MEASURES OF GROWTH

Performance Measures and Benchmarks to Achieve a Vibrant and Sustainable Economy for Maine

2020







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FUNDAMENTAL PERFORMANCE INDICATORS

PROSPERITY

1. Wages

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Maine's average annual wage was \$47,234, well below the U.S. and New England averages of about \$59,000, but just 4% below the average for a group of comparable states.

2. Poverty

pg9

Maine's poverty rate rose from 11.3% in 2017 to 11.6% in 2018. Nationwide, poverty declined from 13.4% to 13.1%, and New England's poverty rate decreased slightly from 10.4% to 10.2%.

3. Gender Income Equity

In recent years, women's income as a percentage of men's in Maine has gradually improved, from 79% in 2014 and 2015 to 84% in 2018.

NEW 4. Racial/Ethnic Income Equity

pg 11

From 2014 to 2018, the average per-capita income in Maine was \$31,253. White, non-Hispanic Mainers averaged \$32,050 in per-capita income, 60% higher than the \$19,920 average among Maine residents of all other races and ethnicities.

PEOPLE

5. Total Employment

pg 13

Maine total employment continued to grow in 2019, adding another 5,100 jobs for a total of 635,500 jobs.

6. Workforce

Maine had a workforce of 690,000 people in 2019. From 2018 to 2019, the workforce shrank by 2,900 people.

PRODUCTIVITY

7. Value-Added per Worker

Worker productivity in Maine has steadily increased, but it is among the lowest of the 50 states. Our value added per worker grew from \$97,201 in 2017 to \$100,463 in 2018, but as a percentage of U.S. value-added per worker, Maine's dropped from 24% lower in 2016 and 2017 to 25% lower in 2018.

8. Gross Domestic Product

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Adjusted for inflation, Maine's GDP grew 1.9% from 2018 to 2019. This trailed the national and New England average of 2.3%.

ECONOMY

INNOVATION

9. Research & Development Expenditures pg 18

In 2017, Maine's total spending on R&D was \$520 million, up from \$483 million in 2016. R&D spending in Maine represents 0.8% of total GDP, which ranks 46th of the 50 states and is one-half of the estimated 1.6% average among EPSCoR states.

10. International Exports

Maine saw a 4% drop in exports from 2018 to 2019; U.S. exports fell 1.4%. Maine's international trade index peaked in 2011 and has been relatively flat since 2013.

11. Entrepreneurship

In 2018, Maine dropped to a 50-state ranking of 43rd, from 6th place in 2017 and 37th in 2015 and 2016. This metric is often volatile due to the small but variable numbers of new business owners each year.

TALENT

NEW 12. Prekindergarten Education

pg 21

In 2019-20, 77% of Maine school districts offered free public pre-K programs. 46% of Maine four-year-olds were enrolled in public pre-K in 2018-19, well above the U.S. average of 34% and the New England average of 30%.

13. Fourth-Grade Reading

In 2019, 36% of Maine 4th-graders were proficient in reading by NAEP standards, the same proportion as in 2015 and 2017. Maine ranked just above the national average of 35% and trailed the New England average by four points.

14. Eighth-Grade Math

pg 23

34% of Maine 8th-graders tested proficient on NAEP in 2019, down from 40% in 2013 and at the same level as in 2007. The national average was 33% and the New England average was 38% in 2019.

15. Postsecondary Degree Attainment and Occupational Credentials

> Maine's postsecondary degree attainment improved from 34% in 2008 to 41% in 2018, equal to the national average, but well below the New England average of 49%.

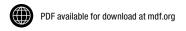
BUSINESS CLIMATE

16. Cost of Doing Business

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pg 24





17. Cost of Health Care

pg 26

In 2018, health care spending in Maine stood at 17.4% of all personal expenditures, above the 2008 rate of 16.6%, but at a stable level since 2015. Mainers devote a higher proportion of expenditures to health care than the national and New England averages.



