



Pathways to Accelerate North Central Idaho

Clearwater Economic Development District
Comprehensive Economic Development Strategy
2020 - 2025

Serving Clearwater, Idaho, Latah, Lewis and Nez Perce Counties



2020 – 2025 Comprehensive Economic Development Strategy



Clearwater Economic Development Association

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Serving the Clearwater Economic Development District
Clearwater, Idaho, Latah, Lewis and Nez Perce Counties

Prepared for the Economic Development Administration



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Cover photos provided by Stephenie O'Callaghan



Figure 1: North Central Idaho

Executive Summary

The development and implementation of a comprehensive plan is a prerequisite and valuable step for obtaining funding for community and regional economic development projects. The Economic Development Administration, of the U.S. Department of Commerce specifically requires a Comprehensive Economic Development Strategy (CEDS) for project funding. In addition, a CEDS is required for the region's designation as an Economic Development District.

Established in 1968, Clearwater Economic Development Association (CEDA) serves as the US Department of Commerce Economic Development Administration's designated planning organization for the Clearwater Economic Development District, encompassing the five counties of North Central Idaho – Clearwater, Idaho, Latah, Lewis, and Nez Perce.

As a member-driven, private, not-for-profit 501(c)(4) organization, CEDA's mission is *"to help North Central Idaho business and communities by serving as a conduit to needed resources."* As the collective voice of North Central Idaho, CEDA provides leadership and guidance in developing communities, diversifying the regional economy, and creating prosperity.

As one of the six Economic Development Districts of Idaho (EDDI), CEDA serves with the others as an essential catalyst for building regional partnerships and local capacity. Local governments, businesses, communities, and the workforce are competing in an increasingly complex economic environment; CEDA brings local

government and industry together to accomplish what cannot be done individually.

Governance: CEDA is governed by a 21-member Board of Directors. At least one-third of the Board of Directors represents private industry or organizations that represent labor or education. Five working councils provide recommendations to the Board of Directors in

the areas of planning, project/program development and implementation, business development services and workforce development. A list of CEDA governance can be found in Appendix B.

Programs: CEDA's development activities include:

- regional and community planning;
- project and program development;
- project financing and administration;
- business development; and,
- small business financing.

CEDA's contract and fiscal management personnel specialize in all types of grant management including construction, public works, housing, public facilities, economic development, and disaster recovery projects.

In 2014, CEDA had less grant writing activities than some years; it was a year for implementation of projects. During 2014 CEDA worked with partners to secure \$817,500 in grants for community-based projects and regional initiatives. In 2013, CEDA managed over \$2.4 million in grants and contracts and administered a revolving loan fund with a capital base of \$3.5 million.

The CEDA Office is located at: 1626 6th Ave. N., Lewiston, ID 83501.



Figure 2: View from Waha, Nez Perce County - Photo by Stephenie O'Callaghan

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Chapter I - Building the Pathways to Accelerate North Central Idaho

Guiding principles for the development of this CEDS follow the National Association of Development Associations (NADO) *Seven Principles of CEDS Standards of Excellence*:

- Build resilient economies and communities by focusing and targeting strategies on the existing and potential competitive advantages;
- Foster a collaborative framework to strategically align public and private sector investments;
- Use modern scenarios, data and analysis tools, and planning techniques that provide policy makers, stakeholders, and the public with evidence-based and factual information;
- Transform the CEDS into a strategy-driven planning process focused on regional visioning, priorities setting, and performance outcomes;
- Promote and support peer reviews and exchanges across EDD boundaries, enhancing organizational resources and positioning the CEDS as a building block for local and state strategies;
- Communicate in a compelling and modern communication style, including use of online media; and,
- Engage the public, private, nonprofit, and educational sectors, along with the general public, in the development and implementation of the CEDS.

CEDA shares the vision and similar goals of the other four Economic Development Districts in the State of Idaho. As a unit, the Districts celebrate each region individually and the State of Idaho as a whole, collaborating to accelerate economic development and diversification. This CEDS focuses on three pathways to economic vitality: Elevate Industry, Advance Individuals, and Strengthen Communities. The goals of the CEDS support progress in education and workforce; encourage entrepreneurship, business development and economic empowerment; and advance infrastructure and healthy communities.

Vision

Promote the continued prosperity, progress, and productivity of North Central Idaho by creating thriving, connected, sustainable and evolving people, communities, and economies.

*We seek to **Elevate Industry** by creating the environment for thriving economies that are diverse, sustainable, geographically dispersed, and globally competitive.*

*We seek to **Advance Individuals** by fostering a culture that enables people to lead productive, prosperous, and meaningful lives.*

*We seek to **Strengthen Communities** by enhancing our communities' unique characteristics, strengths, and assets to improve economic competitiveness.*

Chapter 2 - Technical Report – Where are we today?

The Region's Background

Found in the heart of the nation's Inland Northwest, the Clearwater Economic Development District of North Central Idaho encompasses the counties of Clearwater, Idaho, Lewis, Latah, and Nez Perce. Approximately 108,520 people live in the twenty-nine incorporated communities and in the unincorporated areas of the District's 13,500 square miles. Located at the confluence of the Snake and Clearwater rivers, the city of Lewiston, population 32,820, is the region's largest community and retail hub. Home to the University of Idaho, the City of Moscow is the second largest regional population center with 25,146 inhabitants. All other communities' populations range between 100 and 3,200 residents.



Figure 1: Gospel Hump Wilderness Area, Idaho County - Photo by Stephenie O'Callaghan

The region is rich in history and natural resources. The Nimi'ipuu people, now known as the Nez Perce, hunted and gathered in the region for 10,000 years. In 1805, the Lewis and Clark Corps of Discovery traveled by horse and foot through the Bitterroot Mountains and then continued their westward movement to the Pacific Ocean by canoe on the Clearwater River. A year later, they traveled back through the area. Fur trappers soon arrived in the area, followed by missionaries. In the 1860s, gold was discovered by Captain E.D. Pierce near the present-day town of Pierce and communities began to emerge along stagecoach routes. By the late 1800s, timber and agriculture emerged as the primary economies. These industries remain critical to today's economy.

AT A GLANCE: REGION 2 - NORTH CENTRAL IDAHO



Clearwater, Idaho, Latah,
Lewis, and Nez Perce Counties

POPULATION

2010 Census	Females
105,358	49.1%
2018 Estimate	Males
109,674	50.9%
2025 / 2030 Projection	Minority
110,721 / 111,035	11.9%

Median Age
38.6

Age 65+
10,485
Age 15-64
81,193
Under 15
17,996

HOUSING

Median Home Value
\$178,604

Homeowner Vacancy Rate
2.0%

Rental Vacancy Rate
4.9%

Occupied Housing Units
43,568

Assisted Living Facilities
19



HIGHER EDUCATION

University of Idaho
Lewis-Clark State College



LARGEST PRIVATE SECTOR EMPLOYERS

1. Clearwater Paper
2. Nez Perce Tribe
3. Vista Outdoor
4. St. Joseph Regional Medical Center
5. Schweitzer Engineering Laboratories
6. Idaho Forest Group



ECONOMIC

Median Household Income
\$45,873

Per Capita Income
\$24,469

County Property Tax
\$1.53 per \$100 Value

% of Families Below Poverty Level
9.3%

Food Insecurity Rate:



LARGEST INDUSTRIES

Job Comparison	2013	2018	Change in Jobs	2018 Pay Per Job
Agriculture and Forestry	1,023	977	-46	\$49,487
Mining	193	204	11	\$60,296
Construction	1,574	1,949	375	\$39,136
Manufacturing	4,746	4,856	110	\$54,122
Trade, Utilities, and Transportation	7,693	7,706	13	\$33,960
Financial Activities	2,004	1,882	-122	\$50,664
Professional and Business Services	2,011	2,222	211	\$39,521
Education and Healthcare	13,123	13,521	398	\$41,282
Leisure and Hospitality	4,566	4,849	283	\$16,100
Information and Other Services	1,600	1,670	70	\$29,655
Public Administration	3,585	3,499	-86	\$46,724

Sources
US Census Bureau, 2013-2017 ACS
State America Measuring Distress
Idaho Department of Labor
National Association of Realtors
Feeding America Map the Meal Gap 2018
Google

Workforce Trends

Source: Idaho Department of Labor

Population

North Central Idaho's population has grown more slowly than other regions in Idaho. It grew 6 percent from 103,733 in 2008 to 109,674 in 2018, while the U.S. population grew 8 percent and Idaho's population grew 14 percent. That reflects the region's slow economic growth, which in turn was reinforced by the sluggish population growth.

After many young people left the region and many people who move in were retirees, the population skews older than the U.S.



The largest cities in 2018:

Lewiston	32,817
Moscow	25,766
Grangeville	3,200
Orofino	3,124
Kamiah	1,265
Lapwai	1,132
Genesee	971
Cottonwood	931

Labor Force & Employment

Traditionally, North Central Idaho's economy relied on natural resources—farming, ranching, logging, lumber mills, and the Forest Service. Over the last 35 years, technology and reduced timber availability cut jobs in agriculture, logging, and mills. In the same period, jet boat builders, ammunition makers, and other metal fabricators created hundreds of manufacturing jobs.

Growth of enrollment at the University of Idaho and Lewis-Clark State College boosted retail and service jobs.

Tourism grew, increasing jobs at motels, restaurants, and recreational services.

The Nez Perce Tribe expanded its employment at headquarters, opened a casino resort, and became a major player in environmental remediation.

The state government developed prisons in Orofino and Grangeville and opened a National Guard academy in Pierce, while maintaining the mental hospital in Orofino.

With the rapid growth in the senior population, the region's health care sector has been the fastest-growing sector.

The region's unemployment rate in the last three years fell to record lows—around 3.0 percent. That's made it challenging for employers to recruit and keep workers, and intensified interest in career-technical training and skill development.

Employers & Wages

The region still has not fully recovered from the severe recession that began at the end of 2007. From 2008 to 2018, the number of private-sector employers in North Central Idaho fell 2 percent from 3,198 to 3,149. Despite that decline, it increased 11 percent over the last 25 years—from 2,847 in 1993. About 73 percent of the region's employment in the private sector, which paid an average wage of \$37,000 in 2018.



Of the 3,149 private employers, 1,821 employed fewer than five people; 987 employed 5 to 19, 253 employed 20 to 49, and 88 employed 50 or more.

In addition, the region has 74 federal, 61 state, and 164 local government employers in 2009. Their average pay was \$44,900. The largest government employers are the University of Idaho, Nez Perce Tribe, Lewis-Clark State College, and Forest Service.

Wages are rising in the region. The average pay per job grew 7 percent from \$36,400 in 2008 to \$39,100 in 2018, when adjusted for inflation and expressed in 2018 dollars.

AT A GLANCE: CLEARWATER COUNTY



Square Miles: 2,461
County Seat: Orofino (3,124)
Established in 1911

POPULATION

2010 Census
8,761
2018 Estimate
8,758
2025 / 2030 Projection
8,532 / 8,531

Females
45.0%
Males
55.0%
Minority
10.2%

Median Age
50.5

Age 65+
1,263
Age 15-64
6,362
Under 15
1,133

HOUSING

Median Home Value
\$134,400

Homeowner Vacancy Rate
2.1%

Rental Vacancy Rate
5.5%

Occupied Housing Units
3,706

Assisted Living Facilities
1



HIGHER EDUCATION

University of Idaho
Lewis-Clark State College



LARGEST PRIVATE SECTOR EMPLOYERS

1. Clearwater Valley Hospital & Clinics
2. Nightforce Optics
3. Brookside Landing
4. Nez Perce Tribe
5. Debco Construction



ECONOMIC

Median Household Income
\$41,122
Per Capita Income
\$22,169
County Property Tax
\$1.35 per \$100 Value
% of Families Below Poverty Level
11.1%
Food Insecurity Rate:



Sources
US Census Bureau, 2013-2017 ACS
State America Measuring Distress
Idaho Department of Labor
National Association of Realtors
Feeding America Map the Meal Gap 2018
Google



INDUSTRIES

Job Comparison	2013	2018	Change in Jobs	2018 Pay Per Job
Agriculture and Forestry	229	176	-53	\$51,109
Mining	37	19	-18	\$50,540
Construction	108	91	-17	\$40,002
Manufacturing	160	170	10	\$31,858
Trade, Utilities, and Transportation	436	412	-24	\$40,208
Financial Activities	62	65	3	\$27,324
Professional and Business Services	153	127	-26	\$52,230
Education and Healthcare	740	830	90	\$36,583
Leisure and Hospitality	199	195	-4	\$13,178
Information and Other Services	85	75	-10	\$29,638
Public Administration	551	457	-94	\$40,314

Clearwater County

As the Gold Rush Historic Scenic Byway passes through Clearwater County, travelers go where Lewis and Clark's Corps of Discovery first encountered the Nez Perce Tribe and where gold was first discovered in Idaho. Today's visitors thrill to the scenery and the fishing, hunting, camping and other outdoor opportunities forests and rivers provide. Dworshak Reservoir is a boater's paradise.

Despite all that it offers, Clearwater County has a small tourism sector; about 7 percent of the county's payroll jobs are in the leisure and hospitality sector, while 11 percent of U.S. payroll jobs are in that sector. Leisure and hospitality - which includes amusement, recreation, lodging, restaurants, and bars - employs about two hundred people in the county.

Deep river valleys and the rolling Weippe Prairie, where farmers grow wheat and other crops, also shape the county's economy. Clearwater County's agricultural sector is small. Its 312 farms and ranches cover about 56,600 acres and primarily produce wheat, forage crops, and cattle. Other crops include barley, canola, and legumes. In 2017, according to the U.S. Department of Agriculture five-year economic survey, the county's agricultural products were valued at \$7.3 million.

A long-term decline in logging and lumber mill employment intensified in 2000 when Potlatch, Inc. closed its Jaype mill in Pierce which employed 215 people. The collapse of the housing market in 2006 and decline in U.S. housing starts that started in 2007 resulted in further job losses. Employment in logging and wood products fell from 735 in 1992 to 365 in 2001, where it remained until the housing market collapse depressed it to just 190 in 2009. In 2016, Tri-Pro Cedar closed its mill near Orofino that employed fifty-five people. Currently, about 160 people work in logging and mills in the county.

