

Progress Indicators for Douglas County

**ECONOMIC DEVELOPMENT
ANNUAL PERFORMANCE MEASURES REPORT
2014**



Date of Report – October 15, 2014

**Presented to the Board of County Commissioners
December 4, 2014**

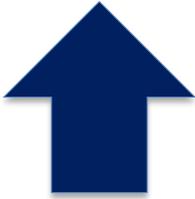
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OVERVIEW



The 2014 Progress Indicators Report provides updated information on economic development activities in Douglas County. The Report measures progress on the Economic Development Element of the Douglas County Master Plan (2012) and the County's Economic Vitality Plan (2010). Contrary to last year's report when there was a mixed picture, most indicators are trending upward for 2014.

The 2014 report includes data for calendar year 2013, Fiscal Year 2013-2014, and in some instances, the first six months of 2014. Information is presented in five categories: 1) Workforce, Industry & Innovation; 2) Place Making/Revitalized Downtowns; 3) Quality of Life; 4) Community Investment/Consumer Spending; and 5) Education. The Table of Economic Development Measures is provided at the end of the report.

Some of the highlights of the 2014 Progress Indicators Report include the following:

- Total building permits have increased from 988 in 2009 to 1,297 in 2013, an increase of 31.3%
- Total businesses (worksites) have increased from 1,767 in 2010 to 1,829 in 2013, an increase of 3.5%
- Unemployment has decreased from a 11.0% rate in 2013 to 7.2% as of August 2014

WORKFORCE, INDUSTRY & INNOVATION



Employment trends and data for 2013 and the first half of 2014 are discussed below. The number of jobs in Douglas County has been increasing at a moderate rate since 2010. The average number of employees in the County was 17,776 for 2013. As shown in Figure 1, the average annual employment figure for Douglas County reached its lowest point in 2010.

The unemployment rate for Douglas County was 11% for 2013 and continues to show improvement from the 14.5% unemployment rate of 2010. In 2006, Douglas County's unemployment rate was 5.4%. DETR reports that the unemployment rate for August 2014 was 7.2%.

Business expansion activities continue to occur in Douglas County. As an example, with the assistance of Catalyst Funds from the Governor's Office of Economic Development (GOED), two manufacturing companies are expanding their workforce in Douglas County. Both companies were expansions from California and began business in Douglas County in the fall of 2013. Cristek Interconnects Inc. will be eligible for up to \$200,000 in Catalyst funds provided the company creates up to 50 jobs over a three-year period. As of July 2014, the company had hired 15 employees. The second company, New Logic Systems, dba Nevada Filtration Systems, has been approved for up to \$75,000 in Catalyst Funds provided the company creates up to 30 jobs over a three-year period. As of July 2014, Nevada Filtration Systems has hired 17 employees.

On September 25, 2014, the County launched a website revision which, among other things, included a "Doing Business" portal on the homepage. The portal allows businesses to find links to most frequently

used services, permits and applications in one location. New webpages were also added for small business counseling, and to answer questions about business expansion and relocation.

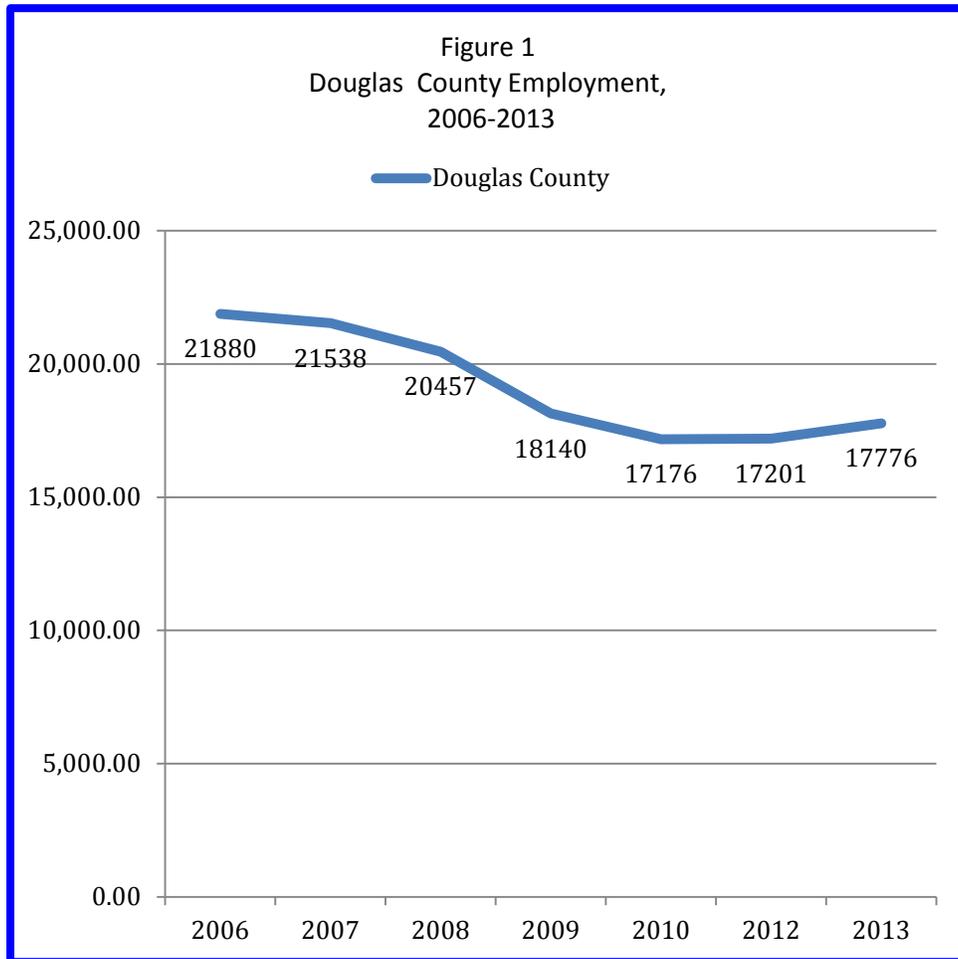


Figure 2 depicts the percentage of jobs in each industry sector for 2013. The largest employment sectors in Douglas County continue to be leisure and hospitality at 34%, Trade, Transportation, and Utilities at 15%, and Government at 12%.

Figure 3 compares the annual average number of employees by industry sector working in 2009 and 2013. Between 2009 and 2013, there have been increases in four industry sectors: 1) Education and Health; 2) Professional and Business Services; 3) Trade, Transportation, and Utilities; and 4) Other Services.

