deal-Breakers”

Despite many advantages, Leicester has a number of apparent weaknesses that can pose a challenge to successful development. The factors in the *Very Important* group are the ones that the town should consider addressing first because they are the most critical potential “deal-breakers.” Again, the town should next consider those in the *Important* group, and finally those the *Less Important* group.

Unlike the above itemization of Leicester’s strengths, this three-part list of weaknesses is **arranged in order of priority**. We suggest that, while reviewing this prioritized list of challenges, participants keep in mind Leicester’s economic development objectives and the feasibility (economic and otherwise) of upgrading “deal-breakers” and other weaknesses.

Weaknesses among *Very Important* Location Factors

INFRASTRUCTURE: Leicester does not have sufficient capacity for growth in water supply, public sewer, and wastewater treatment. In addition, the town’s capacity for natural gas represents a more pressing challenge as it’s inadequate for current needs. On a positive note, the average retail cost per kWh in the municipality for residential, commercial and industrial end users is less expensive than the CGM.

HIGHWAY ACCESS: Leicester has virtually no available sites for manufacturing, retail, and general office space that are within two miles of an entrance or exit to a limited-access major highway.

Weaknesses among *Important* Location Factors

CRITICAL MASS FIRMS: Leicester does not have an industrial attraction policy.

PREDICTABLE PERMITS: Your town does not provide a checklist, flowchart, or handbook on permitting requirements and processes to prospective developers, nor does it allow for a single presentation of development proposals to all review boards and commissions with relevant permit authority.

COMPLEMENTARY BUSINESS SERVICES: Neither Leicester’s economic development committee nor its local business association are actively involved in the economic development activities of the town.

CROSS MARKETING: The jurisdiction does not engage local and regional businesses or regional planning and development organizations in marketing the town.

INDUSTRY SENSITIVITY: The jurisdiction does not have a marketing program based on existing core strengths, identified opportunities, or industry concentrations. In addition, it does not actively engage local business spokespersons to speak on behalf of the town.

MARKETING FOLLOW UP: There is currently no formal procedure in place for contacting existing local firms about their satisfaction with the town. In addition, there is no formal de-briefing process that contacts firms that chose not to locate in the town with the aim of learning what made the difference.

SITES AVAILABLE: Your town does not maintain an active relationship with commercial real estate brokers, developers, or agents with sites in the jurisdiction, and could profit from maintaining a readily available, up-to-date, complete list of sites that are available for development.

STATE AND LOCAL BUSINESS INCENTIVES: Leicester is eligible for state investment tax credits, job training tax credits, research and development tax credits, low interest loans, loan guarantees, and workforce training grants, but does very little to take advantage of them. The town itself does not offer TIF arrangements for retail development.

PHYSICAL ATTRACTIVENESS: Leicester does little to maintain well-kept streets, sidewalks, parks, etc. near development sites, and only 0-5% of the acreage in Leicester is reserved for parks in comparison with the CGM's 6-10%.

LOCAL SCHOOLS: The percentage of students in Leicester who tested proficient in English and Mathematics is 81% or greater, which is higher than the CGM average. The percentage of high school freshman who normally graduate within 5 years is 95% or more compared to the CGM percentage of 81-94%. However, the percentage of high school graduates from last year's class who went on to a four-year college was between 26-49% and one of the town's schools was deemed "underperforming."

PUBLIC TRANSIT: Leicester is below the CGM in percentage of available retail trade, manufacturing sites, and general office space within a quarter mile of public bus or rail rapid transit. The town also has no freight rail or intercity passenger rail service.

SITE AMENITIES: In Leicester, most development sites are not within a mile of amenities important to location specialists, including fast food restaurants, retail shops, and day-care services.

Weaknesses among *Less Important Location Factors*

PERMITTING OMBUDSMAN: Leicester does not actively assist businesses in obtaining required state or federal permitting or licensing. The local licensing process for businesses is also considerably longer than that of the CGM.

AIRPORTS: Although the Worcester Regional Airport lies within Leicester's boundaries, the closest major/international airport is more than 31 miles away or a 61-90 minute drive from the town center, and is not easily accessible by public transportation.

DETAILED ANALYSIS AND QUESTIONNAIRE RESULTS

The following is a ten-part section-by-section analysis of the EDSAT results comparing Leicester’s self-reported responses with the median response among the CGM. Each location factor is ranked with three possible symbols: The shaded circle (●) denotes a *Very Important* factor, the half-shaded circle (◐) denotes an *Important* factor, and the unshaded circle (○) denotes a *Less Important* factor.

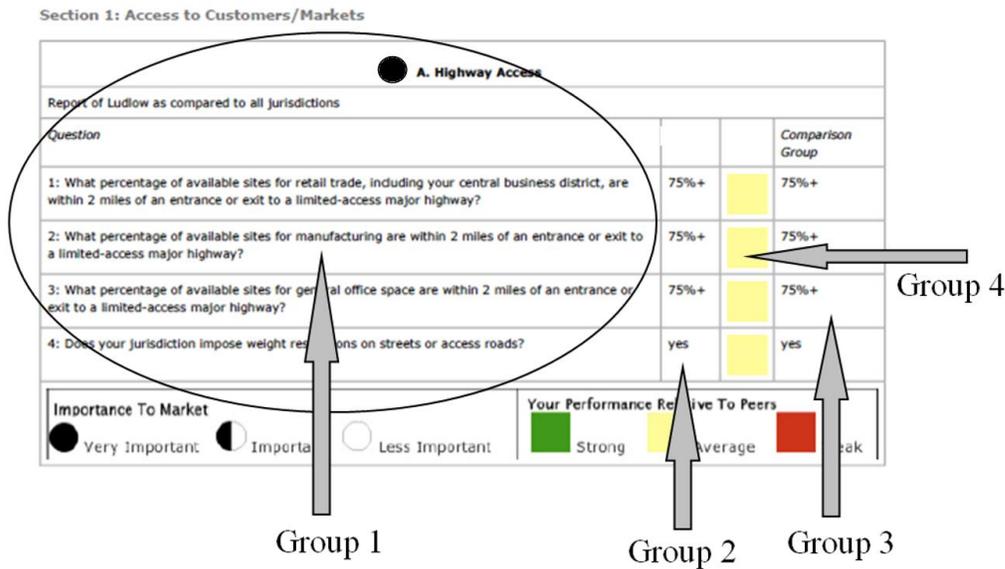
This ten-part portion of the report—its heart, really—is presented in the same order as the questions listed on the EDSAT questionnaire, with the tabular printout of Leicester’s results appearing first, and our narrative summary and interpretation of the results appearing second. The tabular results are displayed in four primary groupings of information:

Group 1 identifies a location factor (such as Highway Access), a circle indicating the relative importance of the location factor, and questions related to the factor that your town has already answered.

Group 2 shows Leicester’s responses to the EDSAT questions.

Group 3 is the median (or majority, for yes/no questions) response among the “comparison group municipalities” (or CGM) that have completed the EDSAT questionnaire.

Group 4 is a series of green, yellow, or red blocks indicating how Leicester compares to the CGM. A built-in function in EDSAT allows a municipality to compare itself against a subset of the CGM by other criteria such as population, median income, or size of operating budget. For purposes of this analysis, however, Leicester is compared with all the CGM.



