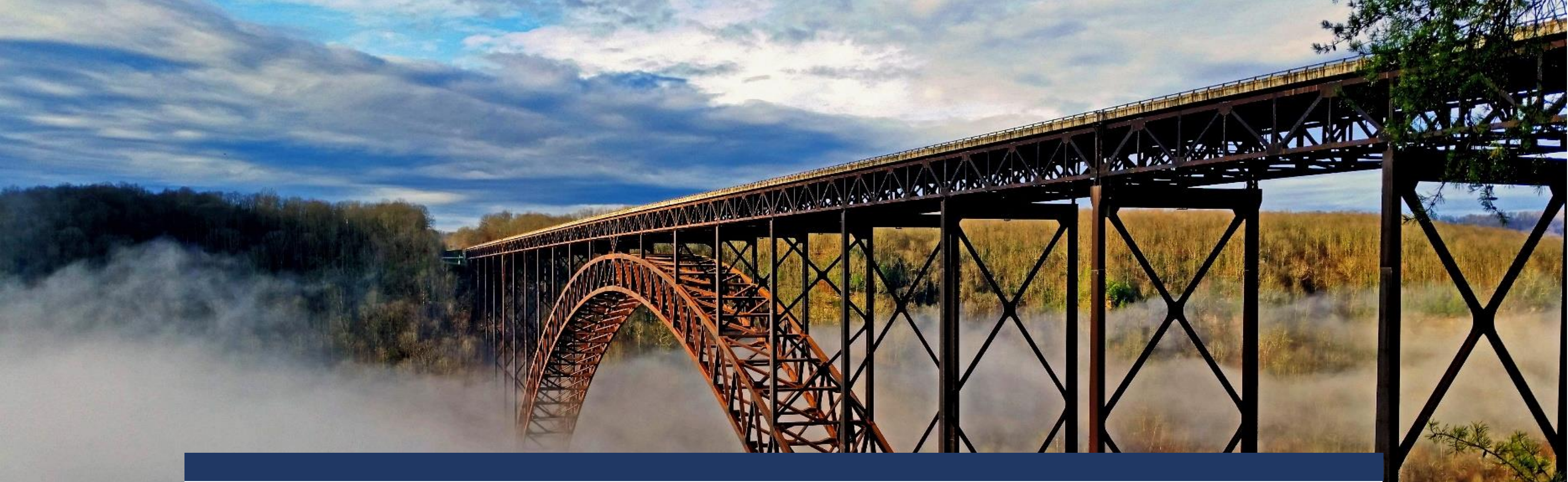

On the Road to Prosperity: Fostering Collaborative Transportation and Economic Development Planning

Virtual Peer Exchange #1: Using Economic Analysis to Support Transportation Planning

May 23, 2018 • 12:00-2:00 pm ET

12:00 pm **Welcome and Overview of the Peer Exchange Series**

- Carrie Kissel, Associate Director, NADO Research Foundation
- Megan McConville, Consultant, NADO Research Foundation

12:10 pm **Framing Remarks for Today's Peer Exchange: The Role of Economic Analysis in Transportation Planning**

To kick off the session, trainers from FHWA will discuss how economic analysis can strengthen the transportation planning process and ensure that infrastructure investments provide the maximum support for long-term economic prosperity.

- Scott Allen, Transportation Specialist, FHWA Office of Planning, Environment, and Realty
- Stefan Natzke, Team Leader for National Systems and Economic Development, FHWA

12:25 pm **Introductions and Breakout Discussions: What Does Your Economy Look Like?**

Participants will break into the small groups they will be working with throughout the afternoon to introduce themselves and share defining features of their regional or statewide economies.

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NATIONAL ASSOCIATION OF DEVELOPMENT ORGANIZATIONS
RESEARCH FOUNDATION

Photo Credit: Region VII Planning and Development Council (WV)

12:40 pm **Checking Our Assumptions: Using Data to Better Understand the Economy**

Using the regions and states of participants as examples, trainers will highlight publicly available data tools and demonstrate simple analyses that can help to uncover economic trends and opportunities, sharpen transportation planning and project selection, and measure the performance of investments.

- Stefan Natzke, Team Leader for National Systems and Economic Development, FHWA

1:00 pm **Case Study: How Economic Data Analysis Led to Better Transportation Service, Job Access, and Business Performance in North Central Idaho**

Participants will hear the story of how planners in rural Idaho used data tools to strengthen their understanding of regional employment and workforce characteristics, forge new relationships with businesses, and create new transportation options for commuters.

- Deb Smith, Regional Economic Development Planner and Mobility Manager, Clearwater Economic Development Association, Lewiston, ID

1:15 pm **Breakout Discussions: Charting a Path to Integrating Economic Analysis into Your Transportation Planning**

Participants will break into their small groups to brainstorm about specific ways they could infuse economic analysis into transportation planning, project selection, and performance measurement.

1:35 pm **Taking Advantage of Existing Resources: CEDS Spotlight**

An economic development planner will share the analysis completed as part of their regional Comprehensive Economic Development Strategy (CEDS). Following the presentation, participants will discuss how similar analyses could support transportation planning efforts.

- Meilani Schijvens, Economic Development Director, Southeast Conference, Juneau, AK

1:50 pm **Final Questions, Wrap-Up, and Preview of Virtual Peer Exchange #2**

- Carrie Kissel, Associate Director, NADO Research Foundation
- Megan McConville, Consultant, NADO Research Foundation

2:00 pm **Training Concludes**

Virtual Peer Exchange #1: Using Economic Analysis to Support Transportation Planning

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RESEARCH FOUNDATION

A PROGRAM AFFILIATE OF NADO
RPOAMERICA
SERVING AMERICA'S RURAL TRANSPORTATION PLANNING PROFESSIONALS

ON THE ROAD TO PROSPERITY

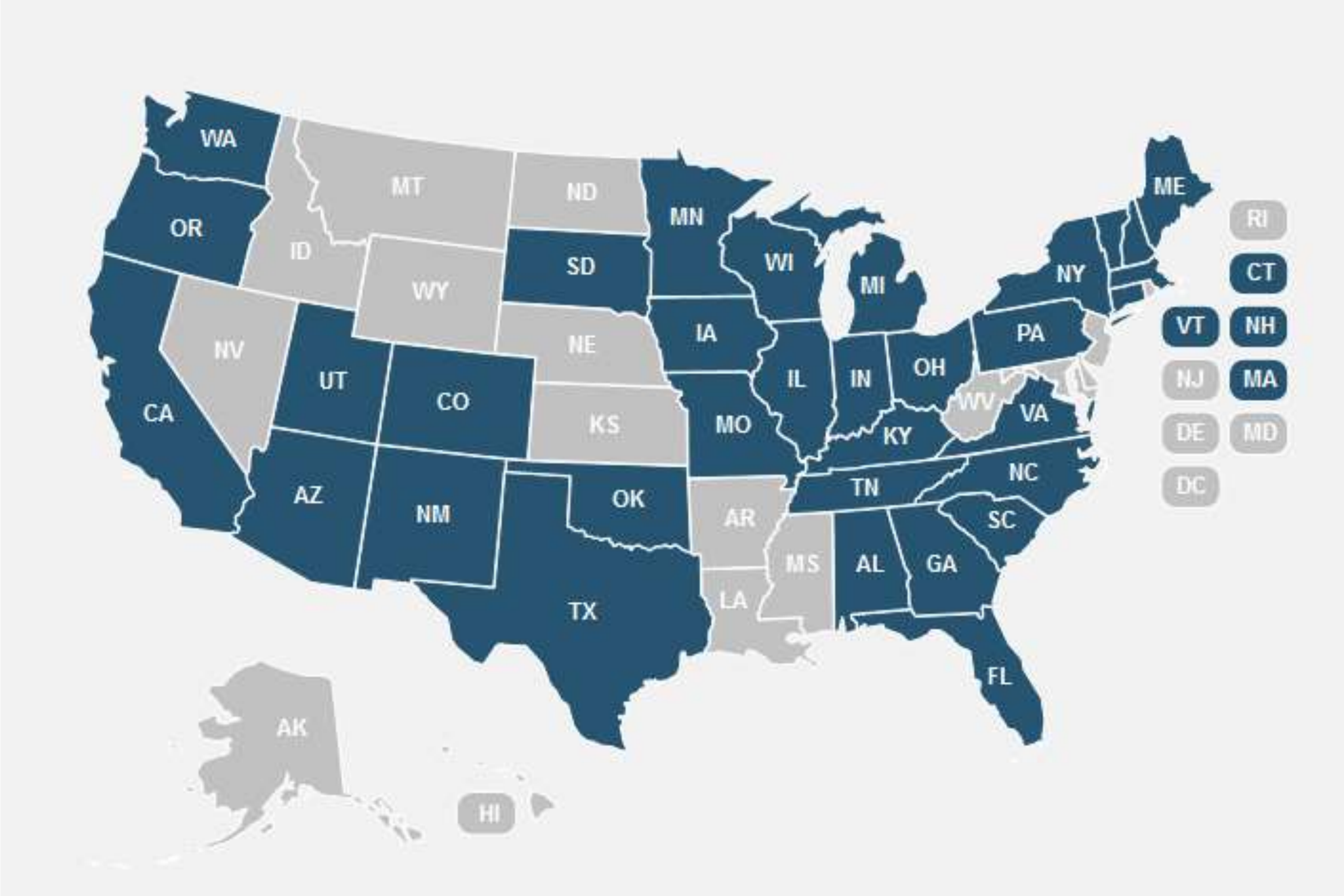
About NADO

- National association for 540 regional development organizations, including emerging network of Rural Transportation Planning Organizations (RTPOs or RPOs)
- Promote public policies that strengthen local governments, communities and economies through the regional strategies, coordination efforts and program expertise of the nation’s regional development organizations

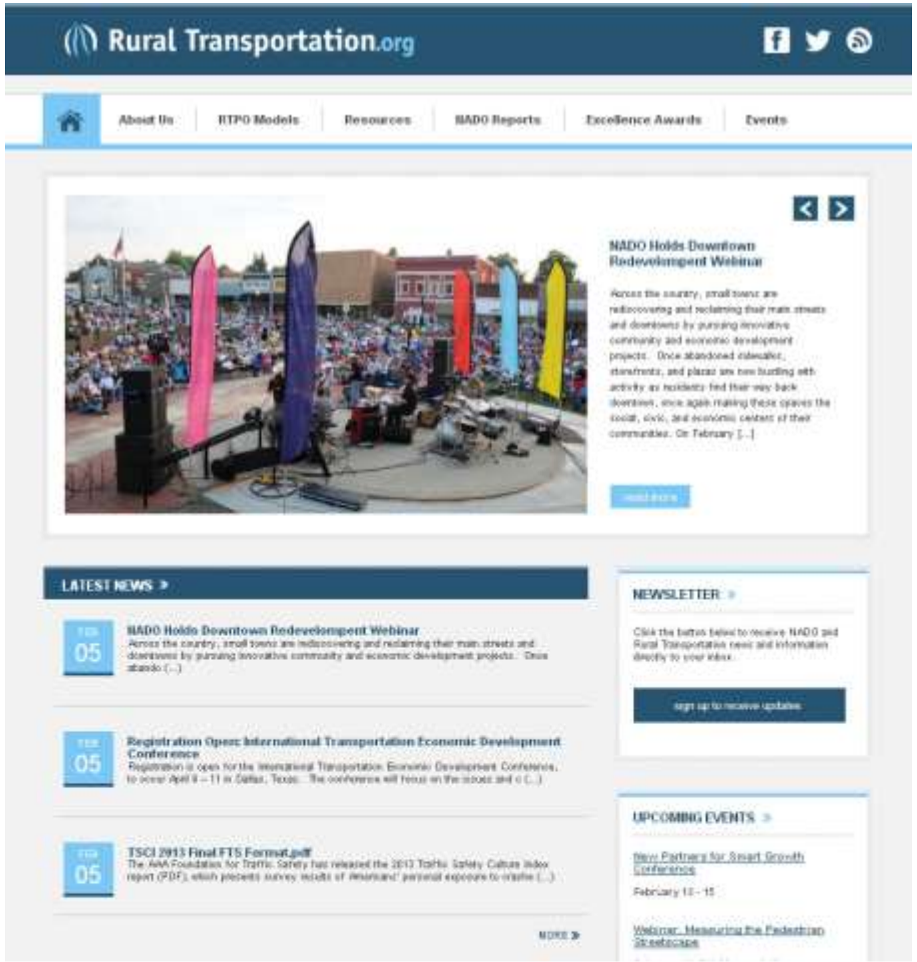
About NADO

- Through the NADO Research Foundation, develop training and resources related to:
  - Rural/small metro transportation planning, RPO America
  - Small business finance
  - Economic development planning
  - Regional resiliency
  - Developing quality of place

Regional Transportation Planning Models

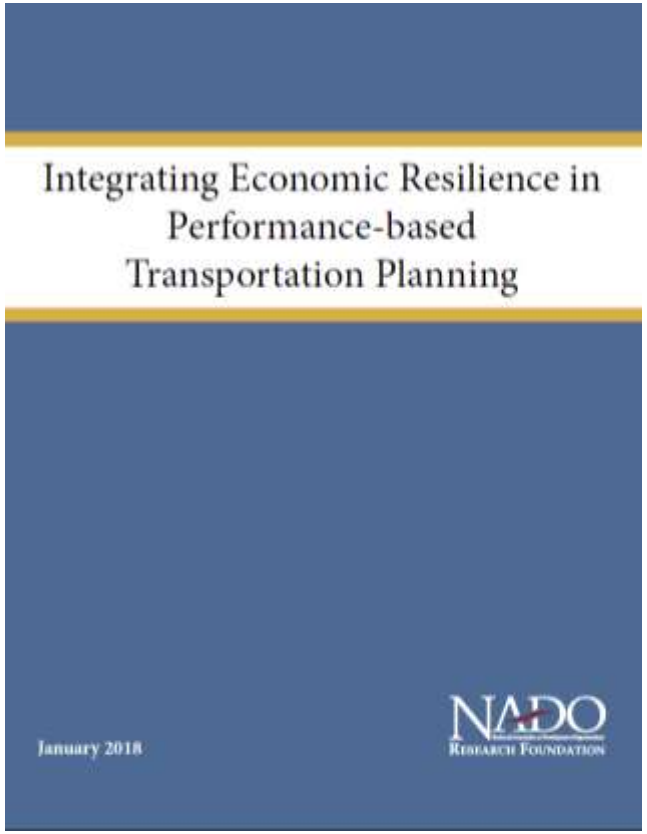


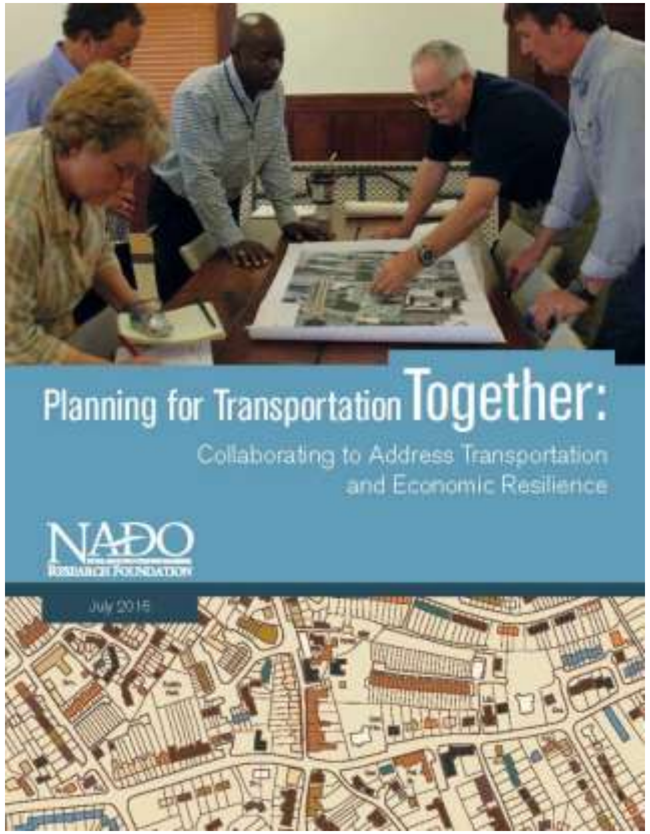
Resources for Regional Planning

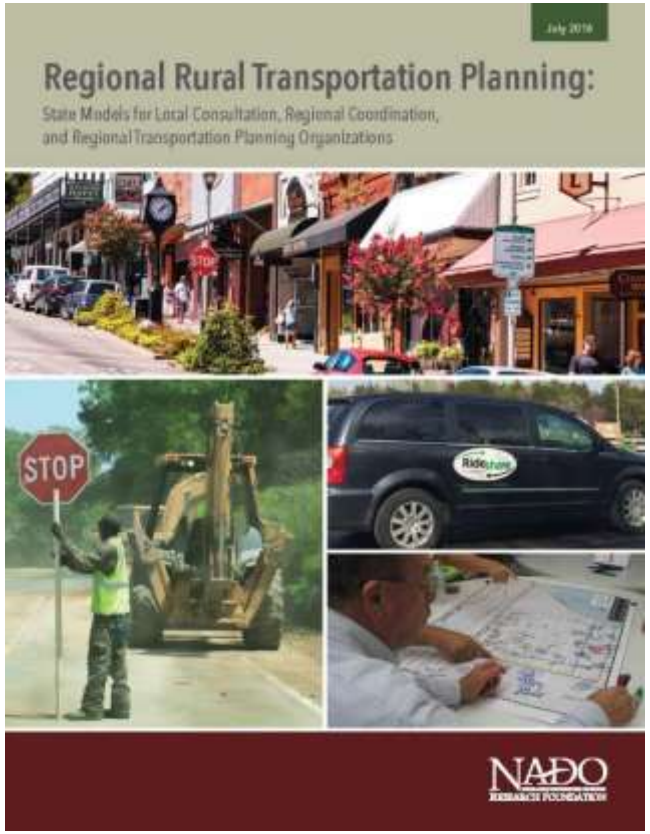


ON THE ROAD TO PROSPERITY

Resources for Regional Planning







Welcome!

ON THE ROAD TO PROSPERITY

Learning Objectives for Today

1. To get you thinking about your regional/statewide economy today and in the future and how the transportation system could better support strategic economic development;
2. To build your capacity to use publicly available data sources and evaluation tools to deepen your understanding of your economy; and
3. To walk away with one concrete next step that you will take to incorporate economic development data, analysis, or information into your transportation planning.

What is different about this virtual peer exchange?