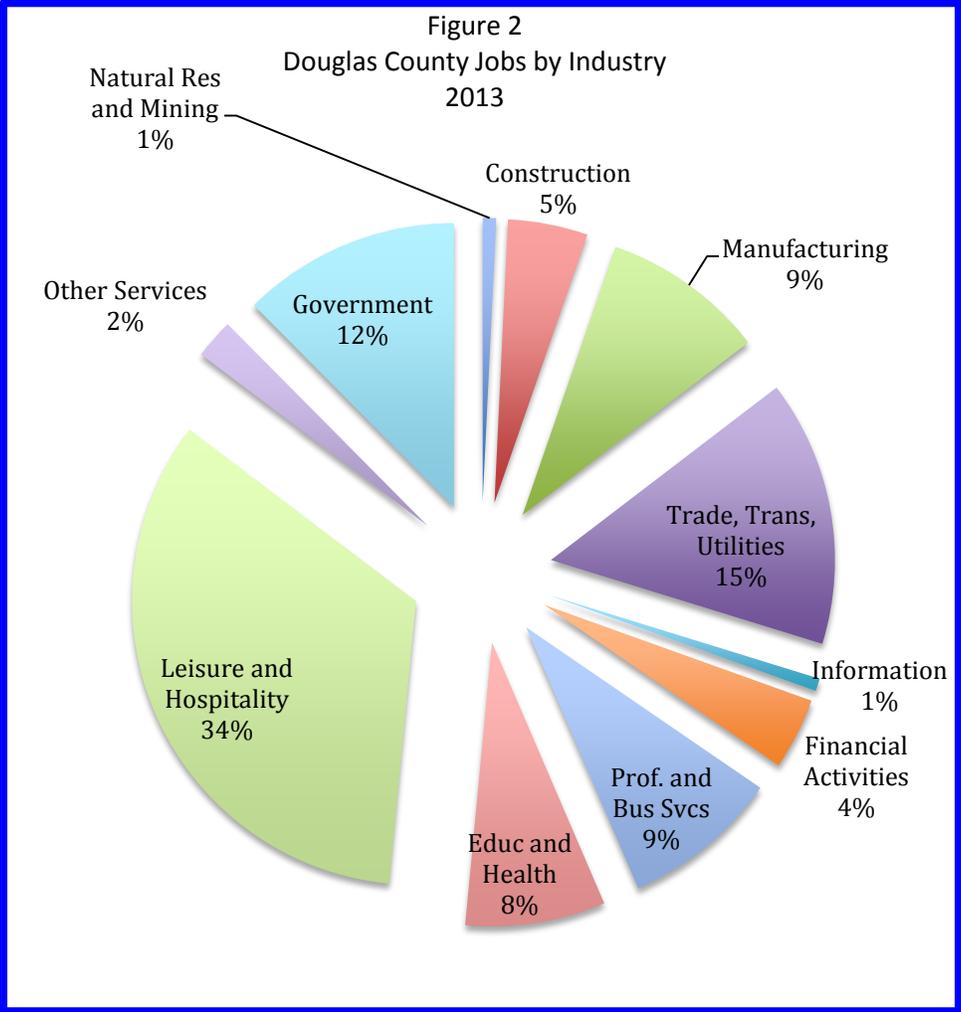


Figure 3
Douglas County Employees by Industry, 2009 vs. 2013

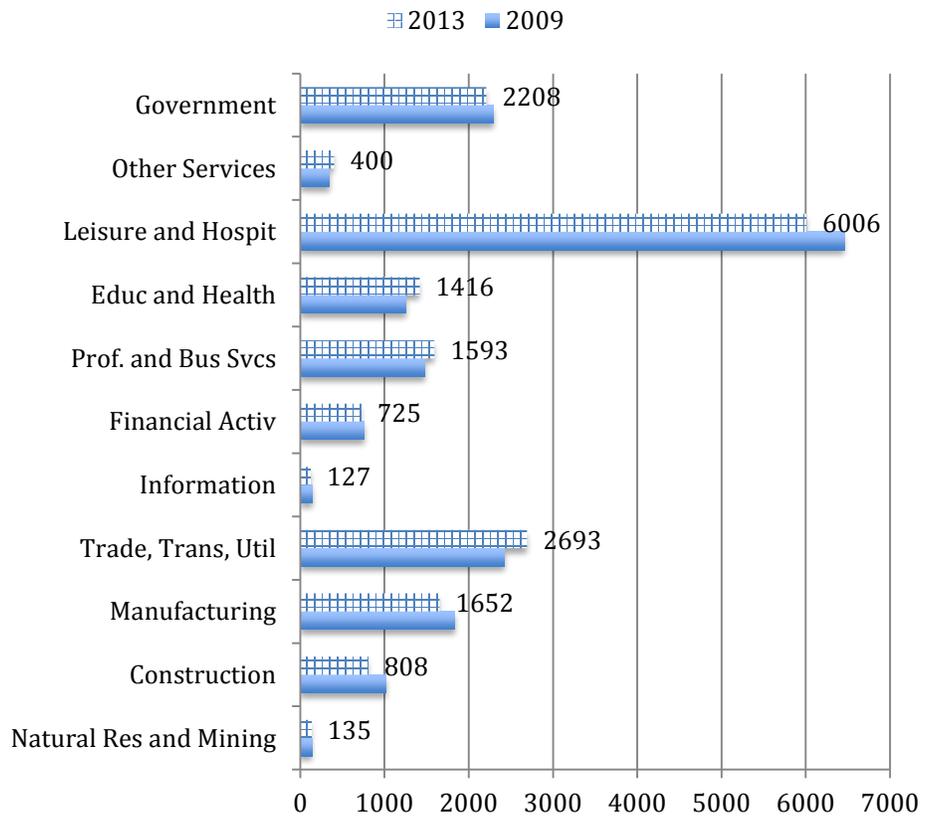


Figure 4 depicts the number of employees in the manufacturing industry between 2003 and 2013. In 2013, there were 1,652 jobs in this industry out of a total of 17,776 total jobs, or 9.3% of the total.

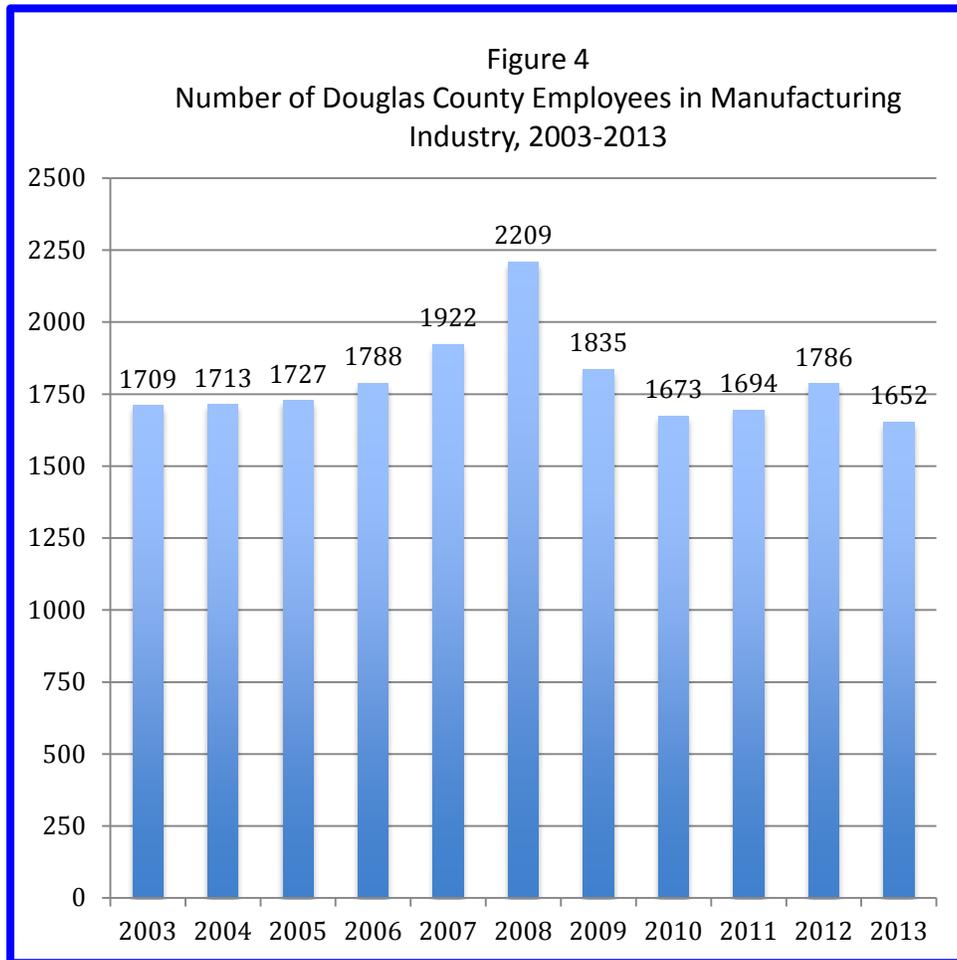


Figure 5 compares the number of manufacturing worksites in Douglas County for the first quarter period between 2011 and 2014. There were 72 manufacturing worksites for the first quarter of 2011 while the comparable figure for the first quarter of 2014 is 81.