18. Cost of Energy

The industrial price of electricity in Maine increased slightly from 9.32 to 9.37 cents per kilowatt hour from 2018 to 2019, while the average New England price declined from 13.19 to 12.92 cents and the U.S. average fell from 6.92 to 6.83 cents.



19. State and Local Tax Burden

pg 28

State and local tax burden in Maine has remained around 12% of personal income since 2009. The 2017 New England average was 10.5%. From 2016 to 2017, Maine's state and local tax burden moved closer to the New England average.



COMMUNITY

INFRASTRUCTURE



20. Broadband Connectivity

pg 30

While 95% of Mainers have access to basic broadband slightly above the national rate of 94%—only 55% have broadband subscriptions, compared with 65% nationally. The proportion of Mainers with basic broadband subscriptions rose from 30% in 2016 to 55% in 2018.



21. Transportation Infrastructure

pg 38

In 2019, 816 miles or 58% of Priority 1 highways were graded A, B or C, and 582 miles (42%) received grades of D or F. This shows further, steady decline since 2012 in the proportion of Maine highways receiving top grades.



22. Housing Affordability

pg 32

Housing is more affordable in Maine than in the United States or the Northeast region. But after improving from 2007 to 2015, housing affordability in Maine has declined slightly each year since.

HEALTH & SAFETY



23. Safety

pg 33

Maine's crime rate in 2018, 14.7 per 1,000 residents, was 43% below the national rate of 25.8 and among the lowest of the 50 states. Maine's violent crimes rates in particular are significantly lower than the nation, and property crime rates have also been falling.



24. Wellness and Prevention

Two-thirds (66%) of Maine adults were overweight or obese in 2018. This is up one percentage point from 2017, and equal to the U.S. average.

25. Health Insurance Coverage

pg 35

The proportion of Maine residents with health insurance coverage has remained at 92% from 2016 through 2018. Maine's health insurance coverage rate rose slightly from 2017 to 2018 while the national rate of 91% dropped slightly.

26. Food Security

pg 36

13.6% of Maine households experienced food insecurity in 2016-2018, down from 14.4% in 2015-2017, but well above the U.S. average of 11.7% and the New England average of 10.6%.



ENVIRONMENT

🐈 27. Air Quality

After declining in the 1980s and 1990s, air quality in Maine has improved substantially, and is better than other Northeastern states. The number of moderate (23) and low (1) air quality days in 2019 were the lowest on record.



28. Water Quality

pg 39

Since 2006, Maine's water quality has remained steady, with 95% of rivers and streams, and 91% of lakes, achieving Category 1 or 2 ("good") in 2016.



29. Sustainable Forest Lands

pg 40

Since 2010, Maine has maintained net forest growth-to-removal ratios slightly in favor of growth over harvest. The growth to harvest ratio fell slightly from 1.38 in 2018 to 1.27 in 2019.



Exceptional Performance

Very high national standing and/or established trend toward significant improvement.



Needs Attention

Very low national standing and/or established trend toward significant decline. The indicator may show improvement but is still viewed as needing attention.



Movement toward the benchmark since the last available data.



No significant movement relative to the benchmark since the last available data.



Movement away from the benchmark since the last available data.

AT THE HEART OF IT ALL, IT'S ABOUT OUR PEOPLE.

A LONG-TERM PROGRESS REPORT ON MAINE'S ECONOMY

The Maine Economic Growth Council is pleased to present 2020 Measures of Growth – a tool to support Maine's short-term recovery and long-term prosperity. Even as COVID-19 draws our focus to the day-to-day survival of businesses and households, the Council firmly believes that a long-term perspective is as crucial as ever. Thinking past the current moment—with guidance from past experience—can be a springboard for future growth.