- Absolutely no bad ideas
- Collective knowledge

Housekeeping and Technology

- Connect via computer & Chrome if possible
- Use the Audio PIN provided
- Mute when not talking
- Use a headset with your computer
- Chat away! Or raise your hand to speak
- Materials available through GoToTraining
- Breakouts: connecting & webcams
- Evaluations at the end
- Recording for NADO’s internal use
- Problems during the session: call GoToTraining Technical Support, (877) 582-7011

Introducing Today's Presenters

Scott Allen, Transportation Specialist, FHWA Office of Planning, Environment, and Realty

Stefan Natzke, Team Leader for National Systems and Economic Development, FHWA

Deb Smith, Regional Economic Development Planner and Mobility Manager, Clearwater Economic Development Association, Lewiston, ID

Meilani Schijvens, Economic Development Director, Southeast Conference, Juneau, AK

U.S. Department of Transportation
Federal Highway Administration

On the Road to Prosperity: Fostering Collaborative Transportation and Economic Development Planning

Virtual Peer Exchange #1: Using Economic Analysis to Support Transportation Planning
May 23, 2018

Framing Remarks for Today's Peer Exchange

- **Guiding Principles of Today's Activities**
- **Economic Development in Transportation – Renewed Focus**
- **Economic Development in the Transportation Planning Process Overview**
- **Strengthening Transportation Planning Process through Economic Analysis and Evaluation Overview**

Framing Remarks for Today's Peer Exchange

- **Be open, be frank, be honest**
- **Don't worry about taking notes, stay engaged**
- **All questions are welcomed**

Framing Remarks for Today's Peer Exchange

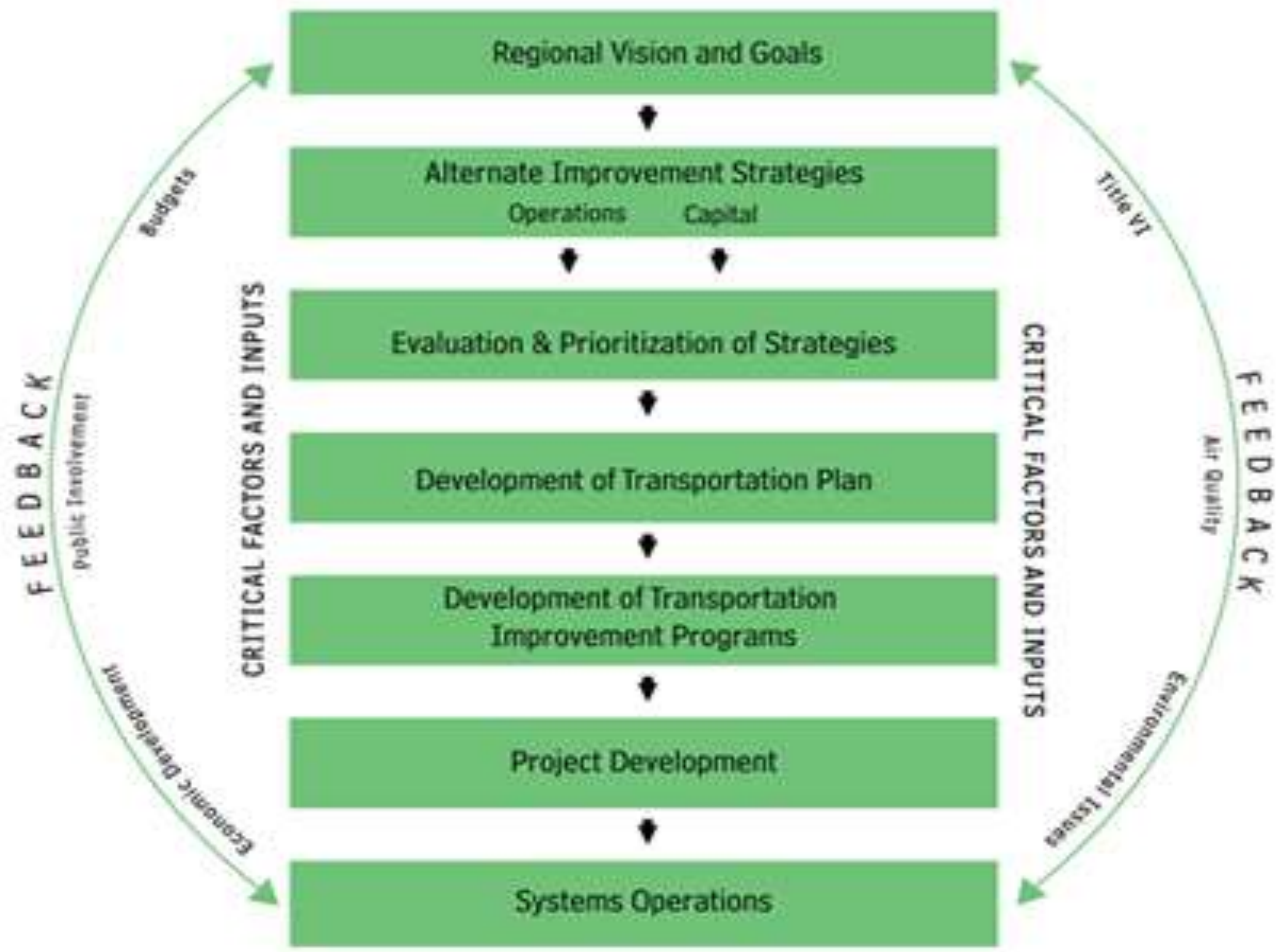
RENEWED FOCUS

- **New Planning Factor** - *Enhance Travel and Tourism*
  23 CFR 450.206(a)10 (Statewide and nonmetropolitan)
  23 CFR 450.306(b)10 (Metropolitan)

- **New Discretionary Grants**
  - **Infrastructure for Rebuilding America (INFRA)**
    - Replaced FASTLANE
    - Projects need to align with national and regional economic vitality goals and leverage non-federal revenue.
  - **Better Utilizing Investments to Leverage Development (BUILD)**
    - NOFO released in Late May 2018
    - Replaces TIGER
    - Increased focus on leveraging non-federal revenue, partnerships, and innovation

Framing Remarks for Today's Peer Exchange

Transportation Planning Process



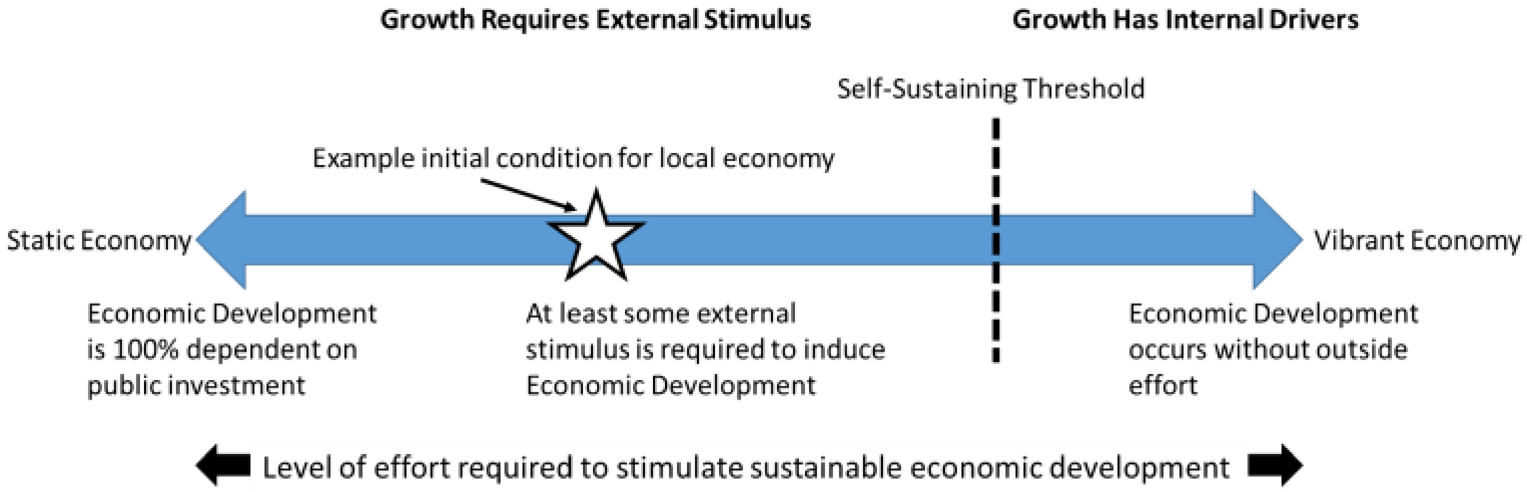
Economic Development

- “Transportation should play a significant role in promoting economic growth, Improving the environment, and sustaining quality of life.” - 23 USC 101
- Policies and actions that promote economic goals within a specific region
- Locally determined

Sources of Economic Gains to a Region

- Exports
- Investment in human and physical capital
- Outside private investment
- Transfers

Sustainable Economies



Comparative Advantage

- Regions can successfully compete as long as they have a specialization
- Assess which local attributes can be leveraged to attract investment and migration

Economic Development Planning

- Improve the likelihood of growth in income and activity
- Depends on local conditions and needs
- Enhance region’s comparative advantage
- Build on local strengths and unique attributes

Breakout 1 Instructions

Breakout Discussion 1, Group 1 Guide and Notes

Breakout Goals:

1) To get participants thinking about the defining features of their regional or statewide economies
2) To help participants identify what they know and what they don't know about their regional/statewide economies
3) To share ideas about helpful sources of economic development data and information

Start by introducing yourselves. (No notes needed here unless you want to take them!)

Discussion Topic 1: What is the defining feature of your regional or statewide economy? You could do this as a round robin, where each person takes a turn sharing their response, or a more free flowing discussion. Responses could relate to industry sectors, workforce, goods movement, unique competitive advantages, transitions or changes underway, or anything else you find relevant. Don't forget to draw on the K-W-L exercise you completed!

Discussion Topic 2: What economic development plans, studies, data, or other resources are available in your state or region that you could draw from to support your work?

- When breakouts launch, you will move automatically to your group, unless you're on the phone
- Phone users may need to call back in (with Audio PIN) or have GoToTraining call you
- You will have audio and use of a Google Doc for jotting down key points
- Use webcams if you'd like
- 15 minutes, timer will start at T-5
- Don't forget to introduce yourselves!

Using Data to Better Understand the Economy

Methods for Assessing Comparative Advantage

- Basic Statistics
  - Cross section
  - Trend analysis
- Location Quotients
- Shift-share analysis
- Cluster Analysis

Location Quotients

$$LQ_i = \frac{e_i / e_T}{N_i / N_T}$$

where LQ_i = location quotient for industry i,
e_i = local employment in industry i,
e_T = total local employment,
N_i = national employment in i, and N_T = total national employment

Quarterly Census of Employment and Wages

Private, High-Level Industries, Ohio
2016 Annual Averages, All establishment sizes
Source: Quarterly Census of Employment and Wages - Bureau of Labor Statistics

Table Filter: (Filter Value) Apply Clear
Page 1 of 1
Download Source Data Build Another Table
Display 75 rows per page

High-Level Industry	Annual Establishments	Annual Average Employment	Total Annual Wages	Annual Average Weekly Wage	Annual Wages per Employee	Annual Average Employment Location Quotient	Total Annual Wages Location Quotient
10 Total, all industries	278,659	4,606,685	$217,045,827,090	$906	$47,115	1.02	1.01
102 Service-providing	237,876	3,688,261	163,751,770,539	854	44,398	0.99	0.95
101 Goods-producing	40,783	918,424	53,294,056,551	1,116	58,028	1.17	1.23
1011 Natural resources and mining	2,512	27,463	1,294,308,065	906	47,129	0.39	0.37
1012 Construction	22,785	205,878	11,741,096,946	1,097	57,029	0.82	0.90
1013 Manufacturing	15,487	685,083	40,258,651,540	1,130	58,765	1.49	1.51
1021 Trade, transportation, and utilities	68,210	1,014,336	41,869,091,896	794	41,277	1.00	1.04
1022 Information	4,295	71,733	4,744,577,537	1,272	66,142	0.68	0.52
1023 Financial activities	28,151	282,441	18,937,196,500	1,289	67,048	0.95	0.80
1024 Professional and business services	51,699	723,036	44,019,318,340	1,171	60,881	0.96	0.94
1025 Education and health services	33,522	888,949	39,270,241,878	850	44,176	1.09	1.13
1026 Leisure and hospitality	27,744	551,277	10,062,431,063	351	18,253	0.95	0.86
1027 Other services	23,512	155,715	4,813,162,894	594	30,910	0.95	0.92
1029 Unclassified	745	773	35,750,431	889	46,249	0.08	0.08

Page 1 of 1

NAICS Sub-Sector	Annual Establishments	Annual Average Employment	Total Annual Wages	Annual Average Weekly Wage	Annual Wages per Employee	Annual Average Employment Location Quotient	Total Annual Wages Location Quotient
NAICS 311 Food manufacturing	1,045	59,818	2,988,952,434	961	49,967	1.03	1.26
NAICS 312 Beverage and tobacco product manufacturing	222	8,419	415,208,673	948	49,316	0.91	0.96
NAICS 313 Textile mills	53	1,788	105,851,945	1,138	59,199	0.42	0.63
NAICS 314 Textile product mills	221	2,517	93,521,045	714	37,151	0.58	0.61
NAICS 315 Apparel manufacturing	82	1,698	60,518,721	686	35,648	0.35	0.35
NAICS 316 Leather and allied product manufacturing	40	1,024	36,103,827	678	35,266	0.93	0.86
NAICS 321 Wood product manufacturing	607	12,988	514,018,453	761	39,577	0.89	0.93
NAICS 322 Paper manufacturing	340	19,842	1,163,574,300	1,128	58,642	1.43	1.44
NAICS 323 Printing and related support activities	1,195	21,595	976,066,078	869	45,198	1.29	1.37
NAICS 324 Petroleum and coal products manufacturing	118	5,046	489,240,958	1,865	96,956	1.21	1.18
NAICS 325 Chemical manufacturing	790	44,257	3,754,512,832	1,631	84,834	1.46	1.48
NAICS 326 Plastics and rubber products manufacturing	865	56,745	2,760,118,132	935	48,641	2.16	2.29
NAICS 327 Nonmetallic mineral product manufacturing	670	27,155	1,524,980,316	1,080	56,159	1.79	2.02
NAICS 331 Primary metal manufacturing	458	36,811	2,413,328,451	1,261	65,560	2.63	2.99
NAICS 332 Fabricated metal product manufacturing	3,613	98,443	5,254,555,995	1,026	53,377	1.86	2.04
NAICS 333 Machinery manufacturing	1,861	76,911	4,703,649,393	1,176	61,157	1.92	1.95
NAICS 334 Computer and electronic product manufacturing	521	20,410	1,352,100,314	1,274	66,246	0.52	0.34
NAICS 335 Electrical equipment and appliance mfg.	355	27,405	1,594,283,515	1,119	58,175	1.92	1.93
NAICS 336 Transportation equipment manufacturing	783	125,324	8,396,666,252	1,288	67,000	2.06	2.15
NAICS 337 Furniture and related product manufacturing	708	15,545	673,101,949	833	43,301	1.07	1.20
NAICS 339 Miscellaneous manufacturing	944	21,341	988,297,957	891	46,310	0.97	0.81

Location Quotient Interpretation

	Low Employment Growth	High Employment Growth
High Location Quotient	Important industries that may require attention if in danger of leaving or need to be supplemented to maintain diversity.	Currently important growth industries that might be able to expand locally under favorable conditions
Low Location Quotient	Industries that might fill in the local economy if they are local service oriented	Potential emerging industries if demand for the sector is growing and the local area has a comparative advantage for producing the product

Source: Introduction to Economic Development. Pittsburgh, PA: Carnegie Mellon University Center for Economic Development.

Shift-Share Analysis

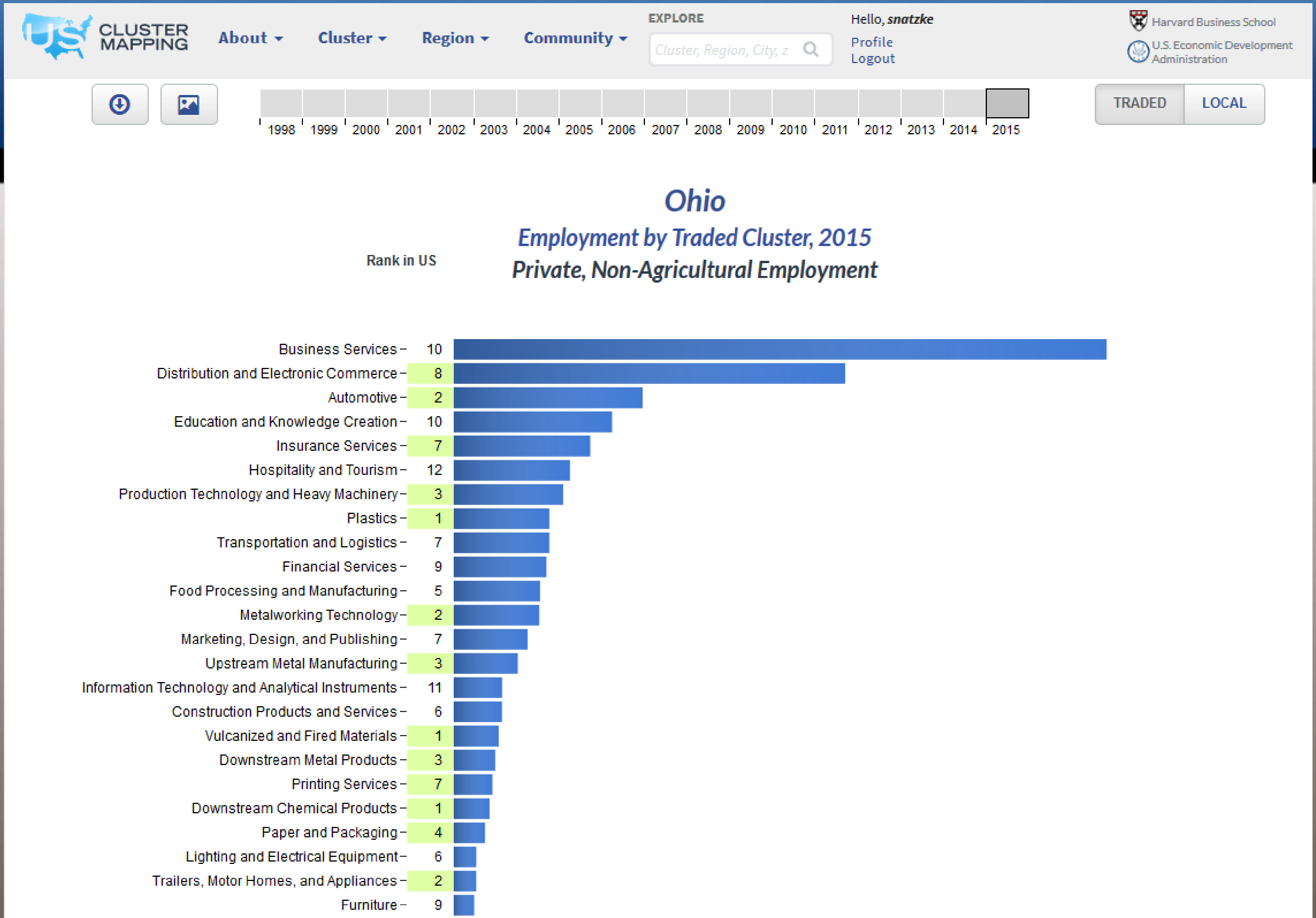
- How much of regional job growth can be attributed to
  - National growth effect
  - Industry effects
  - Regional effects