As mentioned in the 2013 Progress Indicators Reports, many existing or new companies may use staff agencies (not located in Douglas County) for seasonal or new hires that are pending being permanent. These employees are counted elsewhere.

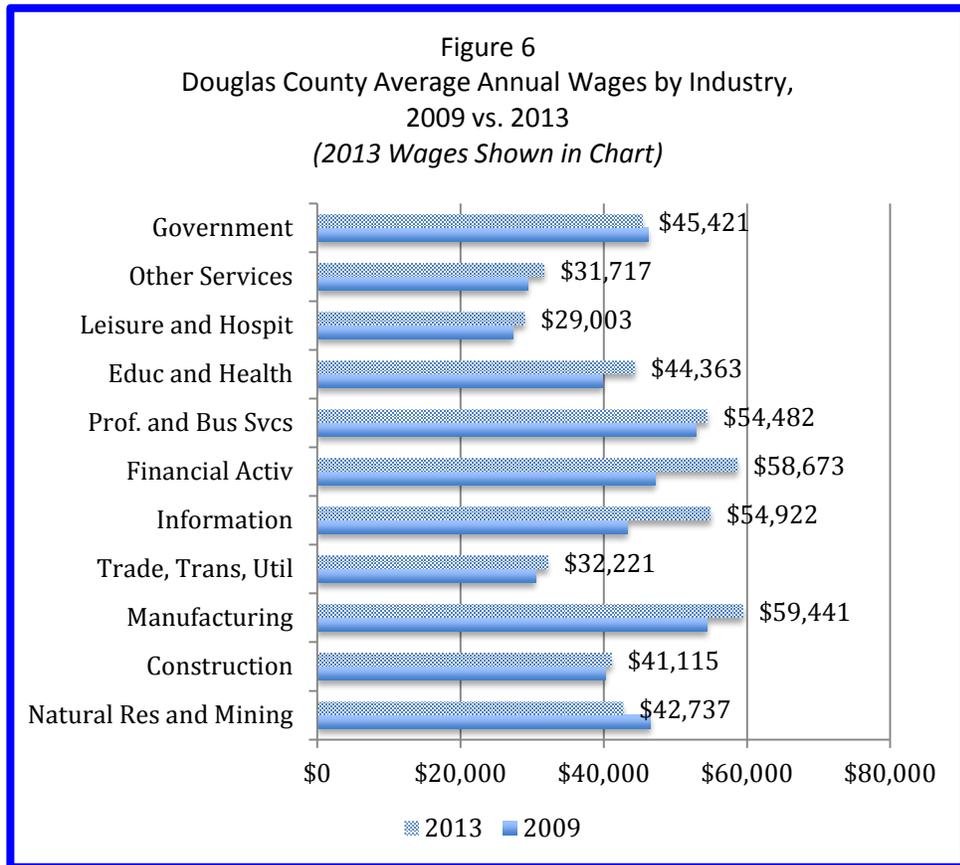
Figure 5
Douglas County Manufacturing Worksites,
First Quarters, 2011-2014

	First Quarter, 2011	First Quarter, 2012	First Quarter, 2013	First Quarter, 2014
Manufacturing Worksites	72	70	77	81

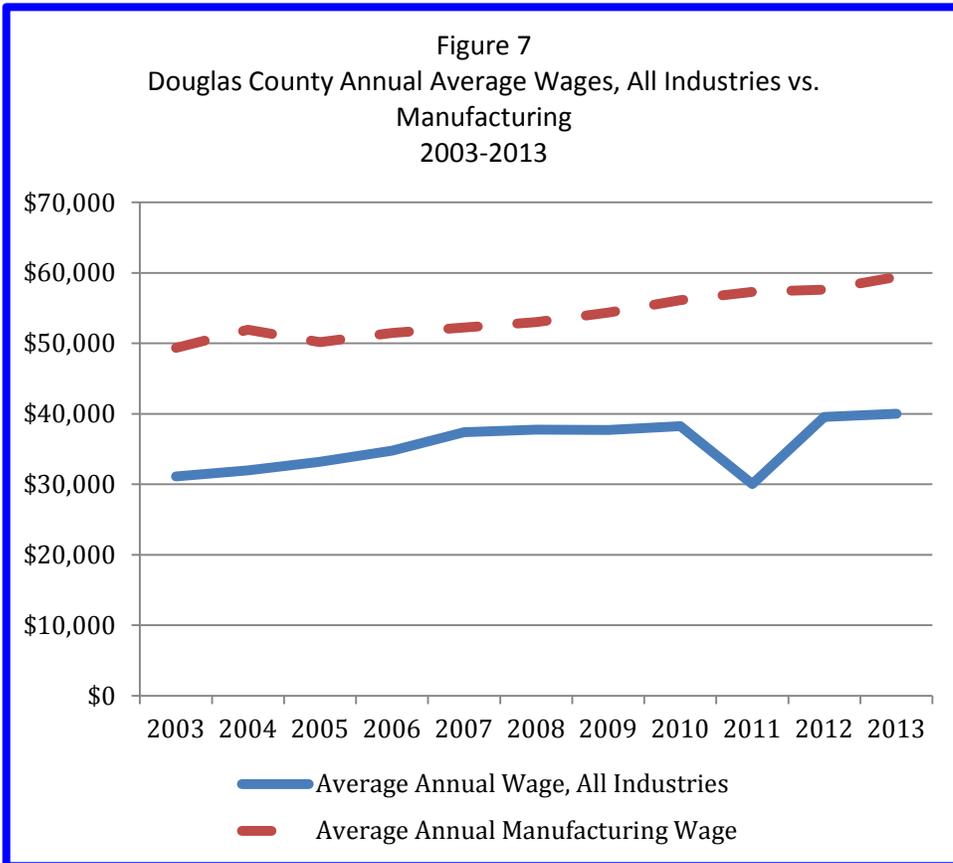
Source: DETR

In 2011, Douglas County contracted with the Northern Nevada Development Authority (NNDA) for the marketing and attraction of manufacturing businesses to the county. Although employment numbers have remained flat, there was a 12.5% increase in the number of manufacturing businesses. Most of the companies recently recruited by NNDA are planning to add additional employees during the next 2-3 years.

Figures 6 and 7 compare the averages wages for each industry in 2009 and 2013 as well as the historical comparison of the average wage for the manufacturing industry with the average wage for all industries in Douglas County.



The average annual wage for all industries for calendar year 2013 was \$40,011. The manufacturing sector continues to show the highest average annual wage at \$59,441. The Leisure and Hospitality sector showed an annual average wage of \$29,003 for 2013.



PLACE MAKING/REVITALIZED DOWNTOWNS



The revitalization of the historic downtowns has been recognized as an important goal in the Douglas County Master Plan, the County's Economic Vitality Plan, and the 2013 Valley Vision Plan. The 2013 Progress Indicators Report focused on successful revitalization efforts in the Town of Genoa. This year's report looks at successful projects that are in the planning or implementation stages in Gardnerville and Minden.