Section 1: Access to Customers/Markets

In order to minimize transportation costs and time-to-market, businesses want adequate access to uncongested transportation corridors for their shipping needs, customers, and employees. Highway access, congestion, and parking are *Very Important* factors in location decisions. Public transportation is *Important*, while proximity to airports, rail, and water transport are *Less Important*. The overall physical attractiveness of public spaces, enforcement of codes, and condition of housing and commercial real estate are *Important*, as they are indications of general economic health and quality of life in a community.

|  A. Highway Access | | | |
|--|-----------|---|------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 1: What percentage of available sites for retail trade, including your central business district, are within 2 miles of an entrance or exit to a limited-access major highway? | 0% |  | 75% or greater |
| 2: What percentage of available sites for manufacturing are within 2 miles of an entrance or exit to a limited-access major highway? | 0% |  | 75% or greater |
| 3: What percentage of available sites for general office space are within 2 miles of an entrance or exit to a limited-access major highway? | 0% |  | 75% or greater |
| 4: Does your jurisdiction impose weight restrictions on streets or access roads? | no |  | no |

|  B. Public Transit | | | |
|---|-----------|---|------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 5: What percentage of available sites for retail trade are within 1/4 mile of public bus or rail rapid transit? | 26-49% |  | 50-74% |
| 6: What percentage of available sites for manufacturing are within 1/4 mile of public bus or rail rapid transit? | 1-25% |  | 26-49% |
| 7: What percentage of available sites for general office space are within 1/4 mile of public bus or rail rapid transit? | 26-49% |  | 50-74% |
| 8: Is there a transit-oriented development strategy in your plans for attracting new firms? | no |  | no |
| 9: Is there a commuter rail or bus stop within 5 miles of your jurisdiction's boundaries? | yes |  | yes |
| 10: Do you offer any shuttle services to other public commuting stations? | no |  | no |
| 11: Is public transit service available on nights and weekends? | no |  | yes |

| | |
|--|---|
| Importance To Market  Very Important  Important  Less Important | Your Performance Relative To Peers  Strong  Average  Weak  No Comparison |
|--|---|

C. Parking

Report of Leicester as compared to all jurisdictions

| <i>Question</i> | <i>Leicester</i> | | <i>Comparison Group</i> |
|---|------------------|---|-------------------------|
| 12: What percentage of available sites for retail trade have on-site parking? | 75% or greater |  | 75% or greater |
| 13: What percentage of available sites for manufacturing have on-site parking? | 75% or greater |  | 75% or greater |
| 14: What percentage of available sites for general office space have on-site parking? | 75% or greater |  | 75% or greater |
| 15: Does your jurisdiction offer parking facilities near development sites? | no |  | no |
| 16: Have you used state or federal infrastructure grants to improve parking in your jurisdiction? | no |  | no |
| 17: How much is typically charged for parking in your central business district? \$/Hourly | 0 |  | 0 |
| 18: How much is typically charged for parking in your central business district? \$/Daily | 0 |  | 0 |
| 19: How much is typically charged for parking in your central business district? \$/Monthly | 0 |  | 0 |

Importance To Market

 Very Important  Important  Less Important

Your Performance Relative To Peers

 Strong  Average
 Weak  No Comparison

| D. Traffic | | | |
|---|----------------------|---|----------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 20: Do you have regular access to a traffic engineer or transportation planner, such as one who is on staff or with a regional organization of which your jurisdiction is a member? | yes |  | yes |
| 21: Do you routinely use the services of a transportation consultant? | no |  | yes |
| 22: Do you have access to traffic count data for the major roadways in your jurisdiction? | yes |  | yes |
| 23: Do you require firms or developers to provide traffic mitigation beyond the streets adjacent to the site? (e.g. installing traffic signals, metering flow) | no |  | yes |
| 24: How would you rate traffic into and out of your jurisdiction during a typical weekday rush hour? | Moderately congested |  | Moderately congested |
| 25: What is the average speed of automobile commuter traffic during a typical weekday rush hour? | 26 - 35 mph |  | 11 - 25 mph |
| 26: Do you require a traffic impact analysis for large-scale development or redevelopment projects? | yes |  | yes |

| E. Airports | | | |
|--|--------------------------|---|--------------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 27: Do you have a local (municipal/ general aviation) airport? | yes |  | no |
| 28: The closest regional airport is how many miles away? | 0-5 miles |  | 11-20 miles |
| 29: The closest major/international airport is how many miles away? | 31 miles or more |  | 20-30 miles |
| 30: Is the major/international airport accessible by public transportation? | no |  | yes |
| 31: How long does it take to drive to the major/international airport from your town center? | 61 minutes to 90 minutes |  | 21 minutes to 60 minutes |

| | |
|--|---|
| Importance To Market  Very Important  Important  Less Important | Your Performance Relative To Peers  Strong  Average  Weak  No Comparison |
|--|---|

| <input type="radio"/> F. Rail | | | |
|---|-----------|--|--------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 32: Do you have rail freight service available? | no | | between yes and no |
| 33: Do you have intercity passenger rail service? Check all that apply. | | | |
| - Commuter | no | | no |
| - Intercity/Interstate(Amtrak) | no | | no |
| - None | yes | | no |

| | |
|---|--|
| Importance To Market <input checked="" type="radio"/> Very Important <input type="radio"/> Important <input type="radio"/> Less Important | Your Performance Relative To Peers <input checked="" type="checkbox"/> Strong <input type="checkbox"/> Average <input type="checkbox"/> Weak <input type="checkbox"/> No Comparison |
|---|--|

| <input checked="" type="radio"/> G. Physical Attractiveness | | | |
|---|------------|--|------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 34: To what extent do you enforce codes and regulations on abandoned properties, abandoned vehicles, trash disposal within your jurisdiction? | Moderately | | Moderately |
| 35: To what extent does your jurisdiction maintain streets, sidewalks, parks, etc., near available development sites? | Weakly | | Moderately |
| 36: Is there a hotline available for reporting code violations and maintenance needs within your jurisdiction? | no | | no |
| 37: Is there a system for monitoring the timeliness and quality of responses to reported violations within your jurisdiction? | no | | no |
| 38: Do you involve the arts community in the design of open space (street furniture, murals, etc.)? | no | | no |
| 39: What percentage of the acreage within your jurisdiction is reserved for parks? | 0-5% | | 6-10% |
| 40: What percentage of your housing stock is considered dilapidated? | 0-5% | | 0-5% |
| 41: What percentage of your commercial buildings are boarded up or closed down and would need renovations to reopen? | 0-5% | | 0-5% |
| 42: What percentage of commercial space is presently vacant (not currently occupied)? | 6-10% | | 6-10% |
| 43: What percentage of your industrial buildings are boarded up or closed down and would need renovations to reopen? | 0-5% | | 0-5% |
| 44: What percentage of industrial space is presently vacant (not currently occupied)? | 6-10% | | 6-10% |

H. Water Transportation

Report of Leicester as compared to all jurisdictions

| Question | Leicester | | Comparison Group |
|--|-----------|---|------------------|
| 45: Do you have water based transportation facilities within your jurisdiction? Check all that apply. | None |  | None |

| | |
|---|--|
| <p>Importance To Market</p> <p><input checked="" type="radio"/> Very Important <input checked="" type="radio"/> Important <input type="radio"/> Less Important</p> | <p>Your Performance Relative To Peers</p> <p><input type="checkbox"/> Strong <input type="checkbox"/> Average</p> <p><input type="checkbox"/> Weak <input type="checkbox"/> No Comparison</p> |
|---|--|

Section 2: Concentration of Businesses (Agglomeration)

Agglomeration refers to the number of complementary and supplemental services and related firms—including academic institutions—that are available within a jurisdiction to support new or existing companies. A concentration of similar or supporting companies creates a critical mass of businesses within an industry, making it easier for that industry to thrive in the local community, regionally, or on the state level. The scale of agglomeration within a jurisdiction can be enhanced by the intensity of its efforts to attract companies, its coordination of marketing plans with regional or state efforts, cross marketing among stakeholder organizations, and follow-up with existing and potential businesses.