Only in the past 20 years have manufacturers outside the lumber and wood products sector began to play significant roles. Some manufacturers have moved into the county, attracted by its low-cost, business-friendly environment. In 1993, the county had only thirty-three non-wood manufacturing jobs and today, it has about 250. ASE Sign Company was the first tenant in the Orofino business park when it opened in 2004. Nightforce Optics, a manufacturer of high-quality riflescopes that

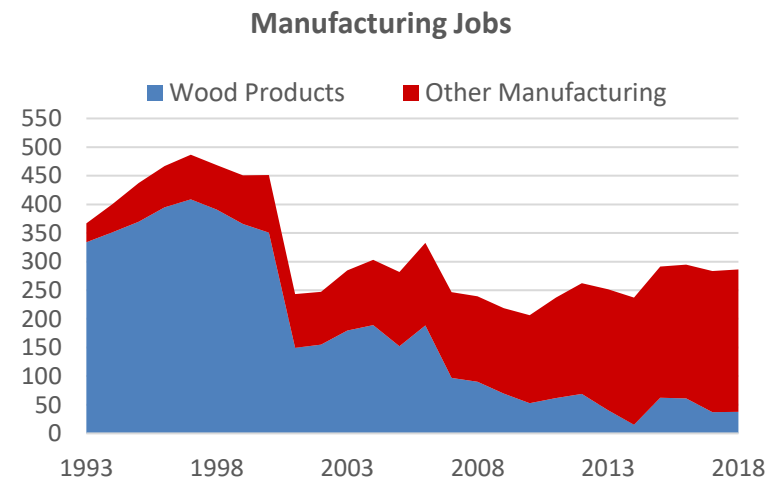


Table 1: Clearwater County Manufacturing Jobs

opened near Orofino about the same time, has grown to one hundred jobs and is expected to continue growing over the next few years. SJX Boats, a jet boat manufacturer, moved to the Orofino business center in 2008 and the City is currently expanding the building to increase production and employment.

After the forest products sector suffered severe job losses during the recessions of the 1980s, the county's population fell sharply from 10,266 in 1978 to 8,753 just 10 years later. Population declined to 8,485 in 1990. In the 1990s, retirees moved into the county, and population rose to 9,049 in 1998. After the Jaype mill closed in 2000, population fell to 8,596 by 2003. The population exodus slowed down and more retirees moved in. By 2008, the population rose to 8,764. The severe recession caused more people to move out than in for several years. In the last few years, the population has returned to its 2008 level. The net result is that the county's population fell 15 percent over the 40-year period, while the state of Idaho's population grew 93 percent and the U.S. population grew 47 percent. Clearwater County's long population slide put downward pressure on retail spending, local government budgets, and construction activity.

With the loss of many young families over the year, the county's population is older than average. Its aging population has made the health care sector its fastest-growing sector. Health care grew 53 percent from 367 jobs in 1998 to 563 in 2018. Clearwater Valley Hospital & Clinics in Orofino employs about two hundred people and the state psychiatric hospital in Orofino employs 120, while 17 other health care providers employ about 240 people.

AT A GLANCE: IDAHO COUNTY



Square Miles: 8,485
County Seat: Grangeville (3,200)
Established in 1864

POPULATION

2010 Census
16,276
2018 Estimate
16,513
2025 / 2030 Projection
16,441 / 16,457

Females
47.5%
Males
52.5%
Minority
9.3%

Median Age
50.2

Age 65+
2,414
Age 15-64
11,444
Under 15
2,655

HOUSING

Median Home Value
\$164,600
Homeowner Vacancy Rate
3.7%
Rental Vacancy Rate
7.4%
Occupied Housing Units
6,480
Assisted Living Facilities
3

HIGHER EDUCATION

University of Idaho
Lewis-Clark State College

LARGEST PRIVATE SECTOR EMPLOYERS

1. St. Mary's Hospital & Clinics
2. Idaho Forest Group
3. Syringa General Hospital & Clinics
4. Advanced Welding & Steel
5. Pacific Cabinets



ECONOMIC

Median Household Income
\$40,299
Per Capita Income
\$20,741
County Property Tax
\$0.71 per \$100 Value
% of Families Below Poverty Level
7.0%
Food Insecurity Rate:



Sources
US Census Bureau, 2013-2017 ACS
State America Measuring Distress
Idaho Department of Labor
National Association of Realtors
Feeding America Map the Meal Gap 2018
Google



INDUSTRIES

Job Comparison	2013	2018	Change in Jobs	2018 Pay Per Job
Agriculture and Forestry	121	129	8	\$32,350
Mining	67	76	9	\$47,063
Construction	351	377	26	\$33,893
Manufacturing	391	459	68	\$43,639
Trade, Utilities, and Transportation	867	836	-31	\$32,737
Financial Activities	183	152	-31	\$38,506
Professional and Business Services	116	103	-13	\$41,371
Education and Healthcare	1,024	1,069	45	\$35,425
Leisure and Hospitality	363	371	8	\$13,369
Information and Other Services	126	99	-27	\$24,853
Public Administration	608	593	-15	\$52,082

Idaho County

Idaho County measures 8,485 square miles, it is the state's largest county and one of the largest counties in the continental United States. More than four-fifths of the county is covered by national forests, making the Forest Service a major employer.

Increasingly known for its spectacular scenery, whitewater rafting, fishing, hunting, hiking and camping, the county attracts growing numbers of visitors. The Salmon River attracts rafters, kayakers, and anglers in the summer. Campers and hikers enjoy three wilderness areas – Gospel Hump, Selway-Bitterroot, and Frank Church River of No Return. Hunters find plenty of game in the county's forests. Snowmobilers and off-road vehicle enthusiasts have access to the thousands of miles of trail. Red River Hot Springs and Lodge in the Nez Perce-Clearwater National Forest has entertained visitors since 1909. The Riggins area has a growing reputation for its fishing and rafting opportunities. In 2000, the Salmon Rapids Lodge opened, providing Riggins with a centerpiece for its tourist sector. Whitewater recreation abounds on the Lochsa and Selway Rivers. St. Gertrude's Monastery, a home to Benedictine nuns near Cottonwood, draws hundreds of visitors to its retreat center and bed and breakfast. Cottonwood's most famous tourist site is Dog Bark Park which sells wood carvings and features a bed and breakfast in the shape of a wooden dog. Both Cottonwood and Grangeville have small ski areas nearby. The county's largest lodging facility is the Super 8 Motel in Grangeville. The leisure and hospitality - a sector that includes amusement, recreation, lodging, restaurants, and bars - employs up to 480 people at the peak of summer season. Employment drops to 290 in the winter. About 9 percent of the county's nonfarm payroll jobs are in the leisure and hospitality sector, while 11 percent of U.S. nonfarm payroll jobs are.

Farming and ranching play a significant role, especially on the Camas Prairie. The county's 708 farms and ranches cover about 537,400 acres and primarily produce wheat, forage crops, barley, canola, and grass seed. Other crops include garbanzos, barley, and lentils. In 2012, according to the U.S. Department of Agriculture economic survey conducted every five years, the county's farms were home to about 26,200 cattle and calves. Some farms also raise bees, horses, pigs, and sheep. In 2017, the county's agricultural products were valued at \$43.7 million.

The abundant forests traditionally provided hundreds of logging and wood products jobs. Technology and changes in forest management have reduced those jobs over the years while the national housing crisis that began in 2007 caused further erosion. Jobs in logging and wood products fell from 476 in 2000 to 389 in 2007 and then to just 188 in 2009. Today, about 280 people work in the industry. Idaho Forest Group, with more than 160 employees at its mill in Grangeville, is the county's largest manufacturer.

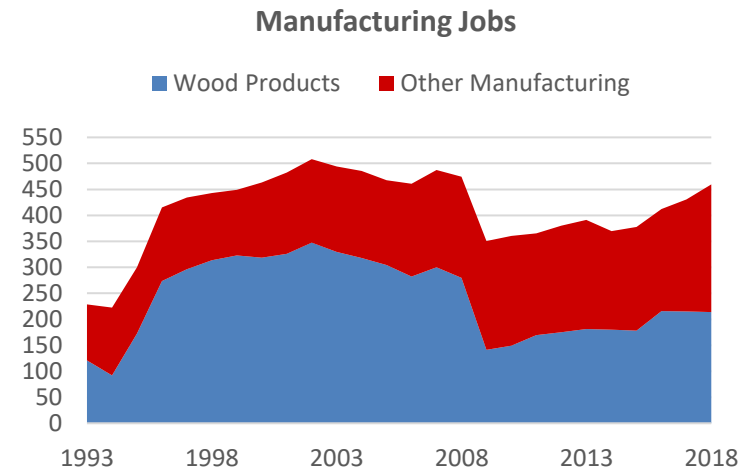


Table 2: Idaho County Manufacturing Jobs

Non-wood manufacturing employment increased from 108 in 1993 to about 250 today. Manufacturers include Pacific Cabinets, which employs fifty people making cabinets in Ferdinand; Anderson Aeromotive, whose thirty-five employees refurbish airplane engines at the county airport in Grangeville; Idaho Sewing for Sports near Grangeville, which employs more than twenty people making custom padding for sports venues; and six machine shops and metal fabricators on the Camas Prairie. Advanced Welding & Steel, a Grangeville company that makes iron skeletons for buildings including beams, columns to stairs, and handrails, is classified in the construction industry, so its eighty employees are not counted in manufacturing.

The federal and state government sectors provide 10 percent of the jobs in the county, while they provide 5 percent of U.S. nonfarm payroll jobs. The U.S. Forest Service is the county's largest employer, employing more than 360 people in August and an average of 240 throughout the year. Twenty years ago, its employment averaged 460. The Bureau of Land Management employs forty people, and the state's minimum-security prison on Cottonwood Butte employs more than sixty. Other large employers include the Postal Service, Idaho Transportation Department, Idaho Department of Health and Welfare, and Idaho Department of Fish and Game. The decline in Forest Service employment explains the decrease in federal jobs over the last 20 years.

Idaho County Federal and State Government				
	Employers		Jobs	
	1993	2018	1993	2018
Federal	26	18	580	316
State	10	8	133	132

Table 3: Idaho County Government Jobs

Idaho County's population grew 7 percent from 15,418 in 1998 to 16,513 in 2018, while the state's population grew 40 percent and the nation's population grew 19 percent. The slow population growth dampened employment in construction, service, local government, and retail.

The county's aging population has made the health care sector a fast-growing sector. Health care more than doubled from 288 jobs in 1993 to 654 in 2018. Syringa Hospital and Clinics in Grangeville and St. Mary's Hospital and Clinics in Cottonwood employ 360 people, while thirty-one other health care providers employ three hundred people.

AT A GLANCE: LATAH COUNTY



Square Miles: 1,077
County Seat: Moscow (25,766)
Established in 1888

POPULATION

2010 Census
37,244
2018 Estimate
40,134
2025 / 2030 Projection
40,546 / 40,806

Females
49.2%
Males
50.8%
Minority
11.7%

Median Age
29.2

Age 65+
2,591
Age 15-64
31,216
Under 15
6,327

HOUSING

Median Home Value
\$207,200
Homeowner Vacancy Rate
1.7%
Rental Vacancy Rate
2.5%
Occupied Housing Units
15,448
Assisted Living Facilities
3

HIGHER EDUCATION

University of Idaho - St. Andrews College
Lewis-Clark State College
sT

LARGEST PRIVATE SECTOR EMPLOYERS

1. Gritman Medical Center
2. Emsi Inc.
3. Walmart
4. Bennett Lumber
5. Moscow Food Co-op



ECONOMIC

Median Household Income
\$43,310
Per Capita Income
\$24,166
County Property Tax
\$1.60 per \$100 Value
% of Families Below Poverty Level
9.8%
Food Insecurity Rate:



Sources
US Census Bureau, 2013-2017 ACS
State America: Measuring Distress
Idaho Department of Labor
National Association of Realtors
Feeding America Map the Meal Gap 2018
Google



INDUSTRIES

Job Comparison	2013	2018	Change in Jobs	2018 Pay Per Job
Agriculture and Forestry	349	359	10	\$54,491
Mining	13	13	0	\$70,430
Construction	383	489	106	\$36,855
Manufacturing	374	360	-14	\$47,738
Trade, Utilities, and Transportation	2,307	2,270	-37	\$28,759
Financial Activities	385	382	-3	\$37,724
Professional and Business Services	795	903	108	\$42,321
Education and Healthcare	5,880	5,994	114	\$45,042
Leisure and Hospitality	1,740	1,937	197	\$14,394
Information and Other Services	432	482	50	\$30,039
Public Administration	625	628	3	\$46,696

Latah County

More than one in four Latah County nonfarm payroll jobs are at the University of Idaho, which employs 4,700 people in Moscow. Eight miles away in Pullman, Washington, Schweitzer Engineering Laboratories and Washington State University employ more than 1,800 Latah County residents.

Moscow is the major retail center for Latah County area so growth at Washington State and Schweitzer directly and indirectly creates jobs for Idaho residents. Enrollments at the universities soared after the recession began. As the economy recovered, enrollment fell at the University of Idaho but continued to grow at WSU. Expansion at Schweitzer also boosted consumer spending.

Agriculture and timber products in the forests around Potlatch, Elk River, and Kendrick have been the county's other economic mainstays. Technological and other changes have reduced agriculture and forest products jobs over the last three decades.

The Palouse is renowned for its rich farmland that makes agriculture a major driver of Latah County's economy. Its 1,041 farms cover 349,500 acres and primarily produce wheat, forage crops, lentils, barley, peas, garbanzos, and canola. In 2017, according to the U.S. Department of Agriculture five-year economic survey, the county's farms were homes to about 5,500 cattle and calves, 1,200 sheep and lambs, and 1,200 horses. In 2017, the county's agricultural products were valued at \$78 million.

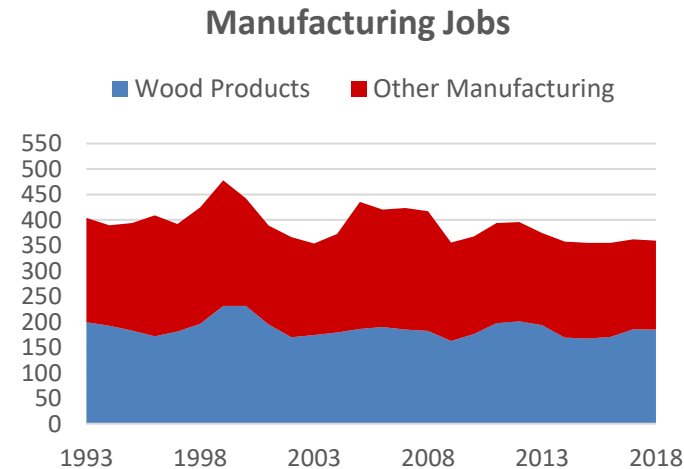


Table 4: Latah County Manufacturing Jobs

Nearly three-fifths of Latah County is forest land, so logging and mills have played a role in the economy for more than a century. Over time, other manufacturing operations also evolved. The largest wood products company is Bennett Lumber mill at Princeton, which employs more than 150 people. Among the larger manufacturers are three Moscow businesses - Fabtec Inc., which makes conveyors and other machinery; Comtech AHA Corp., which designs and makes electronic devices; and Biketronics, which makes electronic devices, including sound systems for Harley Davidson motorcycles. Latah County also is home to three printers and publishers, four machine shops, two wineries, and ten other manufacturers.