The Town of Gardnerville has received \$31,490 in State Brownfields Grants and \$88,700 in State Community Development Block Grant (CDBG) Funds through the County for the Eagle Gas Station Redevelopment Project. The redevelopment of this former gas station into a visitor center for Main Street Gardnerville with public parking will help to implement the Town's Parking District Strategy, which is an Economic Development Element action in the Douglas County Master Plan.

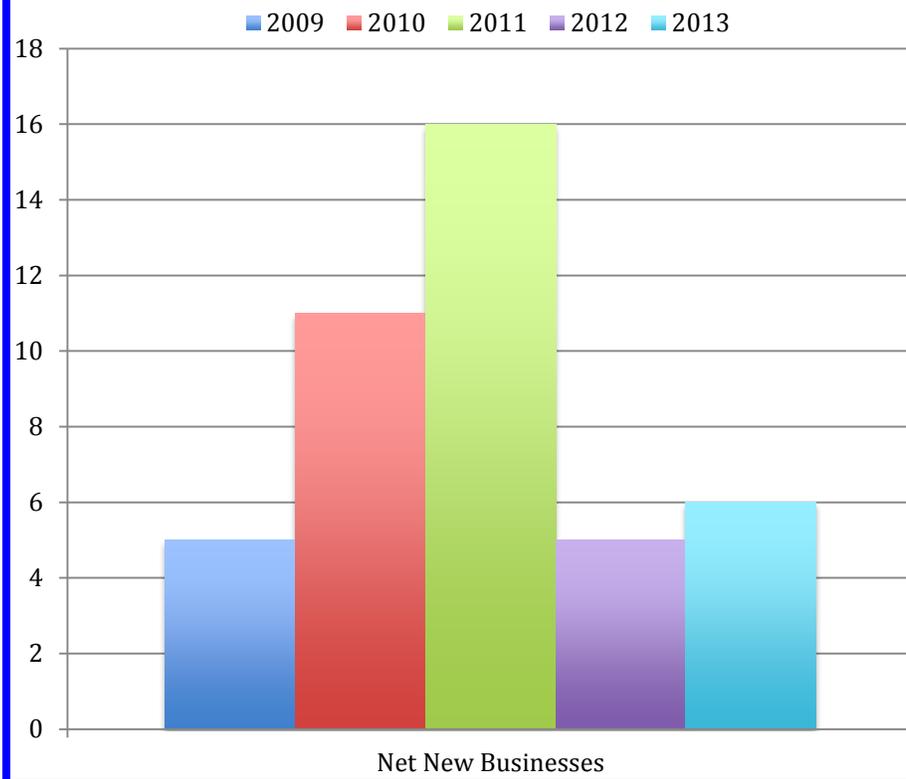
Figure 8 depicts the number of net new businesses in Main Street Gardnerville for the period 2009-2013. In total, there has been a net increase of 43 new businesses in Main Street Gardnerville.

In the Town of Minden, several public and private sector efforts are underway. The COD Casino has been completed (\$3.1 million) and the renovation of the Farmers Bank Building by Bently Enterprises is in progress. In addition, Bently Enterprises is redeveloping the Bently Heritage District.

In Stateline, major hotel renovations are now underway at the former Horizon Casino and the Environmental Impact Statement for the US 50/South Shore Community Revitalization Project (Loop Road) has started.



Figure 8
Net New Businesses in Main Street Gardnerville, 2009-2013

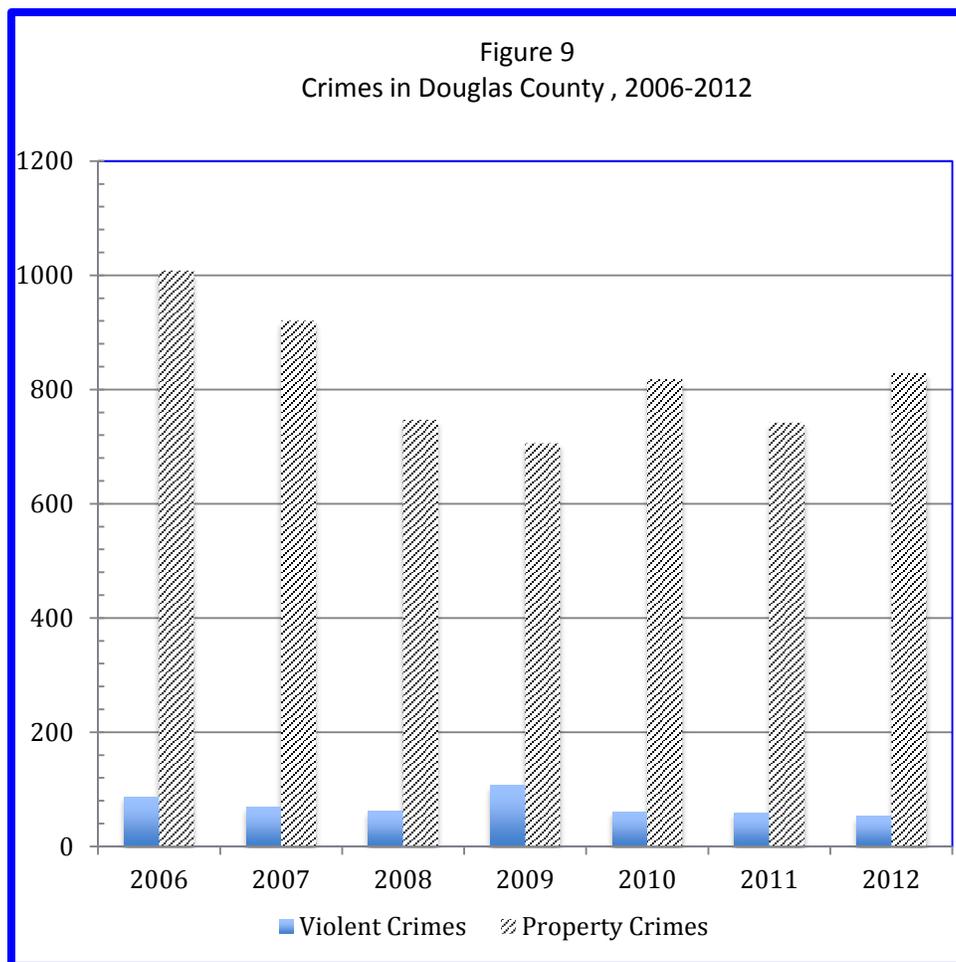


QUALITY OF LIFE



Some of the measures of quality of life include public safety, availability of community services and parks and recreation, and access to health care. Overall, the measures of quality of life are positive for this year's report.

In relation to public safety, Figure 9 depicts the number of violent and property crimes in the County between 2006 and 2012. There were 107 violent crimes in Douglas County in 2009 but the comparable figure for calendar year 2012 is 53, based on the Uniform Crime Reports from the Department of Justice. Property crimes totaled 1,007 in 2006 but decreased to 829 for 2012.



Access to health care and opportunities for healthy living are important quality of life measures. According to the 2014 County Health Rankings Report, Douglas County is ranked number one in health factors and number three in health outcomes compared to other counties in the State of Nevada. Health outcomes rank how healthy a county is in Nevada while health factors are based on the factors that influence health, such as air quality, tobacco use and access to care. The Health Rankings Report

also states that the number of primary care physicians in Douglas County has increased from 26 in 2010 to 31 in 2014.

