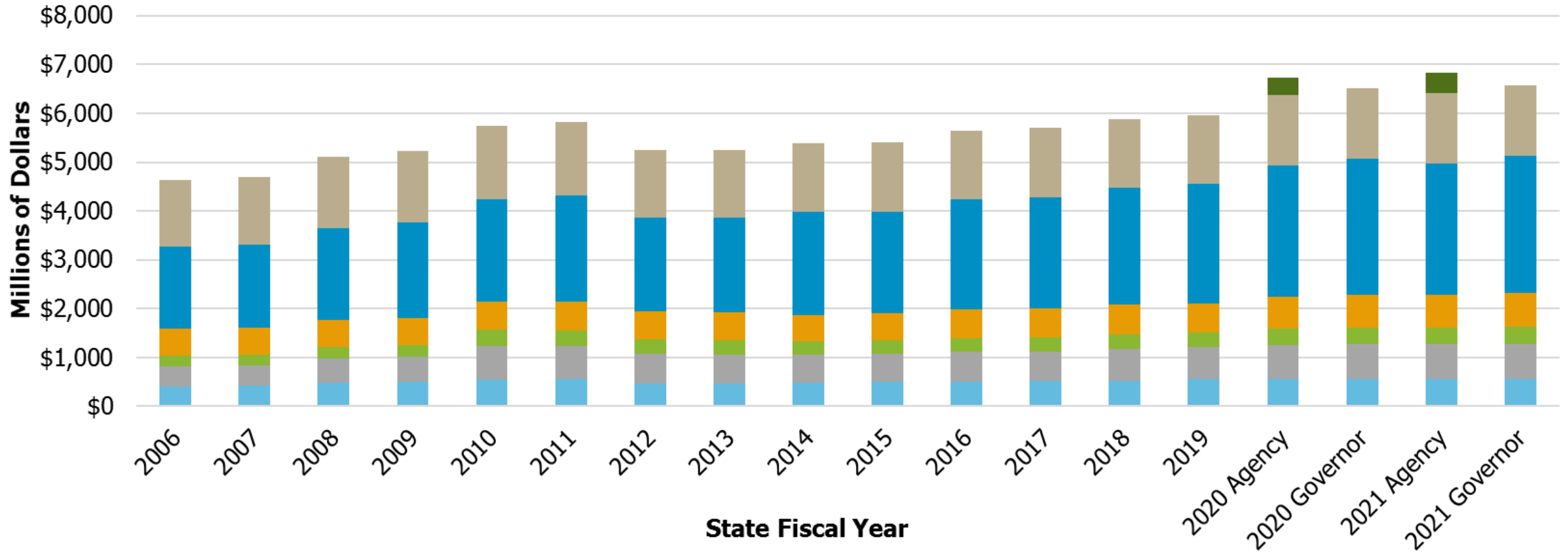


New Hampshire's State Budget and Families in the Post-Recession Economy

New Hampshire Fiscal Policy Institute
Sixth Annual Conference
Investments to Sustain a Vibrant Economy
February 22, 2019

State Budget Category Appropriations

State Budget Appropriations Over Time and Budget Proposals

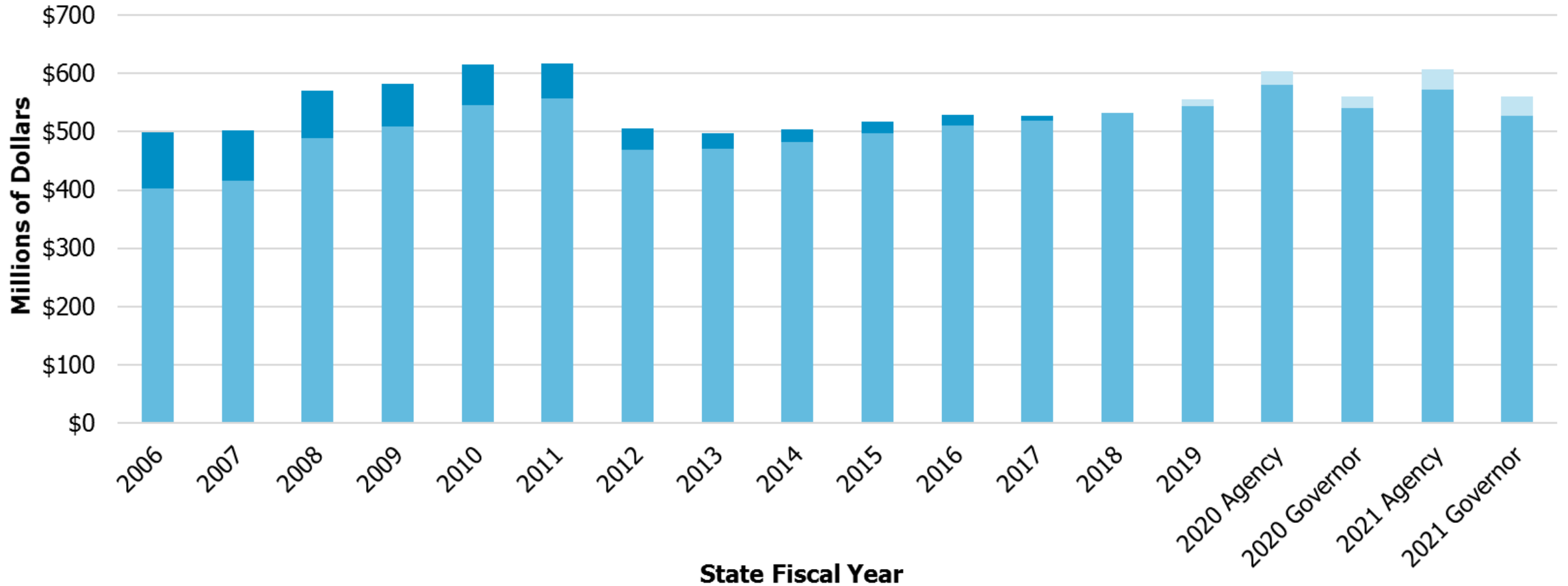


Source: New Hampshire State Operating Budgets, Primary Budgets as Enacted (HB 1, Section 1; HB 144 for 2017 Session); NH Department of Administrative Services, Budget Office, Analysis of Agency Requests for Budget Fiscal Years 2020 and 2021; Governor's Operating Budget for Fiscal Years Ending June 30, 2020-2021

- General Government
- Justice and Public Protection
- Resource Protection and Development
- Transportation
- Health and Social Services
- Education
- Additional Prioritized Needs - All Categories

General Government, Inflation-Adjusted

State Budget Appropriations Over Time and Budget Proposals

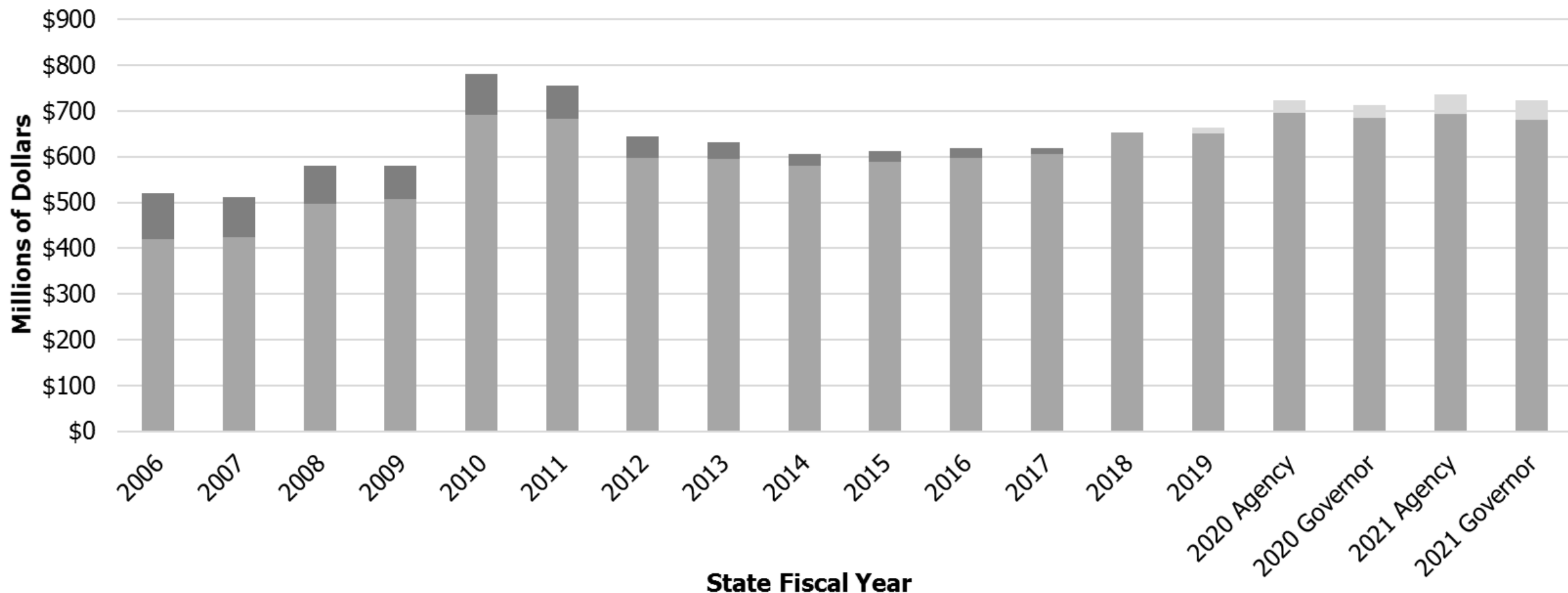


Source: New Hampshire State Operating Budgets, Primary Budgets as Enacted (HB 1, Section 1; HB 144 for 2017 Session); NH Department of Administrative Services, Budget Office, Analysis of Agency Requests for Budget Fiscal Years 2020 and 2021 (full request shown in graph); Governor's Operating Budget for Fiscal Years Ending June 30, 2020-2021; U.S. Bureau of Labor Statistics, CPI-U Northeast; Federal Open Market Committee, December 2018 (inflation projections)

■ Budgeted and Proposed Amounts ■ Inflation-Adjustment to SFY 2018

Justice and Public Protection, Inflation-Adjusted

State Budget Appropriations Over Time and Budget Proposals



Source: New Hampshire State Operating Budgets, Primary Budgets as Enacted (HB 1, Section 1; HB 144 for 2017 Session); NH Department of Administrative Services, Budget Office, Analysis of Agency Requests for Budget Fiscal Years 2020 and 2021 (full request shown in graph); Governor's Operating Budget for Fiscal Years Ending June 30, 2020-2021; U.S. Bureau of Labor Statistics, CPI-U Northeast; Federal Open Market Committee, December 2018 (inflation projections)