|  A. Complementary/Supplemental Business Services | | | |
|---|------------|---|--------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 1: Is your local chamber of commerce or business association actively involved in the economic development activities of your jurisdiction? | Moderately |  | Moderately |
| 2: Does your jurisdiction have an active volunteer economic development committee or nonprofit center for economic development? | no |  | yes |
| 3: Is there an incubator or other form of cooperative space for start-up businesses in your jurisdiction? | no |  | no |
| 4: Are there CPA, business advisory or financial services firms in your jurisdiction? | yes |  | yes |
| 5: Are there law firms in your jurisdiction specializing in commercial law, intellectual property rights, or patents? | yes |  | yes |
| 6: Are there branches of major commercial banks in your jurisdiction? | no |  | yes |
| 7: To what extent are the business services (e.g. venture capital, business planning, specialized recruiting, etc.) in your jurisdiction capable of working with emerging technical and scientific firms? | N/A |  | Moderately capable |

|  B. Critical Mass Firms | | | |
|--|---|---|---|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 8: Does your jurisdiction have an up-to-date development strategy, an overall economic development plan (OEDP), or an economic development plan within your community master plan? | yes |  | yes |
| 9: Is your jurisdiction part of a county or regional OEDP or Comprehensive Economic Development Strategy (CEDs)? | yes |  | yes |
| 10: Does your state have a development strategy or economic development plan? | yes |  | yes |
| 11: If yes, are there firms within specific industry types or sectors that are targeted in your jurisdiction's, your county's or your state's development strategy? | yes |  | yes |
| 12: If yes, what specific industry types or sectors are targeted by your municipality's development strategy? Other, please specify (Your Municipality) | No Targets |  |  |
| 13: If yes, what specific industry types or sectors are targeted by your region/county's development strategy? Other, please specify (Regional/County) | Other Life Sciences, including Biotech; Healthcare; Alternative Energy |  |  |
| 14: If yes, what specific industry types or sectors are targeted by your state's development strategy? (State) | Alternative Energy; Travel and Tourism; Information Technology; Financial Services; Traditional Manufacturing; Other Life Sciences, including Biotech; Healthcare |  |  |

| | | | |
|--|----------------|---|----------|
| 15: Which of the following jurisdictions have development specialists to assist in interpreting the needs of these clusters? (Choose all that apply) | | | |
| - Your Municipality | no |  | yes |
| - Regional/County | no |  | no |
| - State | yes |  | no |
| 16: How aggressive is your industrial attraction policy? | Don't have one |  | Moderate |

| | |
|--|---|
| Importance To Market  Very Important  Important  Less Important | Your Performance Relative To Peers  Strong  Average  Weak  No Comparison |
|--|---|

| C. Cross Marketing | | | |
|---|-----------|--|------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 17: Do you actively enlist the services of firms already resident in your jurisdiction to assist in attracting new firms? | no | | no |
| 18: Do you engage local and regional business organizations to participate in marketing your jurisdiction? | no | | yes |
| 19: Do you engage regional planning and development organizations to participate in marketing your jurisdiction? | no | | yes |
| 20: Do you engage state agencies and organizations to participate in marketing your jurisdiction? | no | | yes |

| D. Marketing Follow-Up | | | |
|--|-----------|--|------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 21: Is there a formal de-briefing process with firms that chose to locate in your jurisdiction about what made the difference? | no | | no |
| 22: Is there a formal de-briefing process with firms that chose not to locate in your jurisdiction about what made the difference? | no | | no |
| 23: Do you have a formal procedure for contacting existing local firms about their satisfaction with your jurisdiction? | no | | no |
| 24: Do you have a formal procedure for intervening when early news surfaces about firm dissatisfaction with your jurisdiction? | no | | no |

| E. Proximity to Universities & Research | | | |
|--|-----------|--|------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 25: How many public or private four-year college or universities are located within your jurisdiction? | 1 | | 0 |
| 26: How many public or private four-year college or universities are located within 10 miles of your jurisdiction? | 10 | | 2 |
| 27: How many community colleges are located within your jurisdiction? | 0 | | 0 |
| 28: How many vocational/technical schools are located within your jurisdiction? | 0 | | 1 |

| | |
|--|---|
| Importance To Market Very Important Important Less Important | Your Performance Relative To Peers Strong Average Weak No Comparison |
|--|---|

Section 3: Cost of Land (Implicit/Explicit)

The cost of land to a firm includes two *Very Important* factors: Infrastructure and Rent. Updating civil, utility, and telecommunications infrastructure is costly, and firms do not like to incur these expenses. Therefore, if a municipality does not already have adequate capacity in place, a potential firm could decide to locate somewhere else with stronger capacity. Likewise, Rents are *Very Important* as they contribute heavily to operating expenses. Location experts consider the quality of available space and amount of available land for development *Important* factors.

| ● A. Infrastructure | | | |
|---|---|--|---|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 1: Are there significant limitations to any of your existing infrastructure systems? - Water Supply | Capacity for current needs only | | Sufficient capacity for growth & reliable service |
| 2: Public Sewer | Capacity for current needs only | | Sufficient capacity for growth & reliable service |
| 3: Wastewater Treatment | Capacity for current needs only | | Sufficient capacity for growth & reliable service |
| 4: Natural Gas | Inadequate capacity for current needs | | Sufficient capacity for growth & reliable service |
| 5: Electric Power | Sufficient capacity for growth & reliable service | | Sufficient capacity for growth & reliable service |
| 6: Data/Telecommunications - Land Lines | Sufficient capacity for growth & reliable service | | Sufficient capacity for growth & reliable service |
| 7: Data/Telecommunications - Cellular | Sufficient capacity for growth & reliable service | | Sufficient capacity for growth & reliable service |
| 8: Data/Telecommunications - Fiber optic / Cable / DSL | Sufficient capacity for growth & reliable service | | Sufficient capacity for growth & reliable service |
| 9: What is the average retail cost in cents per kilowatt-hour (kWh) for residential, commercial, and industrial end users in your municipality? Residential | 13.129 | | 16.23 |
| 10: What is the average retail cost in cents per kilowatt-hour (kWh) for residential, commercial, and industrial end users in your municipality? Commercial | 12.709 | | 15.20 |
| 11: What is the average retail cost in cents per kilowatt-hour (kWh) for residential, commercial, and industrial end users in your municipality? Industrial | 12.167 | | 13.03 |

| | |
|--|---|
| Importance To Market Very Important Important Less Important | Your Performance Relative To Peers Strong Average Weak No Comparison |
|--|---|

Electricity Rates (cents per kilowatt hour)

| Location | Type of Space | | |
|----------------------|---------------|------------|------------|
| | Residential | Commercial | Industrial |
| Leicester | 13.13 | 12.71 | 12.17 |
| Median CGM | 16.23 | 15.37 | 13.34 |
| Massachusetts | 17.99 | 17.30 | 14.03 |
| New England | 18.06 | 14.87 | 11.98 |
| United States | 12.93 | 10.90 | 7.32 |

[State, Region, and U.S. rates are those available as of January 2016 and were obtained from the U.S. Energy Information Administration (EIA). Leicester rates do not include demand charges, which fluctuate.]