Shift-Share Analysis Example

Santa Clara County, CA Employment					
Industry	2013	2016	National Effect	Industry Effect	Regional Effect
Construction of Buildings	7,723	9,738	516	736	763
Computer and Electronic Product Manufacturing	105,987	111,122	7,081	-8,760	6,815
Insurance Carriers and Related Activities	4,044	4,209	270	11	-116

http://www.clustermapping.us/

U.S. Department of Transportation
Federal Highway Administration



CLUSTER MAPPING
About
Cluster
Region
Community
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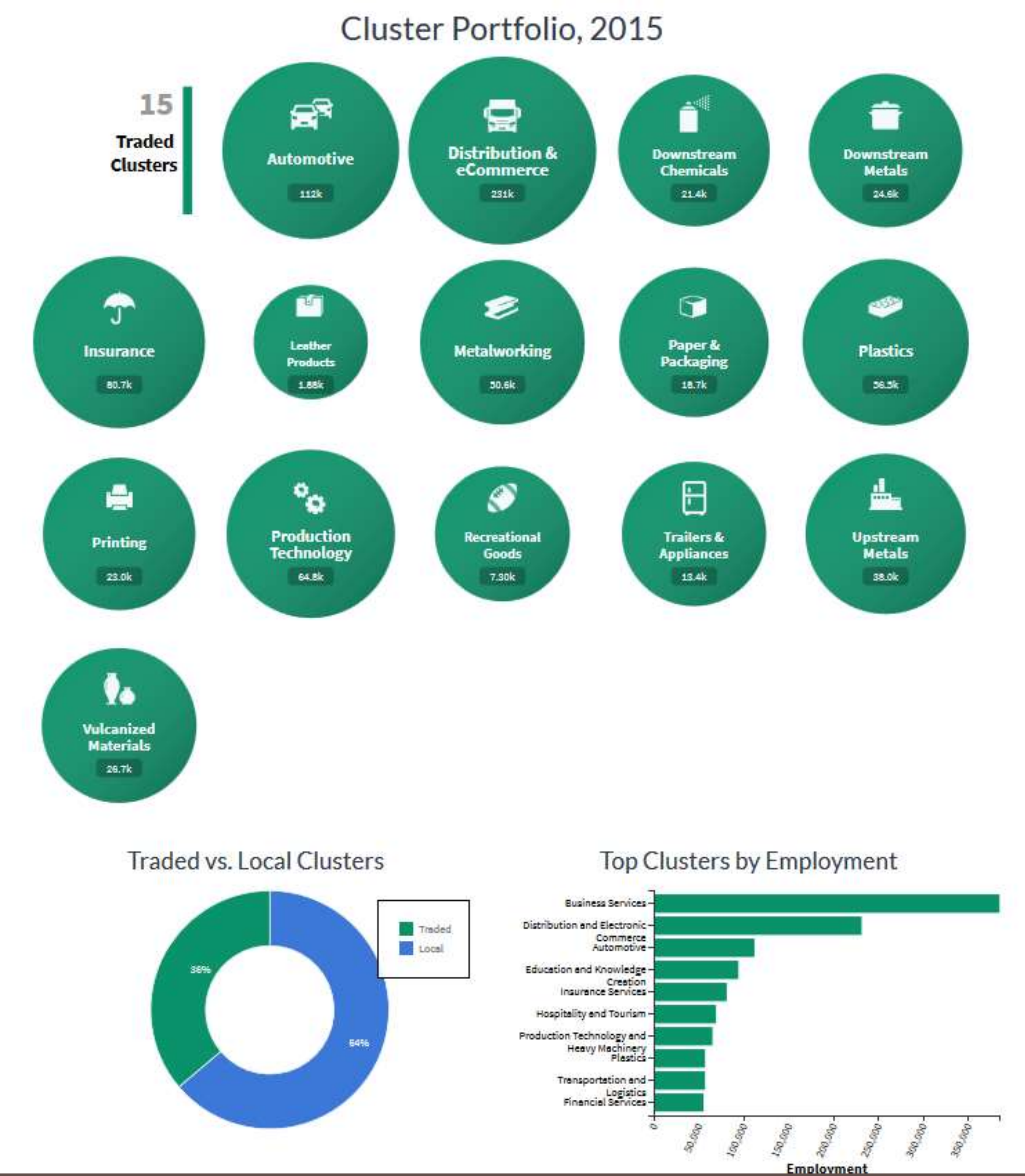
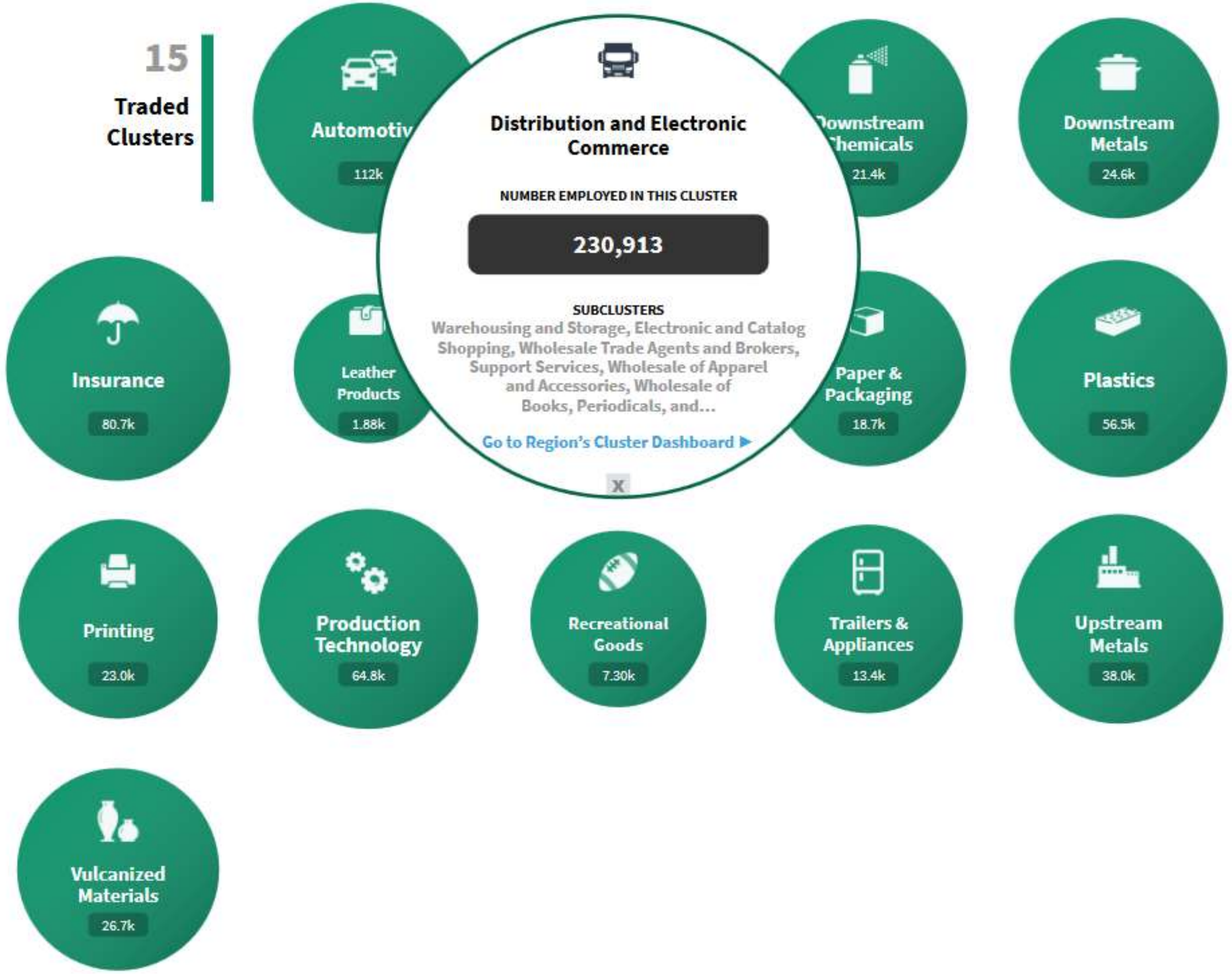
U.S. Economic Development Administration
1998 1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015
TRADED
LOCAL
Ohio
Employment by Traded Cluster, 2015
Private, Non-Agricultural Employment
Rank in US
Business Services 10
Distribution and Electronic Commerce 8
Automotive 2
Education and Knowledge Creation 10
Insurance Services 7
Hospitality and Tourism 12
Production Technology and Heavy Machinery 3
Plastics 1
Transportation and Logistics 7
Financial Services 9
Food Processing and Manufacturing 5
Metalworking Technology 2
Marketing, Design, and Publishing 7
Upstream Metal Manufacturing 3
Information Technology and Analytical Instruments 11
Construction Products and Services 6
Vulcanized and Fired Materials 1
Downstream Metal Products 3
Printing Services 7
Downstream Chemical Products 1
Paper and Packaging 4
Lighting and Electrical Equipment 6
Trailers, Motor Homes, and Appliances 2
Furniture 9


Cluster Portfolio, 2015
15
Traded Clusters
Automotive
112k
Distribution & eCommerce
231k
Downstream Chemicals
21.4k
Downstream Metals
24.6k
Insurance
80.7k
Leather Products
1.88k
Metalworking
50.6k
Paper & Packaging
18.7k
Plastics
56.5k
Printing
23.0k
Production Technology
64.8k
Recreational Goods
7.30k
Trailers & Appliances
13.4k
Upstream Metals
38.0k
Vulcanized Materials
26.7k
Traded vs. Local Clusters
Traded
Local
36%
64%
Top Clusters by Employment
Business Services
Distribution and Electronic Commerce
Automotive
Education and Knowledge Creation
Insurance Services
Hospitality and Tourism
Production Technology and Heavy Machinery
Plastics
Transportation and Logistics
Financial Services
0
50,000
100,000
150,000
200,000
250,000
300,000
350,000
Employment

Cluster Portfolio, 2015



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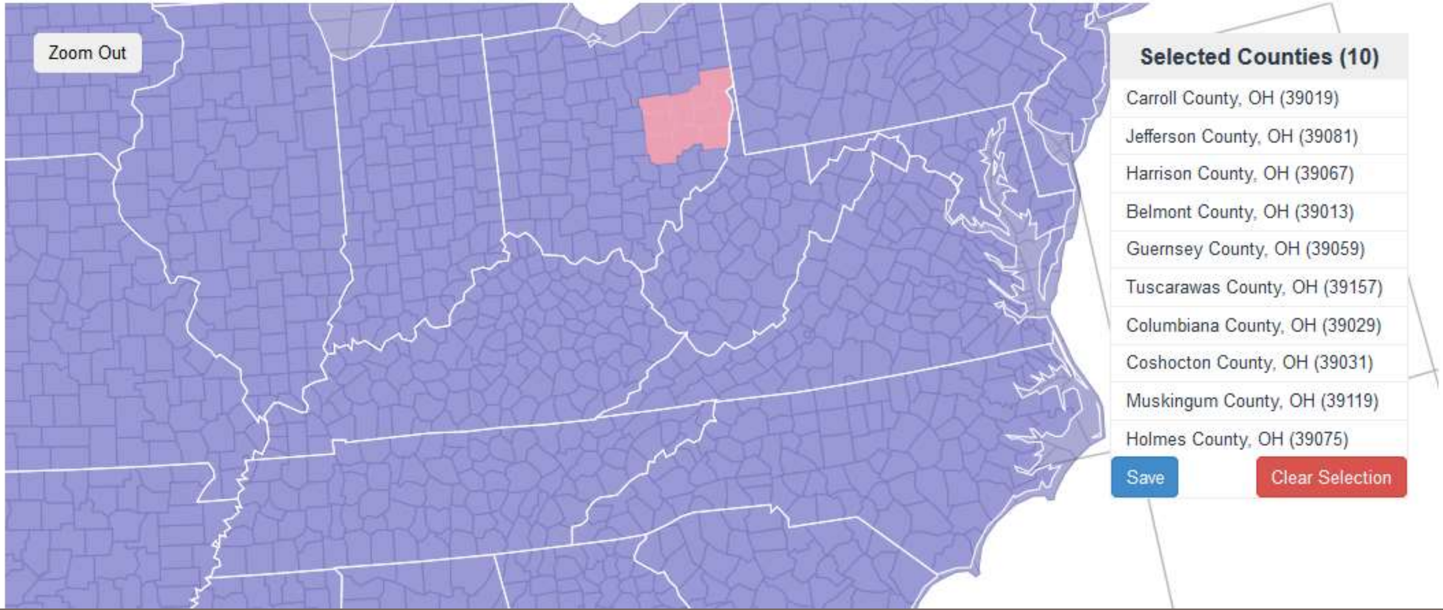
Build and explore a custom region

Use this tool to explore data on a region that you can build out of any U.S. counties. Start by selecting a set of counties. Click on a county twice to remove it from your selection. Once you save your selection, a loading bar will appear. After some time (depending on how many counties you selected), a link to your custom region will appear on your user profile page. This custom region dashboard will not be made publicly available but will be saved in your user profile and have a permanent link which you can refer back to and share with others.

Note: Beginning in the 2012 U.S. Census County Business Patterns (CBP) data there was a reconfiguration of a few county-level regions in Alaska.

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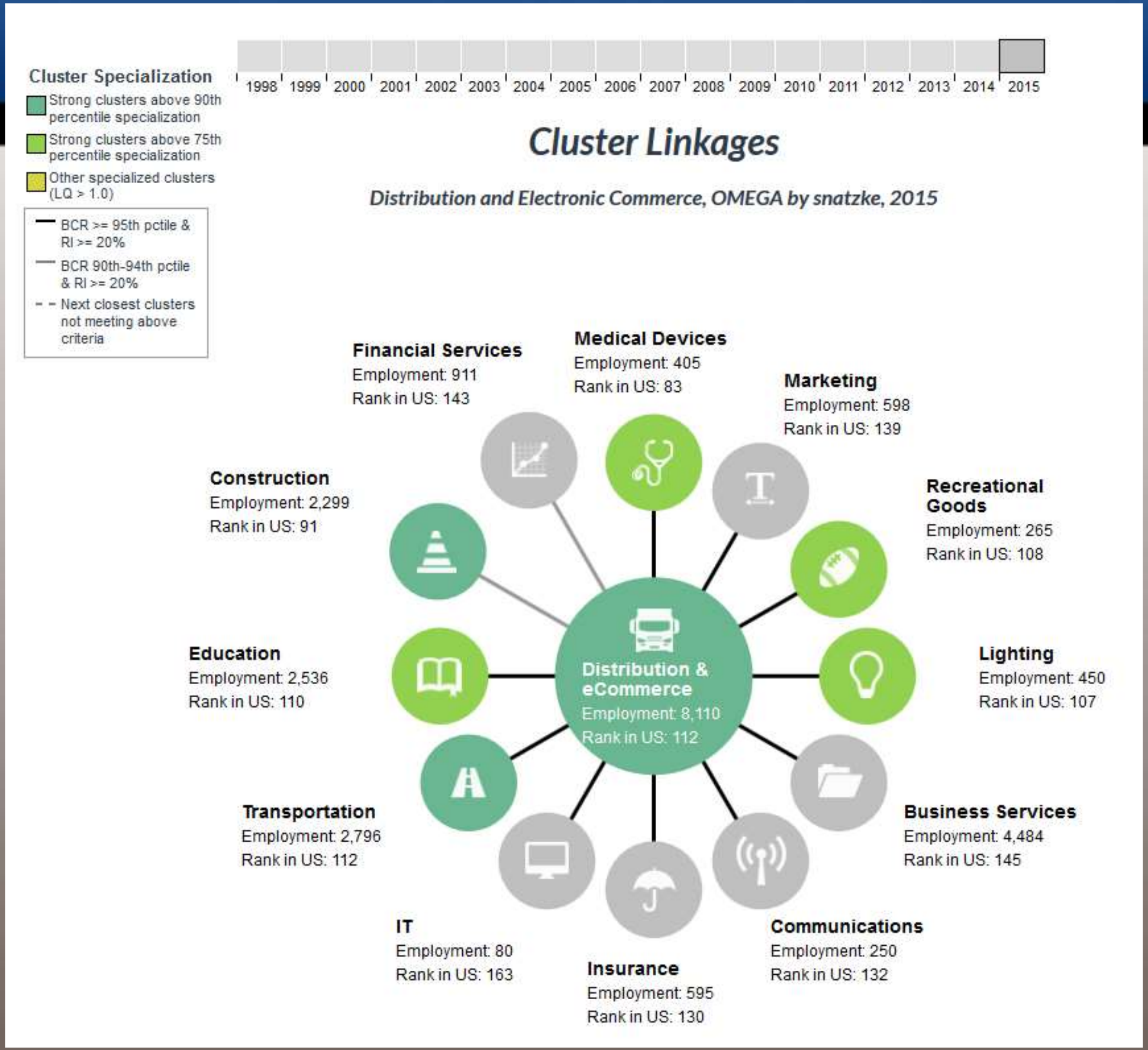
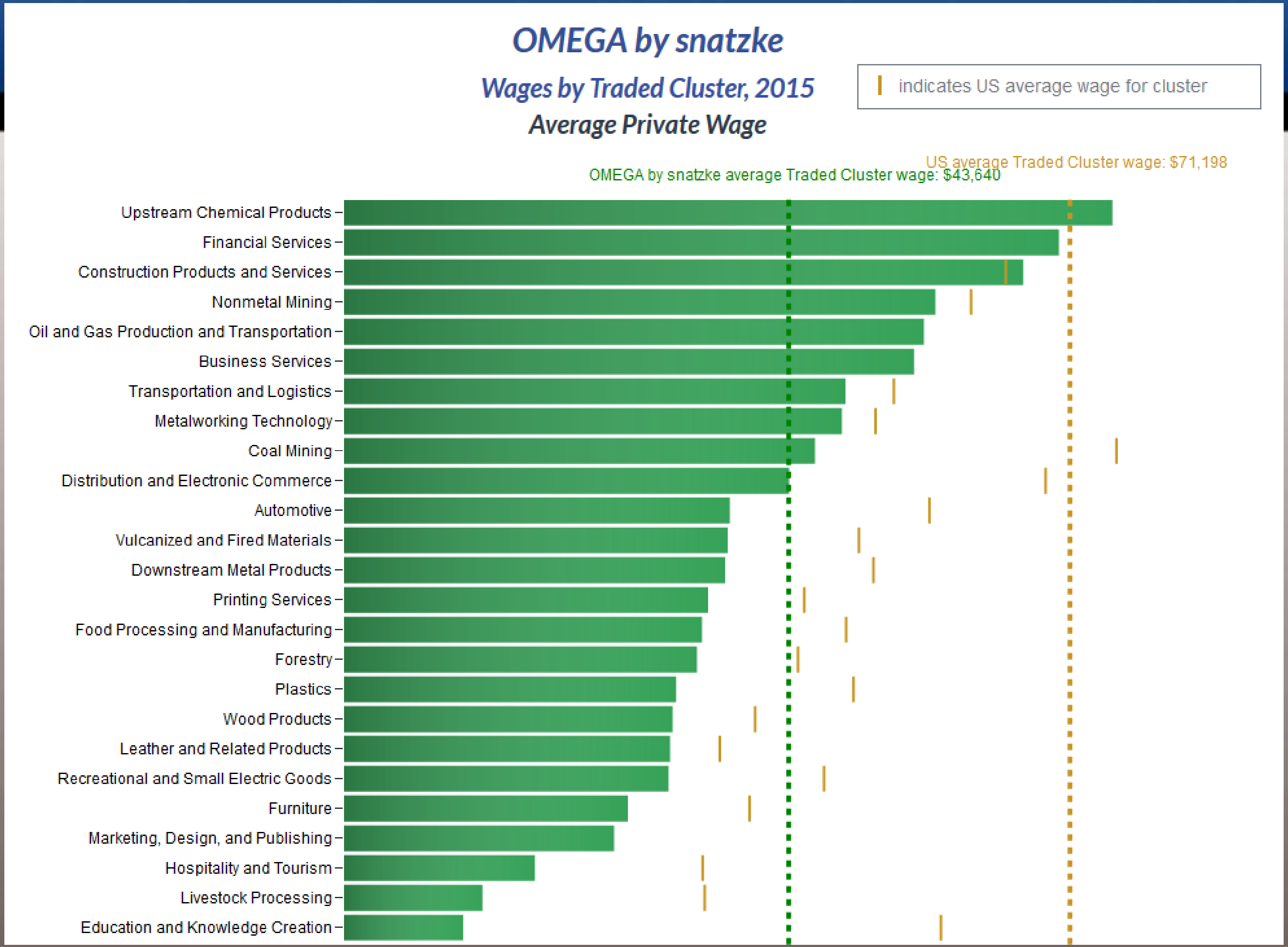
Private, Non-Agricultural Employment
Rank in US
Distribution and Electronic Commerce 112
Business Services 145
Vulcanized and Fired Materials 25
Upstream Metal Manufacturing 39
Oil and Gas Production and Transportation 38
Plastics 70
Metalworking Technology 46
Wood Products 48
Production Technology and Heavy Machinery 93
Transportation and Logistics 112
Food Processing and Manufacturing 111
Education and Knowledge Creation 110
Hospitality and Tourism 156
Downstream Metal Products 60
Construction Products and Services 91
Coal Mining 12
Automotive 78
Livestock Processing 82
Furniture 63
Electric Power Generation and Transmission 46
Paper and Packaging 91
Financial Services 143
Printing Services 93
Nonmetal Mining 55
Downstream Chemical Products 72