Technology transfer from the university, creating companies based on research, has created about 380 professional service and manufacturing jobs in Latah County in the last 25 years and is expected to create more in the future. The largest, Emsi, employs about two hundred, and plans to build headquarters with space for up to five hundred in Moscow, ID.

Latah County offers opportunities for hiking, biking, snowmobiling, hunting, and fishing. The University of Idaho holds conferences, football and other sports events, parents' weekend, theater performances, concerts, and the annual Lionel Hampton Jazz Festival in February, bringing thousands of visitors to the area. Visitors to Moscow enjoy the Appaloosa Museum and Heritage Center, which features the Appaloosa horse and the Nez Perce Tribe, and the McConnell Mansion Museum in a house built by a wealthy merchant and former Idaho governor in the 1890s. A growing trail system is bringing more visitors to Troy, Kendrick, and Juliaetta. The county's largest motel, the Best Western University Inn in Moscow, employs two hundred people. Leisure and hospitality - a sector that includes amusement, recreation, lodging, food service companies, restaurants, and bars - employs about 1,900 people. The highest employment of the year is in the fall, when people come to visit students at the university, attend conferences, and see football games. About 13 percent of the county's total nonfarm payroll jobs are in the leisure and hospitality sector, while 11 percent of U.S. jobs are. The university, Moscow Chamber of Commerce, and local innkeepers are working together to bring more conferences to the area.

Although Latah County is somewhat insulated from economic downturns because of the University of Idaho and agriculture, it felt the economic chill after 2007. Construction fell sharply, logging and wood products lost 260 jobs (about one in four of jobs) between 2007 and 2012. Wood products and logging have restored all the jobs they lost, but in 2018 construction remained about ninety jobs below its peak levels of 640 in 2006.

The federal and state government sectors provide 33 percent of Latah County's nonfarm payroll jobs, while they provide 5 percent of U.S. nonfarm payroll jobs. The county's largest employer, by far, is the University of Idaho. The U.S. Forest Service's employment fell from 148 in 1993 to 72 in 2018.

Latah County has grown faster than the rest of North Central Idaho, but still more slowly than the U.S. and Idaho. Its population grew 15 percent from 34,811 in 1998 to 40,134 in 2018, while the nation's population grew 19 percent and the state's population grew 40 percent. Despite population growth, Latah County's retail sector has stagnated in the last two decades. The increased competition from stores in Whitman County and the growing popularity of online shopping have reduced shopping in Latah County. Retail employment, which had 1,954 jobs in 1998, peaked at 2,128 in 2003. Today, it is hovering around 1,780—about 9 percent lower than 20 years earlier.

Federal and State Government				
	Employers		Jobs	
	1993	2018	1993	2018
Federal	30	21	294	161
State	19	14	5,067	4,809

Table 5: Latah County Government Jobs

The county's growing population has made the health care sector a fast-growing sector. Health care jobs grew 38 percent from 1,123 in 1998 to 1,547 in 2018. Gritman Medical Center in Moscow employs more than five hundred people, while fifty-six other health care providers employ about five hundred people. Among the largest health care providers are the Good Samaritan Society's nursing home and assisted living, the Moscow Care Center nursing home, and Moscow Family Medicine, a doctors' clinic.

AT A GLANCE: LEWIS COUNTY



Square Miles: 479
County Seat: Nezperce (469)
Established in 1911

POPULATION

2010 Census
3,821
2018 Estimate
3,861
2025 / 2030 Projection
3,990 / 4,009

Females
49.2%
Males
50.8%
Minority
16.7%

Median Age
48.6
Age 65+
520
Age 15-64
2,622
Under 15
719

HOUSING

Median Home Value
\$120,000
Homeowner Vacancy Rate
2.6%
Rental Vacancy Rate
5.3%
Occupied Housing Units
1,626
Assisted Living Facilities
3

HIGHER EDUCATION

University of Idaho
Lewis-Clark State College

LARGEST PRIVATE SECTOR EMPLOYERS

1. Kamiah Mill (Empire)
2. Nez Perce Tribe
3. Lakeside Residential Care
4. Hilco Inc.
5. Flying B Ranch



ECONOMIC

Median Household Income
\$40,313
Per Capita Income
\$23,285
County Property Tax
\$1.36 per \$100 Value
% of Families Below Poverty Level
8.8%
Food Insecurity Rate:



Sources
US Census Bureau, 2013-2017 ACS
State America Measuring Distress
Idaho Department of Labor
National Association of Realtors
Feeding America Map the Meal Gap 2019
Google



INDUSTRIES

Job Comparison	2013	2018	Change in Jobs	2018 Pay Per Job
Agriculture and Forestry	112	137	25	\$44,947
Mining	0	0	0	-
Construction	64	81	17	\$26,290
Manufacturing	291	223	-68	\$37,175
Trade, Utilities, and Transportation	337	337	0	\$30,881
Financial Activities	46	66	20	\$53,676
Professional and Business Services	32	74	42	\$37,777
Education and Healthcare	361	356	-5	\$24,050
Leisure and Hospitality	136	152	16	\$16,367
Information and Other Services	30	43	13	\$18,812
Public Administration	155	173	18	\$43,542

Lewis County

Lewis County is largely farmland on prairies above river valleys. Agriculture - especially wheat, peas, barley, lentils, forage crops and cattle - is the major industry. The county's 197 farms cover 200,435 acres and primarily produce wheat, barley, grass seed, forage crops, oats, lentils, peas, and canola. In 2017, according to the U.S. Department of Agriculture five-year economic survey, the county's farms were home to about 4,600 cattle and calves. In 2017, the county's agricultural products were valued at \$37.8 million.



Table 6: Lewis County Manufacturing Jobs

Manufacturing jobs nearly tripled from 80 in 1998 to 223 in 2018. More than forty of the new manufacturing jobs came from Hillco Technologies in Nezperce, which makes leveling systems for combines. Almost one-fifth of Lewis County is forest land, and logging and mills have played a key role in its economy since the 1890s. The wood products industry also added jobs despite the recession and long-term pressures that have reduced wood product employment in most places. Kamiah was hurt by the 2008 closure of Three River Mill just across the county line in Idaho County, impacting 108 Kamiah workers. The August 2010 opening of Blue North Forest Products mill at the same site restored more than half those jobs. The Three Rivers Mill jobs were reported in Idaho County, but the Blue North jobs were reported in Lewis County. Blue North closed in May 2016, idling its sixty-six employees. Kamiah Mills, a sawmill employing more than one hundred people, is the largest manufacturer in Lewis County. Following the Blue North closure, manufacturing jobs in the county fell to 223 in 2018.

Beautiful scenery and outdoor recreational opportunities draw visitors to Lewis County. Winchester Lake State Park offers 211 acres of campsites, yurt and canoe rentals, and nature trails around a beautiful lake. The Nez Perce Tribe operates a small casino in Kamiah that employs nearly sixty people. The Flying B Ranch, a hunting lodge on a 5,000-acre ranch near Kamiah, attracts hunters from across the nation. The Flying B also holds exclusive outfitter rights to a vast tract of special permit areas in the Nez Perce-Clearwater National Forest. The ranch employs more than fifty people at its fall peak. The tourism cluster employs about 250 people today, up from 170 in 1998. Tourism plays a slightly smaller role in Lewis County than in the U.S. - about 9 percent of the county's nonfarm payroll jobs are in the leisure and hospitality sector, while 11 percent of U.S. payroll jobs are.

The federal and state government sectors provide 7 percent of Lewis County's nonfarm payroll jobs, while they provide 5 percent of U.S. jobs. Winchester State Park, Idaho Department of Lands, and Idaho Fish and Game have added jobs. Federal employment also rose after the U.S. Forest Service opened the headquarters for the consolidated Nez Perce-Clearwater National Forest in Kamiah in 2014.

After the damage to agriculture and forest products from the two severe recessions in the 1980s, Lewis County's population fell 21 percent from 4,398 in 1978 to 3,846 in 1987. Population edged up in the next 10 years to 3,856; fell to 3,665 by 2005; and, increased to 3,861 in 2018. Lewis County's population stayed the same between 1998 and 2018, while the U.S. population grew 19 percent and Idaho's population grew 40 percent.

As Lewis County's population has aged, health care has become one of the fastest growing sectors. Health care jobs soared from 32 in 1998 to 169 in 2018. The county's largest health care providers include Lakeside Residential Care in Winchester, St. Mary's Hospitals and Clinics in Kamiah and Craigmont, and the Nez Perce Tribe's clinic in Kamiah. Eight other health care providers serve the county.

Federal and State Government				
	Employers		Jobs	
	1993	2018	1993	2018
Federal	14	7	48	62
State	6	5	40	52

Table 7: Lewis County Government Jobs

AT A GLANCE: NEZ PERCE COUNTY



Square Miles: 849
County Seat: Lewiston (32,817)
Established in 1864

POPULATION

2010 Census
39,265
2018 Estimate
40,408
2025 / 2030 Projection
41,212 / 41,363

Females
50.6%
Males
49.4%
Minority
13.1%

Median Age
40.8

Age 65+
3,697
Age 15-64
29,549
Under 15
7,162

HOUSING

Median Home Value
\$172,500
Homeowner Vacancy Rate
1.3%
Rental Vacancy Rate
7.5%
Occupied Housing Units
16,308
Assisted Living Facilities
9

HIGHER EDUCATION

Lewis-Clark State College
University of Idaho

LARGEST PRIVATE SECTOR EMPLOYERS

1. Clearwater Paper
2. Vista Outdoor
3. Nez Perce Tribe
4. St. Joseph Regional Medical Center
5. Schweitzer Engineering Laboratories



ECONOMIC

Median Household Income
\$51,804
Per Capita Income
\$26,799
County Property Tax
\$1.95 per \$100 Value
% of Families Below Poverty Level
9.4%
Food Insecurity Rate:



Sources
US Census Bureau, 2013-2019 ACS
State America: Measuring Distress
Idaho Department of Labor
National Association of Realtors
Feeding America Map the Meal Gap 2018
Google



INDUSTRIES

Job Comparison	2013	2018	Change in Jobs	2018 Pay Per Job
Agriculture and Forestry	212	176	-36	\$53,754
Mining	75	95	20	\$71,944
Construction	669	911	242	\$43,586
Manufacturing	3,532	3,645	113	\$58,133
Trade, Utilities, and Transportation	3,745	3,852	107	\$36,883
Financial Activities	1,328	1,217	-111	\$57,327
Professional and Business Services	919	1,016	97	\$35,344
Education and Healthcare	5,118	5,273	155	\$40,091
Leisure and Hospitality	2,128	2,194	66	\$18,309
Information and Other Services	928	971	43	\$30,435
Public Administration	1,641	1,648	7	\$46,919

Nez Perce County

Although it is 465 miles from the Pacific Ocean, Lewiston is Idaho's only seaport. The Snake River carries barges loaded with grain, legumes, paper, lumber and other products to the Columbia River and then the Pacific Ocean. Trucks bring products to the port from Idaho, Montana, and Washington. A single grain barge can move 3,000 tons of grain - the equivalent of 134 grain trucks - and uses a quarter to half the amount of fuel as trucks or rail traffic. Problems at the Port of Portland reduced containerized shipping in 2016, but barges still carry grain and other products that do not need to be containerized.

Nez Perce County's agricultural sector plays a significant role in the economy. Its 446 farms cover 381,587 acres and primarily produce wheat and barley. Other crops include peas, lentils, garbanzos, rapeseed, canola, mustard, safflower, oats, and buckwheat. In recent years, a few people have started growing grapes for wine. Cattle and horses are the major livestock. In 2017, according to the U.S. Department of Agriculture five-year economic survey, the county's agricultural products were valued at \$74.3 million.

Nez Perce County is tied to all the counties in North Central Idaho, but even more closely to Asotin County in Washington. Together, the two counties - whose largest cities of Lewiston and Clarkston are connected by bridges across the Snake River - make up the Lewiston metropolitan area. Asotin County is a bedroom community for Nez Perce County although some Nez Perce County residents work across the border in Washington State.

Manufacturing plays a significant role in the county. From the 1920s until 2016, the Clearwater Paper (formerly Potlatch, Inc) complex in Lewiston has been the largest private employer in the region. Clearwater Paper is known for the variety and high pay of its 1,200-plus jobs. In 2011, it sold its sawmill, which was then Idaho's largest mill, to Idaho Forest Group. About 250 people worked at the mill before the sale; the same as today. In 1993, 540 people worked in the county's wood products sector. Today, about 330 do. Lewiston ammunition maker Vista Outdoor (formerly ATK) grew from four hundred jobs in 1993 to more than 1,400 jobs by 2016. Howell Machine, which made equipment for ammunition makers for years, began making ammunition in Lewiston in 2012 and its employment exceeded 400 in 2016. Ammunition makers lost more than five hundred jobs after the presidential election reduced purchases of ammunition and guns. In 2012, Schweitzer Engineering Laboratories opened a plant in Lewiston. The electrical equipment maker increased employment there to more than 500 in 2018.



Table 8: Nez Perce County Mfg Jobs

Lewiston is a gateway to Hells Canyon, the deepest river gorge in North America. The Snake and Clearwater River provide extensive opportunities for boating, fishing, hiking, and other recreation. Hunters can find elk, deer, pheasants, turkeys, and chukars. The Nez Perce Tribe operates a casino and hotel that employs about 240 people near Lewiston. Lewiston's warm climate allows visitors to enjoy golfing for much of the year. From March through November six cruise boats carrying 150 to 200 people per trip dock at the ports in Clarkston so their passengers can enjoy the area's recreational opportunities, including jet boats tours of Hells Canyon. Leisure and hospitality - a sector that includes amusement, recreation, lodging, restaurants, and bars - employs about 2,100 people. About 10 percent of the county's total payroll jobs are in leisure and hospitality, while 11 percent of U.S. payroll jobs are.

The Nez Perce Tribe employs more than nine hundred people at its headquarters, clinic, environmental remediation, and other operations in Lapwai and its casino resort near Lewiston. The tribe offers the greatest diversity of occupations of any employer in the county. It also is one of the District's fastest growing employers and expects to continue to add jobs in a variety of operations.

Lewiston is a regional hub for transportation, retail, health care, entertainment, federal and state government, wholesale, and professional services. The federal and state government sectors provide 7 percent of Nez Perce County's nonfarm payroll jobs, while they provide 5 percent of U.S. jobs. As a regional center, Lewiston is home to many federal and state agencies. The largest state government employer is Lewis-Clark State College that employs about seven hundred people. As a four-year college that also offers one- and two-year professional-technical training programs and customized training for individual employers' workers, the college plays a leading role in developing the long-term skills of the District's labor force. Its enrollment in fall 2018 was 3,684 students. The Idaho Department of Health and Welfare, the Idaho Transportation Department, Idaho Department of Fish and Game, the North Central Idaho Health District, the Idaho State Police, and the U.S. Postal Service are the largest employers outside of the college. Federal employment in Nez Perce County fell after several federal offices closed, while state employment rose mostly because of the growth of Lewis Clark State College.