|  B. Rents | | | |
|---|-----------|---|------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 12: What is the current average square foot cost for existing retail space in your central business district (Triple Net/Lease)? | |  | |
| 13: What is the current average square foot cost for existing retail space in your highway business district (Triple Net/Lease)? | |  | |
| 14: What is the current average square foot cost for existing manufacturing space (Triple Net/Lease)? | |  | |
| 15: What is the current average square foot cost for existing general office space in your central business district (Triple Net/Lease)?: CLASS A | n/a |  | 16.00 |
| 16: What is the current average square foot cost for existing general office space in your central business district (Triple Net/Lease)?: CLASS B | |  | |
| 17: What is the current average square foot cost for existing general office space in your central business district (Triple Net/Lease)?: CLASS C | |  | |
| 18: What is the current average square foot cost for existing general office space in your highway business district (Triple Net/Lease)?: CLASS A | |  | |
| 19: What is the current average square foot cost for existing general office space in your highway business district (Triple Net/Lease)?: CLASS B | |  | |
| 20: What is the current average square foot cost for existing general office space in your highway business district (Triple Net/Lease)?: CLASS C | |  | |
| 21: Of all the available office space in your jurisdiction, what percentage is: CLASS A | 0 |  | 15 |
| 22: Of all the available office space in your jurisdiction, what percentage is: CLASS B | 30 |  | 40 |
| 23: Of all the available office space in your jurisdiction, what percentage is: CLASS C | 70 |  | 40 |

| | |
|--|---|
| Importance To Market  Very Important  Important  Less Important | Your Performance Relative To Peers  Strong  Average  Weak  No Comparison |
|--|---|

| C. Quality of Available Space | | | |
|--|------------------|---|-------------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| <i>Question</i> | <i>Leicester</i> | | <i>Comparison Group</i> |
| 24: Approximately what percentage of available sites in your jurisdiction would be considered contaminated or brownfield sites? | 0-10% |  | 0-10% |
| 25: What experience does your jurisdiction have with the redevelopment of contaminated or brownfield sites? | Limited |  | Limited |
| 26: Approximately what percentage of available sites in your jurisdiction would be considered vacant or severely underutilized shopping centers? | 0-10% |  | 11-20% |
| 27: Approximately what percentage of available sites in your jurisdiction would be considered unused open land or greenfield sites? | 36-50% |  | 21-35% |

| D. Land (space) | | | |
|---|--------------------------|---|-------------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| <i>Question</i> | <i>Leicester</i> | | <i>Comparison Group</i> |
| 28: Approximately how much vacant developable land in your jurisdiction is currently zoned for commercial/industrial uses? | 451 acres or more |  | 1-150 acres |
| 29: Approximately how much vacant useable industrial or warehouse space exists in commercial/industrial buildings in your jurisdiction? | 250,001-500,000 sq. feet |  | 1-250,000 sq. feet |
| 30: Approximately how much vacant useable office space exists in commercial/industrial buildings in your jurisdiction? | 1-250,000 sq. feet |  | 1-250,000 sq. feet |
| 31: What proportion of the parcels available for industrial development or large scale commercial development are of 5 acres or more? | 11-20% |  | 11-20% |

| | |
|---|--|
| <p>Importance To Market</p> <p> Very Important  Important  Less Important</p> | <p>Your Performance Relative To Peers</p> <p> Strong  Average  Weak  No Comparison</p> |
|---|--|

Section 4: Labor

The effect of labor factors on location decisions runs somewhat contrary to popular belief. An available labor force that is adequately trained (Workforce Composition) is a Very Important factor, while the cost of labor is Important and the presence of strong unions is Less Important. Conventional wisdom often holds that higher labor costs and strong unions negatively affect a firm's location decision. However, if the workforce is adequately skilled, these factors are not as detrimental as the conventional rule of thumb suggests. Workforce training resources is Less Important relative to other location factors. However, having a technically trained workforce whose skills align with the industries a municipality wants to attract is a valuable selling point.

|  | | | |
|---|------------------|---|---|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 1: What is the prevailing average hourly wage rate for semi-skilled, blue-collar manufacturing workers? | \$12.26-\$17.25 |  | \$12.26-\$17.25 |
| 2: What is the prevailing average hourly wage rate for mid-level clerical workers? | \$17.26-\$22.25 |  | \$12.26-\$17.25 |
| 3: What is the prevailing average annual salary for public high school teachers? | \$70,001 or more |  | between \$50,001-\$60,000 and \$60,001-\$70,000 |
| 4: Is there a local minimum or living wage statute? | no |  | no |

|  | | | |
|---|-----------|---|------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 5: What percentage of your workforce is Unskilled? | 26-49% |  | 1-25% |
| 6: What percentage of your workforce is Semi-skilled | 26-49% |  | 26-49% |
| 7: What percentage of your workforce is Technically skilled | 26-49% |  | 26-49% |
| 8: What percentage of your workforce is Managerial | 1-25% |  | 1-25% |
| 9: What percentage of your workforce is Professional | 26-49% |  | 1-25% |
| 10: What percentage of your workforce are current English language learners? | 0-10% |  | 0-10% |

| | |
|--|---|
| Importance To Market  Very Important  Important  Less Important | Your Performance Relative To Peers  Strong  Average  Weak  No Comparison |
|--|---|

| <input type="radio"/> C. Unions | | | |
|--|-----------|--|------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 11: Have any employers in your jurisdiction had a major strike or work stoppage within the last three years? | no | | no |
| 12: Has there been a major union organizing drive among public or private workers in the last three years? | no | | no |
| 13: Do labor unions have a significant presence in the labor market of your jurisdiction? | Somewhat | | Somewhat |

| <input checked="" type="radio"/> D. Labor (available) | | | |
|--|----------------|--|------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 14: What percentage of residents age 25 or older have earned at least a high school diploma? | 85% or greater | | 85% or greater |
| 15: What percentage of residents age 25 or older have earned at least a bachelor's degree? | 21-35% | | 21-35% |

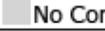
| | |
|---|---|
| Importance To Market <input checked="" type="radio"/> Very Important <input type="radio"/> Important <input type="radio"/> Less Important | Your Performance Relative To Peers <input type="radio"/> Strong <input type="radio"/> Average <input type="radio"/> Weak <input type="radio"/> No Comparison |
|---|---|

| <input type="radio"/> E. Workforce Training | | | |
|--|-----------|--|------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 16: Which of the following workforce training resources do you interact with to respond to skill development needs of firms? | | | |
| - Regional employment board or state employment services department | no | | |
| - Area High schools | no | | |
| - Voc-tech schools or community colleges | no | | |
| - Human service or nonprofit career training centers | no | | |
| 17: Do you support public-private partnerships to provide specific workforce training? | no | | yes |
| 18: Is there an adult education program readily available to residents of your jurisdiction? | yes | | yes |

Section 5: Municipal Process

The municipal process section covers several themes relating to marketing and permitting. Public officials who aggressively market their jurisdictions strengths and collaborate with firms already located in their town or city may have significant advantages in attracting new investment. Local firms can speak firsthand about their own experiences and market conditions to interested companies and investors. Likewise, they can advise municipal leaders about industries with which they are intimately familiar. Additionally, municipalities that have established transparent and efficient permitting processes, minimizing startup time and costs, are also ahead of the game. Among the factors examined in this section, the timeliness of approvals is *Very Important* to location experts and all but one of the remaining factors (Permitting Ombudsman) are ranked *Important*.