The COVID recession undoubtedly challenges Maine's progress, but it reinforces the need for a resilient economy that supports vibrant communities and a healthy environment. It is the Council's longstanding vision that Maine's enduring assets can be the basis for economic development. For instance, the value of Safety, Air Quality, and Water Quality were apparent this summer, when some rural Maine communities saw a welcomed influx of residents from more urban areas. This migration was enabled by Broadband Connectivity, which allowed thousands of Mainers to work, learn, and access medical care safely from home.

In last year's *Measures of Growth*, the Council called for the creation of a long-term economic plan for Maine. Governor Mills convened leaders of industry, education, labor, government, and the nonprofit sector (including current and former Council members) to create a tenyear strategy to grow Maine's economy. Maine's Ten-Year Economic Strategy charts a course for creating jobs and increasing prosperity through talent and innovation. While no plan can command universal consensus, particularly in the details, Maine's Strategy closely aligns with the Council's longstanding vision of a high quality of life for all Maine people based on a strong economy, vibrant communities, and a healthy environment.

More recently, Governor Mills' Economic Recovery Committee (ERC) is guiding the State's response to COVID-19. On November 24, the Committee issued recommendations to help Maine regain its footing, return to its previous growth path and perhaps, with

hard work and collaboration, exceed it. The ERC's work will be a bridge from the COVID response to the Ten-Year Economic Strategy and incorporates strategies for diversity, equity and inclusion as key components for successful economic stabilization and growth.

In order to better reflect current circumstances, *Measures of Growth* has two new measures: Racial/ Ethnic Income Equity and Prekindergarten Education. We have also changed two metrics: Per Capita Personal Income is now Wages, and Working Age Population is now Workforce. In other places we added commentary or cross-references to help tie *Measures of Growth* to the Ten-Year Economic Strategy.

Most of this year's measures of growth indicators show data through 2019, and the majority of our benchmarks are for 2020. The Council considered resetting benchmarks to 2030 this year. We decided to wait so that the impacts of the pandemic on baseline conditions would be clearer.

The 29 indicators in this report track whether Maine is moving towards sustainable long-term prosperity. Within these indicators, we see reasons both for celebration and renewed resolve.

For 2020, the Council assigns Gold Stars for significant progress in:

- Prekindergarten Education
- Safety
- Air Quality

We assign Red Flags for needed attention to:

- · Racial/Ethnic Income Equity
- Workforce
- · Value-Added per Worker
- Research and Development Expenditures
- Cost of Doing Business
- 8th Grade Math Performance

Achieving our vision requires a vibrant and sustainable economy supported by vital communities and a healthy environment.











These areas of progress and concern reinforce the importance of talent, innovation, competitiveness, and quality of place in setting the stage for growth. Maine's growing strengths in Prekindergarten Education, Safety, and Air Quality are selling points the state can leverage to attract and retain employers and educated workers. In the red flag areas of R&D investments and 8th Grade Math, Maine should target state and federal dollars to move the needle. At the same time, we must not lose sight of reining in our relatively high business costs.

2020 has highlighted the importance of economic stability to Maine households, and the corresponding importance of public health to Maine businesses. This includes integration of clinical services with community supports if we are to address what is known as the social determinants of health (SDOH) — factors like housing, education, behavioral health, food and nutrition, and personal safety. According to the National Academy of Sciences, Engineering, and Medicine Roundtable on Population Health Improvement, these SDOH account for 80% of a population's overall health.

The choices we make today will determine Maine's destiny in the post-COVID world. Now more than ever, Maine needs strong cross-sector leadership and strategic investments based on unbiased data and analysis. The Council looks forward to working with the Governor, the Legislature, and business and community leaders across Maine to achieve long-term economic growth and a high quality of life for all Maine people.

KEY TO SYMBOLS

Gold Stars & Red Flags

Gold Stars and Red Flags are determined by consensus of the Growth Council based on consideration of the data and the experience of its members. The general criteria are:



Exceptional Performance

Very high national standing and/or significant positive progress compared to past performance.



Needs Attention

Very low national standing and/or established trend toward significant decline. The indicator may show improvement but is still viewed as needing attention.