The new Community and Senior Center will be open in December 2014 and reflects a significant milestone in the county's efforts to improve recreation and community services. The new center will offer a gymnasium and fitness facilities; multipurpose rooms, congregate dining, senior day care, a community health nurse office and clinic, as well as part time preschool.



Over the last three years, the County has worked with many non-profit, local and state partners to add 45 miles of new trails as well as improved trailhead facilities throughout the County. In Minden, the Jakes Wetland Trailhead is under construction and will be completed this fall. The Town received \$132,000 in grant awards. The total project cost is \$270,722.

The Martin Slough Trail is estimated to cost \$810,000. Douglas County received an NDOT grant of \$585,238 for the Trail and this will be matched with \$25,000 from the Town of Gardnerville and Minden as well as \$50,000 in County funds. The Ranch at Gardnerville will also contribute \$100,000 in matching funds in addition to a public access easement. The Seeman Ranch match was \$33,700 for the access easement. The Martin Slough Trail is expected to be open in mid-summer 2015.

The Clear Creek Trail, a 10.5 mile trail connecting Jacks Valley Road south of Jacks Valley Elementary School to a future trailhead to be located near the Tahoe Golf Course Drive on Highway 50, was developed by the Carson Valley Trails Association.

Another ongoing open space initiative is the Stateline to Stateline Bike Trail. The first section connects Kahle Drive to Elks Point Road, while the second phase (dedicated in 2014) extends the path past Round Hill Pines Beach, for a total of 2.1 miles.

COMMUNITY INVESTMENT/CONSUMER SPENDING



The measures of community investment and consumer spending include taxable sales revenues, building permit activity, and home sales. For 2013 and the first half of 2014, Douglas County is seeing significant improvements in these measures.

According to the Nevada Department of Taxation, the taxable sales for Douglas County increased from \$592,823,014 in Fiscal Year 2012-2013 to \$599,622,888 in Fiscal Year 2013-2014, an increase of 1.1%.

The volume of building permits continues to increase. As shown in Figure 10, building permits increased from 1,103 in calendar year 2012 to 1,297 permits in calendar year 2013. The value of all building permits in 2013 was \$75.48 million, which is the first time that permits have exceeded the value of building permits issued in 2008, as shown in Figure 11.

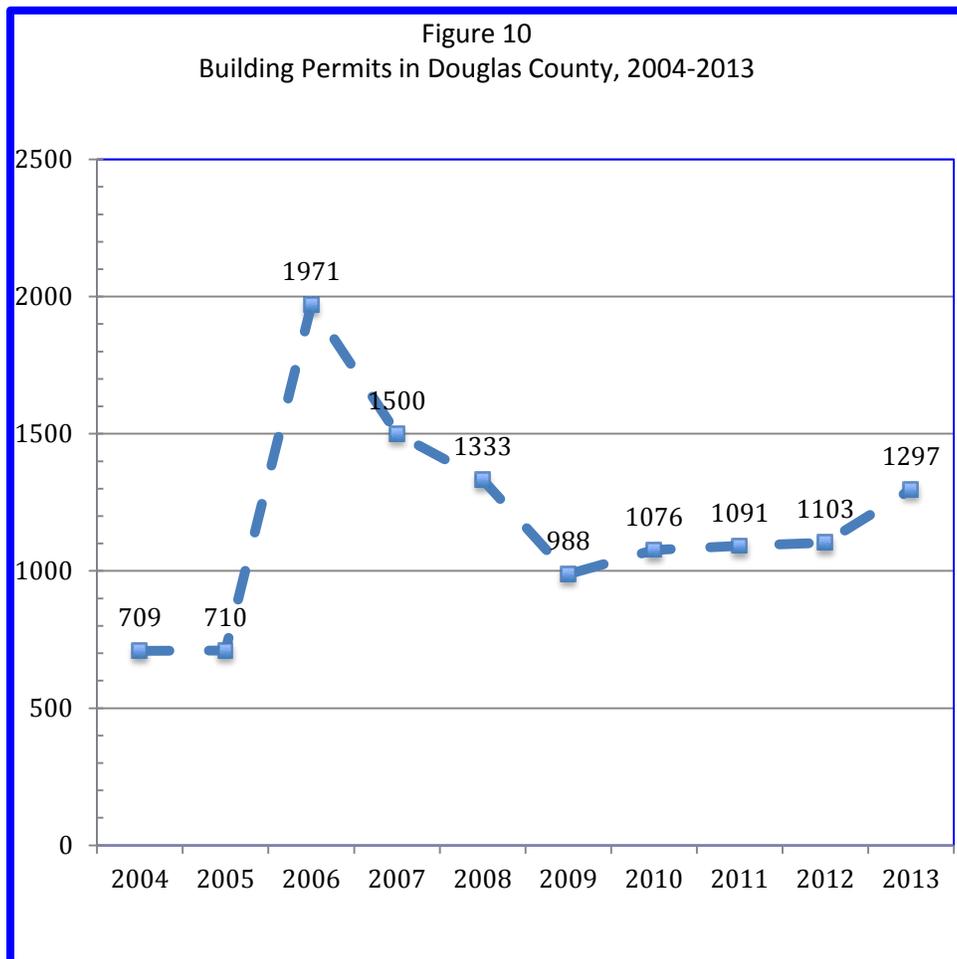
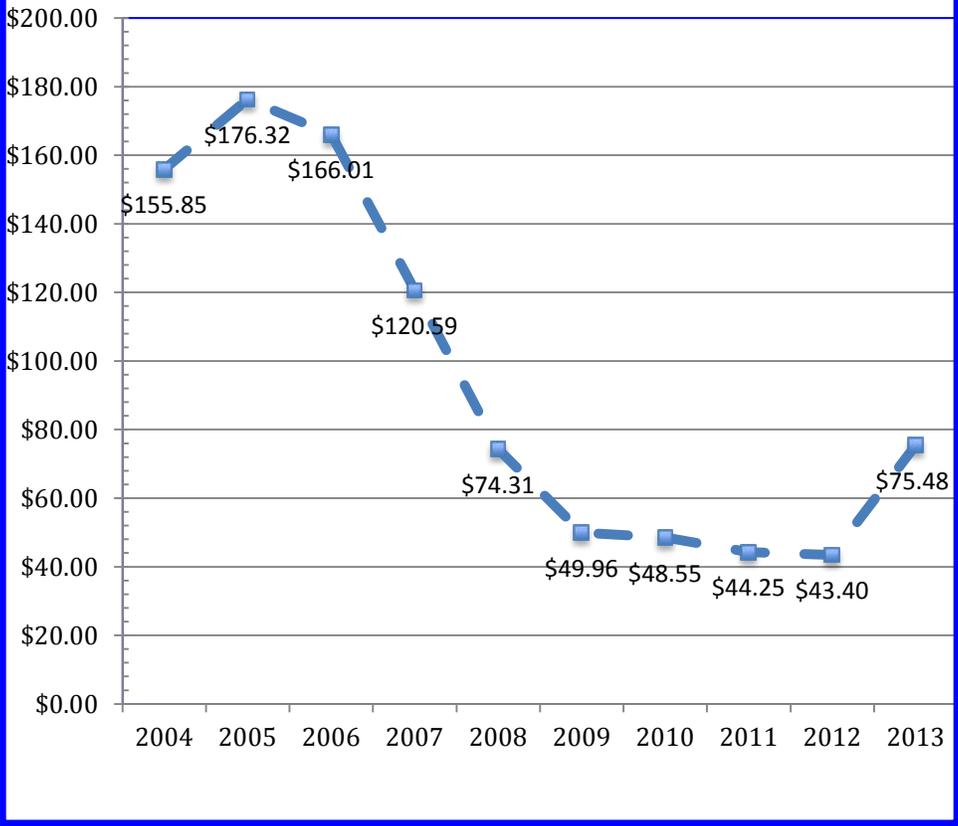
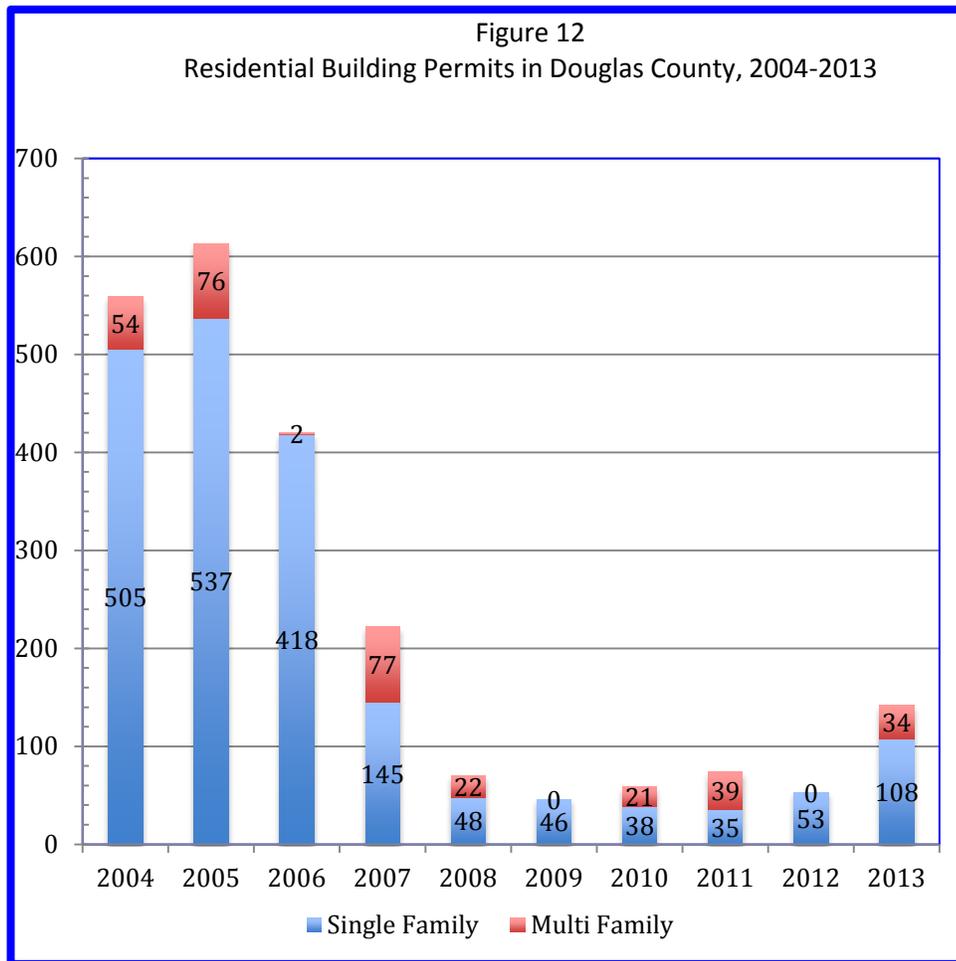