■ Budgeted and Proposed Amounts ■ Inflation-Adjustment to SFY 2018

Resource Protection and Development, Inflation-Adjusted

State Budget Appropriations Over Time and Budget Proposals

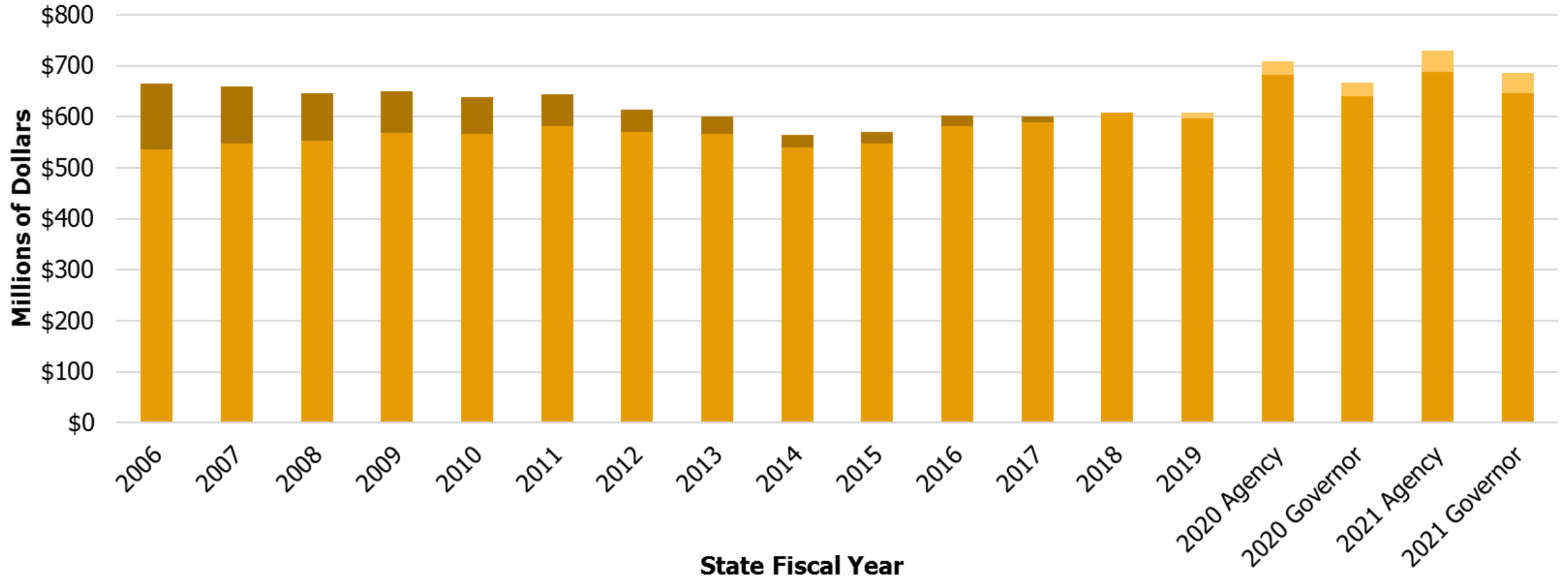


Source: New Hampshire State Operating Budgets, Primary Budgets as Enacted (HB 1, Section 1; HB 144 for 2017 Session); NH Department of Administrative Services, Budget Office, Analysis of Agency Requests for Budget Fiscal Years 2020 and 2021 (full request shown in graph); Governor's Operating Budget for Fiscal Years Ending June 30, 2020-2021; U.S. Bureau of Labor Statistics, CPI-U Northeast; Federal Open Market Committee, December 2018 (inflation projections)

■ Budgeted and Proposed Amounts ■ Inflation-Adjustment to SFY 2018

Transportation, Inflation-Adjusted

State Budget Appropriations Over Time and Budget Proposals

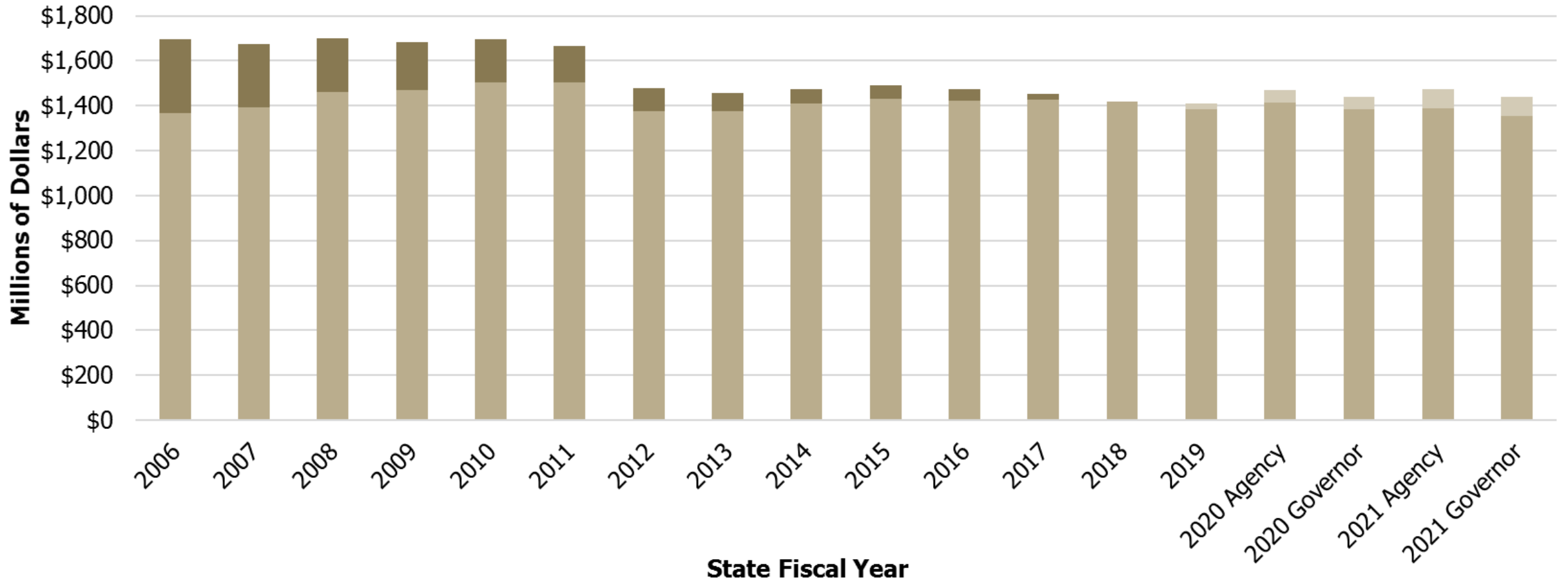


Source: New Hampshire State Operating Budgets, Primary Budgets as Enacted (HB 1, Section 1; HB 144 for 2017 Session); NH Department of Administrative Services, Budget Office, Analysis of Agency Requests for Budget Fiscal Years 2020 and 2021 (full request shown in graph); Governor's Operating Budget for Fiscal Years Ending June 30, 2020-2021; U.S. Bureau of Labor Statistics, CPI-U Northeast; Federal Open Market Committee, December 2018 (inflation projections)

■ Budgeted and Proposed Amounts
 ■ Inflation-Adjustment to SFY 2018

Education, Inflation-Adjusted

State Budget Appropriations Over Time and Budget Proposals

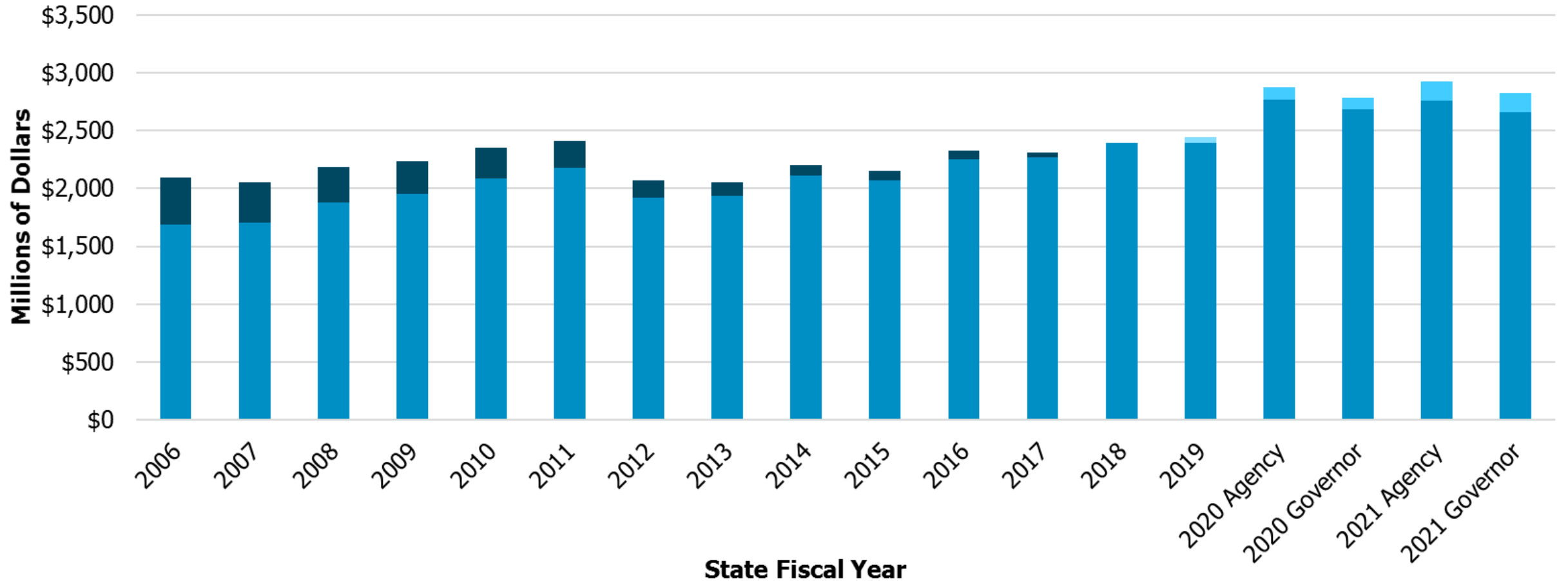


Source: New Hampshire State Operating Budgets, Primary Budgets as Enacted (HB 1, Section 1; HB 144 for 2017 Session); NH Department of Administrative Services, Budget Office, Analysis of Agency Requests for Budget Fiscal Years 2020 and 2021 (full request shown in graph); Governor's Operating Budget for Fiscal Years Ending June 30, 2020-2021; U.S. Bureau of Labor Statistics, CPI-U Northeast; Federal Open Market Committee, December 2018 (inflation projections)