Despite the area's population growth, retail employment now is lower than 20 years ago. In 1998, Nez Perce County retailers employed 2,908 people. Their employment hovered in that range until the recession. By 2018, they employed 2,468. Growth of Clarkston's retail sector, including the move of Wal-Mart from Lewiston to Clarkston in 2009, reduced some of Lewiston's retail employment, as did the growth of Internet retailers such as Amazon.

Nez Perce County's population has grown steadily, but slowly. Between 1998 and 2018, Nez Perce County's population grew 8 percent from 37,395 to 40,408, while Asotin County's population grew 9 percent from 20,721 to 22,610. In the same period, Idaho's population grew 40 percent and the U.S. population grew 19 percent. Steady population growth allowed gradual expansion of retail spending, construction activity, and local government.

As Nez Perce County's population has grown and aged, health care has grown rapidly. Health care jobs grew 37 percent from 2,577 in 1998 to 3,521 in 2018. Residents in neighboring counties in Idaho and Washington often come to Lewiston for medical care. St. Joseph Regional Medical Center in Lewiston employs nearly 1,000 people. About 840 people work in the county's rehabilitation and residential care facilities.

Doctors' offices and medical clinics employ more than nine hundred people in the county. The Nez Perce Tribe runs Nimiipuu Health, a full-service medical clinic in Lapwai that employs about 130 people. Altogether, 161 health care providers operate in the county.

People

The District's population growth reflects its slow economic growth since 1980. In the late 1960s and early 1970s, the region's mainstay industrial cluster - forest products - added hundreds of jobs, and the region's population grew at the same rate as the U.S. population. After the two recessions of the early 1980s cut hundreds of forest product jobs, many people moved out of the District seeking employment elsewhere. In the late 1980s, the recovery in the forest products sector and growth in some other sectors allowed some families to return to the District. Since 1993, the District's population has grown slowly.

The Region's Population Growth since 1973

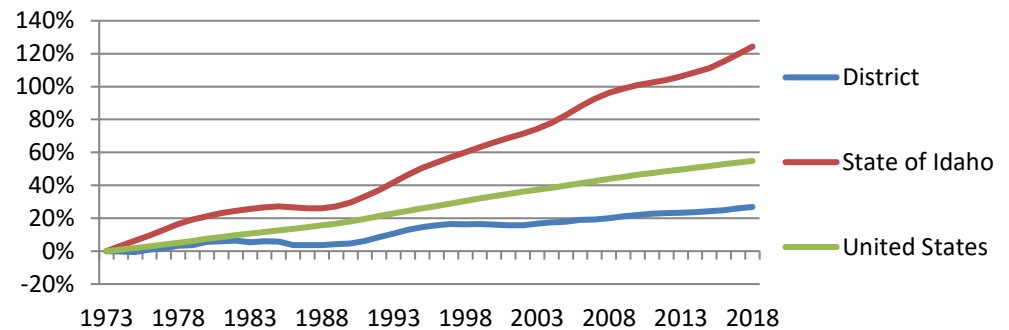


Table 9: Regional Population Growth since 1973

District Population by County					
	2010	2012	2014	2016	2018
Clearwater	8,727	8,578	8,576	8,652	8,758
Idaho	16,309	16,441	16,272	16,230	16,513
Latah	37,254	38,089	38,513	39,038	40,134
Lewis	3,820	3,820	3,813	3,854	3,861
Nez Perce	39,315	39,498	39,835	40,160	40,408
District	105,425	106,426	107,009	107,934	109,674

Table 10: District Population by County

After young people moved out of the area to look for work, the remaining population was older, and therefore the birth rate fell. Many of the people moving into the District are retired, and therefore are not contributing to the District's birth rate. Also contributing to the decline in the birth rate is the change from the large families once typical of rural areas to smaller family sizes more typical of the U.S. today. The birth rate fell further after 2007, when the recession caused young adults to postpone marriage and childbirth.

Clearwater County's long-term economic decline, following the loss of logging and wood product jobs, caused many young people to move away, resulting in an especially high proportion of senior citizens. Lewis County also lost a lot of its population in the 1980s and early 1990s as forest

products lost jobs, but has been growing slowly since. Latah County's more rapid growth mostly reflects the long-term increase in enrollment at the University of Idaho.

The District's population continued to grow after the recession began at the same rate as it did in the previous decade. The District's slow population growth hampers growth in retail, construction, service, and government sectors.

The population of the District is not as racially or ethnically diverse as the U.S. population. Native Americans are the largest racial minority in the District. People who told the Census they were only one race and that was American Indian make up 3.4 percent of the population. The Nez Perce Tribe's reservation is home to most of the District's 3,760 residents who are Native Americans.

Hispanics make up almost 4 percent of the population. Because Hispanic origin and race are two separate Census questions, people identify themselves as Hispanic or not Hispanic and as a member of one or more races. Some of the Hispanics are white, while others are Native Americans or black, and many are of more than one race. Typically, when people refer to ethnic or racial minorities, they mean people who are not white or of Hispanic origin.

The District's population is older than the U.S. population. The higher proportion of older residents limits the District's labor force growth, prompts the rapid growth of the region's health care industry, and poses special problems for social service providers.

Even though the Clearwater District's population grew 32 percent, roughly half as fast as the U.S. population, between 1970 and 2018, its population between the ages of 60 and 74 grew 136 percent which is as fast as the U.S. population growth of 141 percent in that age group. Of note is the District's population ages seventy-five and older grew 207 percent, faster than the U.S. growth of 188 percent. While the U.S. population under 15 years of age grew only 5 percent between 1970 and 2018, the CEDA District's population under fifteen declined 23 percent.

Nez Perce County's warm climate, public transportation options, and large community of health care providers attract retirees, but Lewis-Clark State College in Nez Perce County helps boost the number of

Population of District, by Age			
	1970	2018	Change
Total	82,896	109,674	32%
Under 15 years	23,482	17,996	-23%
15 to 29 years	22,036	26,273	19%
30 to 44 years	13,353	17,727	33%
45 to 59 years	12,711	18,871	48%
60 to 74 years	8,346	19,700	136%
75 years & over	2,968	9,107	207%

Table 11: Population of District Age Groups

people 15 to 29 years of age in the county. Latah County has an unusually high number of people 15 to 29 years of age, because of the students at the University of Idaho.

The counties with the most stagnant economies generally have the oldest populations. Clearwater, Idaho, and Lewis counties all have more people 65 years and over than people under eighteen. The U.S. population 65 years and over is about two-third of the size of the population under eighteen.

The aging of the population in the District is even more dramatic than the aging of the U.S. population, a huge demographic change unprecedented in U.S. history. Because of its high birth rate before the 1970s and because so many young adults moved elsewhere for jobs, the District's population traditionally was young, but now it is relatively old.

Education

A high proportion of the District's adult population has high school diplomas. The 2013-2017 American Community Survey found that 93 percent of the District's population 25 years and older had graduated from high school or earned an equivalency, while only 87 percent of the U.S. population 25 years and older had.

Clearwater County has the lowest proportion of high school graduates in the District, 89 percent. Its lower rate is partly explained by its high proportion of people over 65 years of age. People from earlier generations were less likely to graduate from high school than people in more recent generations.

About 29 percent of the region's residents 25 years and older have earned bachelor's or higher degrees while 31 percent of American adults are college graduates. Lewis County has the lowest percentage of college graduates, only 16 percent of its

Educational Attainment of Population 25 Years and Over by County						
<i>Census Bureau, American Community Survey, 2013-2017 Estimates</i>						
	United States	Clearwater	Idaho	Latah	Lewis	Nez Perce
Less than ninth grade	5%	3%	3%	1%	4%	2%
9th to 12th grade, no diploma	7%	8%	7%	3%	7%	6%
High school graduate (inc. GED)	27%	35%	35%	19%	33%	31%
Some college, no degree	21%	29%	28%	22%	32%	29%
Associates degree	8%	8%	8%	9%	9%	9%
Bachelor's degree	19%	12%	13%	27%	12%	16%
Graduate or professional degree	12%	5%	6%	20%	4%	6%

Table 12: Education Attainment by County, Population 25 and Over

adult population have earned bachelor's degrees or higher. Latah County, whose largest employer is the University of Idaho, has the highest percentage of college graduates - 46 percent. The other three counties are below the national average: Clearwater County - 17 percent; Idaho County - 19 percent; and Nez Perce County - 23 percent.

The Clearwater District has significantly increased the educational level of its adult population in the last three decades. In 1980, only 74 percent of the District's population 25 years and over were high school graduates. Today, 93 percent are. In 1980, 17 percent of the District's 25-plus population had earned a bachelor's degree or higher. Today, 29 percent have. There also has been a significant increase in individuals who are earning technical certificates and associate degrees from colleges.

Workforce

The District's workforce traditionally has had a reputation for its strong work ethic and high productivity, but it has grown slowly. Between 1978 and 2018, the District's civilian labor force grew 22 percent from 42,800 to 52,300. In the same 40-year period, the U.S. civilian labor force grew 59 percent and the state of Idaho's grew 98 percent.

Economic problems and the aging of the population caused Clearwater County to lose labor force throughout the last three decades and Idaho County's labor force did not grow significantly in the last 30 years. Latah County experienced the fastest growth in the region, 40 percent between 1978 and 2018. People living in Latah County often work in neighboring Whitman County, Washington, where Washington State University and Schweitzer Engineering Laboratories are located.

The recession, aging of the population, and stagnant employment caused Nez Perce County's labor force to shrink a bit after the 1990s. Nez Perce County employers draw workers from throughout the District and from Asotin County, Washington, while many Nez Perce County residents work in Latah and Whitman Counties. Despite that decline, Nez Perce County grew 28 percent over the last 40 years. In 2018, Lewis County's labor force was roughly the same size as it was 40 years earlier.

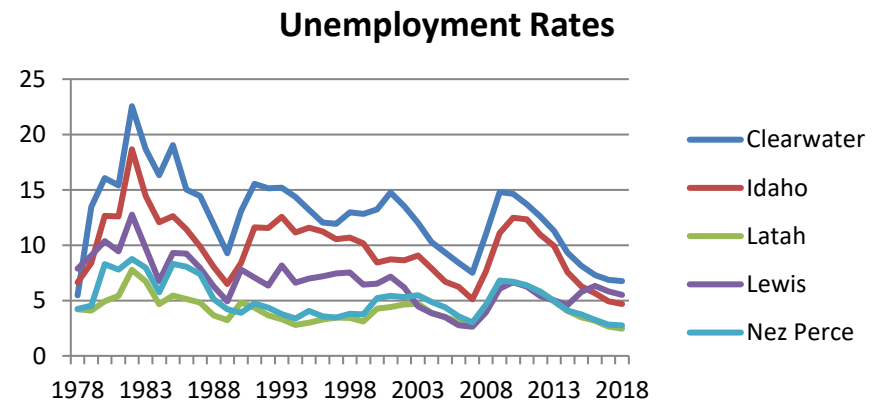


Table 13: District Unemployment Rate

The District experienced especially elevated levels of unemployment in the early 1980, when a double-dip recession devastated forest products employment. Since then, the District's unemployment rate has moved similarly to the U.S. unemployment rate and has often fallen below the U.S. unemployment rate. Between 2003 and 2007, the District experienced some labor shortages. Skilled manufacturing, construction, and health care workers were especially difficult to find, but even wages for unskilled workers rose sharply as employers competed for the limited number of workers.

The District's unemployment rate fell to the lowest rate ever recorded, 2.9 percent, in June 2007. After the U.S. recession began in December 2007, the District's unemployment rate more than doubled, but remained below the U.S. unemployment rate. Clearwater and Idaho counties, the District's most timber-dependent counties, suffered from double-digit unemployment rates after the U.S. housing market collapsed, slashing the demand for lumber and other wood products. Idaho County's unemployment rate fell below 10 percent in late 2012, while Clearwater County's rate fell below 10 percent in 2014. The unemployment rates of the District's other counties also fell since the recession ended. In all the District's counties, except Lewis, unemployment rates fell to record lows in 2018 and 2019.

Workers on Payrolls in District, By Age				
	1998	2018	1998	2018
Total	40,329	41,561	100%	100%
14-18 years	1,496	1,125	4%	3%
19-21 years	2,784	2,484	7%	6%
22-24 years	2,947	2,775	7%	7%
25-34 years	9,000	8,588	22%	21%
35-44 years	10,638	8,464	26%	20%
45-54 years	8,686	8,094	22%	19%
55-64 years	3,936	7,489	10%	18%
65 year & over	842	2,542	2%	6%

Table 14: Workers on Payrolls in District, by Age

While 22 percent of the U.S. labor force in 2018 - including workers on employers' payrolls, the self-employed, and unemployed workers - was over 54 years of age, 24 percent of the District labor force was over 54 years of age. The District therefore will be facing a high number of retirements in coming years. With its youth population growing more slowly than the nation's, the District will face challenges in replacing those retirees. Workers on payrolls who were aged 25 to 54 years fell 13 percent from 19,638 in 1998 to 17,057 in 2018. The number of people under 22 years old on payrolls fell 12 percent from 7,227 to 6,384.

Over the decades, the District has experienced a high level of "brain drain." Young people who grow up in the District or come to the District for an education tend to move away after graduation, because job opportunities are limited. If the region can keep more of these youth, it will solve its biggest potential labor force problem.

Finding and affording care for their children is a barrier to working for many parents. That is especially true for shift workers, people who work unusual hours or days, and families in rural communities. Another difficulty for many workers is the lack of affordable housing, which makes many individuals face long commutes - reducing family time, increasing costs, requiring reliable vehicles, and posing travel challenges especially in the winter months.

Employers often find they lose workers who commute long distances with the arrival of winter weather. The lack of affordable housing also makes it challenging for businesses to expand their workforce in many communities, since this makes it difficult to recruit workers to the area.

The District's workforce is better educated than the state's and the nation's workforces. The District has a better high school graduation rate than the state, which performs better than the nation. The District outperforms the state and U.S. in terms of postsecondary education, as well. Its young men especially stand out for their educational attainment relative to young men in Idaho and the U.S.

Educational Attainment of the Population 25 Years & Over						
U.S. Census Bureau American Community Survey 2013-2017						
	District		State of Idaho		United States	
25 to 34 years	Female	Male	Female	Male	Female	Male
High school graduates	94%	93%	92%	90%	91%	88%
Some college but no bachelor's	39%	36%	40%	36%	33%	31%
Bachelor's degree or higher	38%	29%	28%	23%	38%	30%
35 to 44 years						
High school graduates	96%	92%	92%	89%	89%	87%
Some college but no bachelor's	41%	35%	38%	32%	31%	28%
Bachelor's degree or higher	35%	29%	32%	30%	38%	32%
45 to 64 years						
High school graduates	95%	92%	92%	90%	89%	87%
Some college but no bachelor's	37%	36%	40%	35%	32%	28%
Bachelor's degree or higher	32%	25%	26%	27%	30%	30%

Table 15: Education Attainment of Population 25 Years & Over

Industrial Clusters that Drive the District's Economy

Industrial clusters are groups of industries located in the same area and tied to each other by common products, services, supply chains, and/or workforce needs. Some industries in the clusters may have developed to support another industry in the cluster. Firms in the cluster may compete against each other because they make the same products or services, or they may cooperate as part of a common supply chain. They often have similar workforce needs, and workers who receive training and gain experience in one firm in the cluster may be able to find work easily in another firm in the same cluster. Clusters generally form based on an area's comparative advantages. North Central Idaho has several industry clusters, some are well-developed but continuing to evolve and others are in the process of forming.