Cluster Portfolio, 2015



Cluster Specialization
Strong clusters above 90th percentile specialization
Strong clusters above 75th percentile specialization
Other specialized clusters (LQ > 1.0)
BCR >= 95th pctile & RI >= 20%
BCR 90th-94th pctile & RI >= 20%
Next closest clusters not meeting above criteria
1998 1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015
Cluster Linkages
Distribution and Electronic Commerce, OMEGA by snatzke, 2015
Financial Services
Employment: 911
Rank in US: 143
Medical Devices
Employment: 405
Rank in US: 83
Marketing
Employment: 598
Rank in US: 139
Recreational Goods
Employment: 265
Rank in US: 108
Construction
Employment: 2,299
Rank in US: 91
Education
Employment: 2,536
Rank in US: 110
Distribution & eCommerce
Employment: 8,110
Rank in US: 112
Lighting
Employment: 450
Rank in US: 107
Transportation
Employment: 2,796
Rank in US: 112
Business Services
Employment: 4,484
Rank in US: 145
IT
Employment: 80
Rank in US: 163
Insurance
Employment: 595
Rank in US: 130
Communications
Employment: 250
Rank in US: 132



OMEGA by snatzke
Wages by Traded Cluster, 2015
Average Private Wage
indicates US average wage for cluster
US average Traded Cluster wage: $71,198
OMEGA by snatzke average Traded Cluster wage: $43,640
Upstream Chemical Products
Financial Services
Construction Products and Services
Nonmetal Mining
Oil and Gas Production and Transportation
Business Services
Transportation and Logistics
Metalworking Technology
Coal Mining
Distribution and Electronic Commerce
Automotive
Vulcanized and Fired Materials
Downstream Metal Products
Printing Services
Food Processing and Manufacturing
Forestry
Plastics
Wood Products
Leather and Related Products
Recreational and Small Electric Goods
Furniture
Marketing, Design, and Publishing
Hospitality and Tourism
Livestock Processing
Education and Knowledge Creation

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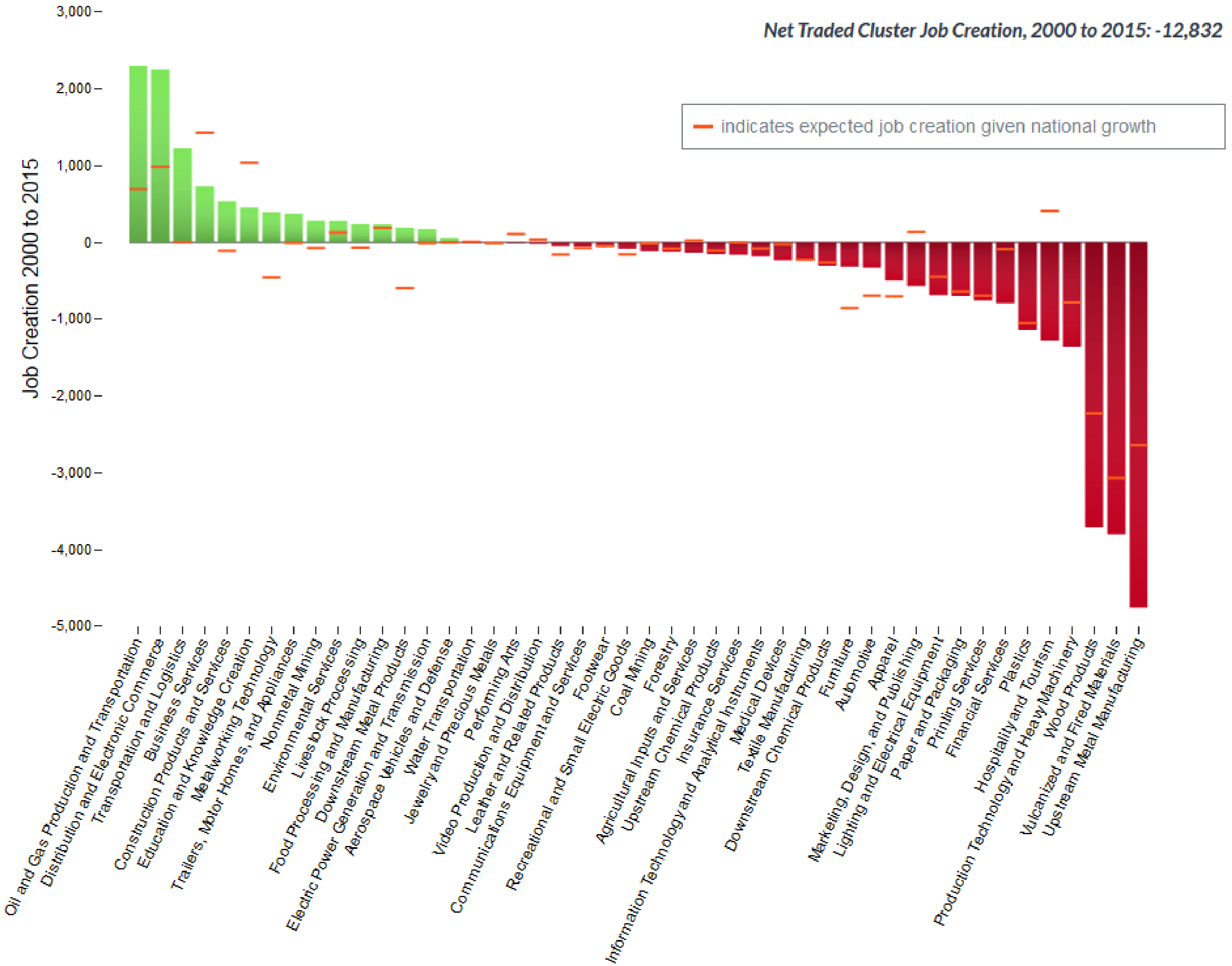
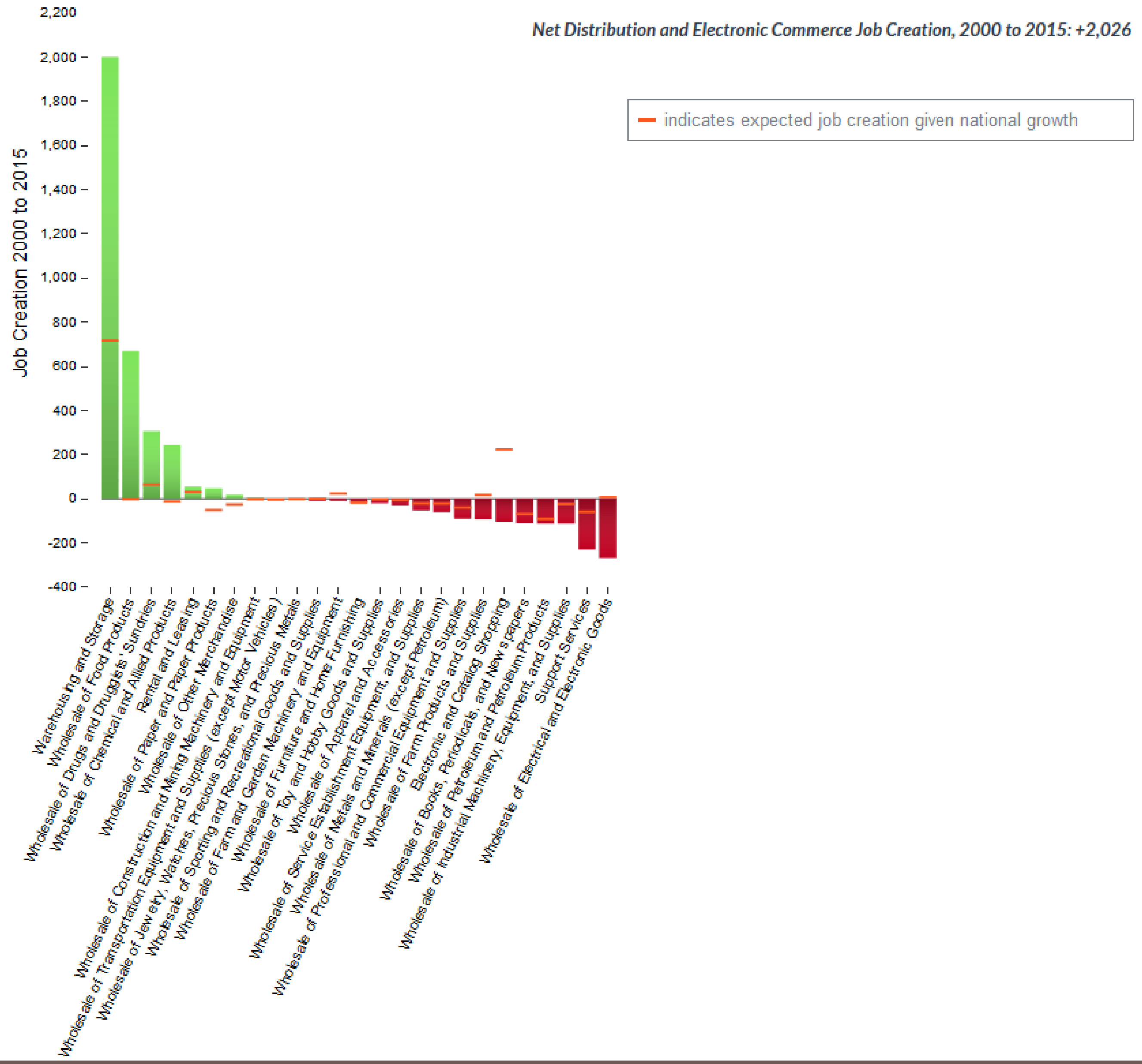
Job Creation by Traded Cluster, 2000-2015

Private Employment, Absolute Job Gains



Distribution and Electronic Commerce Cluster

Job Creation by Subcluster, 2000-2015



Common Economic Analysis Tools

- Benefit-Cost Analysis
  - Wider Economic Benefits (WEB)
- Cost-effectiveness
- Economic Impact Analysis
- EconWorks

EconWorks

- Continuation of SHRP2 C03 and C11 projects
- Now housed at AASHTO: https://planningtools.transportation.org/13/econworks.html
- Searchable database of 132 projects
- Estimates of likely economic development outcomes
- Tools for estimating WEB
  - Reliability
  - Accessibility
  - Intermodal connectivity
- Online economic analysis tutorials

EconWorks
Improved Economic Insight

Tools | Case Studies | FAQ | Resources | Home

Assess My Project

Characteristics

Project Type

- ( ) Access Road
- ( ) Limited Access Road
- ( ) Bypass
- ( ) Connector
- ( ) Beltway
- ( ) Bridge
- (•) Interchange
- ( ) Widening
- ( ) Freight Terminal
- ( ) Station
- ( ) Service Improvement
- ( ) Line Extension
- ( ) New Line

Region

- ( ) New England/Mid-Atlantic
- ( ) International
- (•) Great Lakes / Plains
- ( ) Southwest
- ( ) Southeast
- ( ) Rocky Mountain / Far West

Urban/Class Level

- ( ) Rural
- ( ) Mixed
- (•) Metro
- ( ) Core

Economic Distress

- ( ) Distressed
- (•) Non-Distressed

Length of Project

Required

5

Estimated Project Cost: $0 million
Estimated Average Annual Daily Traffic: 118,125

	Jobs	Wages (mil.)	Output (mil.)
Direct Impacts	2,147 - 3,578	$101 - $168	$320 - $533
Supplier and Wage Impacts	1,233 - 2,055	$58 - $97	$182 - $303
Total Impacts	3,380 - 5,633	$159 - $265	$501 - $835

Actions

Move the sliders to adjust for higher or lower levels of project cost, traffic and community factors applicable in your case. You will then see shifts in the likely range of economic impacts.

Project Cost: Below Average — Above Average

Average Annual Daily Traffic: Below Average — Above Average

Land Use Policies: Restrictive — Supportive

Infrastructure: Not Available — State-of-Art

Business Climate: Negative — Aggressive

If a case study closely matches your selected characteristics, it will display below:

Project	Type	BEA Region	Cost (Millions)	Length	AADT
Commerce Parkway Interchange The Commerce Parkway Interchange is one of three interchanges connecting Hays to Interstate 70 (I-70), which is Kansas's most important east-west travel route.	Interchange	Great Lakes / Plains	$4.73	0.00	1,701
Interchanges in Major Urban Areas - Bloomington, MN This case study focuses on the three interchanges in the city of Bloomington, Minnesota: I-494/US 169; I-494/SR 100; and I-494/STH 77.	Interchange	Great Lakes / Plains	$263.90	0.00	147,000
I-435 & Nall/Roe Ave. Interchange The Nall/Roe Avenue Interchange, built specifically to keep Sprint office	Interchange	Great Lakes / Plains	$68.38	0.00	80,278

U.S. Department of Transportation
Federal Highway Administration

Pre/Post Conditions:

NOTE: All pre/post dollar values are in 2013$

Select a region to display the conditions for that region:

STATE | COUNTY(IES) | LOCAL

Measure	Pre-Project	Post-Project	Change	% Change
Personal Income Per Capita	32,994	36,629	3,635	11.02%
Economic Distress	0.80	0.84	0.04	5.00%
Number of Jobs	1,560,610	1,752,410	191,800	12.29%
Business Sales (in $M's)	35,414	39,909	4,495	12.69%
Tax Revenue (in $M's)	3,610	4,325	715	19.81%
Population	2,580,510	2,678,340	97,830	3.79%
Property Value (median house value)	0	116,758	116,758	N/A
Density (ppl/sq mi)	32	33	1	3.80%

County Impacts for: Johnson

NOTE: All impact dollar values are in 2013$

Measure	Direct	Indirect	Total
Jobs	14000.00	9520.00	23520.00
Income (in $M's)	766.67	521.34	1288.01
Output (in $M's)	2323.33	1579.86	3903.19

Case Location:

Deb Smith
Regional Economic Planner

Clearwater Economic Development Association

Few Transportation Options

Idaho covers 82,747 square miles and has 1.65 million residents.

District 2 encompasses five counties, is 13,500 square miles, has 105,000 residents of which 21% are over the age of 60 and there is an average poverty rate of 14%.

Geographic challenges include rapidly changing elevation, winding roads and narrow bridges.

Employment centers are located in the far west center of the district.

Important Tools

- LED on the MAP
- Idaho Department of Labor
- American Community Survey
- CEDS

- Why LED?
- Information is not only available for counties, metropolitan areas, and WIA regions but also for smaller areas (Census divisions and tracts, zip code areas) and non-county areas (tribal lands, military bases, school districts, legislative and Congressional districts).
-
- Can search radiuses of as many miles as desired (i.e. 2-mile, 4-mile, 6-mile radius of a city).

Learn about your local workforce On the Map

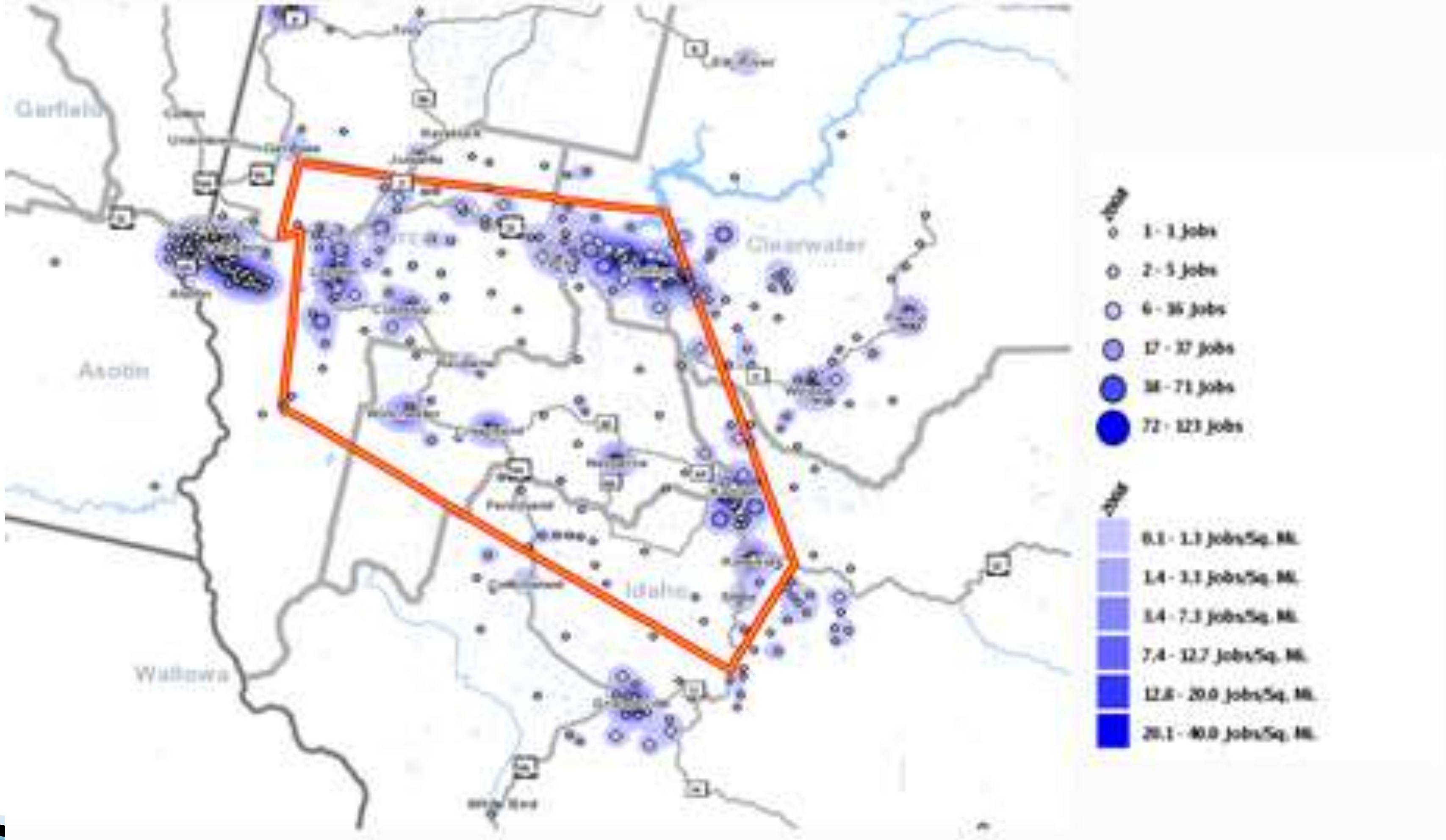
An Interactive Mapping Tool
http://lehdmap3.did.census.gov/themap3/

•Where workers live
•Where residents work
•How far they commute
•Where businesses are located
•What are the workplace destinations of people living in a particular neighborhood
•Where do young residents work
•What are the ages and earnings of commuters
•How many high-wage workers live along a transit corridor and work downtown
•Where are new businesses likely to draw workers from
•Where should we add new bus routes and bus stops
•Where should new roads be added

Data collected identified

- Employers and number of employees
- Payroll size (to identify employees earning lower than average wages
- Where do workers live…where do they work
- Commute Patterns
- Ages and average wages of commuters
- Areas for Park and Ride Lots
- Potential for expansion of existing public transit services

Where people who work on the reservation live…



2 ID Transportation Contracts

- Public Outreach contract used to increase awareness – and support – of public transit options for all users; engage underserved populations, public service agencies and elected officials.

- To provide employers and employees with direct education, assistance and training on available commute options to include car pooling, employer sponsored vans, and public transit.

Mobility Support Services 2016

Workforce Transportation 2017

Our Advantage? The CEDS

- We know that data drives decisions and we know how to mine the data
- We are connected to employers and work to understand their needs
- We are good at public outreach – we do it all the time

Why Economic Development Is Involved

Economic District’s primary goal is to improve the economic conditions and quality of life for our residents. We place a strong emphasis on the development and maintenance of public infrastructures and community facilities necessary to foster business and residential development.

Mobility impacts economic development and growth. If employees can’t get to work, employers can’t produce.