■ Budgeted and Proposed Amounts ■ Inflation-Adjustment to SFY 2018

Health and Social Services, Inflation-Adjusted

State Budget Appropriations Over Time and Budget Proposals

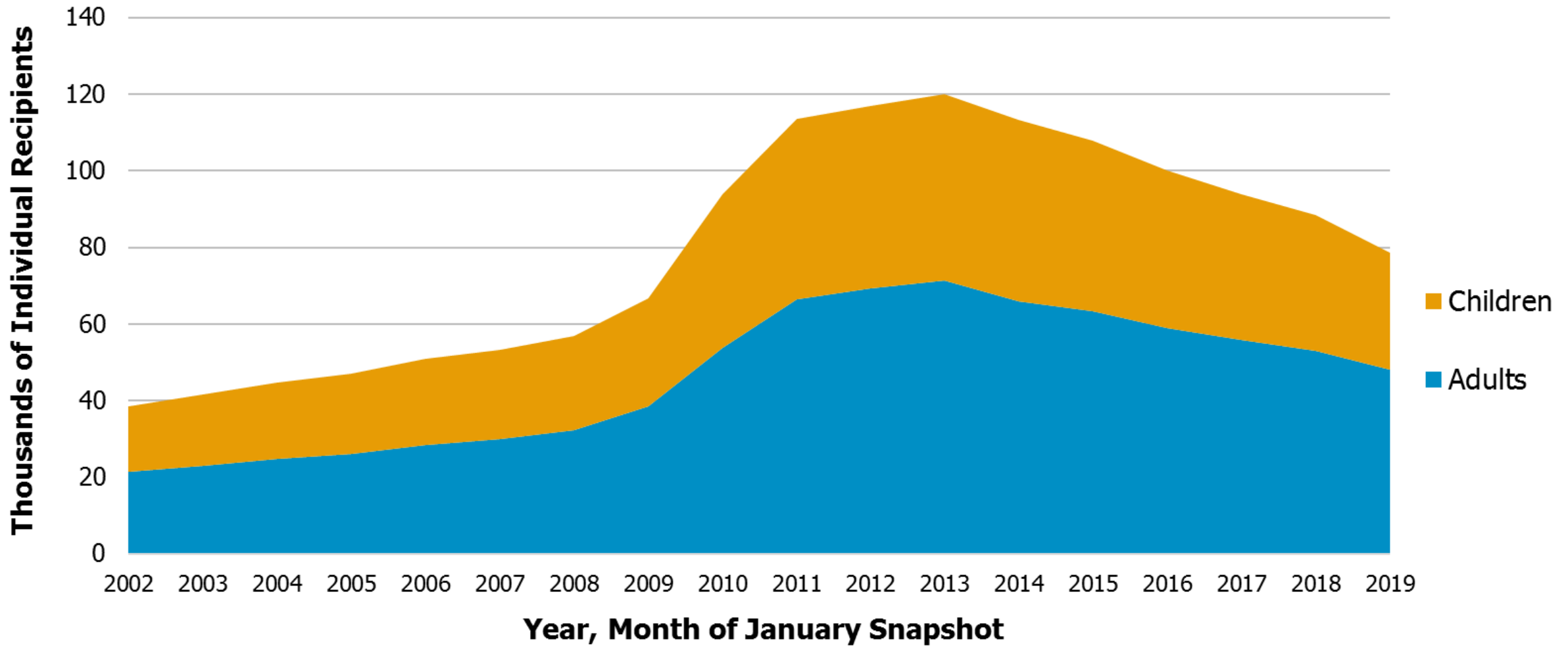


Source: New Hampshire State Operating Budgets, Primary Budgets as Enacted (HB 1, Section 1; HB 144 for 2017 Session); NH Department of Administrative Services, Budget Office, Analysis of Agency Requests for Budget Fiscal Years 2020 and 2021 (full request shown in graph); Governor's Operating Budget for Fiscal Years Ending June 30, 2020-2021; U.S. Bureau of Labor Statistics, CPI-U Northeast; Federal Open Market Committee, December 2018 (inflation projections)

■ Budgeted and Proposed Amounts ■ Inflation-Adjustment to SFY 2018

New Hampshire Food Stamp Program Recipients

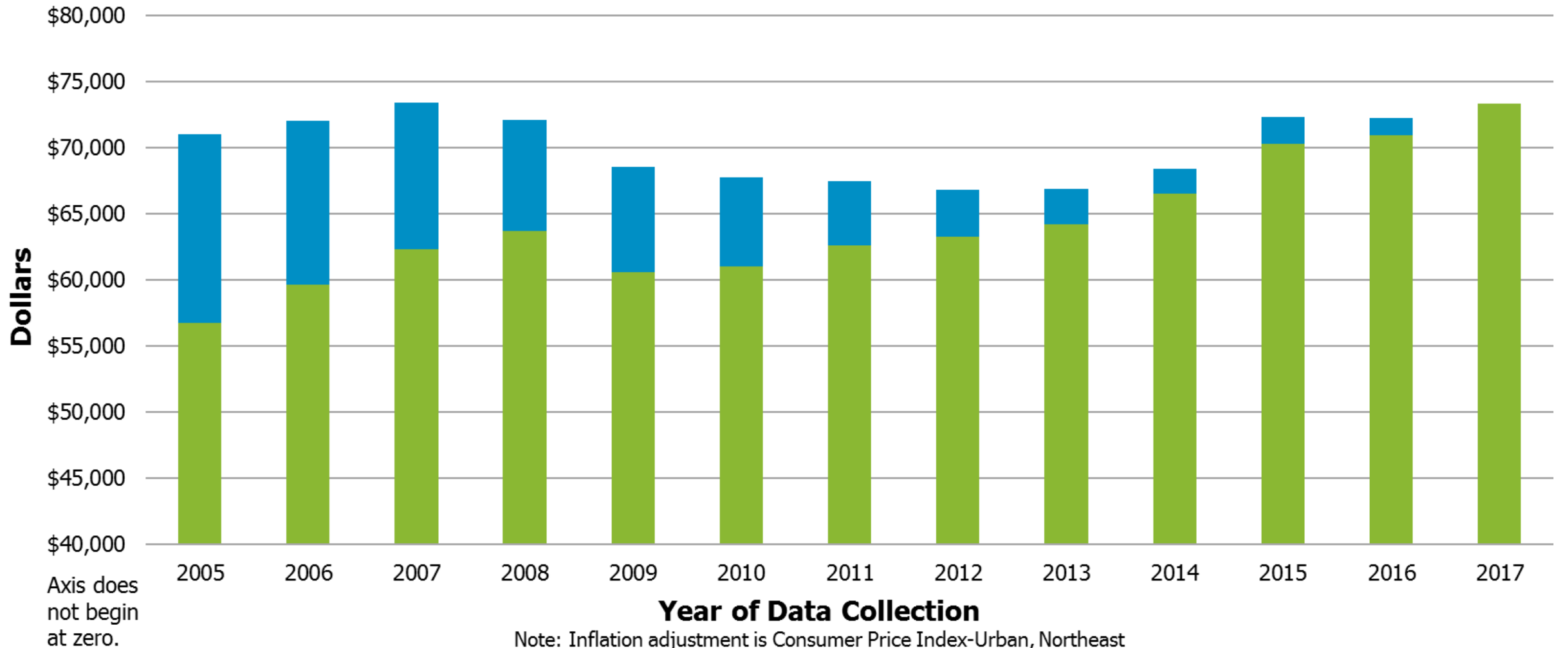
Supplemental Nutrition Assistance Program (SNAP) Recipients in the State



Note: Enrollment figures do not hold policy changes constant or adjust for those changes.
Sources: N.H. Department of Health and Human Services, Division of Family Assistance, Data Provided March 2017;
N.H. Department of Health and Human Services, Caseload Reports, January 2018 and 2019

Median Household Income in New Hampshire

American Community Survey Estimates, Inflation-Adjusted



Note: Inflation adjustment is Consumer Price Index-Urban, Northeast

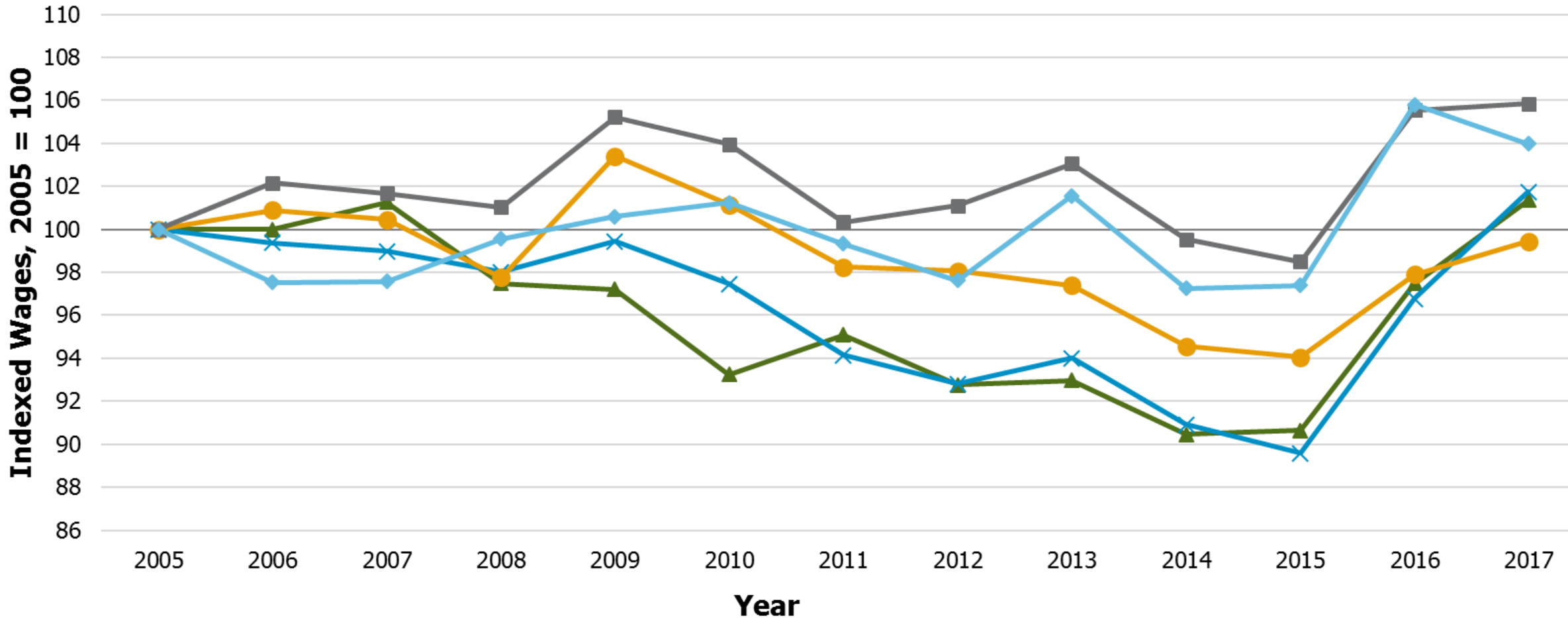
Sources: U.S. Census Bureau, American Community Survey One-Year Estimates; U.S. Bureau of Labor Statistics

■ Median Household Income

■ Inflation-adjustment to 2017

New Hampshire Inflation-Adjusted Wages by Relative Income

Selected Income Deciles, Indexed to 2005, Includes All Income from Work



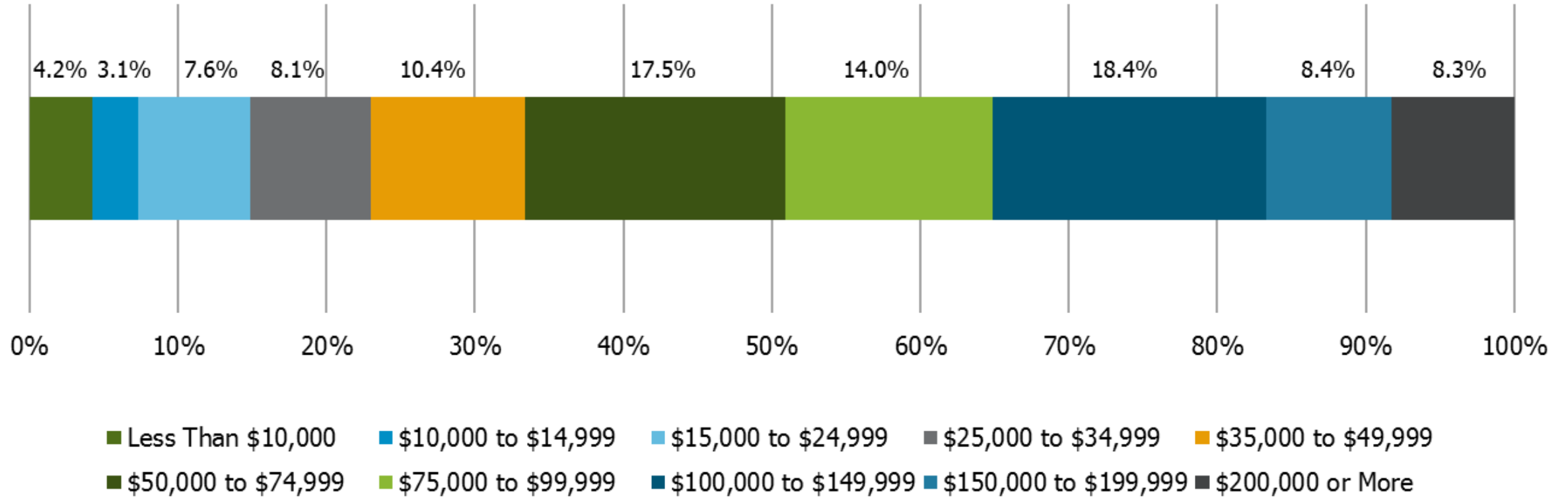
Note: Inflation adjustment using Consumer Price Index-Urban-Research Series (current methods), 2009 dollars.