Figure 11
Building Permit Values in Douglas County, 2004-2013
(in Millions)





During 2013, Douglas County issued 108 single family permits and two multi-family permits for 34 units. The value of new single family permits was \$38,094,761 in 2013 compared to \$16,042,805 in 2012, as shown in Figure 13.

The new multi-family units included the 30 unit Parkway Vista affordable senior housing development in the Town of Gardnerville, which opened in early 2014. The total value of the 2013 multi-family permits was \$3,765,620.



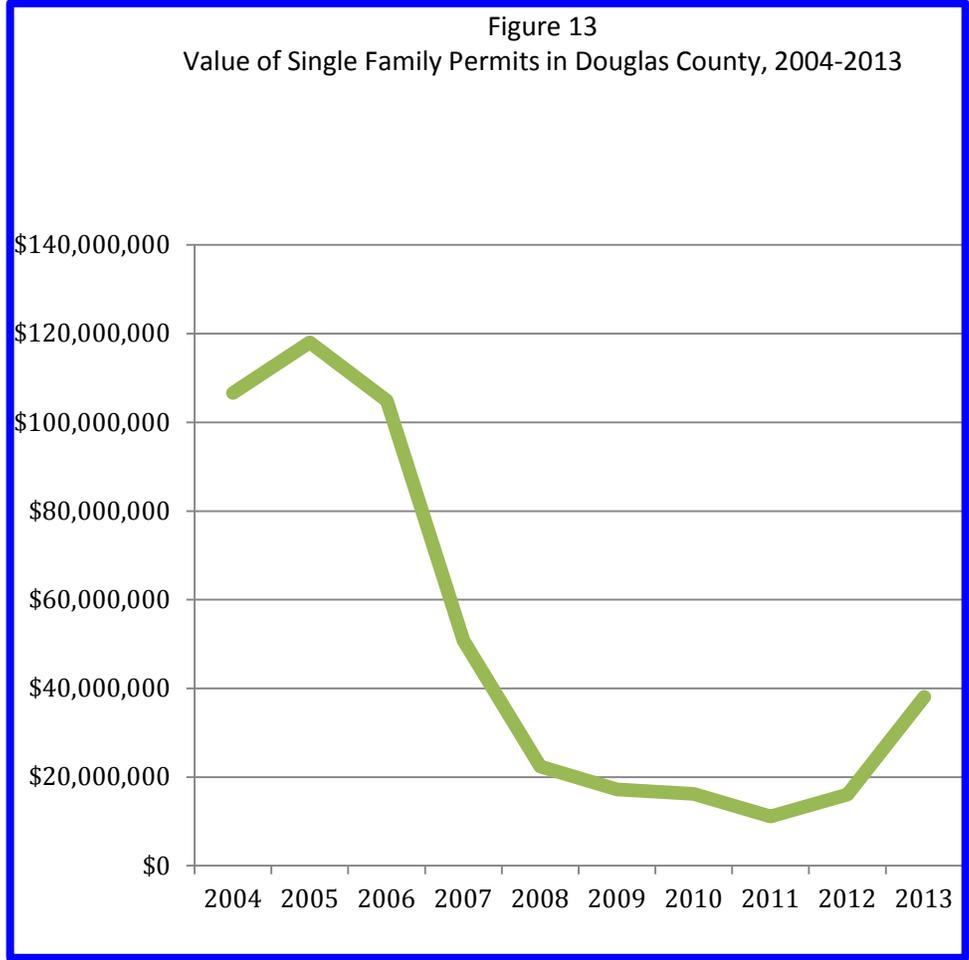


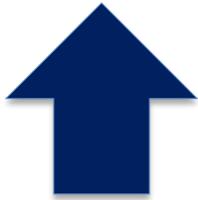
Figure 14 compares the number of single-family dwelling units sold in Douglas County for the first nine months of 2013 and 2014. As of September 30, the Assessor’s Office reported total single family sales of 688, which is down from 745 home sales for the same period last year.

Figure 14
Single Family Sales in Douglas County from January to September, 2013 vs. 2014

	January-September 2013	January-September 2014
Single-Family Sales in East Fork Township	630	584
Single-Family Sales in the Tahoe Township	115	104
Combined Sales	745	688

Source: Douglas County Assessor

EDUCATION



The quality of the K-12 education system in Douglas County is a key component of the Economic Vitality Plan and the Economic Development Element of the Master Plan. Schools in the State of Nevada are evaluated based on the Nevada School Performance Framework (NSPF), also known as Star Rankings, as well as the school accountability reports.