Forest products: The forest product industries make up the District's largest and oldest industrial cluster. This includes logging; transportation firms that carry logs, lumber, paper, and wood chips; wood products manufacturing; paper products manufacturing; machine shops that specialize in repairing and fabricating logging and sawmill equipment; and forest management. Altogether about 3,900 people work in the forest products cluster. The largest employers in the cluster are Clearwater Paper mill in Lewiston, 1,200 jobs; the Forest Service, four hundred jobs; Idaho Forest Group, more than four hundred jobs at its mills in Lewiston and Grangeville; the Nez Perce Tribe, 250 jobs; and Bennett Lumber mill in Princeton.

Forest management - including reforestation, management for recreational uses, stream restoration, fire prevention and fighting, and fish and wildlife management - is the source of many jobs with the Forest Service, state land and park departments, the Nez Perce Tribe, the University of Idaho, environmental engineering and analysis firms, and private forest landowners. Well-managed forests in turn boost tourism and make the district attractive to people looking for places to live.

Recreational technology: North Central Idaho is an outdoor paradise offering great opportunities for hunting, fishing, hiking, camping, jet boating, snowmobiling, whitewater rafting, horseback riding, recreational vehicles, and cross-country skiing. Not surprisingly, manufacturers here make equipment for recreational activities.

The Lewis-Clark Valley is known as the jet boat capital of the world, as thirteen firms in Lewiston, Clarkston, and Orofino manufacture aluminum jet boats. The Snake River Boat Builders, a coalition of jet boat manufacturers has introduced their jet boats into the European market. The coalition has exhibited its boats at Europe's largest boat show in Dusseldorf, Germany, and boat shows and trade missions in Norway, Sweden, and Spain. Boat builders employ about two hundred people in North Central Idaho and another 250 in Clarkston, WA.

Ammunition is the largest rec-tech industry in the region. Ammunition maker, Vista Outdoor (formerly, ATK) in Lewiston, added more than five hundred jobs between 2007 and 2016. They undertook a \$70 million expansion in 2016, and its employment rose to 1,400. Howell Munitions & Technology, a Lewiston firm which made bullet-making equipment, started making ammunition in Lewiston in 2012, and its employment reached four hundred by 2016. After the 2016 presidential election made gun owners less fearful about gun controls, they quit amassing ammunition and Vista Outdoors and Howell Munitions lost more than five hundred jobs between November 2016 and October 2019.

In addition to the boat builders and the ammunition makers, there are seventeen other companies that make outdoor recreational equipment - including guns, riflescopes, kayaks, arrows and bows, bird and animals calls for hunting, and fishing gear. Together, they employ about 460 people. Nightforce Optics, a maker of riflescopes employing more than one hundred people in Orofino; Northwest River Supplies, a Moscow wholesaler that also makes kayaks employs about one hundred people; and Seekins Precision, a gun manufacturer in Lewiston employing more than fifty people, are the largest in this rec-tech group.

Today, rec-tech companies including ammunition makers and boat builders provide about 1,600 jobs, accounting for one in three of the district's manufacturing jobs.

Metal fabrication supercluster: The jet boat builders, ammunition makers, and firearms manufacturers are part of a larger "supercluster" of firms that are primarily engaged in metal fabrication. The supercluster, which employs about 2,500 people, includes machine shops, makers of farm and mining equipment, and metal parts fabricators. The supercluster shares common workforce needs and have interaction between each other as buyers and sellers of intermediate products or services. They also work together on projects such as the American Manufacturing Network, developed by Clearwater Economic Development Association and Northwest Intermountain Manufacturing Association, to assist local manufacturers secure military contracts.

Higher education: Higher education is a major export industry in the district. (Export industries are industries that bring in dollars from outside the district and that drive the local economy.) The University of Idaho in Moscow offers a wide range of bachelor's and postgraduate degrees, while Lewis-Clark State College in Lewiston offers bachelor's programs and professional-technical training, including training customized to the

Ammunition & Gun Mfg Jobs

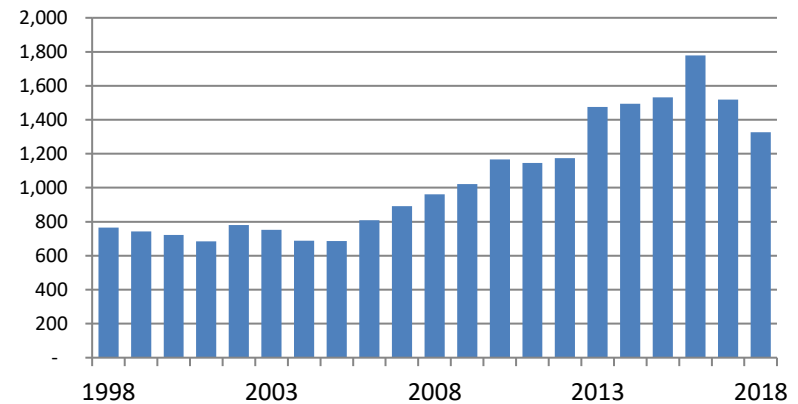


Table 16: Ammunition & Guns Manufacturing Jobs

Higher Education Jobs

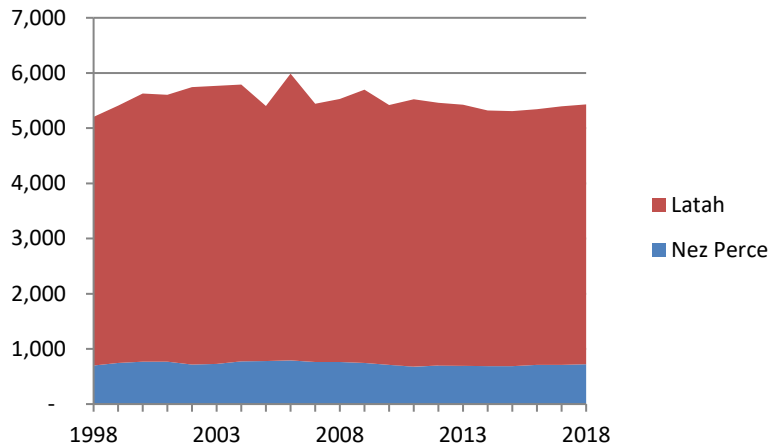


Table 17: Higher Education Jobs in the Region

needs of regional employers. Together they provide about 5,500 jobs including 1,500 work-study positions. The 12,500 students enrolled on the Moscow and Lewiston campuses also spend discretionary funds, benefitting the communities in the region. The district also benefits from the growing enrollment at Washington State University in Pullman, eight miles from Moscow. Pullman residents often shop in Moscow, and many Moscow residents work in Pullman. New St. Andrews College, a four-year Christian school in Moscow, also draws about two hundred students to the area.

The technology transfer cluster: The University of Idaho is the source of another cluster - professional service firms that spin off from university research. Their growth is fostered by the Palouse Knowledge Corridor, an organization formed by the university and Washington State University, a few miles across the border, to promote businesses that develop from

research at the universities. The university is strengthening its efforts to direct its research to the needs of Idaho businesses, generate patents and increase technology transfer programs that create businesses in the community based on those patents.

Management, scientific, and technology consulting and research companies in Moscow employed thirty people in 1995. By 2005, the technology transfer cluster employed two hundred. Today, it employs more than 480 people. In addition, there are two manufacturing operations that employ about fifty people that are technology transfer companies.

The largest technology transfer business in the region is EMSI Inc., which employs about two hundred people to provide economic consulting services and develop Web-based tools for analyzing regional economic and labor market data. Other players include EcoAnalyst which provides biological assessment and consulting services all over the world; First Step Internet which designs distributed computing environments, groupware, graphical user interfaces, application level productivity tools, and multimedia tools; Anatech Labs, which does water testing, other environmental work, and pharmaceutical testing; TerraGraphics, an environmental engineering firm; BioTracking LLC which can confirm pregnancy of cattle and wildlife through blood samples; IVUS Energy Innovations, designer of environmentally friendly, ultra-strong flashlights; Comtech AHA Corporation which designs computer hardware including chips and circuit boards; and Invertebrate Ecology which performs biodiversity studies and environmental site assessments.

Vineyard and wine maker cluster: Designated as an American Viticultural Area (AVA) in 2016, the Lewis-Clark Valley AVA builds upon an industry that emerged in the late 1800's but disappeared due to prohibition. Before Prohibition, the valley was well-known for its award-winning wines. When designated, the AVA was home to five commercial wineries and seven vineyards. The industry cluster has grown to include eight wineries, nine vineyards, three downtown tasting rooms, and a wine tour company. The Lewis-Clark Valley Wine Alliance, the industry's regional trade association, works collectively to increase consumer awareness of the Lewis-Clark Valley AVA wines; promote/host education events relative to industry growth; and increase wine/culinary tourism.

Turning farm products into value-added products: Agriculture is a long-term mainstay of the district's economy. On the agricultural lands throughout the district, farmers grow wheat, barley, lentils, peas, garbanzos, canola, hay, and other crops and ranchers raise cattle and horses. To support farmers and ranchers, there are grain elevators, barge and truck transportation, and wholesalers, retailers, and professional services serving farmers and ranchers.

Very few of the district's agricultural products are processed here. Economic development organizations, university researchers, and agricultural producers are trying to develop food processing that uses local products and turns them into value-added products. Others are hoping to add another element that will bolster farm incomes and attract dollars from outside North Central Idaho by exploring the possibility offered by agritourism. That would also bolster another emerging cluster—the vineyard and wine-making cluster since tourists could visit vineyards and vintners to sample wines.

Tourism: The tourism cluster is minor compared to its enormous potential. The district offers wonderful scenery and an abundance of outdoor recreational opportunities in every season. Hunting, fishing, whitewater, and camping are the biggest draws. The Nez Perce Tribe's casino hotel near Lewiston is the largest tourism employer. About 5,000 people work at inns, RV parks, restaurants, bars, ski areas, golf courses, outfitters and guides, museums, the tribe's two casinos, and related operations, while a few hundred others have jobs hosting visitors at state parks, the Nez Perce National Historic Park, and national forests. Jobs in the tourism cluster - including restaurants, bars, motels, inns, private campgrounds, casinos,



Table 18: Tourism Cluster Employment

outfitters and guides, ski areas, golf courses, tours, and marinas - lost a job during the recession, mostly because of a decrease in business travelers and reduced spending by leisure travelers

Health care: The growth and aging of the population have pushed up health care employment in the last 25 years. Health care cluster jobs increased 72 percent from 3,766 in 1993 to 6,481 in 2018. St. Joseph Regional Medical Center in Lewiston and the large community of medical practices around it attract patients from southeast Washington as well as North Central Idaho.

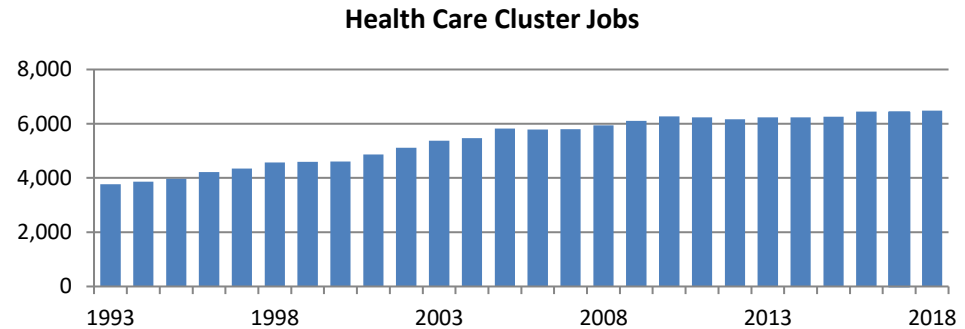


Table 19: Regional Health Care Cluster Jobs

A Traditional Mainstay: Wood Products

Central to understanding the economy of North Central Idaho is knowledge of the long-term changes in its mainstay sector - wood products and logging. To compare the present to the past requires reconciling two different ways of classifying industries that have been used in the last 40 years. In 2001, federal and state statistical agencies quit classifying industries based on the Standard Industrial Classification and began using the North American Industrial Classification System. Comparing data from the time before the classification change is difficult since the systems are so different. To show the long-term trend in manufacturing, the old SIC coding, rather than the new NAICS coding, is used when looking at the wood products sector. Under the SIC, logging was part of “lumber and wood products manufacturing.” Under the NAICS, it is not part of manufacturing. Publishing also went from being part of manufacturing, to becoming part of a new sector - Information. Since this chapter uses the older classification, logging is part of lumber and wood products manufacturing, and publishing is part of manufacturing as well.

Lumber and wood products, an industry that includes logging as well as lumber and wood products manufacturing, has always comprised a large part of the district’s manufacturing employment. Over time, the district has lost lumber and wood products jobs, while adding other manufacturing jobs. Yet, lumber and wood products jobs make up 26 percent of the district’s manufacturing jobs in 2018 compared to 3 percent of U.S. manufacturing jobs. The paper products industry is closely related to lumber and wood products but is treated as a separate industry. Clearwater Paper in Lewiston is the district’s only paper manufacturer. It employs more than 1,200 people.

Manufacturing Jobs

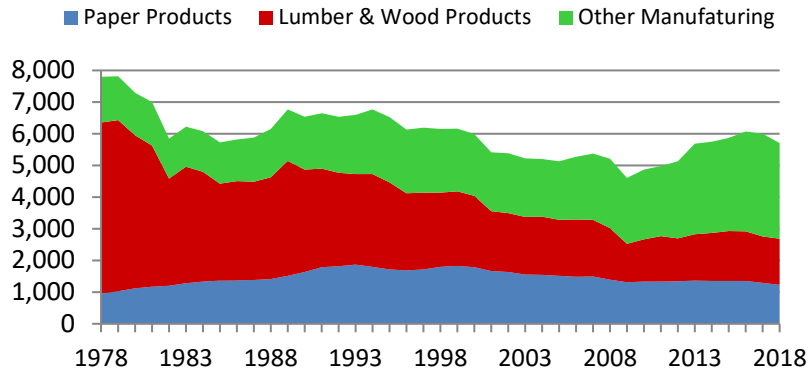


Table 20: Manufacturing Jobs in the Region

Clearwater, Idaho, and Lewis Counties have been especially dependent on the lumber and wood products jobs. Paper products rose from 24 percent of Nez Perce County's manufacturing jobs in 1978 to 47 percent in 1998 and then fell to 32 percent in 2018. Fortunately, the counties have diversified their manufacturing bases in recent years.