Source: Economic Policy Institute analysis of Current Population Survey Outgoing Rotation Group data

▲ 10th percentile × 20th percentile ● 50th percentile (Median) ■ 80th percentile ◆ 90th percentile

New Hampshire Households by Income Group

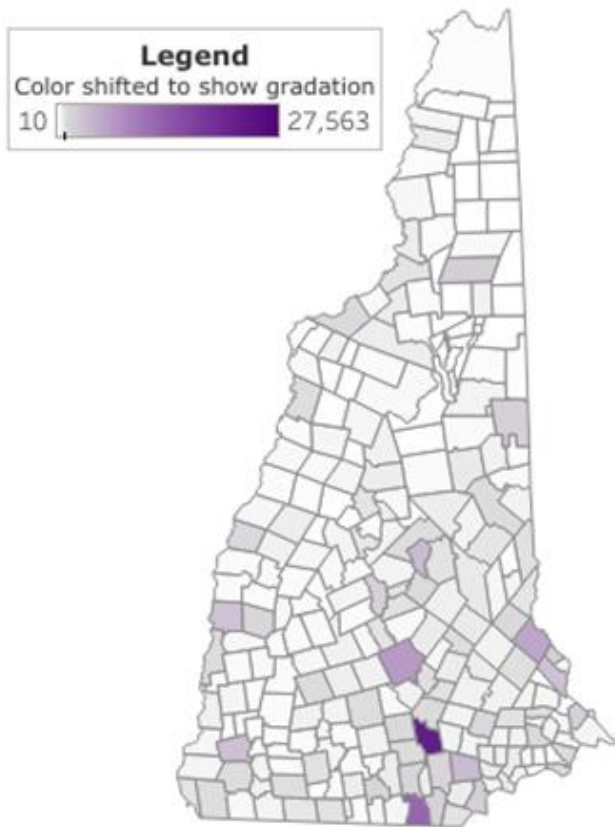
Source: U.S. Census Bureau, American Community Survey, 2017 Data
Note: Calculated for 528,700 Households; Label Figures are Midpoint Estimates



Anti-Poverty Program Enrollment by Municipality

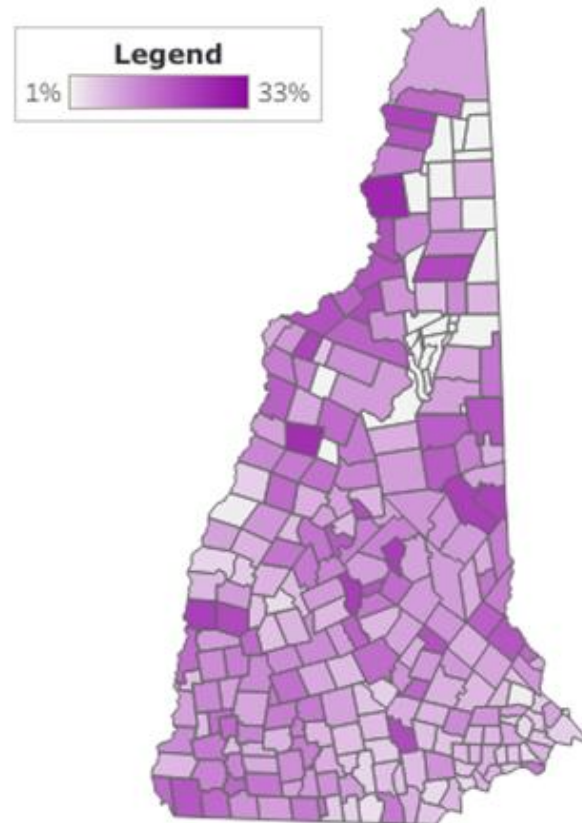
Municipal Medicaid Enrollment, January 2017

Source: NH Department of Health and Human Services



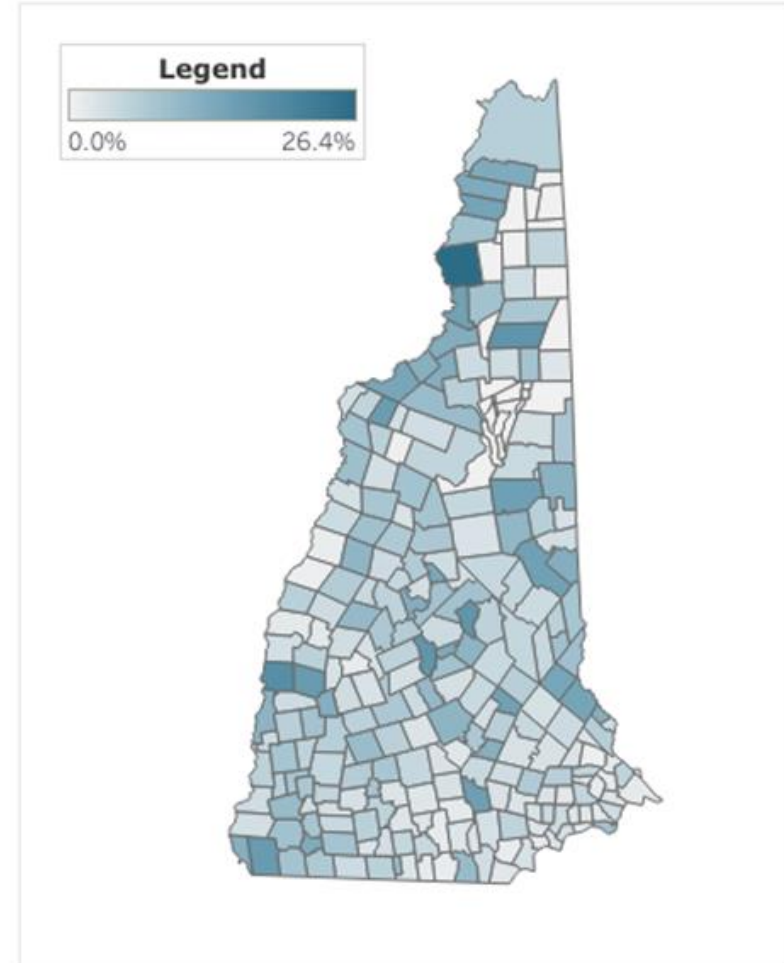
Percent of Municipal Medicaid Enrollment as of January 2017 by 2010 Census Population

Source: NH Department of Health and Human Services. 2010 U.S. Census.



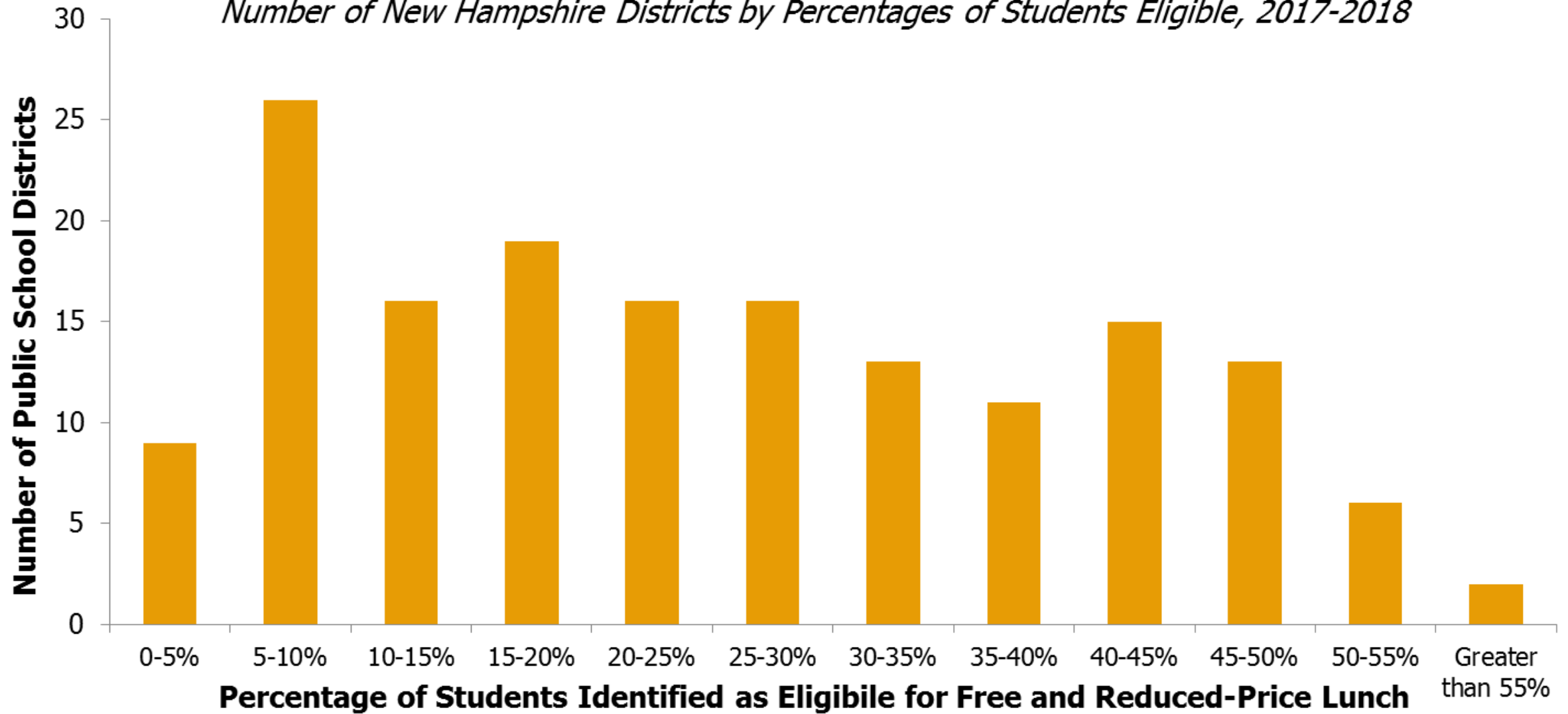
Percentage of Population Enrolled in Food Stamp Program by Municipality

Source: NH Department of Health and Human Services, January 2017 data. 2010 U.S. Census.



Free and Reduced-Price School Lunch Eligibility by District

Number of New Hampshire Districts by Percentages of Students Eligible, 2017-2018



Note: Districts exactly at bin-edges included in lower bins. All districts had at least one eligible student.