With NSPF, each school receives a maximum of five stars based on an index score. The index score is based on student proficiency and student growth on math and reading assessments as well as reductions in achievement gaps. Schools with an index score at or above 50, for example, receive three stars. Schools with an index score at or above 68 and below 77 receive four stars. Schools with an index score at or above 77 receive five stars.

Figure 15 depicts the star rankings for every school in the Douglas County School District between 2012 and 2014. Alternative schools, such as Aspire High School, were not ranked until 2014 and are not included in Figure 15. All of the schools in the District are ranked at three stars or above. Carson Valley Middle School has achieved a five star ranking for three consecutive years.

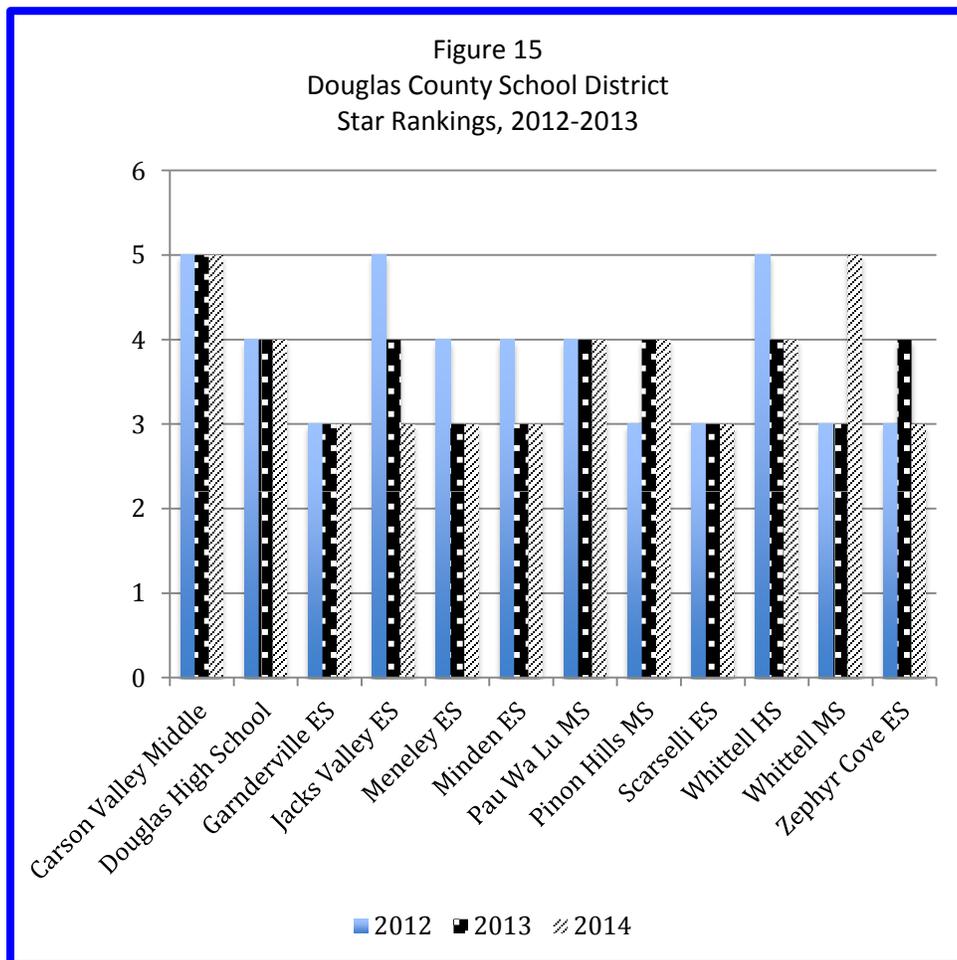
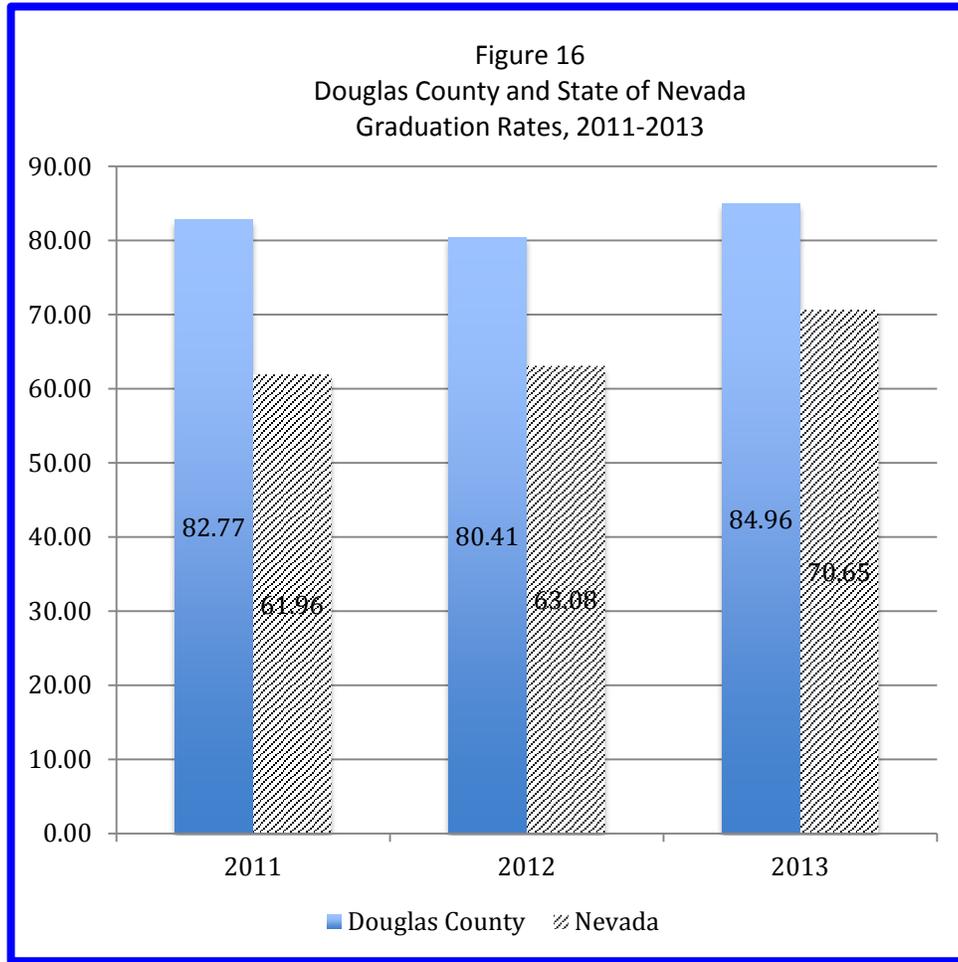


Figure 16 depicts the graduation rates for the Douglas County School District and the State of Nevada from 2011 to 2013. The graduation rate for the School District increased from 80.41% in 2012 to 84.96% in 2013. The graduation rate for the State of Nevada was 70.65% in 2013 and 63.08% in 2012. The Douglas High School is currently undergoing a \$17.9 million renovation, which includes the new STEM Center. The renovation of the high school is expected to be completed by fall of 2015.