In closing!

Understanding the data can help identify need and options to meet the need.

Planners (transportation and economic) should be at the table early and often…and be armed with data.

Transportation is an important element of economics – use economic data to support transportation investments

SOUTHEAST CONFERENCE
COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

SOUTHEAST CONFERENCE

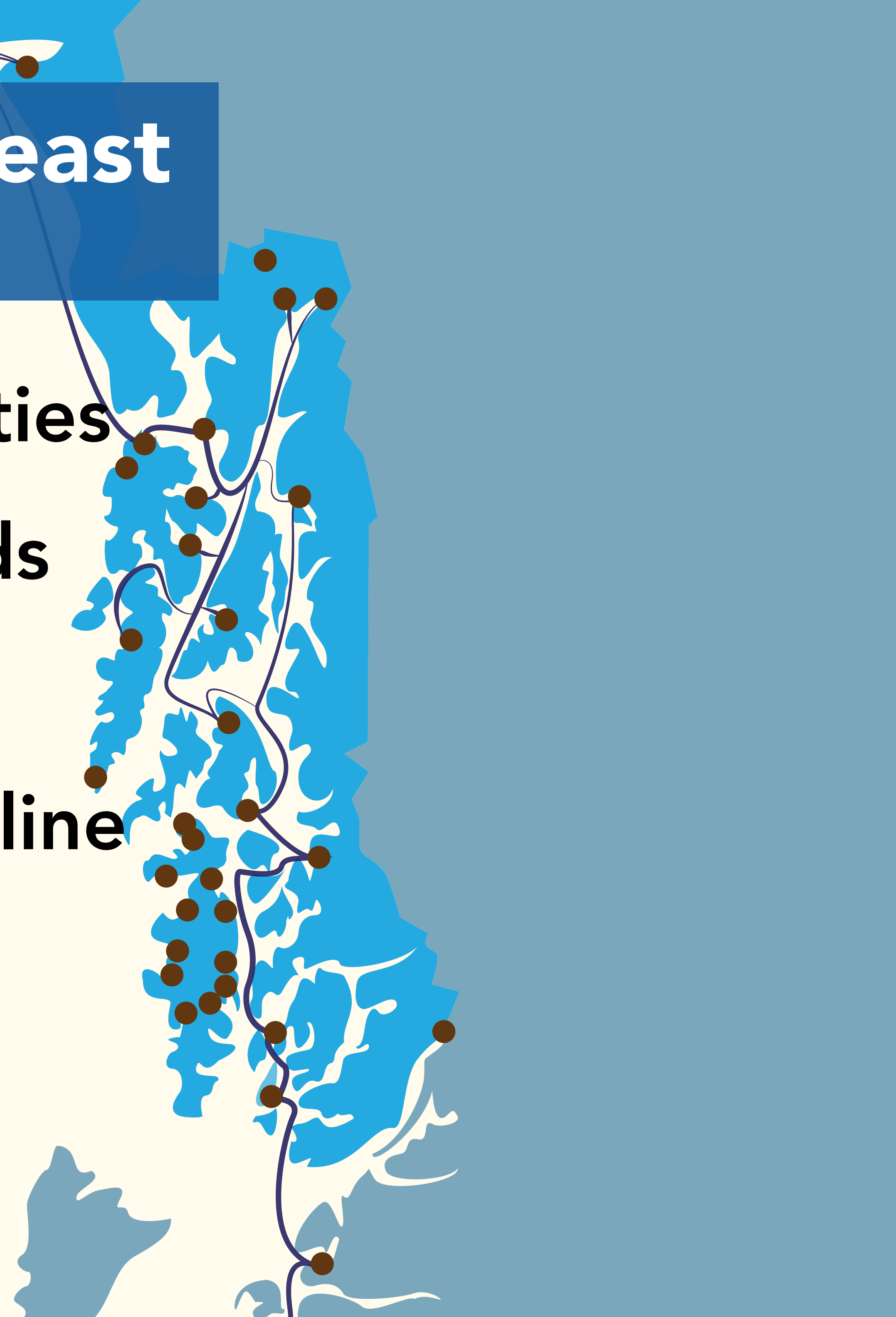
Summary Background

14-page annual publication

www.seconference.org/recent-publications

About Southeast Alaska

- 34 Communities
- 1,000+ Islands
- 500 Miles
- 18,500 shoreline
- 10% of AK Economy



About Southeast Alaska

Only 4 communities connect to outside roads

Southeast Alaska Land Ownership

Circle size = Number of Acres

OTHER FEDERAL

- 3.4% ALASKA NATIVE
- 2.5% STATE OF ALASKA
- ← 0.25% TOWNS
- ← 0.05% PRIVATE LAND OWNERS

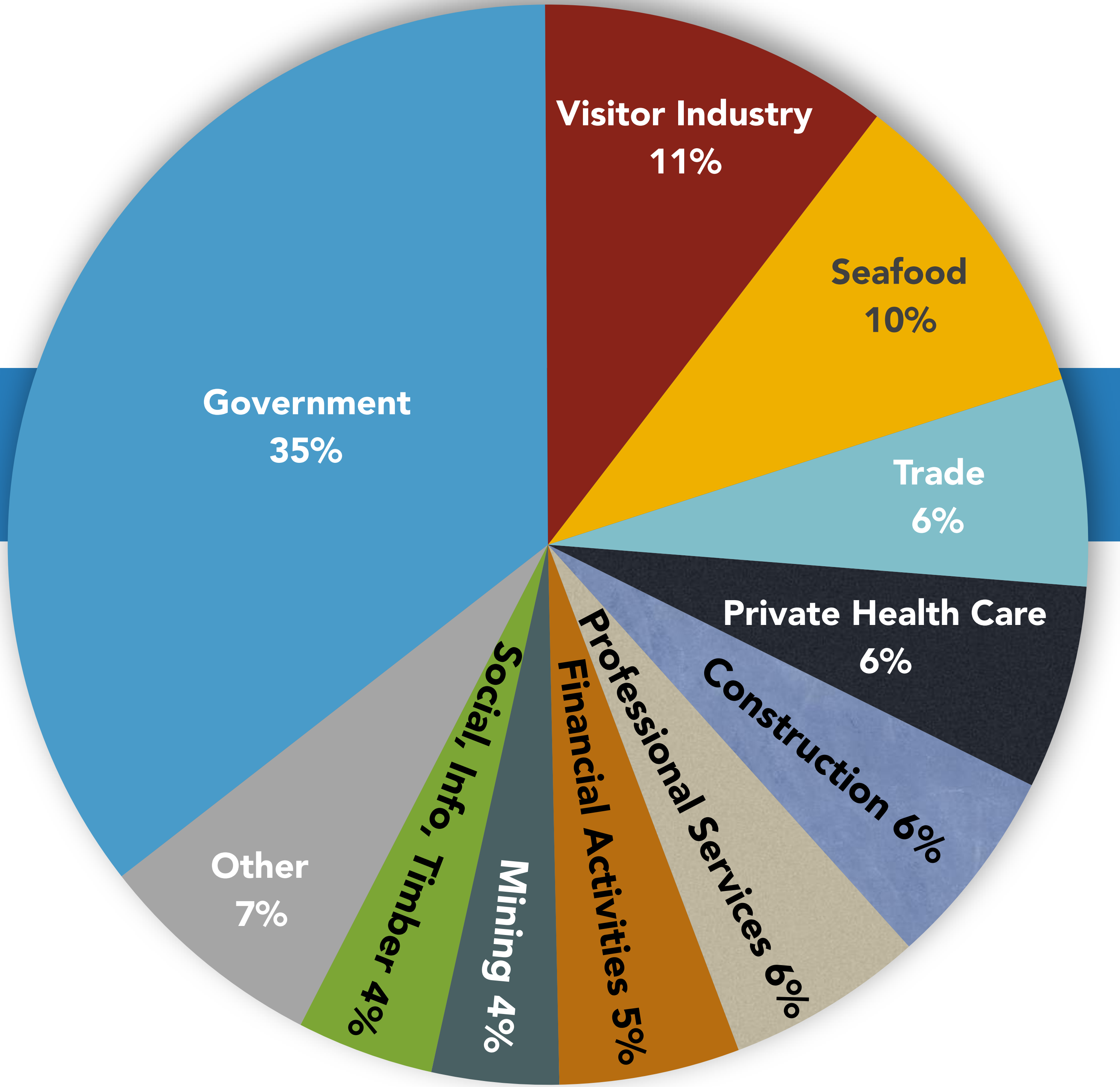
TOTAL FEDERAL = 94%

Southeast Alaska

Employment Earnings

$2.2 billion

44,763 Jobs



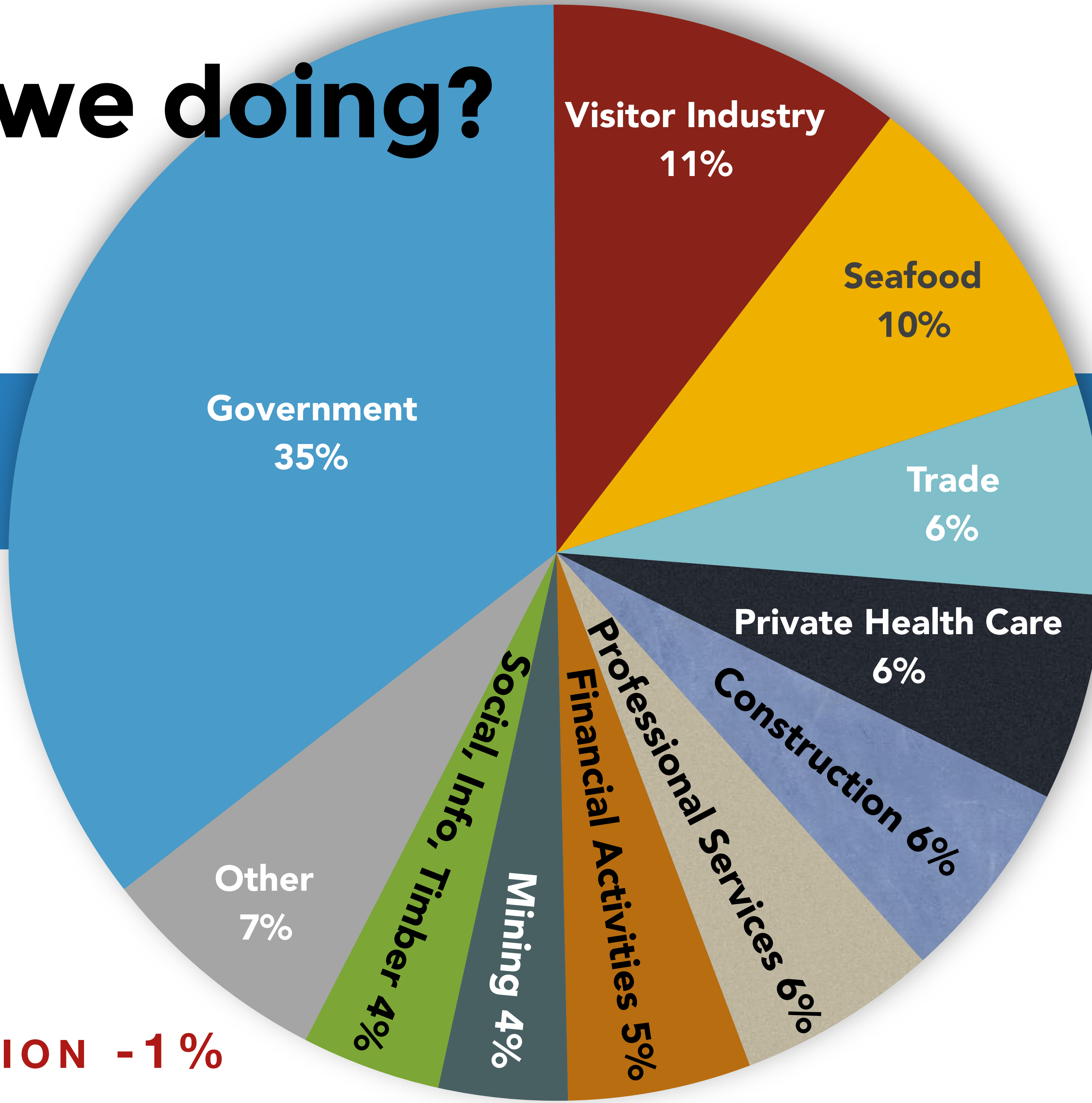
How are we doing?

Southeast Alaska

Employment Earnings

$2.2 billion

44,763 Jobs



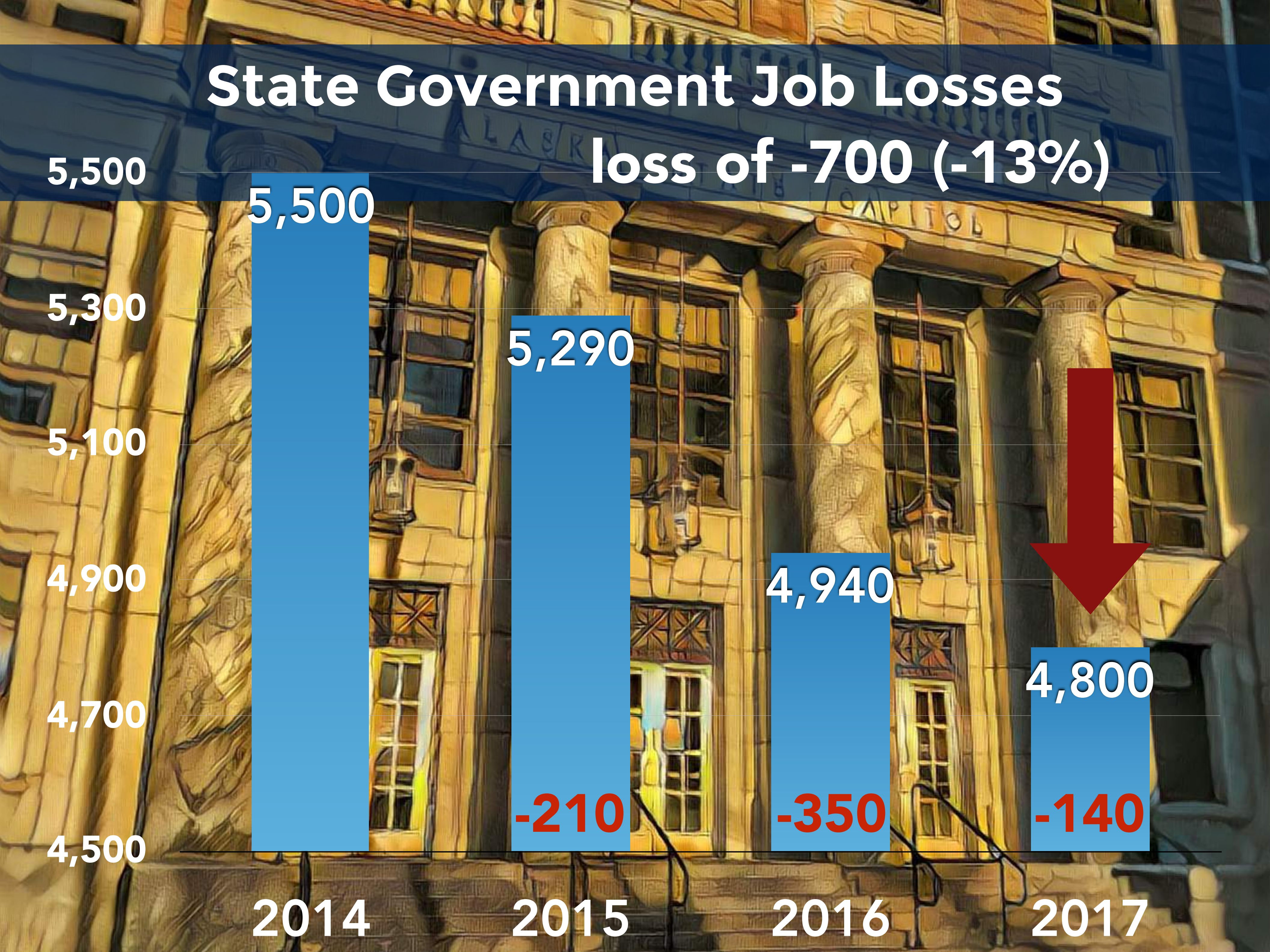
Down $29 Million -1%

Down 885 Jobs in 2016 -2%

Government 13,000 Jobs

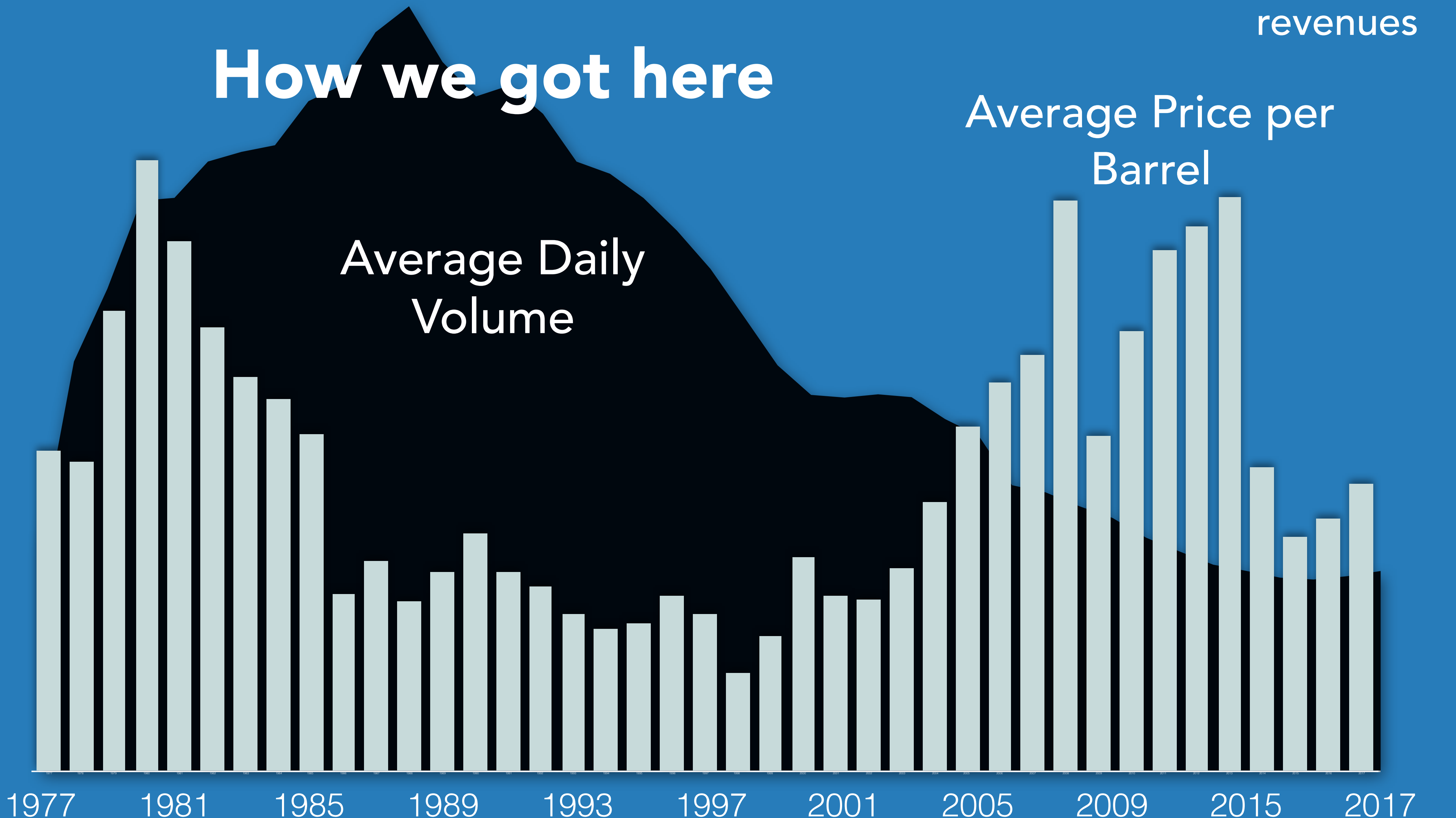
Down 450 Jobs in 2016 -3%

Mostly State jobs


State Government Job Losses
loss of -700 (-13%)
5,500
5,300
5,100
4,900
4,700
4,500
5,500
5,290
4,940
4,800
-210
-350
-140
2014
2015
2016
2017