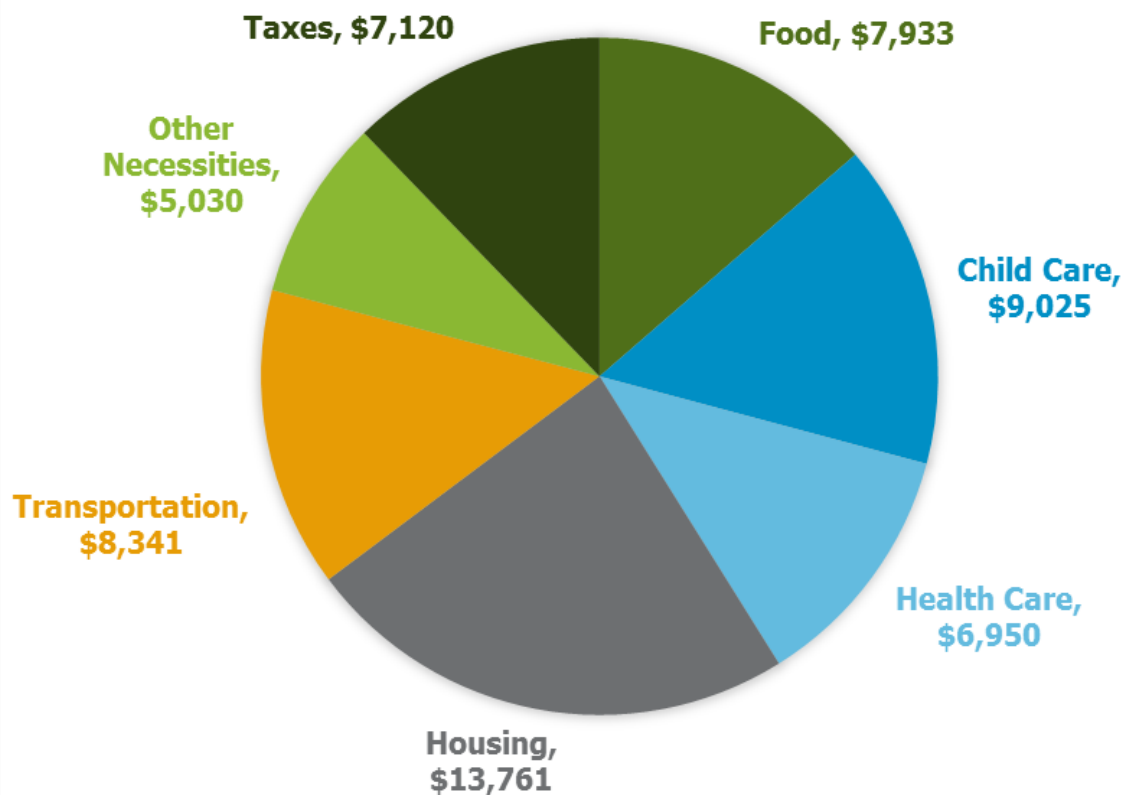
Source: New Hampshire Department of Education, Free/Reduced School Lunch Eligibility Rate by District Data Report

Estimates of Costs of Living

Massachusetts Institute of Technology and Economic Policy Institute Estimates, 2018

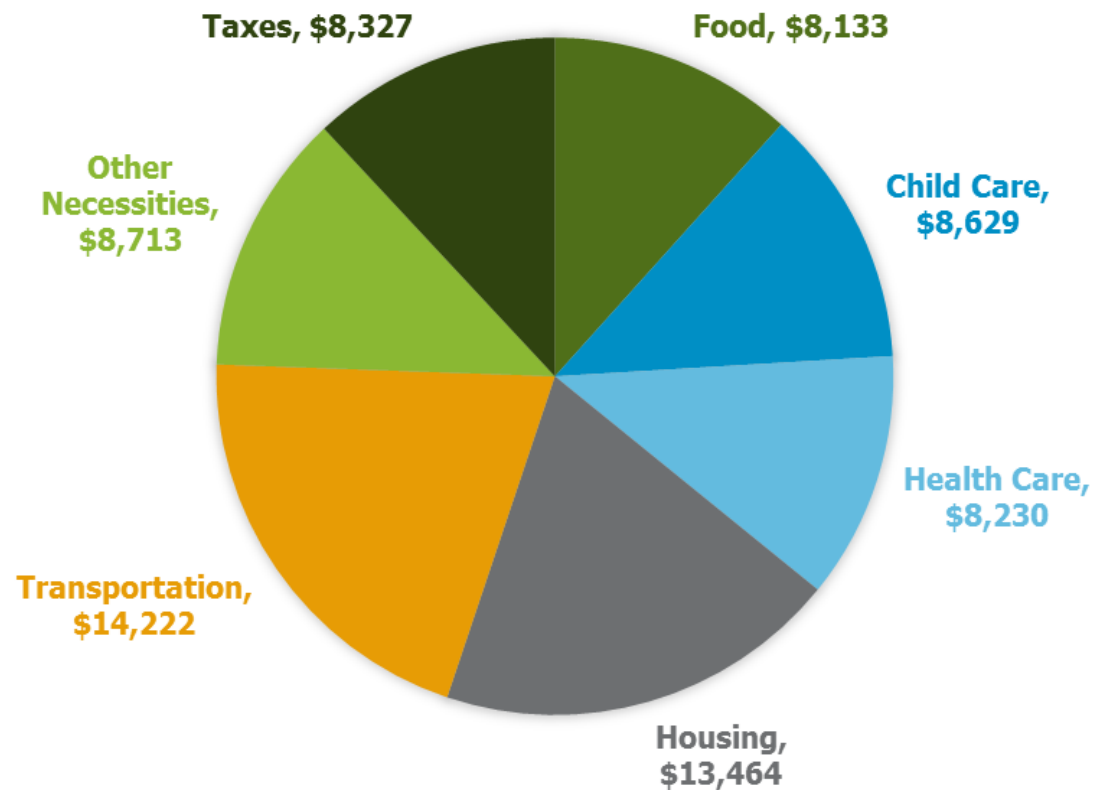
MIT Living Wage Calculator

New Hampshire, Two Working Adults, One Child: \$58,160



EPI Family Budget Calculator

Merrimack County, Two Adults, One Child: \$69,718

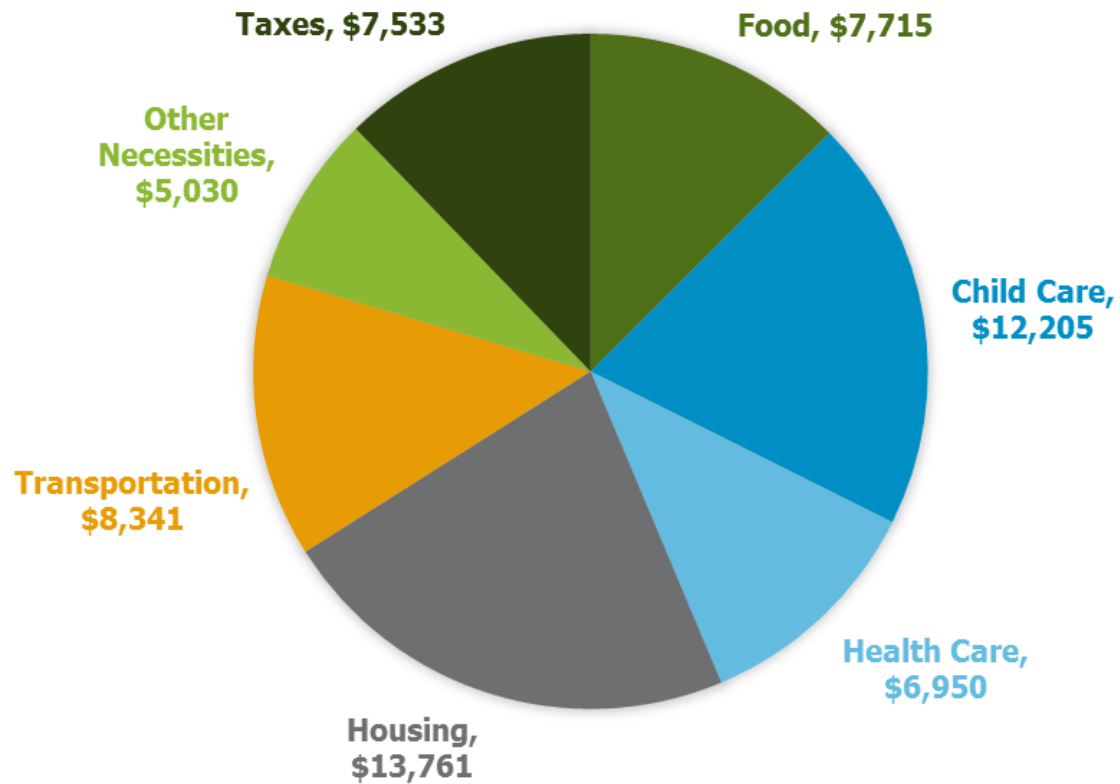


Estimates of Costs of Living

Massachusetts Institute of Technology and Economic Policy Institute Estimates, 2018