|  A. Industry Sensitivity | | | |
|---|-----------|---|------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 1: Does your jurisdiction have a marketing program based on the needs identified by industrial or office location specialists? | no |  | no |
| 2: Does your jurisdiction have a marketing program based on existing core strengths, identified opportunities, or industry concentrations? | no |  | no |
| 3: Do you have a quick response team available when negative data, stories, or incidents about your jurisdiction make the news? | no |  | no |
| 4: Do you actively engage local business spokespersons to speak on behalf of your jurisdiction? | no |  | no |
| 5: Do you have a strategy for engaging your jurisdiction's racial or ethnic populations in unique businesses, festivals, etc., as a way to attract regional niche shopping? | no |  | no |

| | |
|---|--|
| <p>Importance To Market</p> <p>  Very Important  Important  Less Important </p> | <p>Your Performance Relative To Peers</p> <p>  Strong  Average  Weak  No Comparison </p> |
|---|--|

|  B. Sites Available | | | |
|---|------------------|---|-------------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| <i>Question</i> | <i>Leicester</i> | | <i>Comparison Group</i> |
| 6: Does your jurisdiction own sites that it is currently marketing for development? | no |  | no |
| 7: Is there a readily accessible, up-to-date, complete list of sites that are available for development in your jurisdiction? | no |  | no |
| 8: Do you maintain an active relationship with commercial real estate brokers, developers, or agents with sites in your jurisdiction? | no |  | yes |
| 9: Do your land use regulations protect land currently zoned industrial from encroachment by residential or other incompatible uses? | yes |  | yes |
| 10: Do you have an active strategy for reclaiming or land banking tax delinquent and tax title properties? | no |  | no |
| 11: Do you have an active strategy for reclaiming vacant or underutilized shopping plazas? | no |  | no |

|  C. Timeliness of Approvals | | | |
|---|------------------|---|-------------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| <i>Question</i> | <i>Leicester</i> | | <i>Comparison Group</i> |
| 12: What is the average time (in weeks) from application to completion of the review process for new projects?: Site plan review | 9-12 weeks |  | 5-8 weeks |
| 13: What is the average time (in weeks) from application to completion of the review process for new projects?: Zoning variance | 5-8 weeks |  | 5-8 weeks |
| 14: What is the average time (in weeks) from application to completion of the review process for new projects?: Special permit | 9-12 weeks |  | 9-12 weeks |
| 15: What is the average time (in weeks) from application to completion of the review process for new projects?: Building permit | 0-4 weeks |  | 0-4 weeks |
| 16: What is the average time (in weeks) from application to completion of the review process for new projects?: Appeals process | 5-8 weeks |  | 5-8 weeks |
| 17: What is the average time (in weeks) from application to completion of the review process for existing structures?: Site plan review | 5-8 weeks |  | 5-8 weeks |
| 18: What is the average time (in weeks) from application to completion of the review process for existing structures?: Zoning variance | 5-8 weeks |  | 5-8 weeks |
| 19: What is the average time (in weeks) from application to completion of the review process for existing structures?: Special permit | 5-8 weeks |  | 9-12 weeks |
| 20: What is the average time (in weeks) from application to completion of the review process for existing structures?: Building permit | 0-4 weeks |  | 0-4 weeks |
| 21: What is the average time (in weeks) from application to completion of the review process for existing structures?: Appeals process | 5-8 weeks |  | 5-8 weeks |

| | |
|---|--|
| <p>Importance To Market</p> <p> Very Important  Important  Less Important</p> | <p>Your Performance Relative To Peers</p> <p> Strong  Average</p> <p> Weak  No Comparison</p> |
|---|--|

|  D. Predicable Permits | | | |
|---|------------------|---|-------------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| <i>Question</i> | <i>Leicester</i> | | <i>Comparison Group</i> |
| 22: Do you provide a checklist of permitting requirements to prospective developers? | no |  | yes |
| 23: Do you provide a flowchart of the permitting process to prospective developers? | no |  | no |
| 24: Do you provide a development handbook to prospective developers? | no |  | no |
| 25: Do you allow for a single presentation of a development proposal to all review boards and commissions with relevant permit authority? | no |  | no |

|  E. Fast Track Permits | | | |
|---|------------------|---|-------------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| <i>Question</i> | <i>Leicester</i> | | <i>Comparison Group</i> |
| 26: Do you pre-permit development in certain districts? | no |  | no |
| 27: Are there any publicly or cooperatively owned industrial parks in your jurisdiction that have their own expedited permitting authority? | no |  | no |
| 28: Do you have an "overlay" district that allows expedited permitting of certain uses? | no |  | no |
| 29: Do you market "fast track" permitting to potential developers or firms? | no |  | no |

| | |
|---|--|
| <p>Importance To Market</p> <p> Very Important  Important  Less Important</p> | <p>Your Performance Relative To Peers</p> <p> Strong  Average</p> <p> Weak  No Comparison</p> |
|---|--|

F. Citizen Participation in the Review Process

Report of Leicester as compared to all jurisdictions

| Question | Leicester | | Comparison Group |
|--|-------------|---|------------------|
| 30: To what extent do abutters slow the permitting process in your jurisdiction? | Very little |  | Somewhat |
| 31: To what extent do organized neighborhood groups slow the permitting? | Very little |  | Somewhat |
| 32: To what extent do elected officials in your jurisdiction expedite development by facilitating dialogue with community groups? | Very little |  | Very little |
| 33: Do you establish a specific time frame and procedure for abutter or neighborhood response in the initial stage of the process? | yes |  | yes |
| 34: Do interested parties get multiple opportunities for review and comment during the various development review processes? | yes |  | yes |
| 35: Has a development proposal in your jurisdiction been stopped by abutter or neighborhood opposition in the past 5 years? | yes |  | yes |
| 36: Have officials from your jurisdiction intervened to rescue a development proposal that was endangered by abutter or neighborhood opposition in the last 5 years? | no |  | no |

Importance To Market

 Very Important
  Important
  Less Important

Your Performance Relative To Peers

 Strong
  Average
 Weak
  No Comparison

G. Permitting Ombudsman

Report of Leicester as compared to all jurisdictions

| Question | Leicester | | Comparison Group |
|---|-----------|--|------------------|
| 37: Does the chief executive officer of your jurisdiction play a significant role in ensuring the efficiency of your local permitting process? | no | | no |
| 38: Are there other local officials empowered to ensure the efficiency of your local permitting process? | yes | | yes |
| 39: Is there a "development cabinet" or "development team" that is convened to review major developments? | no | | yes |
| 40: Do you have an established training program for development staff that regularly identifies critical adjustments in policy or regulation to accommodate changing needs of firms? | no | | no |
| 41: Do you have an established training program for boards, commissions, authorities, districts, and elected officials that regularly identifies critical adjustments in policy or regulation to accommodate changing needs of firms? | no | | no |
| 42: Is your jurisdiction involved in the process for businesses that require state or federal permitting or licensing? | no | | yes |
| 43: Do you provide technical assistance for businesses in the state or federal permit or license application process? | no | | no |
| 44: Does your jurisdiction require any local licenses for specific businesses or industries? | | | |
| - General license for all businesses | yes | | no |
| - Auto dealership | yes | | no |
| - Barber shop | no | | no |
| - Bar/Tavern | yes | | no |
| - Beauty salon | no | | no |
| - Child care services | no | | no |
| - Construction contractor | no | | no |
| - Home health care | no | | no |
| - Massage therapist | no | | no |
| - Real estate agent/broker | no | | no |
| - Restaurant | yes | | no |
| - Skilled Trades (electrician, plumber, etc) | no | | no |
| - Other, please specify | yes | | no |
| 45: Approximately how long (in weeks) is your local licensing process for businesses? | 5-8 weeks | | 0-4 weeks |

| | |
|--|---|
| Importance To Market Very Important Important Less Important | Your Performance Relative To Peers Strong Average Weak No Comparison |
|--|---|

Section 6: Quality of Life (Community)

The quality of life within the community is an *Important* location factor because companies want to be able to offer employees a safe community with affordable housing, good schools, and a rich selection of cultural and recreational opportunities.