Lumber and wood products employment, which includes logging, tends to follow U.S. housing starts. When many new houses are being built, lumber, plywood, and other wood products tend to be in high demand. When a recession or higher interest rates depress housing starts, then lumber and wood products jobs fall. Over time, two other factors have reduced lumber and wood products employment. A change in U.S. Forest Service policy in the early 1990s reduced timber-cutting on federal land, which led to fewer logging jobs and less raw products for mills. Technology has reduced the amount of labor required to produce the same number of board feet of lumber, veneer, or plywood and to harvest the same number of logs.

Lumber and wood products employment tends to be highly cyclical. When the U.S. is in a recession, housing starts fall to low levels and wood products employment plunges. The recession that began in late 2007 was exceptionally harsh, depressing housing starts and therefore wood products employment to their lowest levels since World War II. In April 2009, housing starts fell to their lowest level, an annualized rate of 479,000. Their two previous low points occurred during major recessions, when they fell to 798,000 in January 1991 and 837,000 in November 1981. Those low points pale in comparison to 2009. U.S. housing starts have risen since the recession but remain below their historic norms. In 2018, they totaled 1.25 million.

District's Lumber & Wood Product Jobs Relative to U.S. Housing Starts

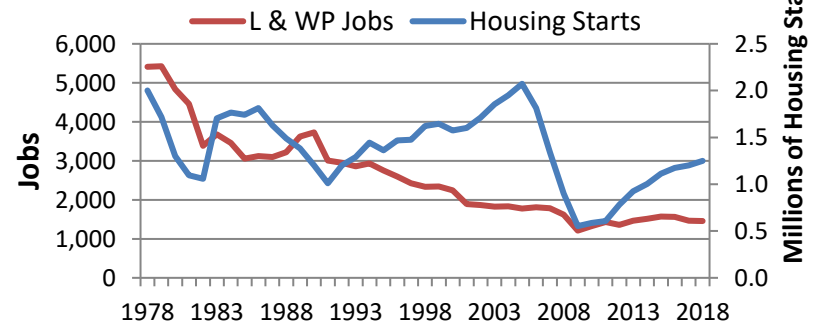


Table 21: Lumber & Wood Product Jobs Relative to U.S. Housing Starts

Since the recession ended, lumber and wood products jobs have increased, with some notable exceptions. In 2016, Blue North Forest Products mill in Kamiah closed, putting its sixty-six employees out of work, and Tri Pro Cedar mill in Orofino closed a few months later, idling fifty-five people. A shortage of timber to cut, along with the impact of rising imports of Canadian lumber and declining exports to Asia and other regions, were cited as the reasons for the closures. The net result was that 2018's employment averaged 1,458, about 330 jobs below its 2007 level.

Logging and wood and paper product manufacturing offer high-paying jobs that can support families. The average worker in the district's forest products cluster made \$62,029 in 2018, while the average worker in all other sectors made \$36,894. Losing those jobs are especially hard on communities. Because of the sector's high wages and its considerable number of related industries - including forest road construction, forestry, paper products, and transportation - the sector has an especially high impact on local economies. Its economic multiplier of 3.56 is more than double the economic multiplier for the average sector. This means that for every job created in the lumber and wood products sector, another 2.56 jobs are indirectly created in the district's economy. Its high multiplier means that timber-dependent communities throughout the district suffer whenever the lumber market is depressed and thrive when it is strong.

Geography

Mountains, high prairies, and river valleys create the region's unique landscape; the lowest point of the region lies at seven hundred feet above sea level – the highest point rises above 8,500 feet. The Bitterroot Mountains divide Idaho and Montana, creating the eastern border of the region. To the west, the border is defined by the Snake River separating the five North Central Idaho counties from Oregon and Washington. The district has four seasons with some areas of the region experiencing more severe temperatures and precipitation than others. Temperatures range from highs of 90°F to 105°F during the summer with lows between zero°F to twenty°F in the winter.

North Central Idaho, like the rest of the state, is well known for scenic wonders and world-class outdoor adventures. The district is home to:

- North America's two deepest river gorges - Hells Canyon and the Salmon River of No Return.
- The largest wilderness area in the lower forty-eight states - Selway-Bitterroot Wilderness, Frank Church-River of No Return Wilderness, Gospel Hump Wilderness and the Hells Canyon National Recreation Area;
- The Nez Perce-Clearwater National Forest encompassing 4.0 million acres; and,
- Scenic Byways – Northwest Passage Scenic Byway All American Road, Gold Rush Byway, Elk River Back Country Byway, and the White Pine Byway.

The forestlands of the District have been a major economic factor since people began settling in the area in the late 1800s. The Clearwater Economic Development District land use is primarily forest (73.2 percent), the Nez Perce – Clearwater National Forest encompass 3.1 acres of forest land. These region’s forests are the source of the District’s largest industry and include sectors such as logging, processing logs into lumber and other wood products, processing wood into outputs such as paper or electricity, and timber management services.

Environment

With over 5.5 million acres managed by the Nez Perce - Clearwater National Forest, Bureau of Land Management, U.S. Army Corp of Engineers, National Park Services, and US Fish and Wildlife Service, 64.6 percent of District land is federally owned. An additional 29.6 percent is privately-owned with the remainder owned by the State of Idaho, Nez Perce Tribe, and local government.

Land Use: The Clearwater Economic Development District land use is primarily forest (73.2%) followed by range land and agriculture (14.9 percent and 11.4 percent). Water and urban areas comprise less than one percent.

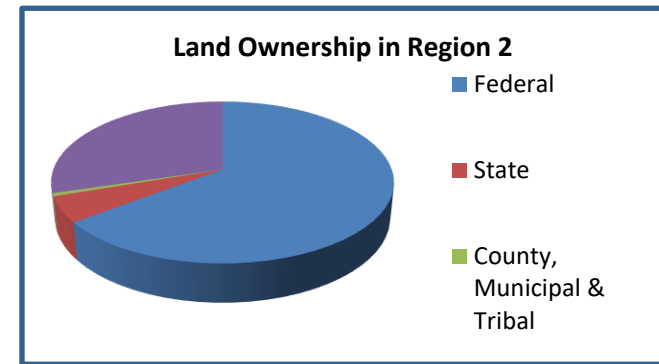


Table 22: Land Ownership in Region 2

Federal Lands

- **Nez Perce – Clearwater National Forest** - Nez Perce - Clearwater National Forests comprises 4.1 million acres; nearly half of which is designated as Wilderness.
 - The **Clearwater National Forest** is divided into seventeen management areas totaling 1.9 million acres, located within Clearwater and Latah Counties. Twenty-eight percent of the forest is managed for timber production; 47 percent is managed for recreation, big game habitat and high valued fishery habitat; the remaining 25 percent of the lands are part of the Selway-Bitterroot Wilderness complex. The Nez Perce Lolo Trail motorway and the Lewis and Clark Trail cross Clearwater National Forest land north of U.S. Highway 12.
 - The **Nez Perce National Forest** is located within Idaho County. The forest is divided into twenty-six management areas totaling 2.2 million acres. Thirty-three percent of the forest is managed for timber production; 25 percent is managed for recreation, big game and fisheries habitat; the remaining 42 percent of the lands are designated wilderness (Selway-Bitterroot, Frank Church River of No Return, Gospel Hump and portions of Hells Canyon).

- The **Clearwater Basin Stewardship Collaborative** brings together representatives from all backgrounds to cooperatively provide a stewardship approach for improving conditions on federal lands. The Collaborative was established to provide direction for managing the ecological, social, and economic needs on portions of the Clearwater and Nez Perce National Forests. The Collaborative Group includes a wide range of commodity, environmental, recreational, fish and wildlife, Native American, and local government interests. www.idl.idaho.gov/LandBoard/flt/AppG_CLEARWATER.pdf
- **The Bureau of Land Management (BLM)** manages 133,207 acres of land within the region. In Idaho and Lewis counties, BLM lands are comprised of several large blocks of land in timber and rangeland habitats. Throughout Clearwater, Latah and Nez Perce counties, BLM lands are primarily small blocks of riparian habitat (stream/river side properties). Management objectives for BLM lands within the region are focused on recreation, livestock and wildlife grazing areas, with small blocks utilized for timber production.
- **The National Park Service (NPS)** owns and manages 1,478 acres of land in the region. The primary objective for management of these lands is the interpretation of Nez Perce Tribal culture and history.

Tribal Lands

- **The Nez Perce Tribe of Idaho's** reservation boundary encompasses 750,000 acres of which approximately 85,000 acres are owned by the Tribe and/or tribal families. The Nez Perce Tribe is federally recognized by virtue of the Treaties of 1855, 1863 and 1868 with the United States government. The remaining 665,000 acres were made available to non-Indian settlement and are currently owned by private individuals.

State Lands

- **The Idaho Department of Lands** manages 355,693 acres of State of Idaho Endowment Fund land within the North Central Idaho region. Lands are distributed throughout all counties with the most timber production lands in Clearwater County. These lands are managed for grazing and timber production. Proceeds from activities on these lands are utilized to support the State Endowment Fund that provides some public-school funding. www.idl.idaho.gov
- **The Idaho Department of Fish and Game** owns and manages Wildlife Management Areas (WMA's) in the region. These lands were acquired as wildlife mitigation from the Bonneville Power Administration in compensation for losses of wildlife habitat in Clearwater County when the Dworshak Dam was built. In addition to these WMA's, the Department manages several fishing reservoirs, conservation easements, and a wildlife preserve within the region. www.fishandgame.idaho.gov/

- **The Idaho Department of Parks and Recreation** manages three state parks located in Nez Perce, Lewis, and Clearwater Counties: Hells Gate State Park, Winchester Lake State Park and Dworshak Reservoir State Park. <http://parksandrecreation.idaho.gov/>

Transportation

The major transportation corridor north to south is U.S. Highway 95 and east to west is U.S. Highway 12. State Highways 3, 6, 8, 11, 13, and 14 connect to the major arterials.

Because of the diverse terrain, the region's road system has a considerable number of winding roads and steep grades. The closest interstate is fifty miles to the north of Latah County and one hundred miles to the south of Idaho County. The Idaho Transportation Department Region II maintains the 4,163 miles of state highway; county road departments maintain several hundred miles of the road system, and local highway Districts maintain 695 miles of the road system.

The Idaho Transportation Department oversees the **State Transportation Improvement Program (STIP)**. The purpose of the STIP is to provide for a one to five-year capital improvement plan for the state's surface transportation program. The STIP is updated annually and follows this planning cycle closely to ensure that projects are identified, selected, and prioritized. The STIP has been developed through a coordinated and cooperative process by the Idaho Transportation Department (ITD) involving citizens, elected officials, tribal governments, other state and federal agencies, each of Idaho's six metropolitan planning organizations (MPO), the Local Highway Technical Assistance Council (LHTAC) and other interested organizations. The STIP establishes schedules for a variety of projects, including highways and bridges, bicycle and pedestrian facilities, highway safety, congestion mitigation, air quality, railroad crossing safety, airports, public transportation, and transportation planning. www.itd.idaho.gov/planning/stip/

Scenic Byways: The region hosts four Scenic Byways with America's Scenic Byway or State Scenic Byway designation. Byways include:



Figure 2: North Central Idaho Transportation Network

- Northwest Passage Scenic Byway All American Road – 202 miles, beginning in Lewiston and following U.S. 12 northeast to the Idaho - Montana border; also following Idaho 13 from Kooskia to Grangeville and the junction of U.S. 95.
- Gold Rush Byway – 42.5 miles, beginning at the junction of U.S. 12 and Idaho 11 on the Clearwater River at Greer.
- Elk River Back Country Byway – 57 miles, beginning in Orofino, going north across the Dent Bridge following the route to Elk River and ending at Bovill on State Highway 8.
- White Pine Byway – 82.8 miles, beginning at Potlatch following the Palouse River through Princeton and Harvard, turning north, and ending in Cataldo outside the Clearwater Economic Development District. www.idahobyways.gov/byways; www.nwpassagescenicbyway.org

Airports: The Lewiston-Nez Perce County Airport and the Pullman-Moscow Regional Airport provide the primary air transportation services to the region. The region has four general aviation airports located in or near the cities of Orofino, Kamiah, Grangeville (Idaho County Airport), and Craigmont. There are three community airports to include Cottonwood, Nezperce, and Kooskia. There are also eight wilderness or backcountry airports.

- **The Lewiston-Nez Perce County Airport:** Since 1944, the Lewiston-Nez Perce County Regional Airport has provided passenger service to the region. With commercial service provided by Delta airlines, the airport provides direct service to Salt Lake City. Federal Express, the United Parcel Service, DHL and other air cargo services provide the whole region with freight transport.

The regional agriculture and forest industries rely on the airport for servicing aerial applicators that apply fertilizers and other chemicals to farmland and for providing airframe, applicator, and power plant maintenance to the aerial applicator planes. Federal agencies use the airport to address forest and wildland fires that occur on neighboring federal, state, and private lands. The United States military uses the airport for training and national security purposes.

The Lewiston-Nez Perce County Airport is owned and operated jointly by the City of Lewiston and Nez Perce County. The Airport Authority Board provides oversight. Currently, the Airport is developing the 80-acre Southside Airpark. www.golws.com

- **The Pullman-Moscow Regional Airport:** The Pullman-Moscow Regional Airport is in the State of Washington near the Idaho border. Alaska Airlines provides direct service to the Seattle-Tacoma International Airport, providing connections to American, Delta, Northwest, and Continental. www.pullman-wa.gov/airport

The Port of Lewiston: The Port of Lewiston, located in Lewiston along the Clearwater River, is the furthest inland seaport on the west coast of the United States and is important to the agriculture and paper product industries of the region. The Port of Lewiston was established in 1958 as an Economic Development District (encompassing the boundaries of Nez Perce County, Idaho), intermodal transportation center, and facilitator of international trade. The mission of the Port is to create and retain jobs that enhance the economic stability of Nez Perce County and the other counties of North Central Idaho. Located on the Lower Granite Dam Reservoir, the Port began shipping cargo in 1975 when the last of eight dams were constructed as part of the federal Columbia Snake River System.

The Port of Lewiston operates the 150,000 square foot Inland 465 Warehouse, a container yard, and a business incubator program in North Lewiston. In addition, the Port offers land for lease and purchase at the Harry Wall Industrial Park and the Business and Technology Park.

Because the Port of Lewiston is the end of the navigable Columbia Snake River System, the Port acts as a natural funnel for inbound and outbound products from North Central Idaho, Canada, Montana, the Dakotas, and Wyoming. Agricultural and wood products have primarily benefited from the efficient transportation alternative as it allows these industries to compete in global markets.