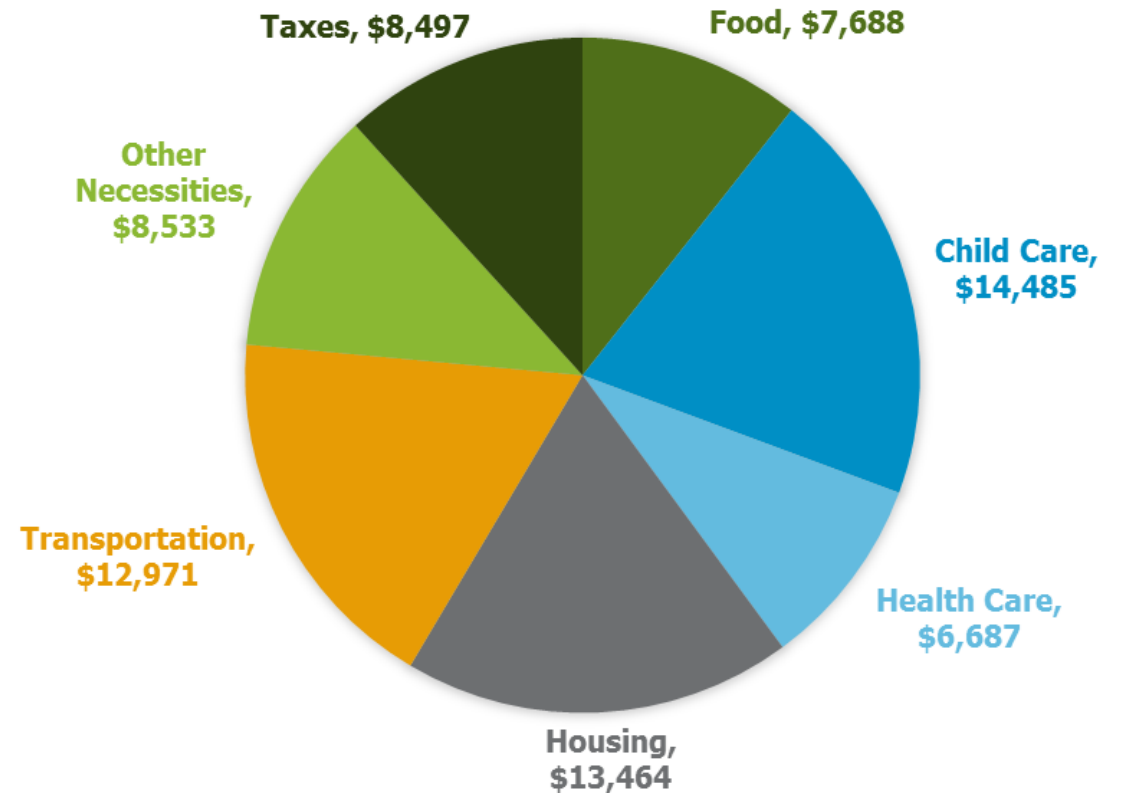
MIT Living Wage Calculator

New Hampshire, One Adult, Two Children: \$61,535



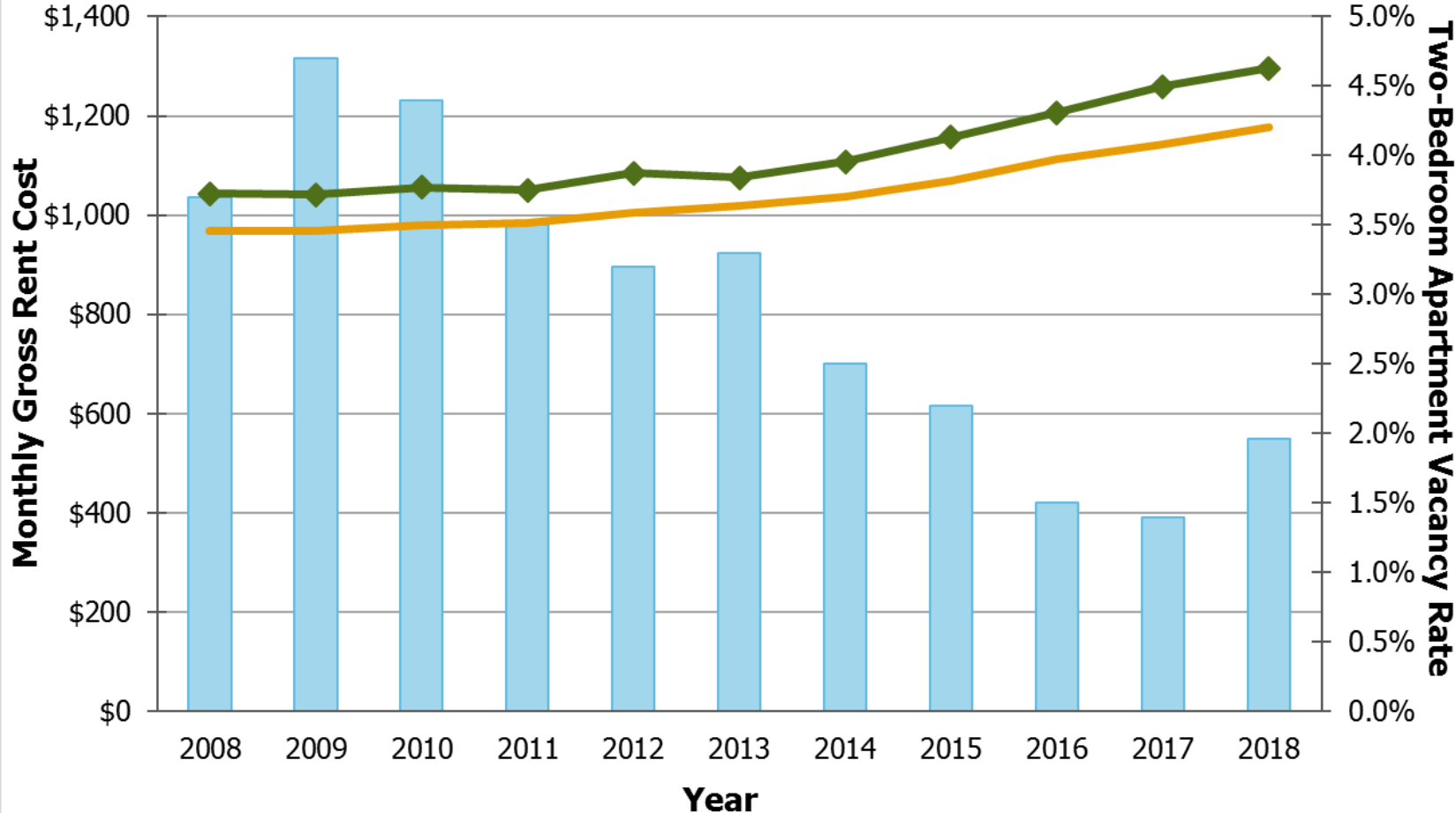
EPI Family Budget Calculator

Merrimack County, One Adult, Two Children: \$72,324



Median Rental Costs and Vacancy Rates in New Hampshire

Median Monthly Gross Rent for Two-Bedroom Apartments and All Units, Two-Bedroom Apartment Statewide Vacancy Rate

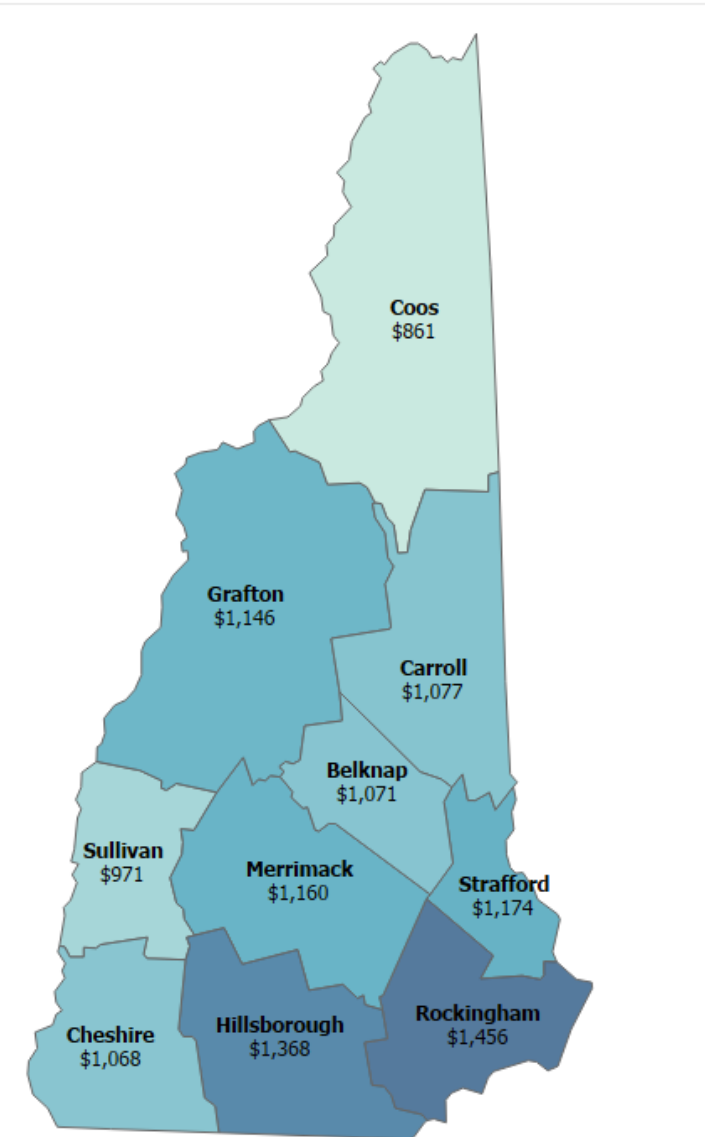


Source: New Hampshire Housing Finance Authority, 2017 Residential Rental Cost Survey and Housing Market Report June 2018

Two-Bedroom Vacancy Rate Two-Bedroom Median Gross Rent All Units Median Gross Rent

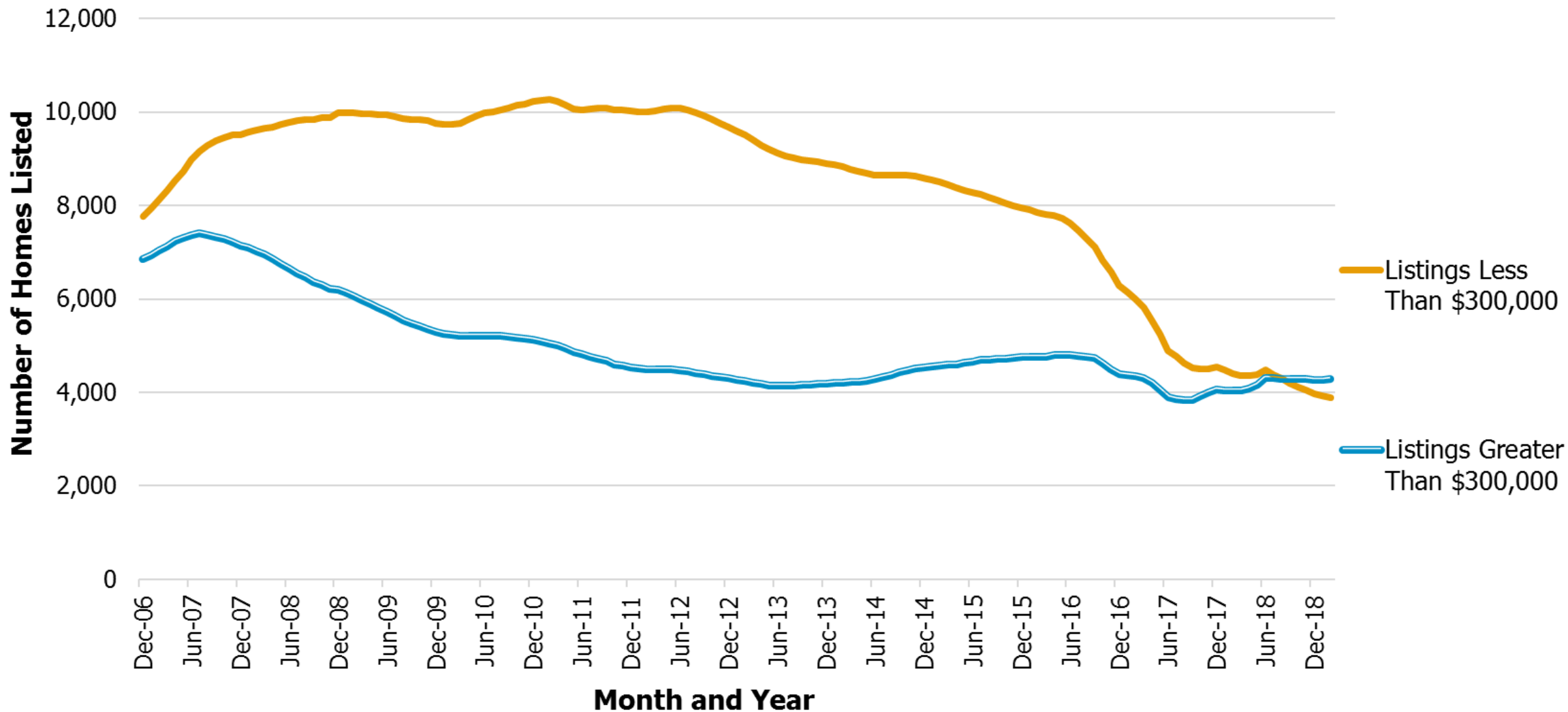
Median Rents for Two-Bedroom Apartments by County