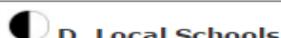
|  A. Cultural and Recreational Amenities | | | |
|---|-----------|---|------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 1: Is there a professional sports team resident within your jurisdiction? | no |  | no |
| 2: Is there a major art, science or historical museum? | no |  | no |
| 3: Is there a professional repertory theater company? | no |  | no |
| 4: Is there a civic center, arena or major concert hall? | no |  | no |
| 5: Is there a golf course within your jurisdiction? | yes |  | yes |
| 6: Is there a symphony orchestra, opera, or ballet company? | no |  | no |
| 7: Are there public beaches or boating activities within 5 miles of your jurisdiction? | no |  | yes |

|  B. Crime | | | |
|---|-----------|---|-------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 8: What was the residential burglary rate per 100,000 residents last year in your jurisdiction? | 215 |  | 295 |
| 9: What was the auto theft rate per 100,000 residents last year? | 36 |  | 86 |
| 10: What was the robbery rate per 100,000 residents last year? | 4 |  | between 32 and 33 |
| 11: What was the homicide rate per 100,000 residents last year? | 0 |  | 2 |

| | |
|--|---|
| Importance To Market  Very Important  Important  Less Important | Your Performance Relative To Peers  Strong  Average  Weak  No Comparison |
|--|---|

|  | | | |
|--|---------------------|---|---------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 12: What was the median sale price of a single-family home in your jurisdiction last year? | \$151,000-\$250,000 |  | \$251,000-\$350,000 |
| 13: What was the median rent for a two-bedroom apartment in your jurisdiction last year? | \$801-\$1000 |  | \$1001-\$1250 |
| 14: What is the homeownership rate? | 66-75% |  | 66-75% |
| 15: What is the vacancy rate for rental housing? | 7-9% |  | 3-5% |
| 16: What percent of homes are for sale? | Less than 3% |  | Less than 3% |
| 17: Approximately what proportion of the major officers of firms located in your jurisdiction live in the community? | Some |  | Some |

| | |
|--|---|
| Importance To Market  Very Important  Important  Less Important | Your Performance Relative To Peers  Strong  Weak  Average  No Comparison |
|--|---|

|  | | | |
|--|---------------------|---|---|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 18: What is the average K-12 per pupil expenditure in your jurisdiction last year? | \$12,001 - \$14,000 |  | between \$10,001 - \$12,000 and \$12,001 - \$14,000 |
| 19: Does your state mandate an assessment or proficiency test as a prerequisite for high school graduation? | yes |  | yes |
| 20: If yes, what percent of students in your jurisdiction tested at least "proficient" in English? | 81% or greater |  | 66-80% |
| 21: If yes, what percent of students in your jurisdiction tested at least "proficient" in Mathematics? | 81% or greater |  | 66-80% |
| 22: If yes, are the tests used as a measure of performance within your local school district for teacher assessments or teacher evaluations? | yes |  | no |
| 23: What percentage of your jurisdiction's K-12 students are eligible for free or reduced-cost lunch last year? | 26-49% |  | 1-25% |
| 24: What was the average combined (reading, math, and writing) SAT score last year? | 1126 or higher |  |  |
| 25: What was the average composite score (English, math, reading, and science) for the ACT last year? | 24.7 |  |  |
| 26: What percentage of high school freshmen normally graduate within 5 years? | 95% or more |  | 81%-94% |
| 27: What is the high school dropout rate last year? | 1-25% |  | 1-25% |
| 28: Are there any schools in your jurisdiction that are currently deemed "underperforming?" | yes |  | no |
| 29: What percentage of high school graduates from last year's class went on to a four-year college? | 26-49% |  | 50-74% |
| 30: Are there any charter schools in your jurisdiction? | no |  | no |
| 31: What types of private schools are there in your jurisdiction? | | | |
| - Parochial | no |  |  |
| - Non-sectarian | no |  |  |
| - Boarding | no |  |  |

Section 7: Quality of Life (Site)

This section reviews the amenities and services available within one mile of existing development sites. Having a variety of amenities, restaurants, stores, and services near employment centers enhances the location, adds convenience, and allows employees more social opportunities.

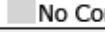
|  A. Amenities | | | |
|---|-----------|---|------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 1: What proportion of existing development sites within your jurisdiction have the following within 1 mile?: Fast food restaurant | Few |  | Most |
| 2: What proportion of existing development sites within your jurisdiction have the following within 1 mile?: Fine dining | Few |  | Some |
| 3: What proportion of existing development sites within your jurisdiction have the following within 1 mile?: Day care | Few |  | Most |
| 4: What proportion of existing development sites within your jurisdiction have the following within 1 mile?: Retail shops | Some |  | Most |

| | |
|--|---|
| Importance To Market  Very Important  Important  Less Important | Your Performance Relative To Peers  Strong  Average  Weak  No Comparison |
|--|---|

Section 8: Business Incentives

When companies are evaluating various jurisdictions for site location, business incentives (mainly subsidies and tax credits) are *Important* considerations. However, contrary to conventional wisdom, these incentives are not the first factors on which an investor makes a location decision—nor are they decisive. Factors such as infrastructure, workforce composition, and timeliness of permitting are of the utmost importance and can all too easily become “deal-breakers.” A municipality must be at least adequate in these areas before a company will advance negotiations. While investors value a broad portfolio of business incentives as possible “deal-closers,” they might not initially attract them.

| A. State | | | |
|--|-------------|---|------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 1: Are businesses in your jurisdiction eligible for any of the following special state tax incentives? Check all that apply. | | | |
| - Investment tax credits | yes |  | no |
| - Job training tax credits | yes |  | no |
| - Research and development (R&D) tax credits | yes |  | no |
| - Low (subsidized) interest loans | yes |  | no |
| - Loan guarantees | yes |  | no |
| - Equity financing | no |  | no |
| - Workforce training grants | yes |  | no |
| - Other, please specify | no |  | no |
| 2: To what extent does your jurisdiction actively take advantage of any special state business incentives? | Very little |  | Somewhat |
| 3: Does your state allow for priority funding for distressed economic areas? | yes |  | yes |

| | |
|---|--|
| <p>Importance To Market</p> <p>  Very Important  Important  Less Important </p> | <p>Your Performance Relative To Peers</p> <p>  Strong  Average  Weak  No Comparison </p> |
|---|--|

|  B. Local | | | | | |
|---|---|---|-------------------------------|--|---|
| Report of Leicester as compared to all jurisdictions | | | | | |
| Question | Leicester | | Comparison Group | | |
| 4: Does your jurisdiction offer existing businesses property tax abatement? | no |  | no | | |
| 5: If yes, what proportion of existing businesses are offered abatements? | |  | | | |
| 6: Does your jurisdiction offer new businesses property tax abatement? | no |  | no | | |
| 7: If yes, what proportion of new businesses are offered abatements? | |  | | | |
| 8: Who negotiates the tax abatement? | |  | | | |
| 9: Does your jurisdiction offer any of the following incentives for businesses to locate in your jurisdiction? (Check all that apply) | | | | | |
| - Revolving loan fund | no |  | no | | |
| - Loan guarantees | no |  | no | | |
| - Revenue bonds | no |  | no | | |
| - Equity participation | no |  | no | | |
| - Business district group loans | no |  | no | | |
| - None | yes |  | no | | |
| - Investment tax credits | no |  | no | | |
| - Job training tax credits | no |  | no | | |
| - Research and development (R&D) tax credits | no |  | no | | |
| - Low (subsidized) interest loans | no |  | no | | |
| - Workforce training grants | no |  | no | | |
| - Other, please specify | no |  | no | | |
| 10: Does your jurisdiction actively pursue federal and/or state programs designed to assist in attracting and retaining businesses? | no |  | yes | | |
| 11: Does your jurisdiction use Tax Increment Financing (TIF) or other programs to provide tax breaks to businesses? | no |  | yes | | |
| 12: Does your jurisdiction grant TIFs or similar programs for retail development? | no |  | no | | |
| 13: Does your jurisdiction assist in securing financing for businesses with commercial lenders or state industrial finance mechanisms? | no |  | no | | |
| 14: Do you actively try to attract local, state, and federal facilities to your jurisdiction? | no |  | no | | |
| 15: Is any part of your jurisdiction in a designated Enterprise Zone? | no |  | no | | |
| 16: Do you participate in a regional brownfield revolving loan fund or offer your own? | No brownfields funds utilized |  | No brownfields funds utilized | | |
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| Importance To Market  Very Important  Important  Less Important | Your Performance Relative To Peers  Strong  Average  Weak  No Comparison | | | | |