Avg. Daily Volume of the Trans Alaska Pipeline System and Inflation Adjusted Price Per Barrel, 1977-2017

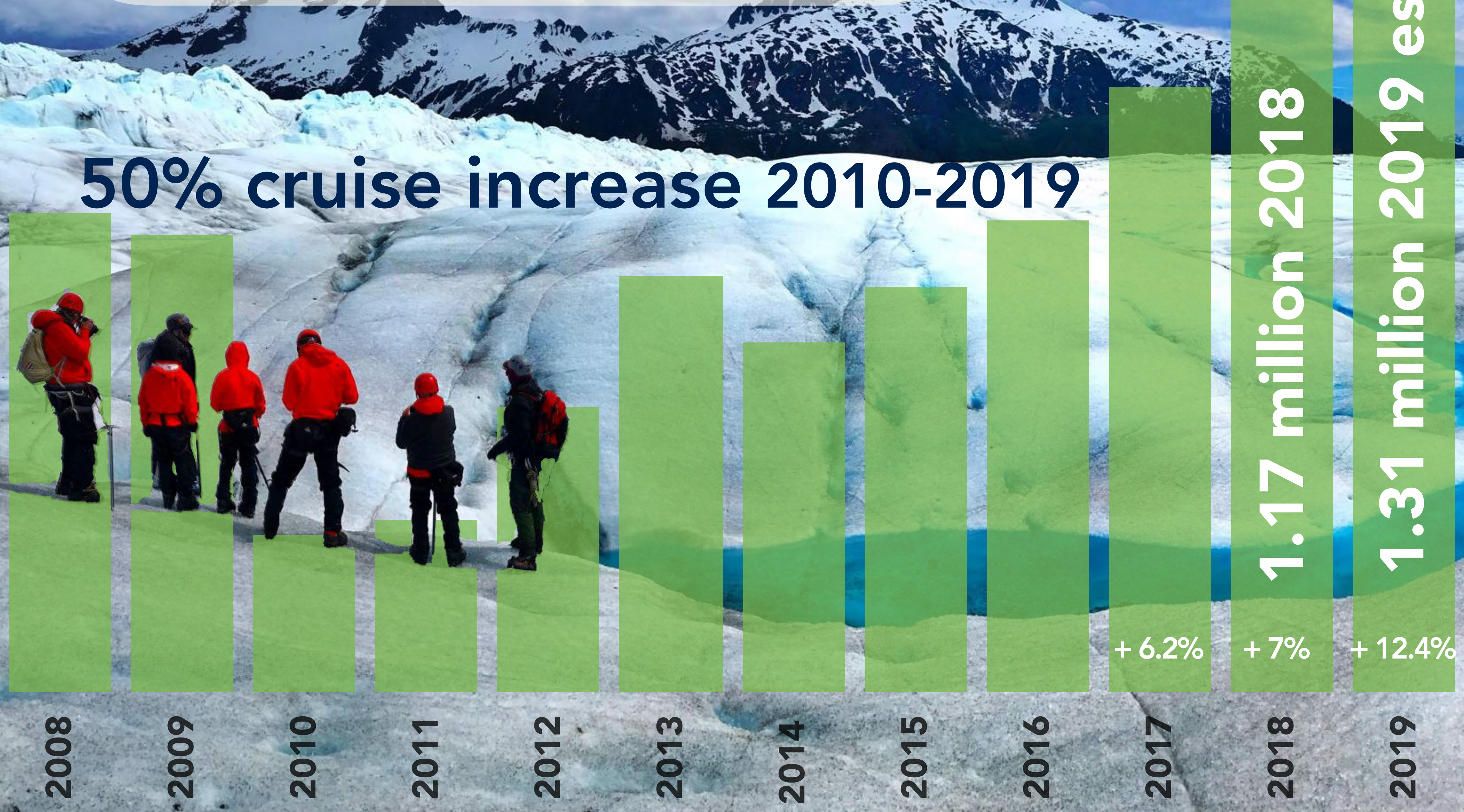
Oil revenues historically accounted for 90 percent of the state's unrestricted revenues



Visitor Industry

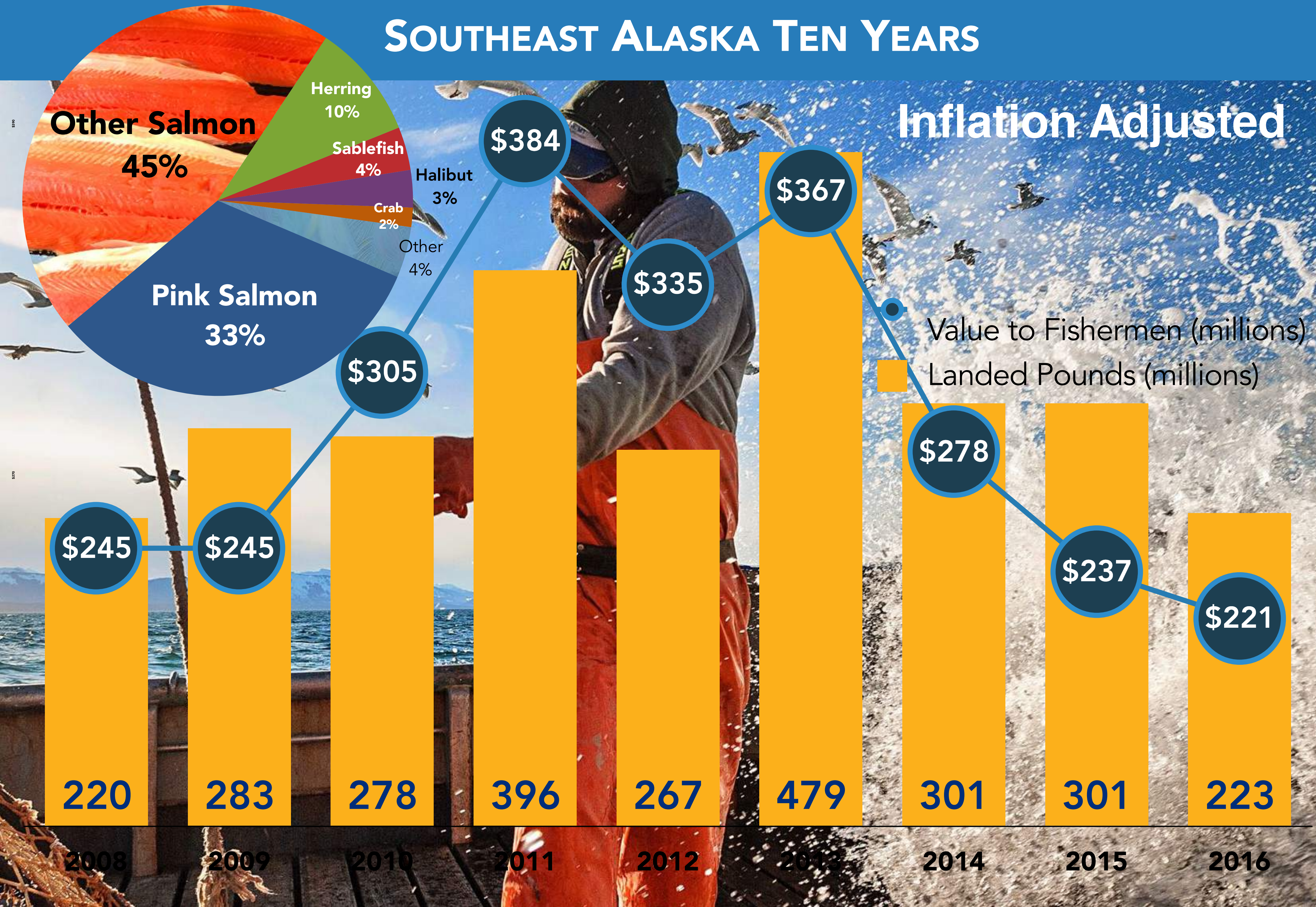
7,400 Jobs

UP 350 JOBS +6%



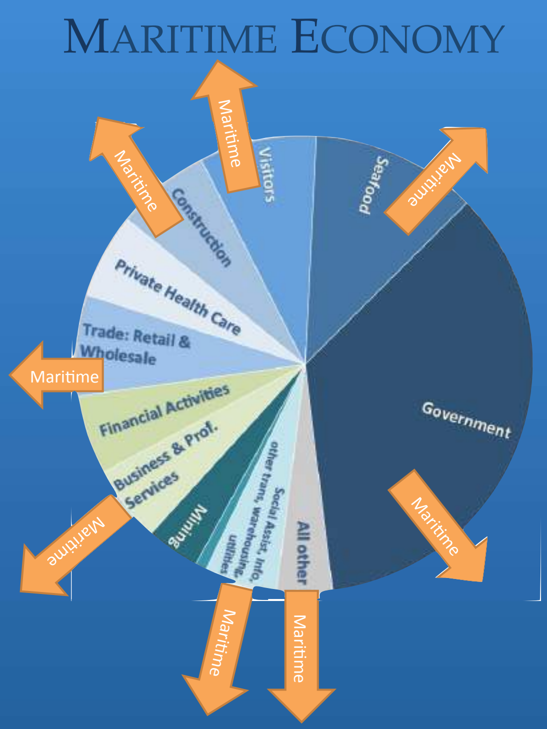

Seafood Industry
3,854 Jobs
Down 500 Jobs

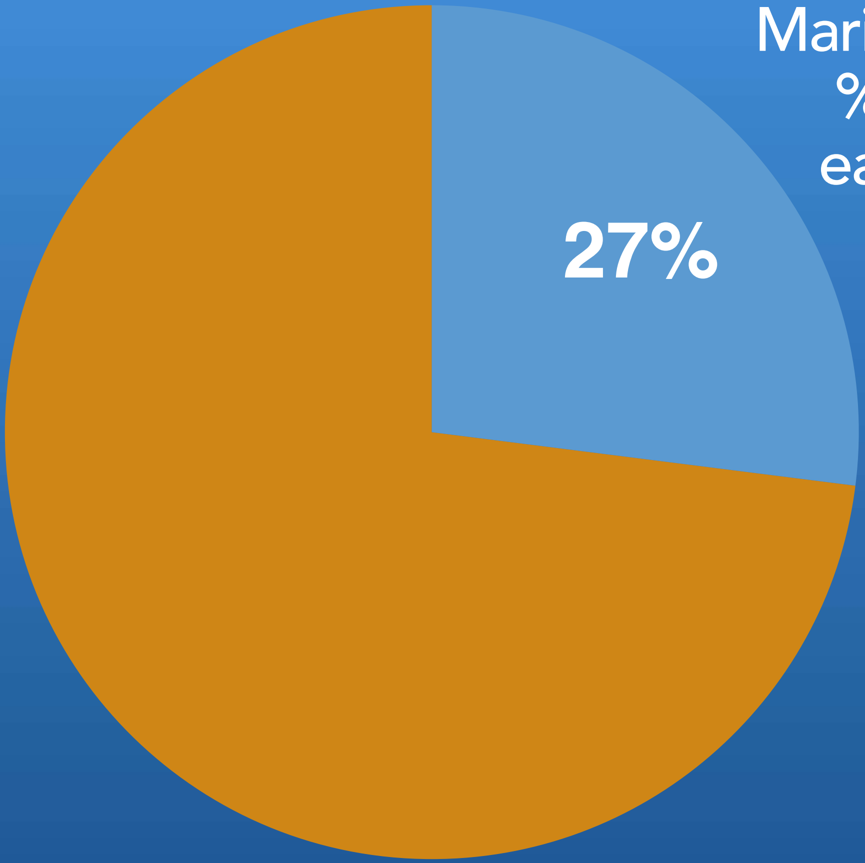
Value & Pounds of Seafood Landed in Southeast Alaska Ten Years