Progress Symbols

Progress Symbols reflect movement from year to year and/or recent trends toward or away from the benchmarks established by the Council. No symbol is assigned to new indicators, indicators with a new data set, or indicators for which updated data is not available. The general criteria are:

- Movement toward the benchmark since the last available data.
- No significant movement relative to the benchmark since the last available data.
- Movement away from the benchmark since the last available data.

TAKING STOCK: 2020 IN PERSPECTIVE

2020 is Maine's 200th anniversary, but it will be remembered more as the year of COVID-19, recession, a presidential election, and racial justice activism. It is the year we relearned how connected we are to other Mainers and to people around the world. One person's exhale is another's inhale. One person's spending is another's paycheck. We also learned of hidden vulnerabilities. Missed paychecks and closed schools tipped many Maine households into stressful, precarious situations. The challenges created by the pandemic hit low-income and rural households disproportionately hard.

2020 also taught us the power of resilience and collaboration. In March, thousands of Maine businesses quickly modified their operations to protect staff and customers. We adapted to six-foot spacing, curbside pickup, and face coverings. Maine research institutions and biomedical companies worked with state and local officials to provide testing in communities across the state. We relearned the power of science, innovation, and public-private partnerships.

Due to data lags, the full impact of COVID on Maine's economy is not yet known. However, a few key statistics tell the story.

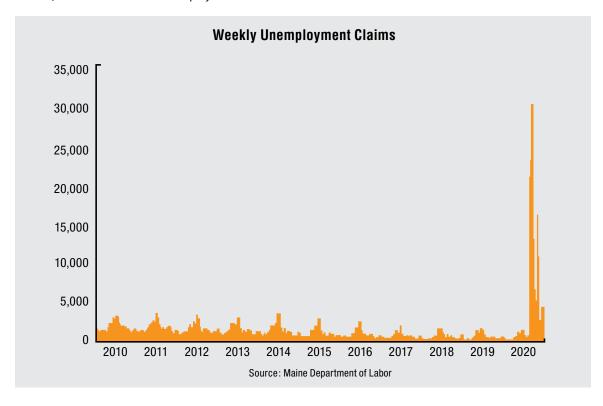
Unemployment and Insecurity

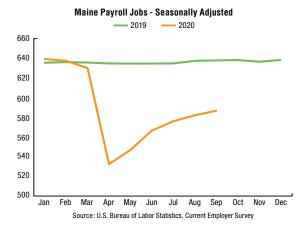
In March 2020, stay-at-home measures led to thousands of sudden job losses. Within two weeks, over 45,000 Mainers filed for unemployment – more than in all of 2019. The estimated unemployment rate hit 18% in May.¹ COVID-related job losses have disproportionately hit frontline workers who are often the lowest paid and least able to find alternate employment. In Maine, unemployed individuals are disproportionately female and under age 45. Data on racial disparities is incomplete, but likely follow national trends, with Black and Hispanic workers suffering disproportionate job losses.²

In the spring of 2020, during the initial COVID shutdowns, jobs fell 100,000 (16%) below year-ago levels.³ Jobs have recovered since then but were still 50,000 (8%) below year-ago levels heading into fall. In a typical week almost half (40-45%) of Maine households reported lost employment income, 25% have said it is somewhat or very difficult to pay their usual household expenses, and over 10% of households with children have been experiencing food insecurity.⁴

Working and Learning from Home

Social distancing measures have turned Maine homes into centers of learning for children, and work for those privileged to be able to do their jobs remotely. The abrupt shift to virtual learning revealed how much our economy relies on public schools. They provide childcare for legions of working parents, and food, health services, and safety to thousands of vulnerable children – Maine's future workers and leaders. This experience has laid bare the inequalities between wealthy and poor, and rural and urban, households and school districts.