In addition to port-owned facilities, the North Port property hosts privately-owned grain terminals and trucking companies. A feeder line of the Great Northwest Railroad with a direct link to the main lines of the Union Pacific and Burlington Northern Railroads serves the Port.

Nearly all the region's soft white wheat, pea, and lentils are shipped through the Port of Lewiston. www.portoflewiston.com

Rail System: A feeder line of the Great Northwest Railroad (GRNW) with a direct link to the main lines of the Union Pacific (UP) and Burlington Northern Railroads (BNR) to the west of North Central Idaho serves the region. The Great Northwest Railroad (GRNW) is in the Idaho Panhandle with an office in Lewiston and consists of approximately seventy-seven mainline miles. From Lewiston, Idaho, the railroad leads west to Riparia, Washington. www.watcocompanies.com/Railroads/gnr/grnw.htm

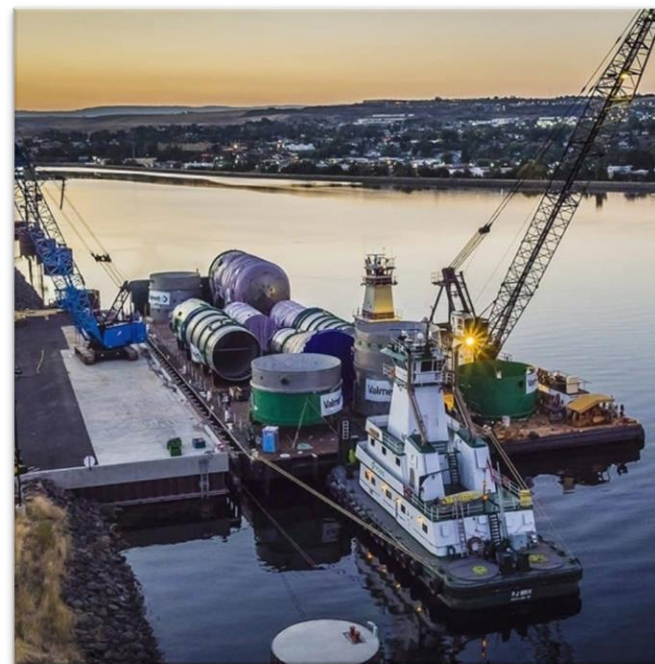


Figure 3: Port of Lewiston, Nez Perce County - photo provided by Port of Lewiston

Mobility Systems: Public transportation services are available but limited in North Central Idaho. Primary public transit providers include SMART, providing fixed route and dial-a-ride services in Moscow, and the City of Lewiston providing similar service for the residents of Lewiston. Appaloosa Express Transit offers service to Lenore, Greer, Orofino, Kamiah, Kooskia, Peck, Culdesac, Lapwai, and Lewiston. Appaloosa Express Transit connects with Lewiston Transit and Asotin County Public Transportation Benefit Area at the Lewiston Community Center. Northwestern Trailways provides inter-city transportation, connecting the region south to Boise, and west to Spokane.

Lewis-Clark Valley Metropolitan Planning Organization (LCVMPO): The Lewiston, Idaho/Clarkston, Washington area is designated as a bi-state, metropolitan planning area to consider the transportation needs of the Lewiston and Clarkston Valley area and to plan for the orderly improvement, development, and growth of the communities. www.lewisclarkmpo.org

Power

Hydroelectric Power Production: Dworshak Dam is a hydroelectric, concrete dam on the North Fork of the Clearwater River in Clearwater County. The Dam has a generating capacity of four hundred megawatts with an overload capacity of 460 megawatts. It is the highest straight-axis concrete dam in the western hemisphere.

Power Utilities: Avista Corporation, an investor-owned utility, provides about 80% of the electricity and 100% of the natural gas to the region. Public cooperatives, including Clearwater Power Company, Idaho County Light and Power, and Idaho Power cover the rest of North Central Idaho needs. Natural gas is available for residential and small commercial business use in some areas of the region. Providing reliable basic service to remote communities like Elk City, White Bird and Riggins is a fundamental challenge in the District. Efforts to expand and implement the visibility of alternative sources, such as wind, hydro-electric, biofuels, and bio-mass sources are under way. Clearwater Paper Corporation of Lewiston owns and operates the only working co-generation plant within the region that sells electricity back to Avista Corporation.

- Avista Corporation: www.avistacorp.com
- Clearwater Power Company: www.clearwaterpower.com
- Idaho County Light and Power: www.iclp.coop
- Idaho Power: www.idahopower.com

Medical and Emergency Services

Health Care Systems: The Clearwater Economic Development District has one regional medical center and four (4) critical access hospitals. Numerous independent clinics and hospital-owned medical clinics are scattered throughout the region. In nearby Clarkston and Pullman, Washington, two additional hospitals serve the region.

- St. Joseph Regional Medical Center, Lewiston, ID, www.sjrmc.org
- Clearwater Valley Hospital, Orofino, ID, www.smh-cvhc.org
- Gritman Medical Center, Moscow, ID, www.gritman.org
- St. Mary's Hospital, Cottonwood, ID, www.smh-cvhc.org
- Syringa General Hospital, Grangeville, ID, www.syringahospital.org
- Tri-State Memorial Hospital, Clarkston, WA, www.tristatehospital.org
- Pullman Region Hospital, Pullman, WA, www.pullmanhospital.org



Figure 4: St. Mary's Hospital, Cottonwood, ID - photo provided by St. Mary's Hospital

Primary challenges for hospitals include the shortage of medical personnel (doctors, nurses, and technicians), scarce financial resources, and the expense of providing services to the uninsured or under-insured. The hospitals are active and aggressive in establishing collaborative partners to share resources, seeking out grant funding, and using technology such as telehealth and telemedicine to provide service.

Emergency Medical Services: The Region operates with a web of regional, county, and city organizations that provide various levels of emergency medical services. For example, the City of Lewiston provides regional emergency response services with full-time professionals to the City and some of the communities and non-incorporated areas of Nez Perce County and Asotin County, Washington. Clearwater County Ambulance Service works with approximately twenty volunteer Emergency Medical Technicians (EMTs) trained in basic or "first response" that are in Elk River, Orofino, Weippe, and Pierce. In rural areas, emergency services are provided by primarily trained, first response, or basic EMT volunteers. Most emergency medical service organizations are linked to the local fire department, often co-locating in the same facility and sharing personnel. Most EMS organizations have no tax revenue and are dependent on community contributions for operations. Major

challenges facing EMS organizations include funding for needed equipment and facilities, communication equipment inoperability, and trained volunteers.

Law Enforcement: The Idaho State Police; the Idaho, Clearwater, Latah, Lewis, and Nez Perce County Sheriff's Departments; the Nez Perce Tribe; and city police departments provide security within the District. Except for Lewiston, Moscow, Grangeville, and Orofino, all other North Central Idaho communities rely on the sheriff's department for law enforcement services. Each county has an established, volunteer Search and Rescue and/or Sheriff's Posse who collaborate with the Sheriff's Department on search and rescue efforts. Key issues facing law enforcement are radio inoperability and maintaining trained staff. Once trained, staff often seeks employment in larger communities or outside the region where pay is better.

Fire Suppression: North Central Idaho has approximately forty city fire departments, fire Districts, and fire organizations that serve the wildland and structural fire suppression needs for the region. Very few of the organizations are staffed with paid, full-time or part-time employees. There continue to be pockets of the region that do not have structural fire protection. To increase capacity, every organization has Mutual Aid Agreements with other fire suppression organizations. Significant issues facing the fire suppression services include limited capital for constructing or renovating fire stations and for equipment/vehicles, lack of trained volunteers, and radio inoperability.

ECONOMIC GROWTH & DEVELOPMENT: COMPARING THE DISTRICT TO THE NATION: The table below compares various measurement of economic well-being of the District to the U.S.

Economic Measurements & Percent Changes Over 15 Years											
<i>All dollar figures are adjusted for inflation and expressed in the value of a dollar in 2015.</i>											
Region two	2000	2005	2010	2015	Change	United States	2000	2005	2010	2015	Change
Total Nonfarm Payroll Jobs	44,918	45,681	44,315	45,333	0.9%	Total Nonfarm Payroll Jobs	131,881,000	133,747,000	129,917,000	141,865,000	7.6%
Average Pay	\$33,338	\$33,290	\$35,208	\$36,757	10.3%	Average Pay	\$45,653	\$48,061	\$50,561	\$52,942	16.0%
Private-Sector Employers	3,033	3,191	3,127	3,038	0.2%	Private-Sector Employers	7,622,274	8,294,662	8,695,598	9,224,336	21.0%
Private-Sector Nonfarm Payroll Jobs	31,476	31,796	30,078	31,557	0.3%	Private-Sector Covered Payroll Jobs	111,091,000	110,611,016	106,201,232	118,307,717	6.5%
Private-Sector Average Pay	\$31,761	\$31,439	\$33,417	\$34,963	10.1%	Private-Sector Average Pay	\$45,653	\$47,858	\$50,241	\$52,876	15.8%
Unemployment Rate	5.9%	4.4%	8.1%	4.2%		Unemployment Rate	4.0%	5.1%	9.6%	5.3%	
Population	100,416	101,875	105,362	107,383	6.9%	Population	282,162,411	295,516,599	309,346,863	321,418,820	13.9%
	1999	2004	2009	2014	Change						Change
Poverty Rate	13.3%	12.9%	16.7%	16.8%		Poverty Rate	14.0%	12.7%	14.3%	15.5%	
Personal Income (millions of dollars)	2,960	3,268	3,522	3,793	28.2%	Personal Income (billions of dollars)	10,506	12,128	13,232	14,886	41.7%
Per Capita Income	\$29,392	\$32,195	\$33,636	\$35,437	20.6%	Per Capita Income	\$37,649	\$41,421	\$43,132	\$46,685	24.0%
Number of nonfarm proprietors	\$11,494	\$11,621	\$12,734	\$12,980	12.9%	Number of nonfarm proprietors	24,528,300	29,541,700	35,510,700	39,066,800	59.3%

Chapter 3 - The Region's Disaster Resiliency

Sustainability and resiliency in disaster recovery are a collaborative effort of interagency and intergovernmental coordination. Pre-disaster activities focus on integrating resiliency practices into day-to-day operations, while recovery begins at the beginning of a disaster, whether natural or man-made. Coordination is critical to recovery efforts from pre-disaster to full economic recovery. The County Offices of Emergency Management, with assistance from the Idaho Bureau of Homeland Security, focus on coordination of the immediate needs during and after a disaster.

Planning is always the first step in disaster resiliency. Each County Office of Emergency Management has a Local Emergency Planning Committee (LEPC) to foster public awareness of any hazard, and encourage public involvement in emergency planning, training, and exercise. The LEPC's partner with local, state, and tribal governments, first responders, and business and industry for planning, prevention, preparedness, response, and recovery. In addition to the LEPC, each County Office of Emergency Management has an All-Hazard Mitigation Plan and Emergency Operations Plan (EOP). *Plans can be accessed through the counties' Emergency Management Coordinator or on the county's website.*

- Nez Perce County: www.co.nezperce.id.us/Departments/EmergencyManagement
- Clearwater County: www.clearwatercounty.org/?EmergencyManagement
- Lewis County: www.lewiscountyid.us/Emergency_Management
- Latah County: www.latah.id.us/disasterservices
- Idaho County: www.idahocounty.org/disaster-mangement-menu
- Idaho Bureau of Homeland Security: www.bhs.idaho.gov

The Region's Disasters

North Central Idaho experiences significant impacts from natural hazards including floods, storms, wildland fires, severe weather, and landslides/mudslides. Beyond natural hazards, there are technological hazards including dam failures, extended power outages, pandemic outbreaks, and hazardous materials spills.

Most disastrous incidents in North Central Idaho are flood or fire related. Floods damage roads, farmlands, and structures. Most flooding in the region is caused by spring melt or extreme rainfall associated with a warm regional frontal system. Weather, topography, and fuels (any material that can ignite and burn) contribute to wildland fires in the region.

Severe weather, including wind, hail, and drought also impacts the area. These storms can cause substantial damage to crops, recreation and tourism which can have a disastrous impact on the local economy. Environmental losses include damages to plant and animal species, wildlife habitat and air and water quality.

In March 2017 and again in April 2019, severe storms, flooding, landslides, and mudslides led to federal disaster declarations in the District. The storms of March 2017 (FEMA 4313) impacted Clearwater, Latah and Idaho Counties with a countywide per capita impact of \$196.09, \$11.87, and \$128.97 respectively. The Nez Perce Tribe and Idaho, Latah, and Lewis counties endured most of the April 2019 storms (FEMA 4493). Idaho County was impacted the most, the countywide impact per capita to Idaho County was \$146.86; Latah County - \$7.38, Lewis County - \$6.25 and \$10.39 to the Nez Perce Tribe. Two large fires, both igniting in August 2015, rated fire management assistance declarations. The Clearwater-Municipal Complex Fire (FM-5099) consisted of a group of lightning sparked fires in Clearwater, Idaho and Lewis Counties in northern Idaho. In total, 82,243 acres burned with costs of approximately \$41.5 million. The Tepee Springs Fire (FM-5110) began in Idaho County after a lightning struck. The fire was fully contained by November 5th. In total, the Tepee Springs Fire burned 95,709 acres with costs of approximately \$31.54 million.



Figure 4: Tepee Springs Fire - photo by USGA

Disaster Planning for Economic Recovery

Each of the five Office of Emergency Management in the region are well versed in planning for natural and man-made hazards, and each have a hazard mitigation plan. In addition, each office has an Emergency Operation Plan in the event of an emergency, and cross jurisdictional boundaries when the assistance is needed.

As the Region II Economic Development District of Idaho, CEDA can assist municipalities in both pre-disaster and post disaster roles. In disaster-impacted communities, economic development organizations such as CEDA lead economic recovery efforts by helping local businesses respond to and recover from disaster. CEDA's role as a conduit to resources for the region is to assist communities and businesses in seeking resources and implementing plans for recovery as well as navigating federal disaster assistance programs.