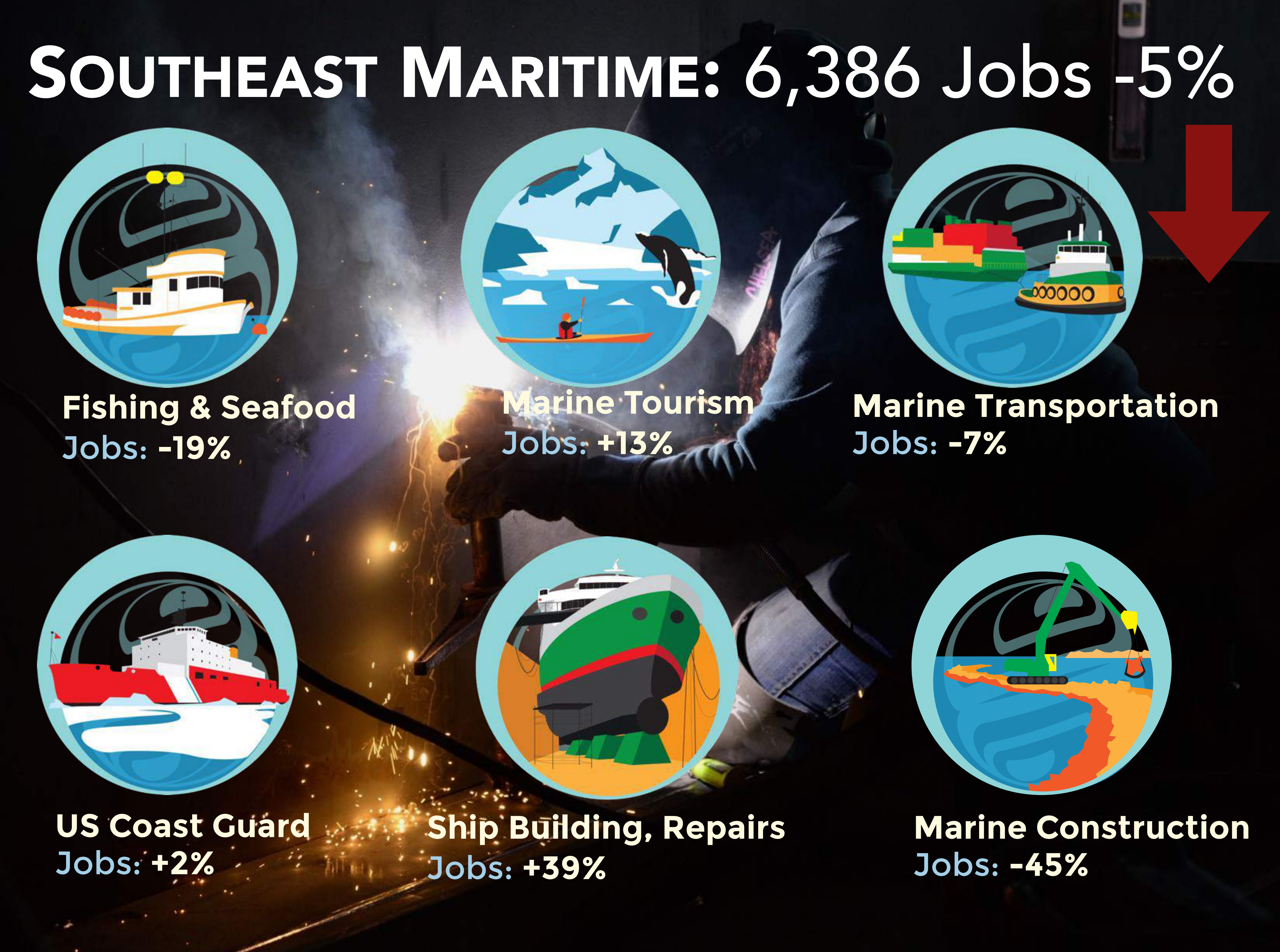
The **Blue** Economy

Southeast Maritime

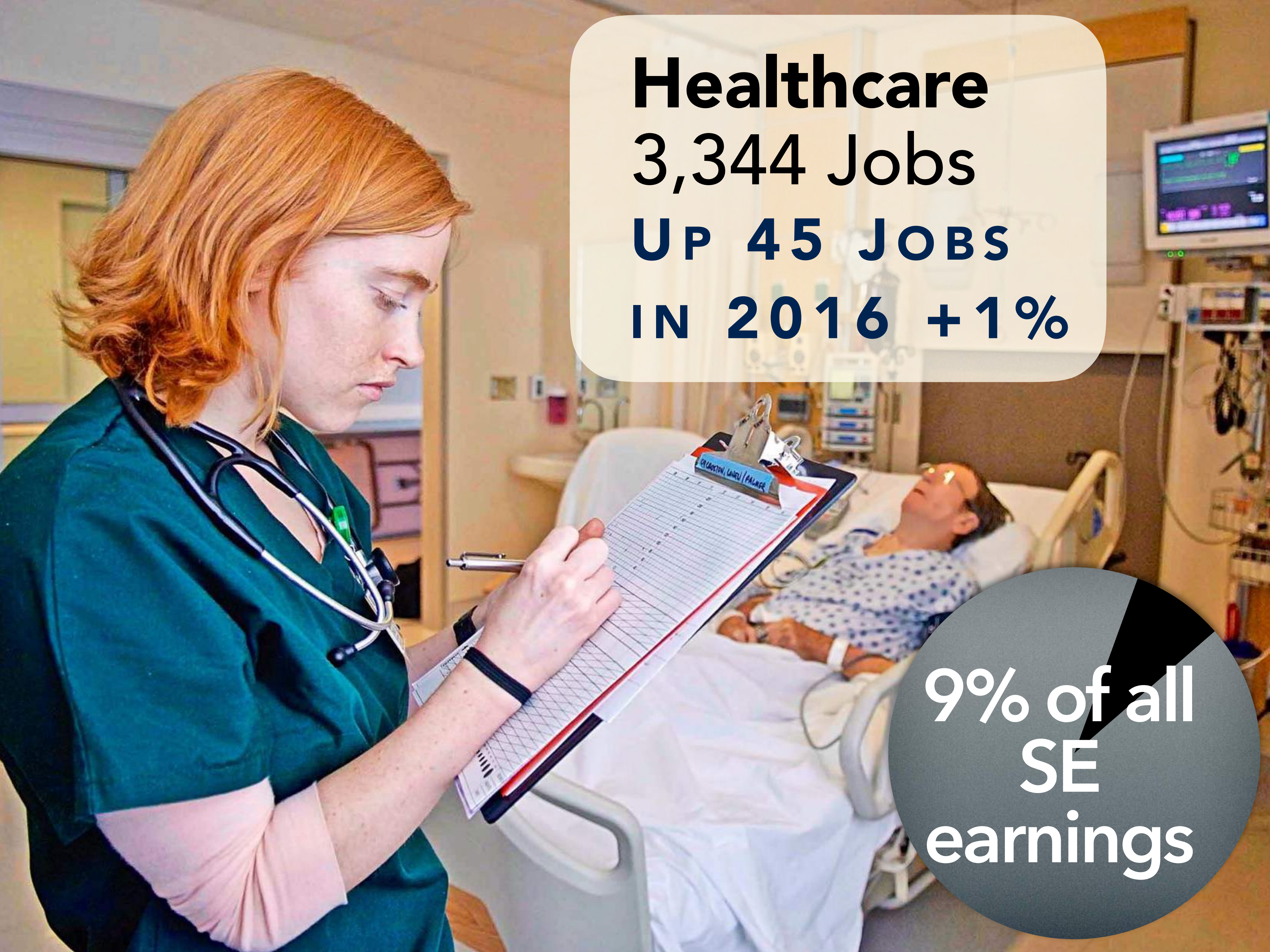




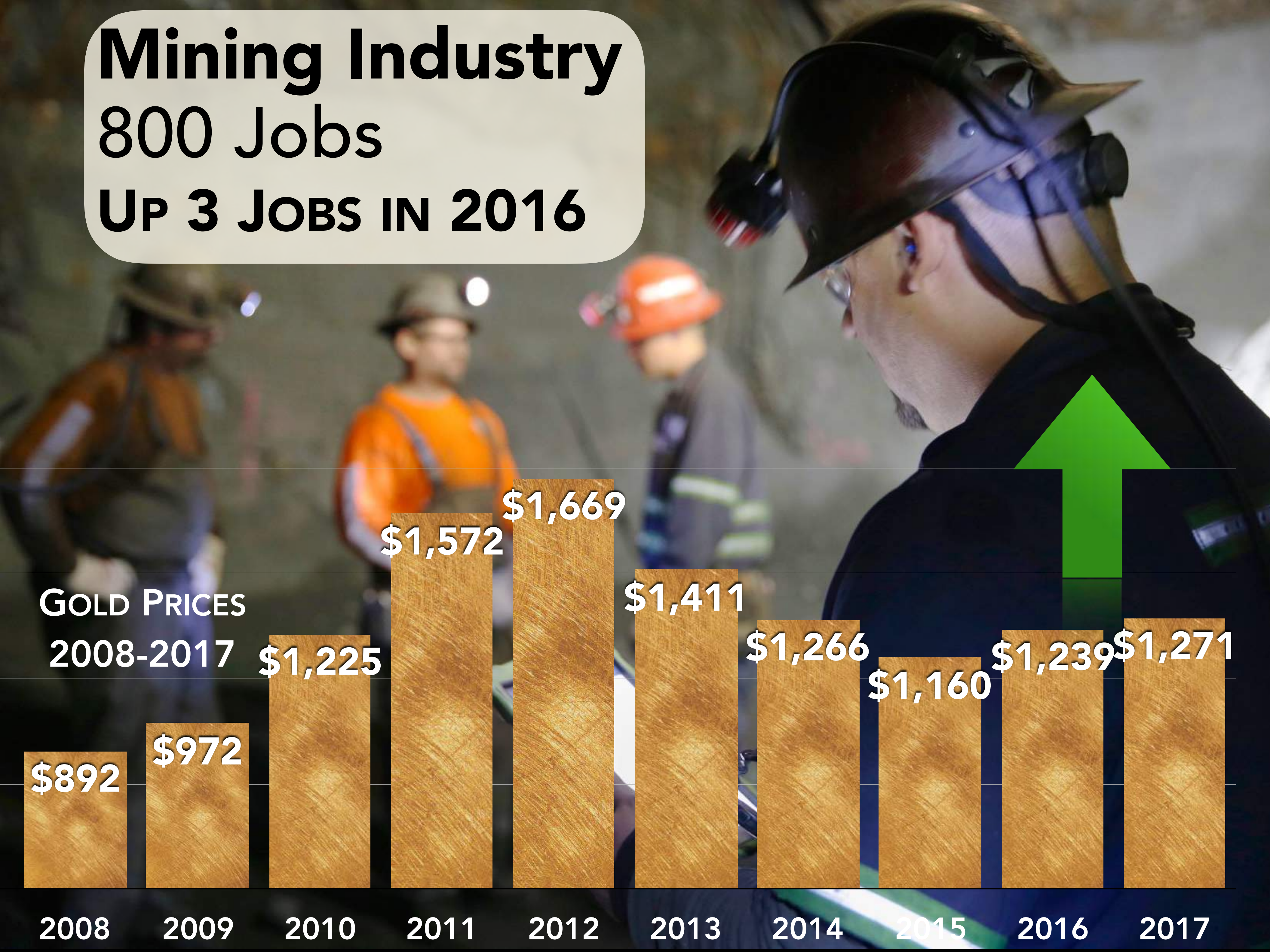
Maritime as a % of all earnings

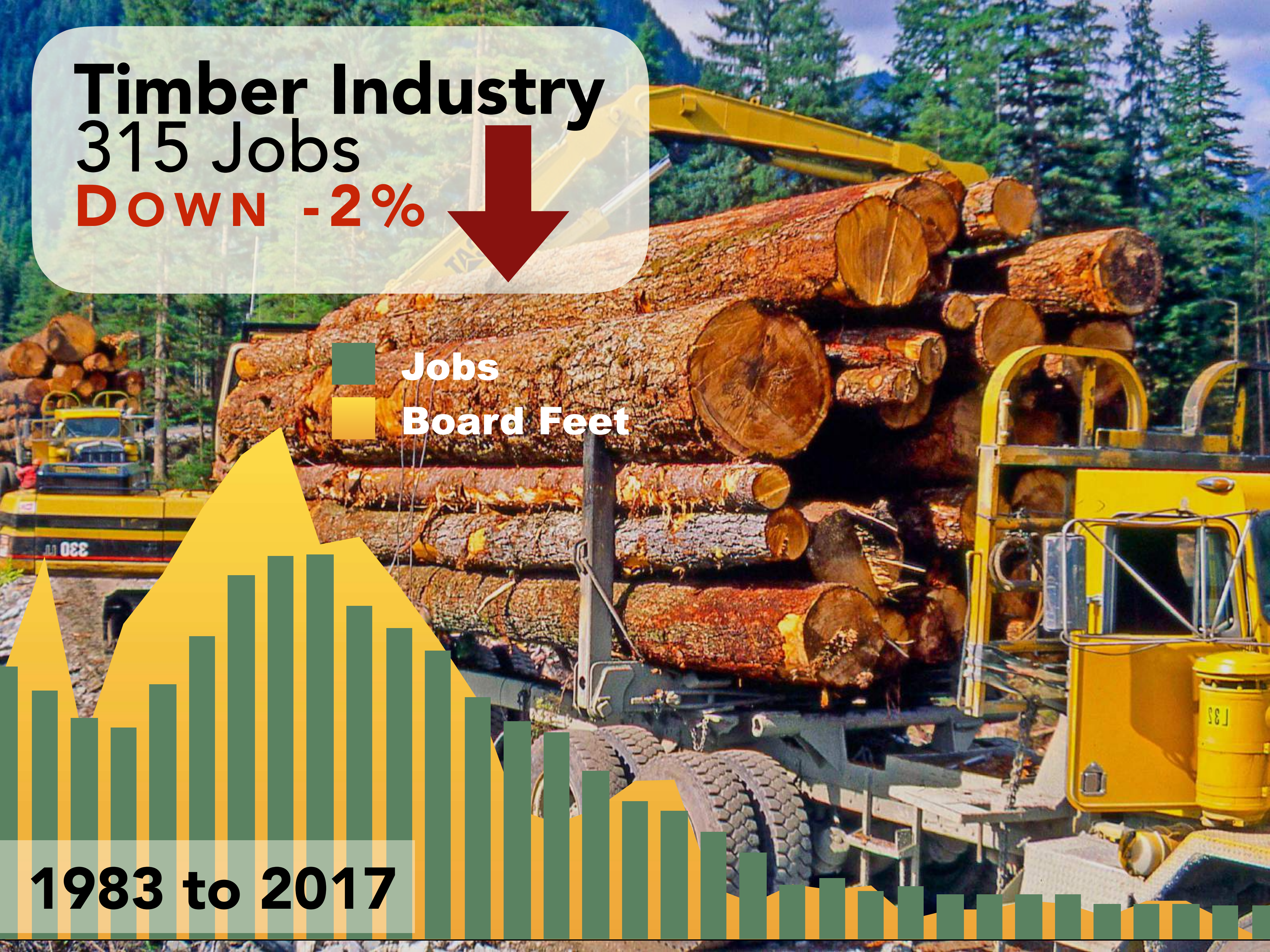


SOUTHEAST MARITIME: 6,386 Jobs -5%
Fishing & Seafood
Jobs: -19%
Marine Tourism
Jobs: +13%
Marine Transportation
Jobs: -7%
US Coast Guard
Jobs: +2%
Ship Building, Repairs
Jobs: +39%
Marine Construction
Jobs: -45%

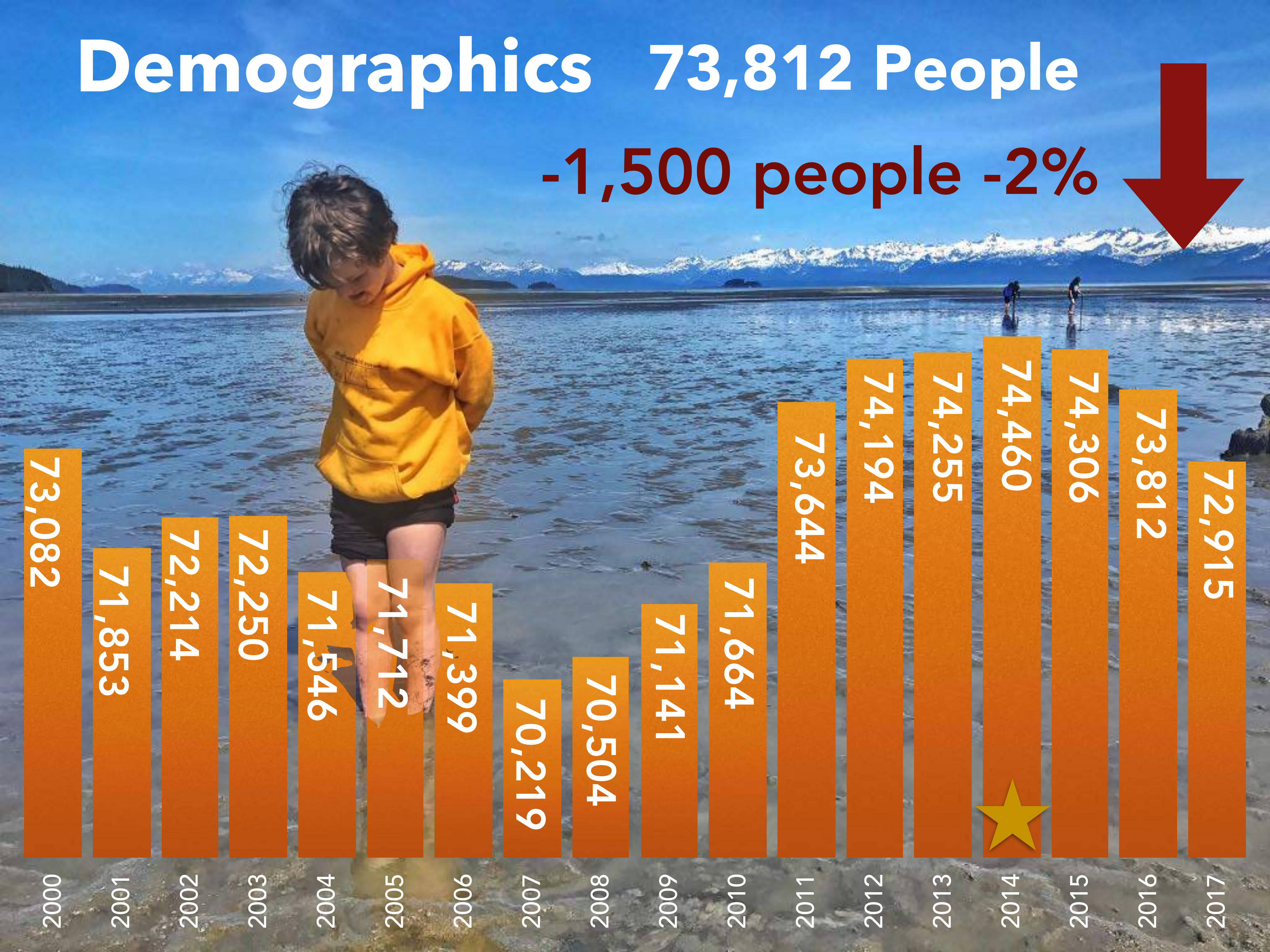

Healthcare
3,344 Jobs
Up 45 Jobs
in 2016 +1%
9% of all
SE
earnings

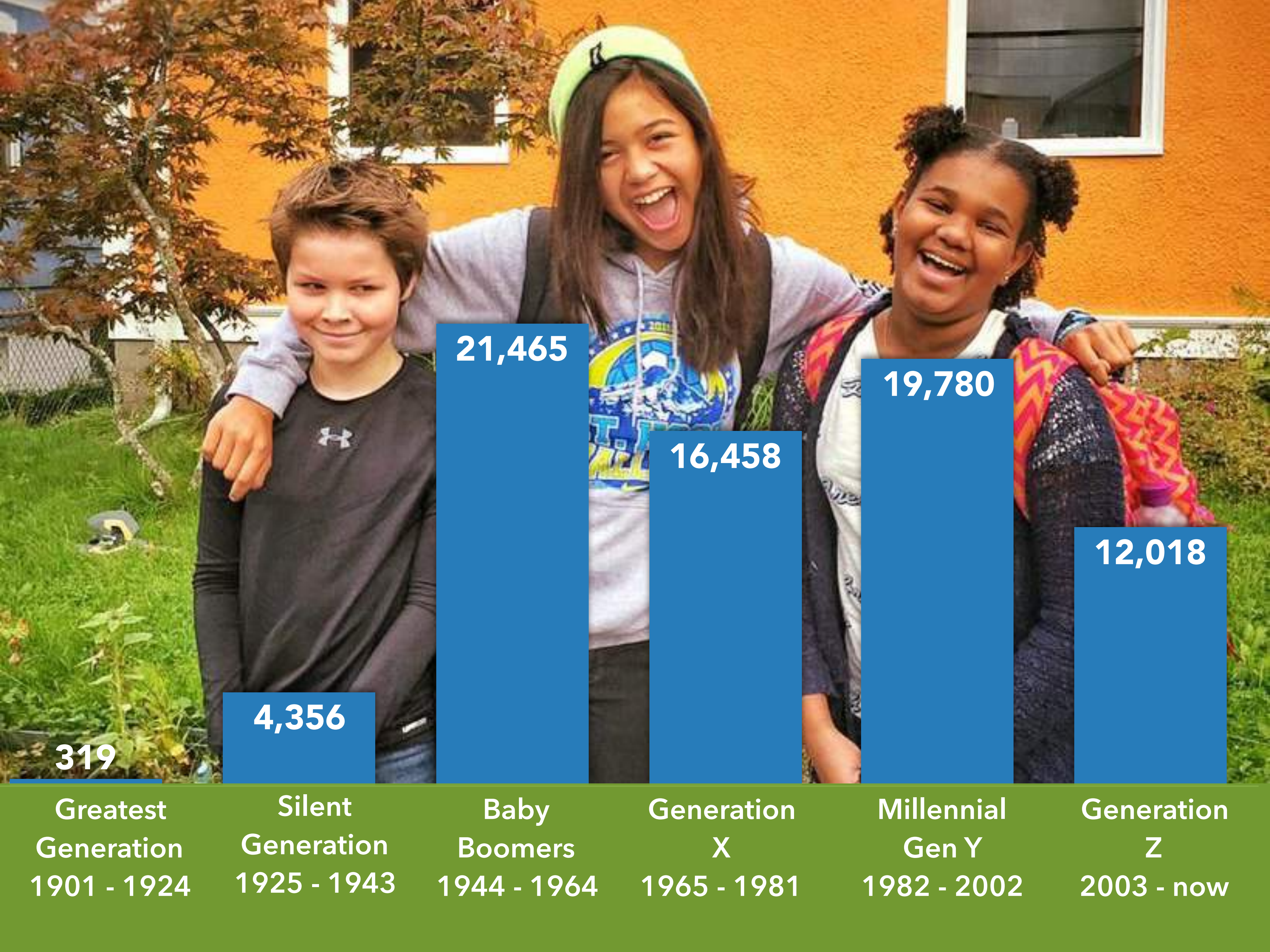
Construction Industry 2,030 Jobs
Down 90 Jobs in 2016 -4%
STOP
Capital Appropriations in Southeast in Millions
$400
$0
$385
$215
$183
$107
$47
FY13
FY14
FY15
FY16
FY17
30


Mining Industry
800 Jobs
Up 3 Jobs in 2016
Gold Prices
2008-2017
$892
$972
$1,225
$1,572
$1,669
$1,411
$1,266
$1,160
$1,239
$1,271
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017

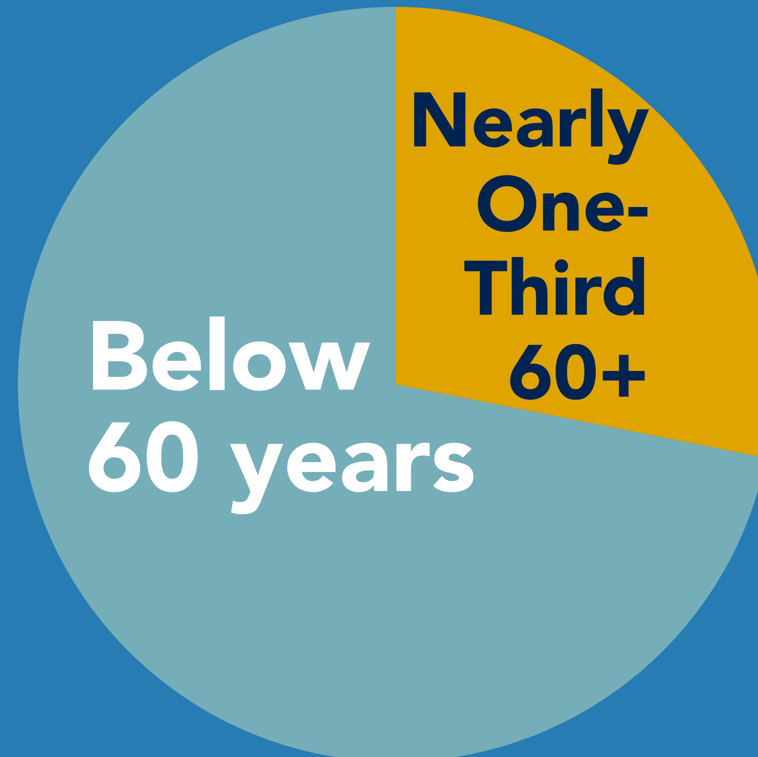


Timber Industry
315 Jobs
Down -2%
Jobs
Board Feet
1983 to 2017


Demographics 73,812 People
-1,500 people -2%
73,082
71,853
72,214
72,250
71,546
71,712
71,399
70,219
70,504
71,141
71,664
73,644
74,194
74,255
74,460
74,306
73,812
72,915
2000
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017


319
4,356
21,465
16,458
19,780
12,018
Greatest Generation 1901 - 1924
Silent Generation 1925 - 1943
Baby Boomers 1944 - 1964
Generation X 1965 - 1981
Millennial Gen Y 1982 - 2002
Generation Z 2003 - now