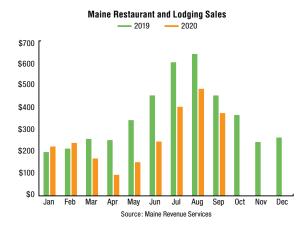




The new Prekindergarten Education metric highlights the importance of ensuring that all Maine children receive the support they need to become healthy, skilled adults. With this addition, the workforce metrics now span the full continuum of care and education necessary to help the next generation of Mainers reach its full potential. Early Education also highlights the role childcare plays in helping parents participate in Maine's workforce.

Tourism Downturn

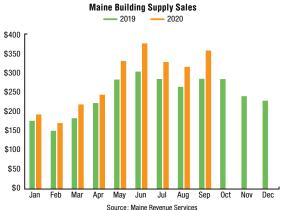
Tourism, the lifeblood of many Maine communities and businesses, has been hit hard by COVID containment measures. Travel restrictions discouraged some people from visiting Maine. Others were wary to travel regardless of restrictions; they feared contracting the virus. The result was an unprecedented decline in summer tourism. From March through September 2020, sales at Maine restaurants and lodging establishments were 39% below 2019 levels.



Housing Upturn

The flipside of reduced travel was more time at home, which many people used for do-it-yourself home improvement projects that required extra trips to the hardware store. From March through September 2020, taxable sales at Maine building supply stores were 19% above 2019 levels.

As people sought refuge from the pandemic, Maine's housing market exploded, especially in rural areas. In June through August 2020, home prices soared 11% over year-ago levels.⁵ Prices rose most in rural counties such as Franklin (30% increase) and Washington (19%).



"Liberty and Justice for All"

In May 2020, the killing of George Floyd by police officers sparked demonstrations for racial justice in Maine and across the U.S. These have prompted a national discussion about the continued legacy of racism against Black Americans. The Council strongly believes that Maine needs the contributions of every resident – and to be a safe and prosperous home for families of all races and ethnicities - if it is to achieve a vibrant, sustainable economy. Increasing prosperity is not true progress unless it is equitably shared.

The new Racial/Ethnic Income Equity metric reveals persistent income and poverty disparities between Maine's white households and those of all other races and ethnicities. In Maine and across the U.S., COVID has exposed intolerable disparities in the health and welfare of non-white populations. Responding to these realities will require honesty, humility, and an openness to unbiased data and analysis. It will require commitment to a long-term strategy to grow Maine's economy in ways that benefit all Maine people.

¹ Maine Department of Labor, Center for Workforce Research and Information, "Understanding the Employment Situation in Maine," June 19, 2020.

² U.S. Bureau of Labor Statistics, The Employment Situation—September 2020

³ U.S. Bureau of Labor Statistics, Current Employment Survey.

⁴ U.S. Census Bureau, Household Pulse Survey through August 31, 2020.

Maine Listings, Press Release, September 22, 2020.

TAKING ACTION: BEYOND 2020

Short-Term Disruptions, Long-Term Goals

Beyond the turbulence of COVID lies the prospect of brighter days—if we maintain a strategic focus on long-term goals. The Council sees reason for optimism: Maine's quality of place is attracting new residents, new research has found nascent growth opportunities where Maine's strengths align with growing global demand, and a promising new approach to economic development seeks to cultivate these opportunities.

The Ten-Year Economic Strategy, purposely designed to transcend political cycles, is the first of its kind in several decades. It eschews the haphazardness of short-term plans that too often have not lived up their promises.

Ten Year Economic Strategy Vision

"By 2030, Maine will be an international leader with a vibrant, sustainable, environmentally responsible economy. All across the state, the people of Maine will have access to an unmatched quality of life and good paying jobs."

Gnale:

- "Grow the average annual wage by 10%, to the benefit of workers at all income levels"
- "Increase the value of what we sell per worker by 10%"
- "Attract 75,000 people to Maine's talent pool"

Long-term plans have driven growth for many countries and states. Years ago in North Carolina, a group of determined public- and private-sector leaders launched a decades-long effort to modernize their state's economy. Their efforts included Research Triangle Park, which took nearly a decade to attract its first major tenant (IBM) but now hosts over 300 companies with 50,000 employees. Thanks to a long-term vision, this area of North Carolina is now a global leader in technology and innovation.