2018 New Hampshire Residential Rental Cost Survey, New Hampshire Housing Finance Authority



New Hampshire Home Inventory by Price

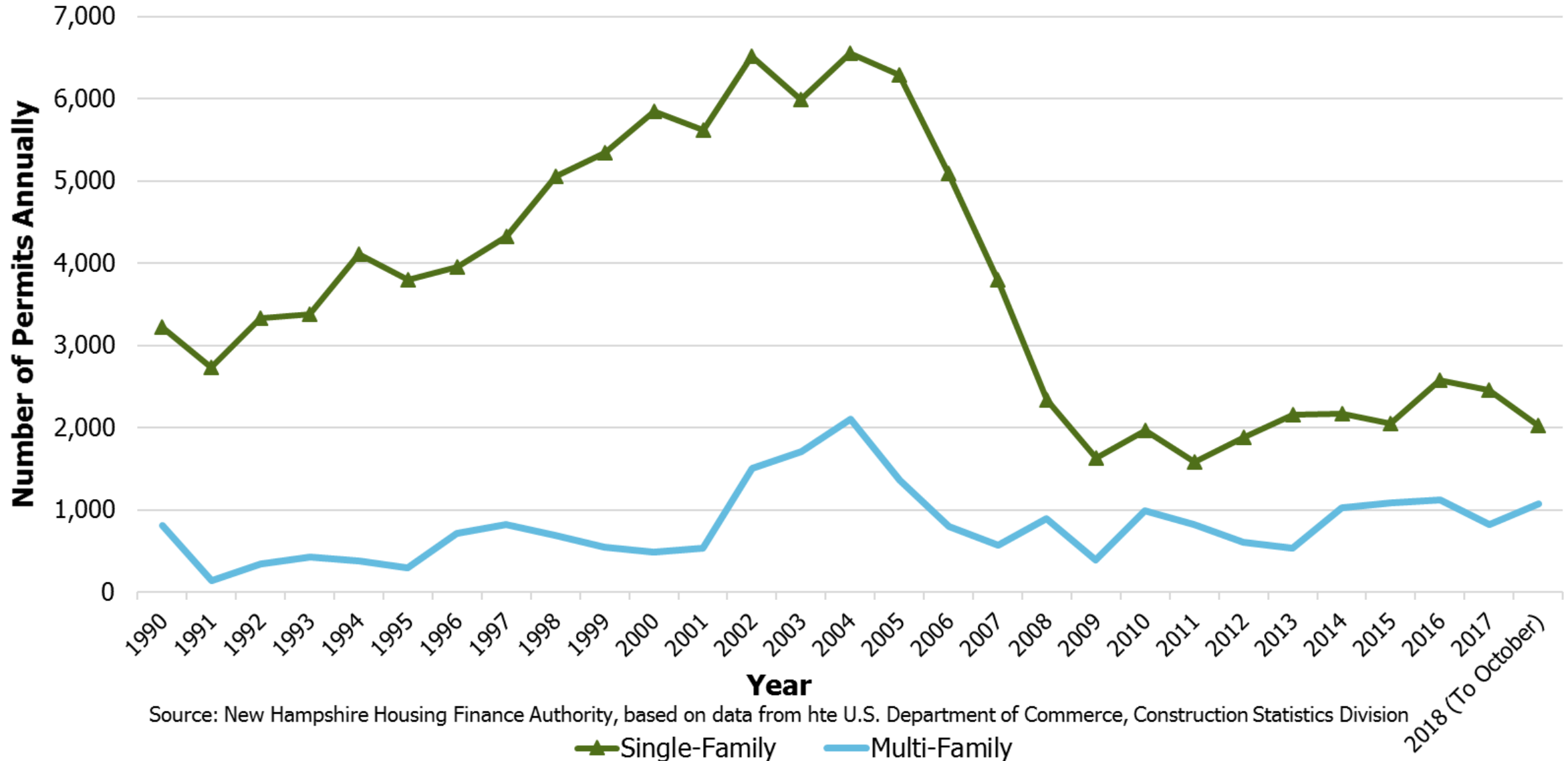
Multiple Listing Services Home Listings by Price, Twelve-Month Rolling Average



Source: New Hampshire Housing Finance Authority, based on information from the Northern New England Real Estate Network

New Hampshire Residential Unit Construction

Single-Family and Multi-Family Units Authorized Annually, Seasonally-Adjusted

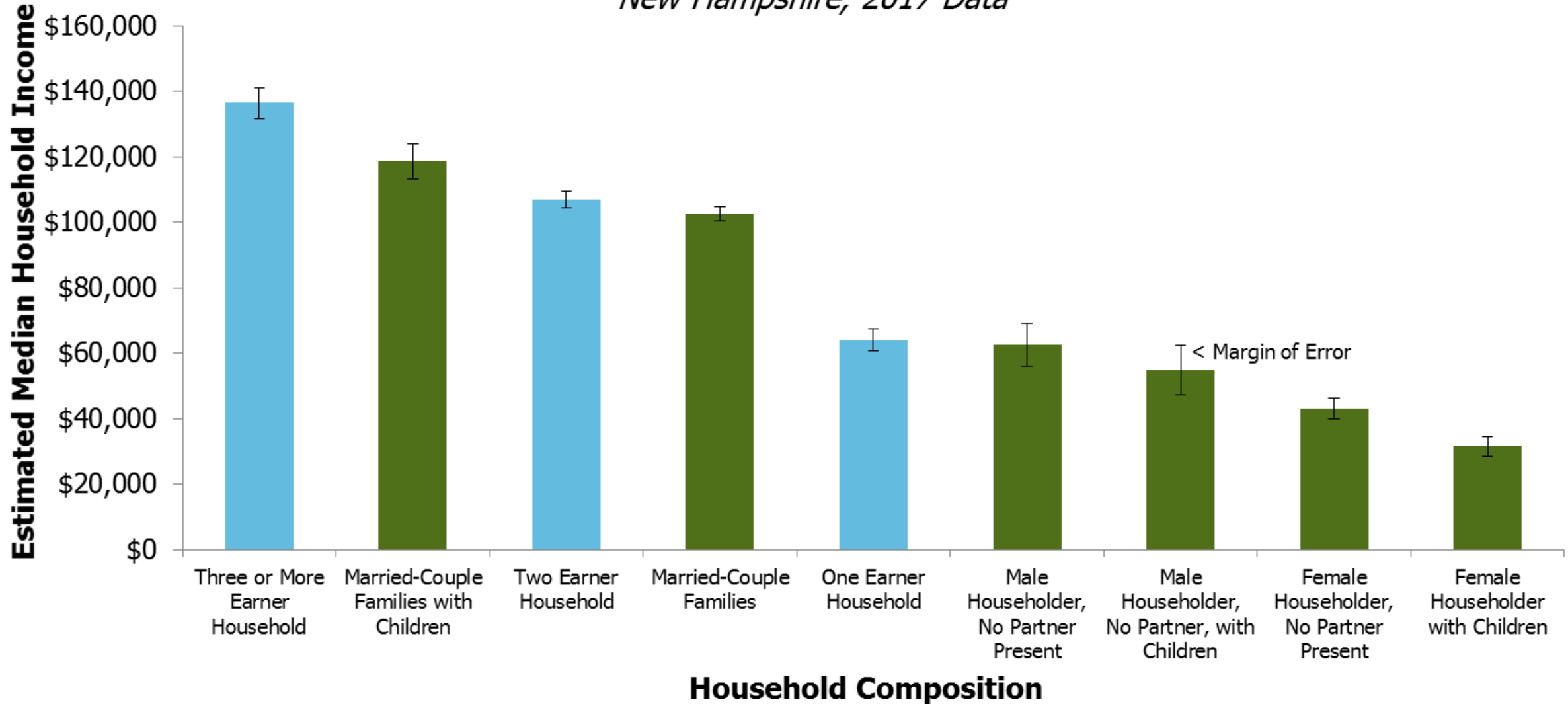


Source: New Hampshire Housing Finance Authority, based on data from the U.S. Department of Commerce, Construction Statistics Division

—▲— Single-Family — Multi-Family

Household Median Incomes by Household Characteristics

New Hampshire, 2017 Data



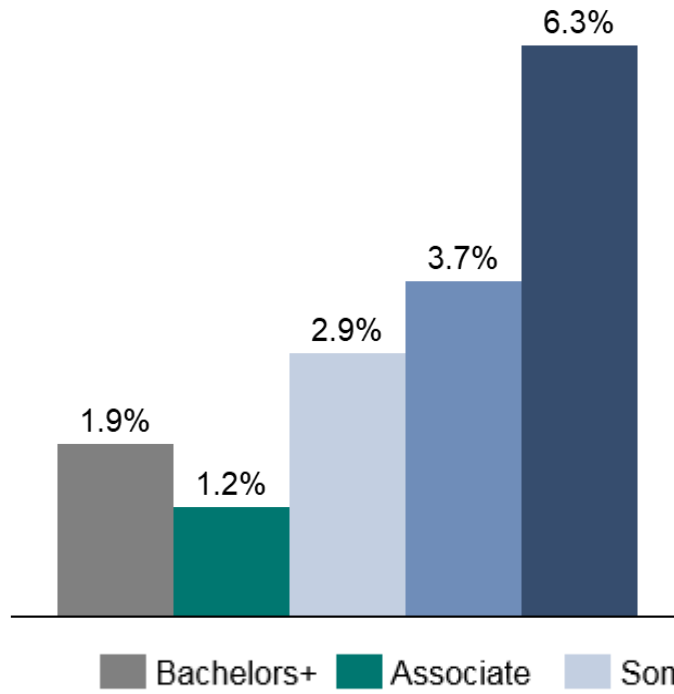
Notes: Children are own children under 18 years of age. Margin of error based on a 90 percent confidence interval.

Source: U.S. Census Bureau American Community Survey, 2017 (One-Year Data)

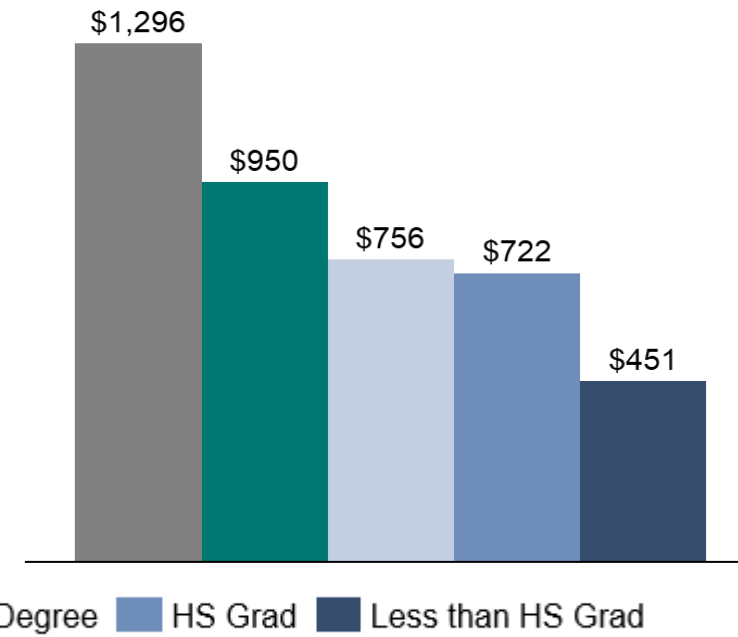
Wages, Unemployment, and Educational Attainment

New Hampshire Data from the Community College System of New Hampshire

Unemployment Rates by Educational Attainment 2017 Annual Averages



Weekly Wages 2017 Annual Averages



Source: Community College System of New Hampshire; New Hampshire Employment Security, Labor Force and Wages by Age and Education, March 15, 2018, based on unpublished Current Population Survey data