Section 9: Tax Rates

Municipalities often think that if tax rates are too high, they will have a hard time attracting businesses—that high taxes are a “deal-breaker.” Like financial incentives, however, the tax rate is not one of the *Very Important* location factors. If the *Very Important* factors are satisfied, then a business will likely request a more favorable tax rate during later-stage negotiations. Yet negotiations are unlikely to get to that point if the *More Important* location factors have not been satisfied.

|  A. Local | | | | | |
|---|---|---|---|--|---|
| Report of Leicester as compared to all jurisdictions | | | | | |
| Question | Leicester | | Comparison Group | | |
| 1: What types of taxes are collected by your jurisdiction to pay for local services? | | | | | |
| - Property tax | yes |  | yes | | |
| - Local sales tax | no |  | no | | |
| - Local income tax | no |  | no | | |
| - Hotel room tax | no |  | no | | |
| - Meals tax | yes |  | no | | |
| 2: Of the potential commercial and industrial property tax revenue your jurisdiction could collect, what percent is currently abated? | 0% |  | between 0% and 1%-10% | | |
| 3: Does your jurisdiction tax property in industrial or commercial uses at a different rate than residential properties? | no |  | yes | | |
| 4: If yes, what is the tax rate on industrial/commercial property? \$ /\$1,000 | |  | | | |
| 5: If yes, what is the tax rate on residential property? \$ /\$1,000 | |  | | | |
| 6: If no, what is the tax rate on all property? | 14.90/1000 |  | between 13.97 and 14.2 mills | | |
| 7: What % of your tax revenue is derived from: Industrial % | 2.14% |  |  | | |
| 8: What % of your tax revenue is derived from: Commercial % | 6.41% |  |  | | |
| 9: What % of your tax revenue is derived from: Residential % | 88.82% |  |  | | |
| 10: Does your jurisdiction impose impact fees on new commercial or industrial development? | no |  | no | | |
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| Importance To Market  Very Important  Important  Less Important | Your Performance Relative To Peers  Strong  Average  Weak  No Comparison | | | | |



B. Tax Delinquency

Report of Leicester as compared to all jurisdictions

| Question | Leicester | | Comparison Group |
|--|-----------|--|------------------|
| 11: What proportion of residential property in your jurisdiction is more than one year delinquent in taxes? | 0%-3% | | 0%-3% |
| 12: What proportion of commercial property in your jurisdiction is more than one year delinquent in taxes? | 0%-3% | | 0%-3% |
| 13: What proportion of industrial property in your jurisdiction is more than one year delinquent in taxes? | 0%-3% | | 0%-3% |
| 14: How many properties are tax defaulted or subject to the power of sale? | 0-50 | | 0-50 |
| 15: When do you choose to auction tax title properties? | 1-5 years | | 1-5 years |
| 16: Do you have an organized and defined process for conducting such auctions and ensuring that they are successful? | yes | | yes |
| 17: Do you auction the "right to foreclose" on tax delinquent properties? | no | | no |
| 18: Do you seek tax abatement on tax title properties to allow the liens to clear for new owners? | no | | no |
| 19: If a tax delinquent or tax title property serves as an impediment to development, does the property receive special attention? | no | | no |

Importance To Market



Very Important



Important



Less Important

Your Performance Relative To Peers

Strong

Weak

Average

No Comparison

Section 10: Access to Information

A town's website could offer a business location expert his or her first impression of what the area has to offer. In today's digital age, a location expert could use a municipality's website to gather initial information, and if it is not available, easy to find, and easy to understand, the researcher may reject the town as a potential location without further consideration. While a town's website may rank *Less Important* as a factor in decision making, it can be this initial source of information that entices a location expert to probe deeper and to contact a municipality to seek additional information. At that point, the municipality's economic development leader or permitting ombudsman has an opportunity to step in and develop one-on-one rapport with the developer or company representative.

|  A. Website | | | |
|--|-----------|---|------------------|
| Report of Leicester as compared to all jurisdictions | | | |
| Question | Leicester | | Comparison Group |
| 1: Does your jurisdiction's website list all local development policies and procedures? | yes |  | no |
| 2: Does your website have contact information for key officials? | yes |  | yes |
| 3: Does your website have general information about your jurisdiction? | yes |  | yes |
| 4: How frequently is your website updated? | Weekly |  | Weekly |
| 5: Does your website include an explicitly designed economic development tool aimed at businesses and developers? | no |  | no |
| 6: Is there a development permit checklist or flow chart on the website? | no |  | no |
| 7: Are permit applications available for downloading on the website? | yes |  | yes |
| 8: Are applications and other forms date certified to ensure that they are the most recent versions (i.e. the same versions that you would get in person)? | yes |  | no |
| 9: Is it possible to file permit applications electronically? | no |  | no |
| 10: Is there a list of available land and building sites on the website? | no |  | no |
| 11: If yes, check the types of information available about each site. (Check all that apply) | | | |
| - :Owner | no |  | no |
| - Square footage of vacant land | no |  | no |
| - Square footage and quality of existing buildings and structures | no |  | no |
| - Abutters | no |  | no |
| - Zoning | no |  | no |
| - Assessed value | no |  | no |
| - Tax rate | no |  | no |
| - Current tax status (e.g. paid up, delinquent) | no |  | no |
| - Contamination | no |  | no |

| | | | | | |
|---|---|---|-----|--|---|
| - Aerial photos | no |  | no | | |
| - GIS links | no |  | no | | |
| - Other, please specify | no |  | no | | |
| 12: Is there a posting of current hearings available on the website? | yes |  | yes | | |
| 13: Is there a posting of pending applications available on the website? | yes |  | no | | |
| 14: Is there a listing of current members of development review boards and staff contact information? | yes |  | yes | | |
| 15: Are there links to other local development resources? (Check all that apply) | | | | | |
| - State finance agencies | no |  | no | | |
| - State permitting agencies | no |  | no | | |
| - Regional planning agencies | no |  | no | | |
| - Regional development organizations | no |  | no | | |
| - Workforce training organizations | no |  | no | | |
| - Local public or quasi-public financing resources | no |  | no | | |
| - Demographic information | no |  | no | | |
| - Economic development agencies | no |  | no | | |
| - Other, please specify | no |  | no | | |
| 16: Are there links to other locally-based private or non-profit organizations? | | | | | |
| - Colleges and universities | no |  | no | | |
| - Chambers of Commerce | no |  | no | | |
| - Community development corporations | no |  | no | | |
| - Arts and cultural organizations | no |  | no | | |
| - Sports and recreation venues | no |  | no | | |
| - Convention and tourist organization | no |  | no | | |
| - Other, please specify | yes |  | no | | |
| 17: Is there a designated webmaster or staff person responsible for maintaining the website? | yes |  | yes | | |
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NEXT STEPS

Leicester is an attractive small town of approximately 11,000 people, with a well-educated workforce, a relatively high homeownership rate, and a valuable network of nearby educational institutions. A former mill town, Leicester is a growing bedroom community adjacent to Worcester, which is the major employment hub in central Massachusetts and where most of the town's residents go to work. Businesses are clustered along the two state highways running through Leicester (State Routes 9 and 56), which also carry considerable traffic volume, to Worcester and the Massachusetts Turnpike.