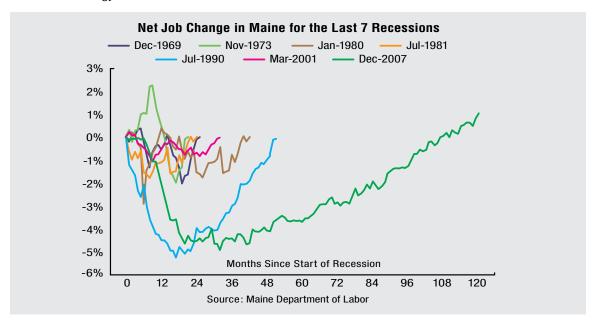
Maine's new ten-year strategy offers the potential for similar growth if it is sustained. In spite of current challenges, the strategy remains the guiding star of the State's economic development initiatives, and a reason for optimism.

Economic Recovery

Governor Mills' Economic Recovery Committee (ERC) is guiding the State's economic response to COVID-19.6 On November 24th it issued recommendations to help Maine regain its footing, return to its previous growth path and perhaps, with hard work and collaboration, exceed it. The ERC's work will be a bridge from the COVID response to the ten-year strategy.

Maine's recovery will take time. In July, the Consensus Economic Forecasting Commission predicted it will take two years for Maine's job market to stabilize, and then only to below pre-COVID levels. The chart below shows Maine's recovery path following the past seven recessions. Prior to the Great Recession of 2007-2009, the average time to full job recovery was 27 months, according to the Maine Department of Labor.⁷

The speed of Maine's COVID recovery will depend on many factors, including: the course of the virus, vaccines and treatments, state and federal relief programs, and how well we recognize and leverage the cultural and economic shifts resulting from the pandemic. The health of Maine's economy and the wellbeing of its citizens have perhaps never been more interconnected. COVID has shown how the social determinants of health have implications far beyond the individual. In the short-term, a prolonged period of low employment could create an unprecedented opportunity, as well as a need, for upskilling and reskilling the workforce. In the long-term, Maine's safe communities could be increasingly valuable economic assets.



The Council recognizes the challenge of funding economic and workforce development in times of historic budget deficits and applauds efforts to creatively leverage this downturn. For instance, in weak labor markets, college enrollment often increases. To capitalize on this trend, the Maine Community College System has offered free online courses to recent high school graduates and, with help from the Harold Alfond Foundation, several campuses are offering free certification in high-demand fields.

Maine's quality of life was attracting new residents before COVID, and the pandemic seems to be accelerating this trend. Since 2010, Maine has enjoyed a net gain of 28,000 residents from other states and counties. The flight from urban areas and the rise of telecommuting could easily broaden this movement. Strengthening social and digital connections between rural areas and nearby cities may be the key to future growth, rather than traditional efforts to grow placebound jobs.

Opportunities Ahead

In addition to Maine's attractive quality-of-place, we have unique economic assets that we can leverage for growth. The data-driven process behind Maine's Ten-Year Economic Strategy identified four areas where our unique resources—and the skills of our existing workforce—align with growing global demand. These areas are where Maine can capture a larger share of future economic activity and jumpstart its recovery. These areas also add to existing opportunities, such as renewable energy generation and distribution, which are already generating growth.