Workforce Size and Job Openings

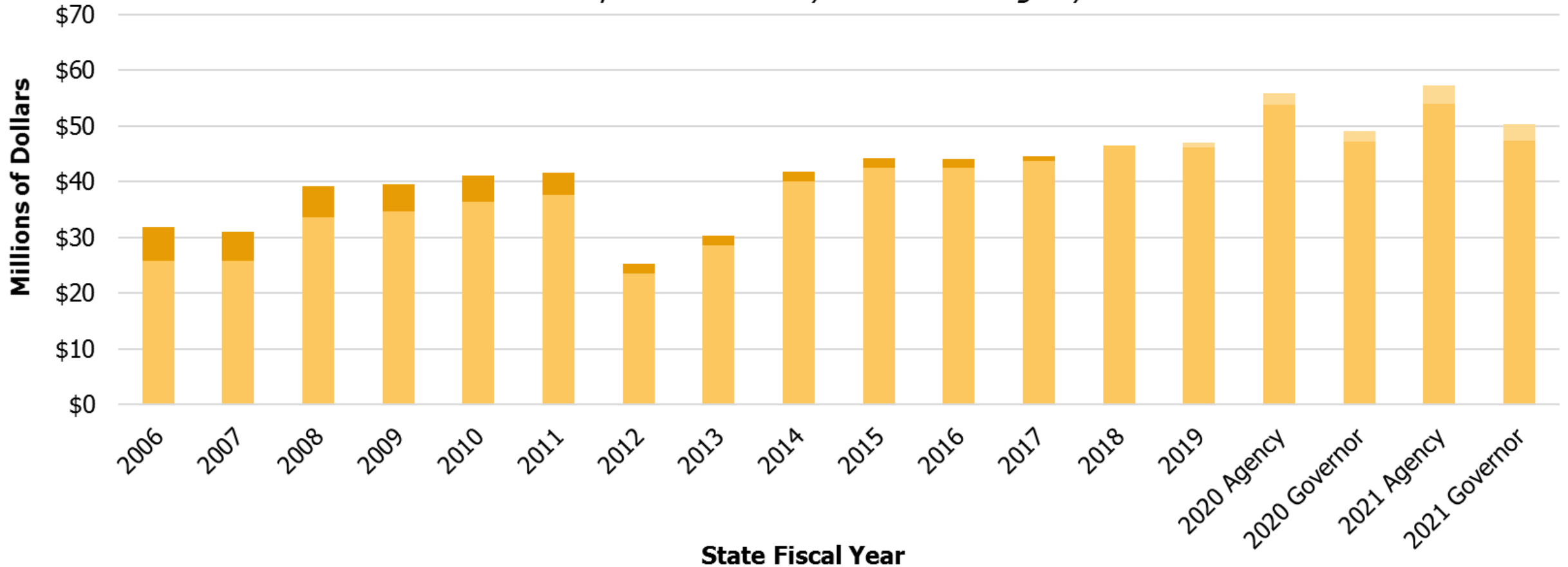
New Hampshire Data

	Workforce Size	Unemployment	Job seekers	Job openings
Graduate or professional degree	94,080	1.9%	5,531	9,522
Bachelor's degree	154,560	1.9%		
Associate degree	67,200	1.2%		
Some college, no degree	127,680	2.9%	13,380	6,132
High school graduate or equivalent	181,440	3.7%		
Less than 12th grade or less	47,040	6.3%		

Source: Community College System of New Hampshire; Labor Insight, Burning Glass Technologies

General Fund Appropriations to Community College System

State Budget Appropriations Over Time and Budget Proposals, Community College System and New Hampshire Community Technical College System

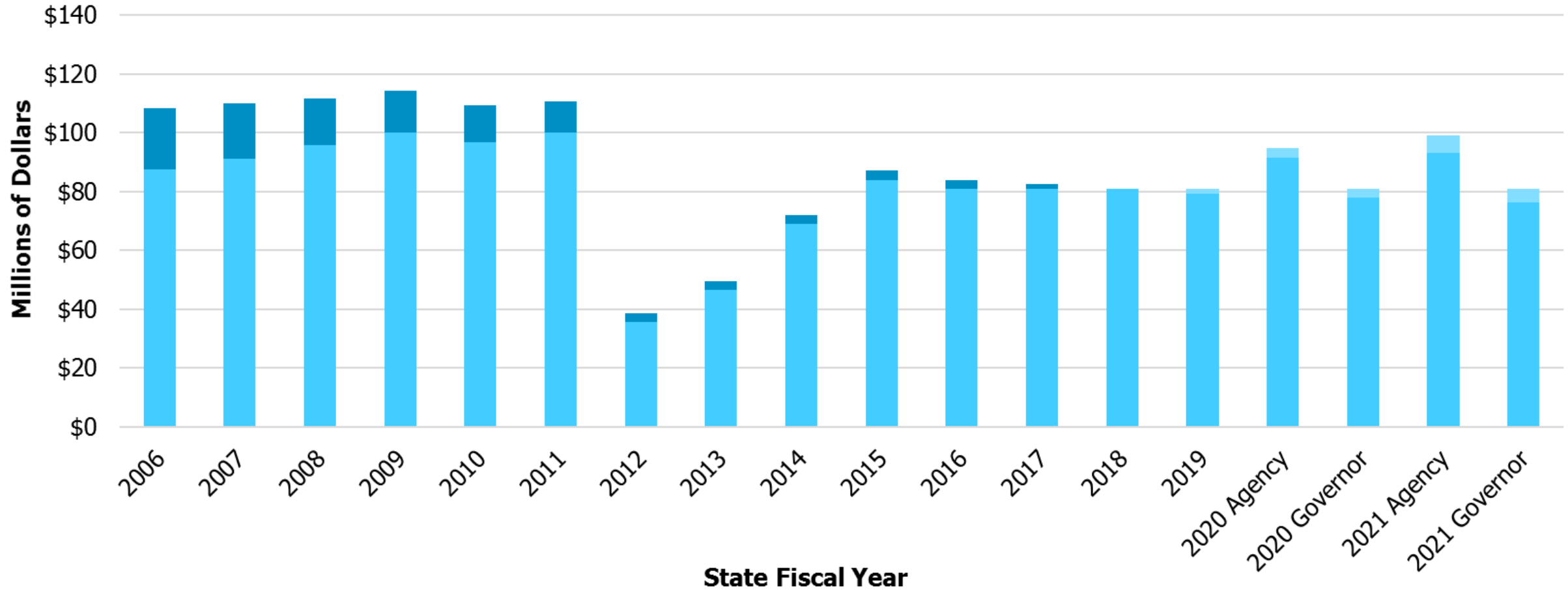


Source: New Hampshire State Operating Budgets, Primary Budgets as Enacted (HB 1, Section 1; HB 144 for 2017 Session); NH Department of Administrative Services, Budget Office, Analysis of Agency Requests for Budget Fiscal Years 2020 and 2021 (full request shown in graph); Governor's Operating Budget for Fiscal Years Ending June 30, 2020-2021; U.S. Bureau of Labor Statistics, CPI-U Northeast; Federal Open Market Committee, December 2018 (inflation projections)

■ General Fund State Budget Appropriations and Proposals ■ Inflation-Adjustment to SFY 2018

General Fund Appropriations to University System

State Budget Appropriations Over Time and Budget Proposals

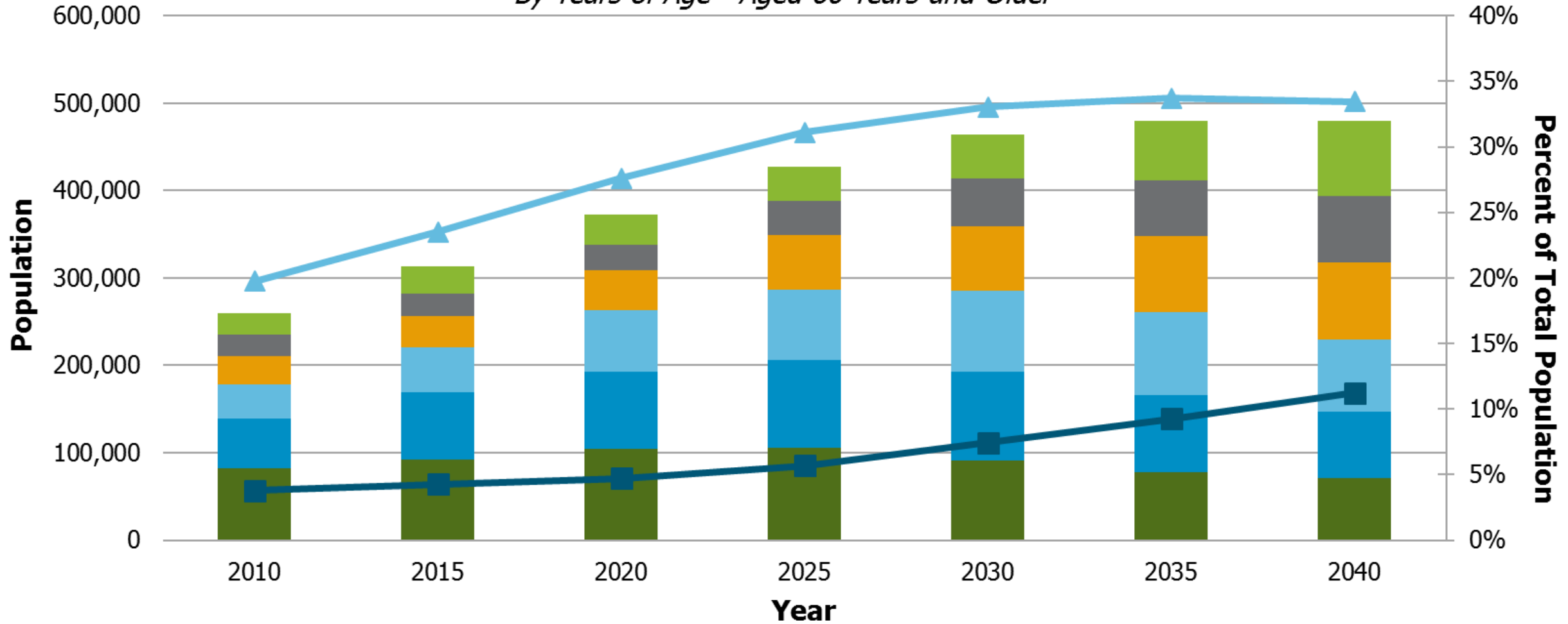


Source: New Hampshire State Operating Budgets, Primary Budgets as Enacted (HB 1, Section 1; HB 144 for 2017 Session); NH Department of Administrative Services, Budget Office, Analysis of Agency Requests for Budget Fiscal Years 2020 and 2021 (full request shown in graph); Governor's Operating Budget for Fiscal Years Ending June 30, 2020-2021; U.S. Bureau of Labor Statistics, CPI-U Northeast; Federal Open Market Committee, December 2018 (inflation projections)

■ General Fund State Budget Appropriations and Proposals ■ Inflation-Adjustment to SFY 2018

New Hampshire Population Projections

By Years of Age - Aged 60 Years and Older



Source: September 2016 Projections from the New Hampshire Office of Energy and Planning

- 60-64
- 65-69
- 70-74
- 75-79
- 80-84
- 85 and Over
- ▲ Percent 60 and Over
- Percent 80 and Over