SE Adults

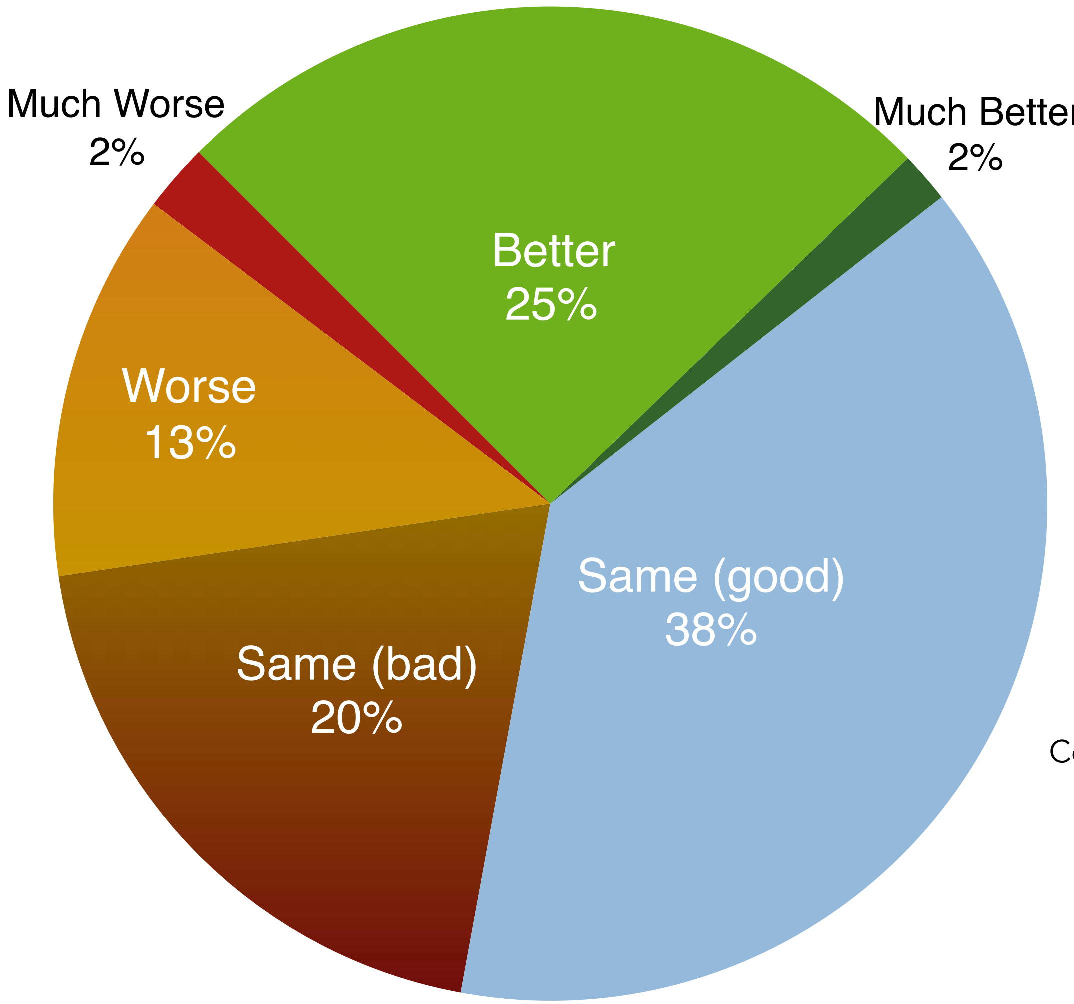


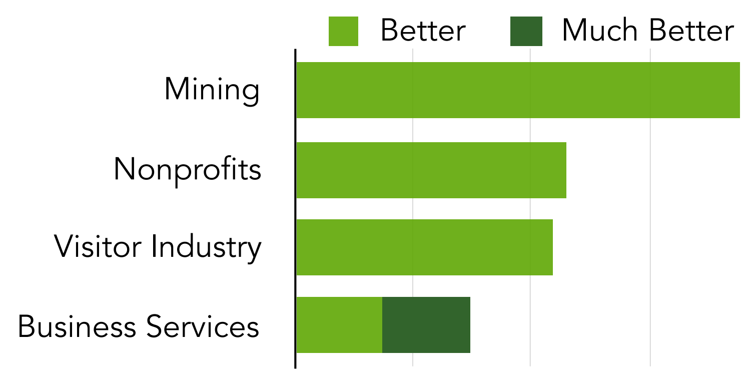
Those 65+ increased by 10% in last two years

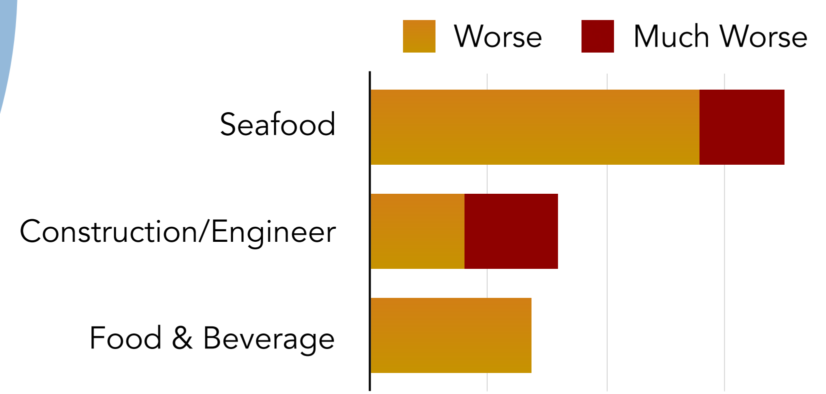
41 % of Southeast Alaskan adults will be over the age of 55 by 2020

Annual Business Confidence

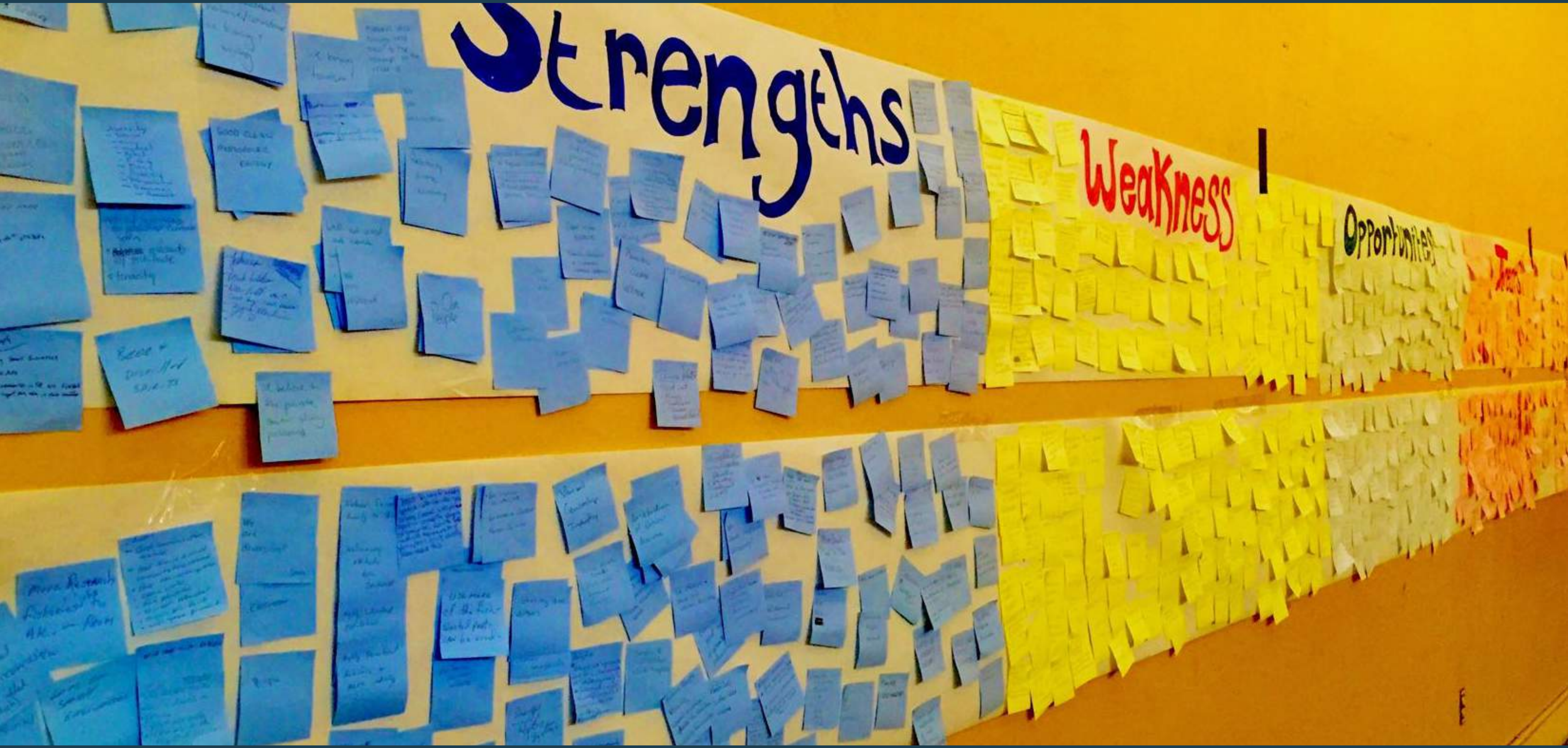
"What is the economic outlook for your business or industry over the next year (compared to the previous year)?"







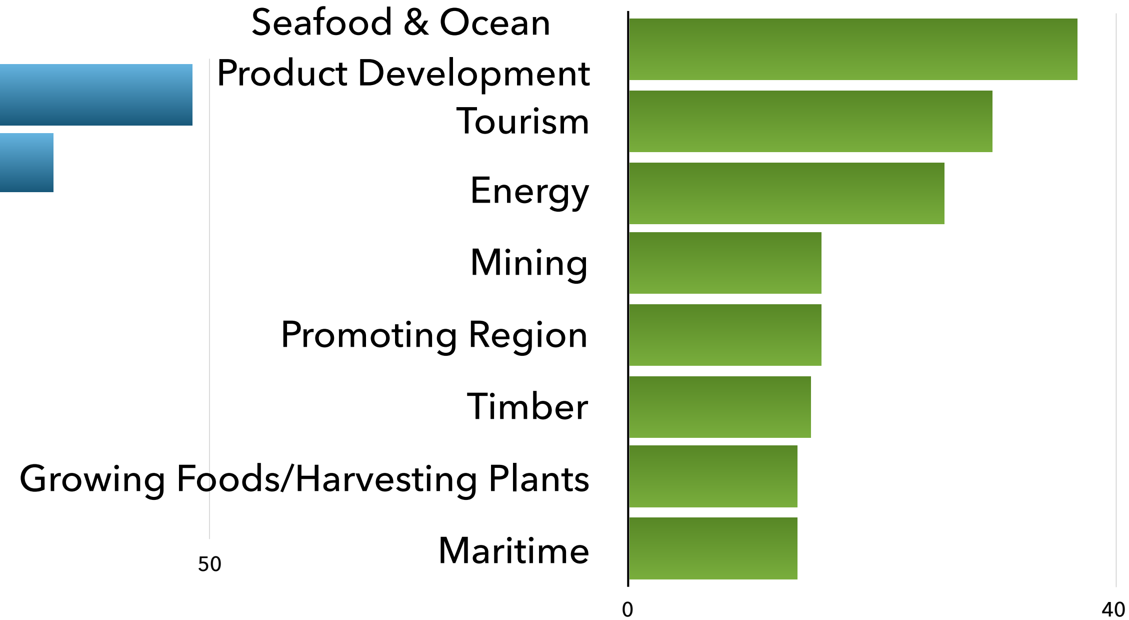
SWOT Analysis



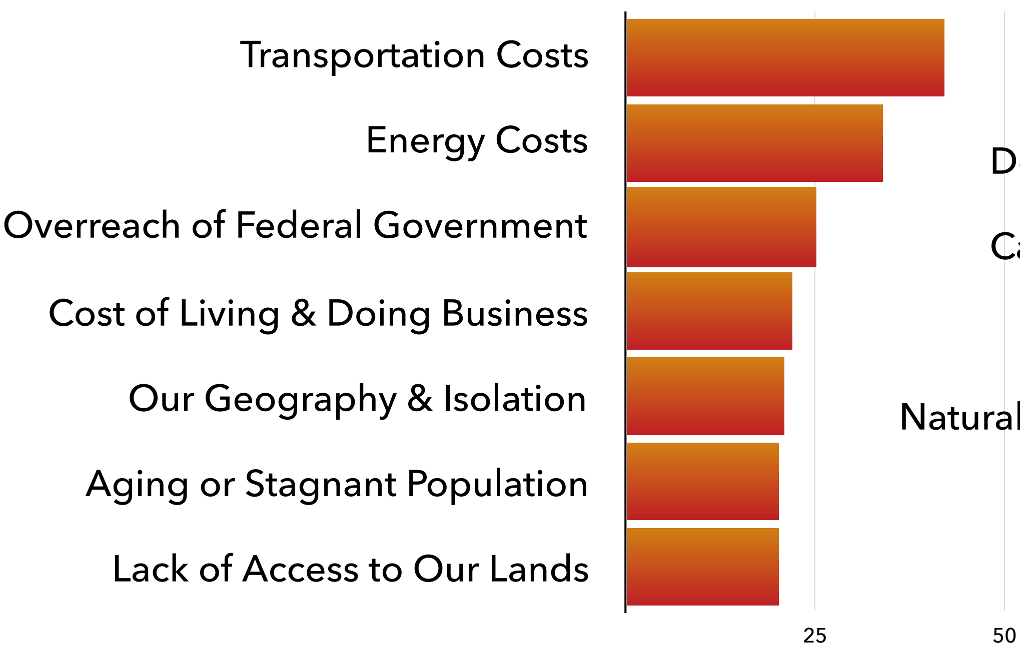
1,300 hand written comments

Strengths

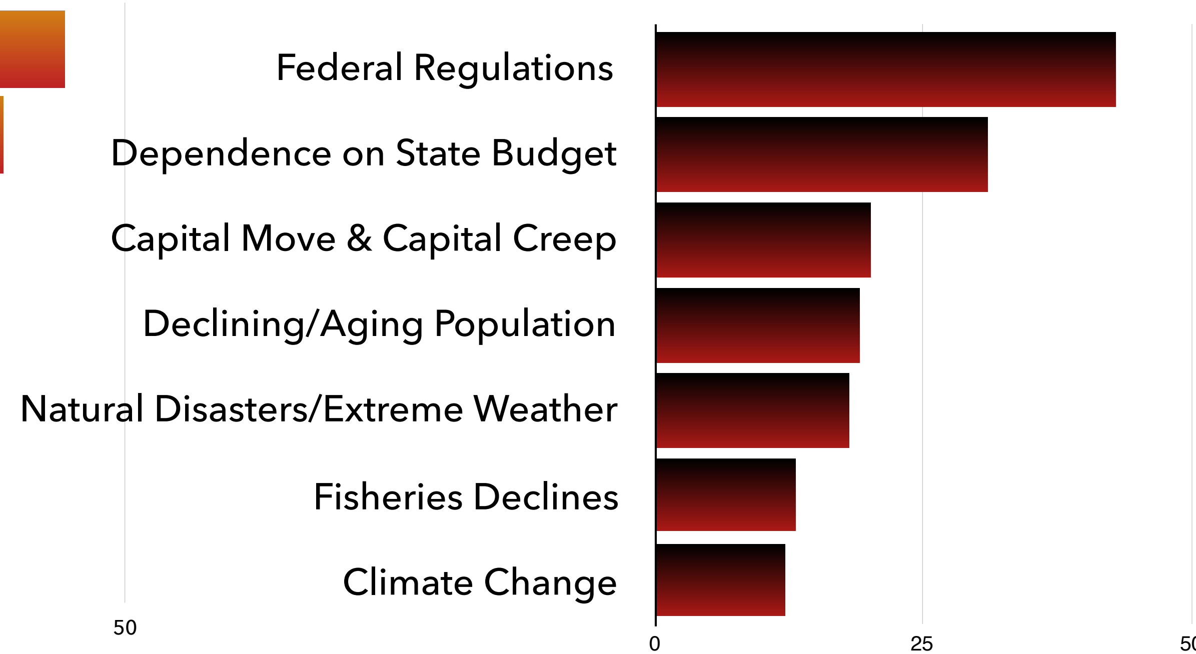
Opportunities



Weaknesses



Threats



PLANNING PROCESS

- EDA Driven Process
- One year
- 27 workshops and strategic planning meetings
- 400+ participants
- 100s of ideas for economic initiatives

Southeast Alaska 5 Year Plan

Promote strong economies, healthy communities, and a quality environment in Southeast Alaska.

Transportation

Minimize Impacts of Budget Cuts to AMHS and Develop Sustainable Operational Model.
Road Development.
Move Freight to and from Markets More Efficiently.
Ensure the Stability of Regional Transportation Services Outside of AMHS.

Energy

Work with Federal and State Government to Promote Regional Energy Projects.
Diesel Displacement.
Support Community Efforts to Create Sustainable Power Systems That Provide Affordable/Renewable Energy.
Complete Regional Hydrosite Evaluation for Southeast Alaska.

Maritime

Maritime Industrial Support

Maritime Industrial Support Sector Talent Pipeline: Maritime Workforce Development Plan.
Increase Access to Capital for the Regional Maritime Industrial Support Sector.
Harbor Improvements.
Examine Arctic Exploration Opportunities That the Region as a Whole Can Provide.

Seafood Industry

Mariculture Development.
Full Utilization and Ocean Product Development.
Increase Energy Efficiency and Reduce Energy Costs.
Regional Seafood Processing.
Seafood Markets.
Sea Otter Utilization and Sustainable Shellfish.
Maintain Stable Regulatory Regime.

Visitor Industry

Market Southeast Alaska to Attract More Visitors.
Improve Access to Public Lands.
Increase Flexibility in Terms of Permit Use.
Increase Yacht and Small Cruise Ship Visitations.
Improve Communications Infrastructure.
Advocate for Adequate Funding to Maintain Existing Recreational Infrastructure.

Timber Industry

Provide an Adequate, Economic and Dependable Supply of Timber from the Tongass National Forest to Regional Timber Operators.
Stabilize the Regional Timber Industry.
Work With USFS to Direct Federal Contracts Toward Locally-Owned Businesses.
Support Small Scale Manufacturing of Wood Products in Southeast Alaska.
Continue Old Growth Harvests Until Young Growth Supply is Adequate.
Community-Based Workforce Development.
Update Young Growth Inventory.

Other Objectives

Housing: Support Housing Development.
Food Security: Increase Production, Accessibility, and Demand of Local Foods.
Communications: Improved Access to Telemedicine in Southeast Alaska.
Marketing: Market Southeast Alaska as a Region.
Solid Waste: Regional Solid Waste Disposal.
Arts: Increase Recognition of Southeast Alaska's Thriving Arts Economy.
Mining: Minerals & Mining Workforce Development.
Attract Research Jobs.
Research: Attract Science and Research Jobs to Southeast Alaska.
Cultural Wellness: Support Development of Activities and Infrastructure That Promote Cultural Wellness.


7
Priority
Objectives
Marine Highway Reform Project
Diesel Displacement
Secure Adequate Timber Supply
Market Southeast Alaska to Visitors
Full Seafood Resource Utilization
Alaska Mariculture Initiative
Maritime Workforce Development

2020 Plan Priority Objective #1:

Minimize Impacts of Budget Cuts to AMHS and Develop Sustainable Operational Model

STEP I: The "AMHS Reform Project"

Phase I: Mission, goals and governance recommendations.
Completion December 2016

Phase II: Twenty-five Year Ferry System Operating Plan.
January 2017 through December 2017

STEP II: AMHS Value Outreach, STEP III: Address Decreased State Funding Impacts

Ongoing through 2020

Breakout 2 Instructions

[Breakout Discussion 2, Group 1 Guide and Notes]

Breakout Goals:

1) To get participants thinking about specific ways they can infuse economic analysis into their transportation planning, project selection, and performance measurement.

Don't forget to identify yourselves when speaking.

Discussion Topic:

How can you include economic development analysis, data, or discussion in your:

- Long range transportation plan
  - Background/trends section
  - Transportation network description
  - Regional vision, goals, and strategies
  - Project selection criteria
  - Performance measurement
- TIP/STIP
- Other transportation plans/studies
  - Freight
  - Corridor
  - Safety
  - Project/scenario
  - Other

Be as specific as you can. Think about specific pieces of economic information, data, and analysis that would add value to your plans and increase their impact. If you have ideas that you don't know how to measure or quantify, include those too.

- When breakouts launch, you will move automatically to your group, unless you're on the phone
- Phone users may need to call back in (with Audio PIN) or have GoToTraining call you
- You will have audio and use of a Google Doc for jotting down key points
- Use webcams if you'd like
- 20 minutes, timer will start at T-5

Thank you!

- Materials available through GoToTraining and email
- Evaluation
- Virtual Peer Exchange #2: Engaging Business and Economic Development Partners in the Transportation Planning Process
    - Coming this summer—watch for information!
- Questions or suggestions? Contact megan.e.mcconville@gmail.com or ckissel@nado.org