Opportunity Area	Example Sectors	Example "Nexus Points"
Food/Marine	Aquaculture, Breweries, Full-Service Restaurants, Berry Farming	Food Packaging, Local Food Supply Chains
Forest Products	Logging, Sawmills, Niche Wood Products, Packaging Manufacturing	Nano and Bio Cellulose Products, Cross Laminated Timber, Bioenergy
Technical Services	Financial and Insurance Services, Scientific Research and Development, Surveying and Sensor Technology	Forestry Surveying, Pharma Testing, Nano Cellulose Engineering, Bio Product Design
Making/ Manufacturing	Biopharma, Food, Paper and Wood Products, Fabricated Metal, Ship Building	Nano and Bio Cellulose Products, Cross Laminated Timber, Biopharma

According to researchers, the most unique and promising opportunities come at the "nexus points" where these areas intersect. "For example, in the last couple of years the forest product industry has seen quantum leaps forward in development where new products have begun to emerge such as nanocellulose. This product takes advantage of the great abundance of trees with cutting edge science and engineering. To keep pushing this evolution, support is needed in the existing value chain, i.e. loggers are still required to fell trees and transport is still required to mills, in addition to new elements such as coders, chemists and biologists. This thematic approach requires cross cutting labor force policies that generate the depth of skills and training needed from basic to advanced degrees." 11 It also points to cost-effective areas where Maine could invest in research and development.

This new approach to economic development improves on past strategies that focused on already-successful industries or clusters. Those strategies created backward-looking incentives that sent resources toward what worked in the past, rather than what might work in the future. The new ten-year strategy embraces a forward-looking approach that broadly supports talent development and innovation without picking individual sectors. Sustaining this new approach will require regularly updating this analysis to understand emerging opportunities.

Moving Forward, Together

The Council steadfastly believes that Maine has the potential to push through the COVID headwinds and build a stronger, better connected, more resilient, and more equitable economy than ever before. Doing so will require collaboration, disciplined adherence to a long-term strategy, and a renewed commitment to shared prosperity. We look forward to joining other Maine leaders to realize this vision.

⁶ The ERC includes more than forty public- and private-sector leaders from throughout Maine. It is co-chaired by Josh Broder, CEO of Tilson, and Laurie Lachance, President of Thomas College and former President and CEO of MDF.

Maine Department of Labor, Center for Workforce Research and Information, Recession Index, accessed September 11, 2020.

For example, Julian R. Betts and Laurel L. McFarland, "Safe Port in a Storm: The Impact of Labor Market Conditions on Community College Enrollments, 1995, Journal of Human Resources, 30(4).

⁹ U.S. Census Bureau, Population Division, December 2019.

¹⁰Andrew Crawley and Angela Hallowell, "Developing Industrial Thematics for Maine Technical Report," 2019. Crawley and Hallowell identified these opportunities through rigorous analysis of Maine's labor market and industry mix, and projections of global demand.

¹¹ Ibid, p. 3.

BACKGROUND

The Maine Economic Growth Council was established by statute in 1993 to develop, maintain, and evaluate a long-term economic plan for Maine. Its members represent a broad and diverse cross-section of Maine's key constituencies. Members are jointly appointed by the Governor, Senate President, and Speaker of the House. The Council is chaired by Steve Von Vogt, President and CEO of Maine Marine Composites. The annual Measures of Growth report is a widely used and respected report on Maine's economy. The report has been revised from time to time to provide the most current and meaningful assessment of Maine's progress toward long-term economic growth and a high quality of life for all Maine people. The Maine Economic Growth Council is administered by the Maine Development Foundation (MDF), a private, non-partisan membership organization created in statute in 1978 that drives sustainable, long-term economic growth for Maine. The work of the Growth Council is financed by a state appropriation through the Maine Department of Economic and Community Development, with additional support provided by the membership of MDF.

ACKNOWLEDGEMENTS

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THE NATURE OF DATA

The Growth Council strives to provide the most accurate, timely, and consistent data available. Some source data is regularly revised as methodologies improve and more information becomes available. As a result, the data presented here may differ slightly from that of past reports. The Council accounts for these limitations in identifying overall trends and policy implications.

MAINE ECONOMIC GROWTH COUNCIL MEMBERS 2020

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VISION A HIGH QUALITY OF LIFE FOR ALL MAINE PEOPLE