Douglas County, Nevada
Economic Development Performance Indicators

Aspect	Indicator/Measure	Source	Frequency	Historical	2010	2011	2012	2013	2014	
Workforce, Industry & Innovation	Unemployment rate	DETR	Annually	5.4% (2006)	14.5%	14.4%	12.0%	11%	-	
	# of Employment Training participants who are unemployed and obtain a job	Social Services	Annually (FY)	new program in FY 10	29	59	72	77	96	
	% of Employment Training participants who are unemployed and obtained a job	Social Services	Annually (FY)	new program in FY 10	37.6%	51.3%	49.6%	52%	51%	
	Median family income	HUD	Annually	\$65,800 (2006)	\$73,000	\$75,900	\$76,900	\$78,200	\$74,102	
	# of construction jobs	DETR	Annually	1015 (2009)	775	767	752	808	-	
	# of manufacturing jobs	DETR	Annually	1835 (2009)	1673	1694	1786	1652	-	
	# of leisure and hospitality jobs	DETR	Annually	6523 (2009)	6056	6148	5904	6006	-	
	Avg. annual wage	DETR	Annually	\$37,710 (2009)	\$38,270	\$39,033	\$39,564	\$40,011	-	
	Avg. annual manufacturing wage	DETR	Annually	\$54,371 (2009)	\$56,152	\$57,321	\$57,634	\$59,441	-	
	Number of worksites	DETR	Annually	1874 (2009)	1767	1753	1775	1829	-	
	# of total jobs, all industries	DETR	Annually	18,140 (2009)	17176	17270	17201	17776	-	
	# of companies relocated through NNDA	Northern Nevada Development Authority	Annually (FY)		1	2	3	9	2	
	# of companies expanded through NNDA	NNDA	Annually (FY)		2	0	1	2	4	
	# of new jobs resulting from relocations handled by NNDA	NNDA	Annually (FY)		22	45	20	280	10	
	# of new jobs resulting from expansions handled by NNDA	NNDA	Annually (FY)		40	17	38	97	73	
	Number of commercial building permits issued in business parks	Community Development	Annually		2	0	0	4	-	
	Value of commercial improvements in industrial parks	Community Development	Annually		\$2,816,848	0	0	\$341,500	-	
	Value of commercial personal property assessments (machinery, equip., fixtures)	Assessor	Annually (FY)	\$75,759,224 (2006)	\$69,384,370	\$65,066,659	\$59,888,398	\$57,610,702	\$62,240,578	
	# of entrepreneurs (clients) that receive small business counseling	NSBDC -UNR	Annually (FY)		36	24	27	21	19	
	# of new clients that received small business counseling	NSBDC -UNR	Annually (FY)		10	12	22	15	13	
	Place Making/ Revitalized Downtowns	Number of net new businesses in Genoa	Gillmor Coons Real Estate	Annually (FY)			4	4	-3	-
		Commercial occupancy rate in Genoa	Gillmor Coons Real Estate	Annually			94.79%	97.28%	87.03%	-
		Number of net new businesses in the Main Street Gardnerville District (MSG)	Main Street Gardnerville	Annually	5 (2009)	11	16	5	6	-
# of MSG businesses that made investments/improvements in their properties		Main Street Gardnerville	Annually	0 (2009)	4	17	14	16	-	
Number of commercial building permits issued in towns & downtowns (Genoa, Minden, Gardnerville, Stateline)		Community Development	Annually	-	1	0	3	19	-	
Value of commercial improvements in the towns & downtowns		Community Development	Annually	-	\$140,040	0	\$5,026,148	\$5,034,392	-	
Room tax occupancy rate - Lake		Finance Department	Annually (FY)	70.58% (2006)	61.21%	59.37%	56.72%	58.20%	58.09%	
Room tax occupancy rate - Valley		Finance Department	Annually (FY)	54.25% (2006)	43.36%	45.97%	46.11%	48.40%	45.35%	

Updated and new data highlighted in yellow
N/A -Not available

Douglas County, Nevada
Economic Development Performance Indicators

Aspect	Indicator/Measure	Source	Frequency	Historical	2010	2011	2012	2013	2014
Quality of Life	Poverty rate	ACS	3-Year Estimates	6.6% (2000)	9.3%	9.6%	10.3%	-	-
	# of individuals seeking food assistance	Social Services	Annually (FY)	1608 (2007)	2338	2369	2469	2221	N/A
	% change in the number of individuals seeking food assistance over prior year	Social Services	Annually (FY)	15.5% (2008)	16.6%	1.3%	4.2%	-10.0%	N/A
	% change in the number of individuals seeking food assistance over FY 06/07	Social Services	Annually (FY)	15.5% (2008)	45.4%	47.3%	53.5%	38.2%	N/A
	Ranking of County in the State in terms of overall health	CountyHealthRankings.org	Annually	-	#1	#1	#1	#3	#3
	Mean travel time to work (minutes)	ACS	3-Year Estimates	23.1 (2009)		24.2	24.8	-	-
	Primary care physicians (PCP)	CountyHealthRankings.org	Annually		26	34	34	31	32
	PCP ratio per 100,000	CountyHealthRankings.org	Annually		N/A	1345:1	1345:1	1516:1	1512:1
Community Investment/ Consumer Spending	Taxable sales	Nevada Dept. of Taxation	Annually (FY)	\$584,679,285 (2009)	\$537,187,480	\$532,983,978	\$557,659,542	\$592,823,014	\$599,622,888
	% change in taxable sales	Nevada Dept. of Taxation	Annually (FY)	-15.5% (2009)	-8.1%	-0.8%	4.6%	6.3%	1.1%
	# of single family detached home sales - Valley	Assessor	Annually	776 (2006)	600	700	806	800	-
	# of single family home sales - Lake	Assessor	Annually	102 (2006)	92	94	121	147	-
	# of new single family dwelling building permits	Community Development	Annually	418 (2006)	35	35	49	108	-
	Value of new single family dwelling building permits	Community Development	Annually	\$104,896,384 (2006)	\$16,207,102	\$11,106,794	\$16,042,805	\$38,094,761	-

Douglas County, Nevada
Economic Development Performance Indicators

Aspect	Indicator/Measure	Source	Frequency	Historical	2010	2011	2012	2013	2014
Education	Percent of public high school students								-
	who graduate in four years	Douglas County School Dist. (DCSD)	Annually	84.6% (Class of 2008)	87.8%	86.9%	80.4%	85.0%	-
	who graduate in five year (adjusted graduation rate)		Annually			87.6%	N/A	-	-
	who took the SAT	DCSD	Annually	41% (2008)	41.0%	48.8%	46.1%	50.7%	53.3%
	who took to ACT	DCSD	Annually	46% (2008)	41.0%	46.0%	45.9%	43.7%	51.4%
	with college-ready ACT score - Eng. (Composition)	DCSD	Annually	83% (2008)	79.0%	78.0%	78.0%	75.0%	79.0%
	with college-ready ACT score - Math (Algebra)	DCSD	Annually	55% (2008)	55.0%	62.0%	53.0%	50.0%	70.0%
	with college-ready ACT score - Science (Biology)	DCSD	Annually	36% (2008)	32.0%	40.0%	35.0%	46.0%	59.0%
	Population 25 and older								
	High school graduate or higher	ACS	3-Year estimates		91.8%	93.2%	93.4%	-	-
	Some college, no degree	ACS	3-Year estimates		30.3%	30.0%	29.4%	-	-
	Associates degree	ACS	3-Year estimates		10.7%	10.8%	10.7%	-	-
	Bachelors degree	ACS	3-Year estimates		14.6%	17.0%	17.6%	-	-
	Graduate, professional or doctorate degree	ACS	3-Year estimates		8.7%	8.9%	9.0%	-	-