The road to development poses a unique set of challenges to Leicester. With the town's commercial and industrial sectors on a downward spiral, the majority of tax revenue (88.8%) has been raised from homeowners. This trend will likely continue unless new robust, innovative, and sustainable policies encourage economic development in the town. Building on existing assets is of critical importance, and the town's strategic location adjacent to Worcester presents various opportunities to support the local community. The town is, however, in need of a more active economic development committee that helps the town reach its economic objectives and garners support from the community. A robust economic development committee can assist the town in forging an industrial attraction policy and an updated business development strategy, while fostering a common vision among residents, businesses, and local officials.

The Dukakis Center's Economic Development Self-Assessment Tool (EDSAT) creates a snapshot of Leicester's economic revitalization efforts at a critical moment in the town's development history. The following is an overview of where Leicester is getting it right, and where improvements can be made. Outlined below are the top recommendations and their respective levels of priority for your economic development efforts.

CORE STRENGTHS

Leicester has some valuable strengths that can persuade firms and developers to locate—or remain—in town. One of the most significant is its good management of **traffic**, which is reflected in its relatively high average automobile speeds during weekday rush hour commutes. Leicester is also attentive to **parking**—among location specialists' most important considerations.

Perhaps Leicester's greatest strength is the decent quality of life it offers its residents, as reflected in its relatively low **crime rates** and its affordable **housing market** with strong homeownership numbers. The town's **workforce composition** is also an asset, with the high proportion of professional workers helping to offset the large number of unskilled workers in the community. While the **cost of labor** reveals higher wage rates for mid-level clerical workers in comparison with the CGM, the town offers its public school teachers comparatively high salaries, which reflects how much the community values an educated workforce.

An oft-overlooked resource for economic development is a city or town's network of **universities and research centers**. Although location specialists regard the presence of such assets as a less important factor, companies considering expansion or relocation, as well as small-business start-ups, are increasingly looking at their potential as economic collaborators, the proximity and size of their pool of local talent, and the availability of high-quality education for employees' families. Leicester is fortunate to be in the midst of a rich cluster of nearby educational institutions, including Becker College and several institutions of higher learning in Worcester. Local government officials should consider building on this undervalued asset by fostering entrepreneurial start-ups that commercialize university generated research. The town's relatively low housing costs—and, although not confirmed, possibly low commercial rents—further enhances such a strategy.

Leicester offers **tax rates** that are attractive to location specialists. Your town maintains a unified property tax rate, which is much preferred by businesses, and also derives a portion of its revenue base from taxes levied on meals—taking some of the pressure off other types of firms. However, given the town's small number of restaurants, local officials might look toward the large proportion of vacant developable **land**, which is currently zoned for commercial and industrial uses for ways to boost tax revenues. Local officials might also find comfort in the fact that the **quality of available space** is deemed a strength, with low numbers of vacant or severely underutilized shopping centers as well as a proportionately large body of sites sitting on greenfields.

The need for a strong and easily navigable **website** is more important than ever, and Leicester’s certainly meets standards. The website lists all of the town’s local development policies and procedures, it provides updated versions of useful applications and forms, including ones for site plan reviews and special permits, and contains links to the local business association. The website is refreshed on a weekly basis and has a staff person responsible for its maintenance. Nevertheless, there is much room for improvement. With so many towns competing for a limited number of development projects, Leicester must adopt a more aggressive marketing approach and the website is a chance to make a good first impression on potential developers and investors. Given the fact that a municipality’s website is often the first result when someone searches for the name of that town, it can be a powerful driver of economic development. As such, providing easy to find, up-to-date, and thorough information is crucial for showcasing what your town has to offer. One possible enhancement could involve dedicating an economic development page solely targeting businesses and developers; where permit checklists or flow charts are made available, and links to relevant regional planning agencies and demographic information are provided. In addition to its potential marketing value, the website could be designed for use as an effective transactional tool, by making it possible to file permit applications electronically for instance.

AREAS FOR IMPROVEMENT

Leicester’s most pressing need for improvement and the most feasibly addressed lies in the realm of agglomeration, which refers to the number of complementary and supplemental services and related firms that are available within a jurisdiction to support new companies or enhance existing ones. With that in mind, Leicester should work on crafting **an industrial attraction policy** that targets specific types (or a type) of industry, and organizes incentives, land-use, workforce development, and marketing programs around its implementation.

The scale of agglomeration within Leicester can be further enhanced by intensifying efforts to attract companies, coordinating **marketing plans** with the Central Massachusetts Regional Planning Commission, further **cross marketing** among both town officials and current business owners and organizations, **follow-up** with existing and potential businesses, and cultivating **complementary business services**. Leicester must also find ways of stabilizing its economic development committee if it is to assume its role as the main driver in establishing and meeting the town’s economic development goals.

In its efforts to foster a business environment that is conducive to private sector investment, Leicester can provide more **predictable permitting** so as to reduce businesses’ “time to market.” A checklist, flowchart, or handbook on permitting processes should be produced and made available on the town’s website. Your jurisdiction should also consider allowing for a single presentation of development proposals to all review boards and commissions with relevant permit authority.

Other areas in need for improvement include the development of active relationships with commercial real estate brokers, developers, or agents, given the growing importance of having a readily available, up-to-date, complete list of **available sites**. Leicester should also take advantage of **state and local business incentives** such as job training tax credits and offer TIF arrangements, which would help attract new firms and businesses. Moreover, Leicester does little to maintain well-kept streets, sidewalks, parts, etc. near development sites and should work on upgrading the town’s **physical attractiveness** through better code enforcement and sidewalk buildout. On a related note, **local schools** are in need of improvement as evidenced by the relatively low percentage of high school graduates going on to college and the fact that the Leicester Memorial School is currently deemed “underperforming.”

With its heavy reliance on automotive travel, Leicester could explore whether it would be feasible and practical (at least in the short-term) to invest in **public bus transit**, and perhaps even coordinate shuttle services—particularly to the Worcester Regional Airport and the Union Station intermodal transportation center in Worcester. In addition, most of the town’s existing development sites are not within a mile of **amenities** important to location specialists including fast food restaurants, retail shops, and day-care services.

In Leicester’s case, the absence of **highway access** will shape its economic development strategy, and will likely ward off industries that rely on heavy transportation. This limitation might lend itself to policies that encourage mixed-use development, where a variety of small-scale retail businesses line up in a more pedestrian-friendly town center. If the town does decide to further densify and fill out potential areas along Main Street with mixed-use retail and office space, it might be worthwhile to work with the Regional Transit Authority on developing bus transit—especially since younger workers, who

will be needed to replace aging baby boomers—are demonstrably drawn to walkable urban environments, and not just in big cities.

On a final note, Leicester’s limited **infrastructure** capacities for natural gas, water supply, public sewer, and wastewater are a cause for concern. We recommend conducting a feasibility study, with input from civic and business leaders as well as local and regional agencies and organizations, to analyze the full spectrum of investment options and the direct and indirect impacts of each type of investment. In addition, findings from a marketing follow-up with firms (recommended), could help identify whether certain infrastructure limitations were among the reasons why firms decide not to locate in your town.

Outlined below are our top recommendations and their respective levels of priority for your economic development efforts.

| Recommendations | Priority |
|--|----------|
| Establish a realistic industrial attraction policy that takes into account Leicester’s relative lack of highway access. | High |
| Provide predictable permitting, via a checklist, flowchart, or handbook on permitting processes to prospective developers and make it available on the town website. | High |
| Engage local businesses, the Worcester Regional Chamber of Commerce, and a (re-established) economic development committee to assist in marketing the community and targeting specific industries. | High |
| Pursue state/federal programs to assist in attracting and retaining businesses. | Medium |