	Normal Economic Development Roles	Roles in a Disaster, Above Normal Roles
Analyst/Educator	Understand strengths, weaknesses, and comparative advantage of the local economy and business environment; provide quantitative and qualitative information to decision-makers	<i>Pre-Disaster:</i> Seek to understand vulnerabilities and risks to critical industries and businesses within the community
	Keep public officials and the public informed of costs and benefits of economic development initiatives	<i>Post Disaster:</i> Assist with the assessment of physical damage and business interruption impacts to industries and businesses; assist in the communication of recovery information between local businesses and local government
Visionary/Catalyst	Develop partnerships, both public and private to stimulate future working relationships	<i>Pre-Disaster:</i> Establish an Economic Recovery Group to identify immediate and long-term economic recovery strategies and resources
	Engage key stakeholders in visioning to identify goals, strategies and resources for economic development	<i>Post Disaster:</i> Envision how communities can rebuild and recovery to be stronger and more resilient
	Leverage the investment/involvement of partners and stakeholders	<i>Post Disaster:</i> Create a strategic plan for economic recovery in collaboration with stakeholders and communities
	Invoke enthusiasm and excitement for catalyst projects that can change a community's future	<i>Post Disaster:</i> Connect public/private resources for recovery
Gap Filler	Aid where the private sector cannot meet community or business needs	<i>Post Disaster:</i> Conduct concerted business retention efforts outreach to reconnect business and at-risk companies

	Leverage financing to facilitate enterprise development	<i>Post Disaster:</i> Assist with short and long-term financing and business counseling
Connector/Advocate	Serve as a key liaison between public, private sectors and communities on economic development initiatives	<i>Pre-Disaster:</i> Seek input, support and funding opportunities to support economic initiatives <i>Post Disaster:</i> Address emergency management plans from a business perspective
	Advocate for the well-being of the community and business	<i>Pre-Disaster:</i> Advocate for mitigation and preparedness efforts
	Coordinate activities, communication and resources between stakeholders to facilitate business partnerships	<i>Post Disaster:</i> Communicate local economic priorities and any needed policy changes to local, state and federal governments

Chapter IV - The Strategies to Accelerate NC Idaho

Leading to the development of strategies, 109 regional stakeholders responded to surveys and joined in brainstorming sessions to identify the District's strengths (assets), weaknesses, economic opportunities, and economic threats. The participants represented the region's small businesses, municipalities, counties, education, nonprofit organizations, a tribe, and private citizens. The survey results and inputs from the brainstorming sessions were refined by the stakeholders and used as a foundation for the development of the strategies and action plan. Common themes were identified in each category, which aligned with the regional goals and objectives. *See Appendix A for a complete list of CEDS Planning Team Members, and Appendix B for surveys and survey results.*

- Notable Strengths: natural resources, attractive and livable communities, tourism assets, and constructed infrastructure
- Prominent Weaknesses: housing availability, well-trained workforce, technology/communications, customized workforce training
- Economic Opportunities: quality of life, attractive communities, tourism attractions, proximity to higher education, skilled labor force
- Economic Threats: lack of affordable housing, aging population and workforce, low wages, exiting of youth/younger generations

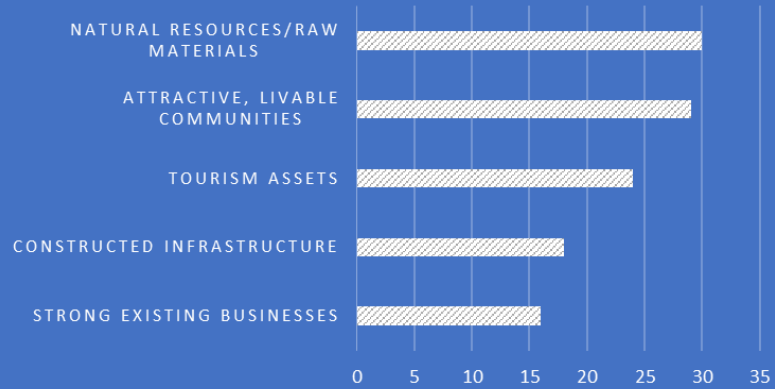
Using the opportunities as a guide, critical success factors were considered in development of the comprehensive economic development strategies for the region.



***CEDA Planning
Stakeholders met
four times at
locations throughout
the region to craft
economic and
community vitality.***



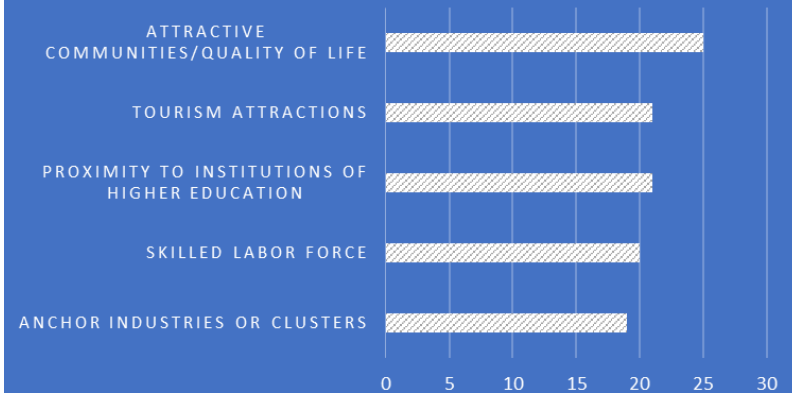
TOP FIVE REGIONAL STRENGTHS



TOP FIVE REGIONAL WEAKNESSES



TOP FIVE REGIONAL OPPORTUNITIES



TOP FIVE REGIONAL THREATS



The Region's Pathways to Economic Vitality

The vision of the regional and statewide economic goals is to *“promote the prosperity, progress and productivity of Idaho by creating thriving, connected, sustainable and evolving people, communities and industries.”*

The Clearwater Economic Development District CEDS centers on regional priorities. The plan focuses on three broad goals – *Elevating Industry*, *Advancing Individuals* and *Strengthening Communities*. Each goal has four distinct objectives - *Education and Workforce*; *Entrepreneurship*, *Business Development and Economic Empowerment*; *Infrastructure*; and *Healthy Communities*. These goals and objectives will serve as a roadmap to coordinate regional resources to achieve the greatest impact.

Pathways Goals		
Elevate Industry	Advance Individuals	Strengthen Communities
<ul style="list-style-type: none">• Energize existing industries, empower business opportunities, and invigorate innovation and research for thriving industries that are diverse, sustainable, geographically dispersed and globally competitive.	<ul style="list-style-type: none">• Engineer talent pipelines, cultivate K-through-career learning, and expand high quality jobs to allow individuals to lead productive, prosperous and meaningful lives.	<ul style="list-style-type: none">• Inspire community vitality, develop infrastructure solutions, and galvanize regional collaboration thereby enhancing our communities' unique characteristics, strengths, and assets to improve economic competitiveness.

The following pages identify the objectives and strategies developed by regional stakeholders for each of the three Pathway Goals.



Elevate Industry Goal: Energize existing industries, empower business opportunities, and invigorate innovation and research for thriving businesses that are diverse, sustainable, geographically dispersed and globally competitive

Entrepreneurship, Business Development and Economic Empowerment Objective

An ever-changing economic climate demands the discovery of new ways of combining resources

Strategy	Tasks and Partners	Benchmarks
<i>Ongoing - businesses, artisans, and small producers will be connected to opportunities for expansion, marketing, and supply chain development.</i>	<p><u>Tasks</u></p> <p>CEDA will maintain a small business loan program for start-up and expanding businesses.</p> <p>Stakeholders will execute WealthWorks Value Chain mapping to identify and address supply chain gaps and bottlenecks for regional businesses, artisans and small producers.</p> <p>CEDA will continue activities that support the development of the North Central Idaho manufacturing industry cluster through grant writing, grant administration, coordination, implementation of the Dream It Do It program, federal apprenticeship programs, and additive manufacturing education.</p> <p>CEDA will continue activities that support the development of the North Central Idaho tourism and hospitality industry cluster through grant writing, grant administration, and coordination.</p> <p><u>Partners</u></p> <p>CEDA</p> <p>University of Idaho</p>	<p>Reduction of regional business, artisan, and small producer closures by 5 percent by 2025.</p> <p>Increase or expansion of regional business, artisan, and small producers by 5 percent by 2025.</p>

	Nez Perce Tribe Rural Roots Palouse Food Coalition Rural ED Professionals	
<i>By 2022, increase daycare and after-school program availability through additional services and/or start-ups to meet workforce needs, especially shift and weekend workers.</i>	<u>Tasks</u> CEDA will develop partnerships with businesses to explore opportunities for affordable childcare services, such as onsite childcare. Stakeholders will identify the level of need for childcare and after-school programs in both population centers and rural communities. Stakeholders will investigate best practices/case studies that have led to increased childcare availability. <u>Partners</u> Community Action Partnership Local ED Professionals CEDA Human Needs Agencies Resource Providers/Councils Municipalities (Business Licensing)	Regional childcare services increase by 25 percent by 2022. Evening and weekend childcare services increase by 5 percent by 2022.
<i>By 2022, the region will convene a coalition of regional stakeholders to develop and implement a regional workforce and business attraction strategy.</i>	<u>Tasks</u> CEDA's <i>Inland Northwest Workforce Council</i> will identify target clusters of businesses that would support existing regional industries. CEDA's <i>Inland Northwest Workforce Council</i> will identify target workforce demographics that could support existing regional industries workforce needs.	Regional industries, employers, municipalities, economic developers, realtors, and chambers understand the importance of regional branding. Development of a regional brand that identifies the region's strengths. Use of the regional brand by stakeholders for website themes, social media campaigns,

	<p>CEDA's <i>Inland Northwest Workforce Council</i> will convene regional stakeholders to include economic developers, chambers, tourism entities, realtors, education, municipalities, counties, and health providers to develop and implement a regional workforce and business attraction strategies.</p> <p><u>Partners</u> CEDA Valley Vision Local ED Professionals Chambers Visit Lewis-Clark Valley North Central Idaho Travel Association LC State College University of Idaho Realtors Regional Hospitals Municipalities Counties</p>	<p>signage, relocation packets, promotional videos, commercials, etc.</p>
<p style="text-align: center;">Infrastructure Objective <i>The region's infrastructure supports a diverse and growing economy</i></p>		
Strategy	Tasks and Partners	Benchmarks
<p><i>By 2022, local governments and community leaders will understand private and public ownership/operation options for broadband infrastructure to encourage public/private partnerships leading to broadband infrastructure development and deployment.</i></p>	<p><u>Tasks</u> CEDA and stakeholders will develop partnerships, including elected officials, to identify true costs and needed skillsets (education) to operate and maintain public ownership and operation of broadband infrastructure.</p>	<p>A collective knowledge of funding and workforce needed to operate and maintain public broadband infrastructure is demonstrated through comprehensive discussions and actions to address broadband gaps in the region.</p> <p>Increase in the number of publicly owned and operated broadband infrastructure.</p>

	<p>CEDA Rural Community Development Initiative will be used as an education tool for stakeholders, community leaders and city administrators.</p> <p><u>Partners</u> CEDA REVUP Initiative Broadband Providers Elected Officials Counties Communities</p>	
<p><i>By 2025, regional municipalities water and wastewater capacities will increase to accommodate the needs of existing and emerging business and industry growth.</i></p>	<p><u>Tasks</u> Identify existing, deficiencies, future needs, and costs to upgrade rural municipal water and wastewater systems.</p> <p>Assist municipalities seek funding resources to address water and wastewater solutions that will support industry expansion.</p> <p><u>Partners</u> Municipalities Idaho Rural Partnership Idaho Department of Commerce USDA Rural Development</p>	<p>North central Idaho municipalities such as but not limited to Bovill, Cottonwood, Craigmont, Elk River, Genesee, Grangeville, Hoodoo, Juliaetta, Kamiah, Kendrick, Kooskia, Nezperce, Peck, Pierce, Potlatch, Troy and Winchester are able to qualify for state and federal funding assistance to complete water and wastewater improvements.</p> <p>Existing industries/businesses access water and wastewater systems with adequate capacity to meet their current and future needs.</p> <p>Regional rural municipalities can meet new industries/businesses water and wastewater needs.</p>
<p><i>By 2023, there will be increased coordination of regional air service providers, destinations, and freight movement.</i></p>	<p><u>Tasks</u> Air service stakeholders will develop an ad hoc committee comprised of board, staff, and community stakeholders from the Lewiston-Nez Perce County Regional Airport and the Pullman Regional Airport to develop a plan to</p>	<p>Increased air service by the attraction of one new carrier.</p> <p>New destinations from regional airports due to an additional carrier.</p>

	<p>coordinate services that would enhance air travel and freight movement as well as create opportunities for cost-sharing.</p> <p><u>Partners</u> Lewiston-Nez Perce County Regional Airport Pullman Regional Airport Airport providers/suppliers Regional industry</p>	<p>Joint marketing campaigns will be executed with regional airports, tourism entities, and private business.</p> <p>Freight distribution will increase by 5 percent through regional airports.</p>
<p><i>By 2023, versatile land, space, and buildings appropriate for new construction or renovation will be identified to meet the needs of new and established businesses in the region.</i></p>	<p><u>Tasks</u> CEDA will continue its Asset Management Program for support and future development of properties for new and/or expanding businesses.</p> <p>Rural ED Professionals will inventory by county available land, space, buildings, and available essential services.</p> <p>Stakeholders will provide inventory to financial lenders, realtors, and to new and established businesses.</p> <p><u>Partners</u> Valley Vision CEDA Rural ED Professionals Chambers Downtown Revitalization Organizations Port of Lewiston Port of Clarkston Realtors Municipalities</p>	<p>New start-up and business expansions increase in the region by 10 percent compared to 2019 data.</p>

Healthy Communities Objective <i>Investment in local products and resources strengthens the economic base of a community</i>		
Strategy	Tasks and Partners	Benchmarks
<p><i>By 2025, ways for local agriculture and livestock commodities to be value-added and/or locally consumed will be identified and developed.</i></p>	<p><u>Tasks</u></p> <p>Stakeholders and private industry will Increase promotion of tourism related value-added businesses such as wineries, breweries, and restaurants.</p> <p>Stakeholders will identify high potential value-added crops suitable for growth in North Central Idaho.</p> <p>Stakeholders will identify meat alternative crops such as soybeans/lentils suitable for growth in North Central Idaho.</p> <p>Stakeholders will connect producers to regional restaurants, hospitals, and schools to develop farm to table programs.</p> <p>Stakeholders will research potential of growing hops in North Central Idaho for emerging micro-brew industry.</p> <p>Stakeholders will research potential of growing/manufacturing hemp to diversify agriculture production in region.</p> <p>Stakeholders will continue work to develop a regional USDA inspected slaughter facility.</p> <p><u>Partners</u></p> <p>State Department of Agriculture</p>	<p>Increased availability and consumption of value-added foods made from regional commodities by local restaurants, hospitals, and schools currently serving regional value-added commodities.</p> <p>Increase in annual wine production 5 percent over 2019 production.</p> <p>Hemp research data influences the diversification of the region's agriculture.</p> <p>Construction of one USDA inspected slaughter facility in the region.</p>

	CEDA Rural ED Professionals Communities State Legislature U of I USDA Trade Associations	
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Advance Individuals Goal: Engineer talent pipelines, cultivate K-through-Career, and expand high quality jobs to assist residents in building productive, prosperous and meaningful lives

Education and Workforce Development Objective

Lifelong learning is recognized as critical to empowered people

Strategy	Tasks and Partners	Benchmarks
<p><i>By 2022, students in the region will have increased opportunities for students to participate in workplace learning with a variety of industries.</i></p>	<p><u>Tasks</u></p> <p>Stakeholders will develop an employer pipeline for student internships, apprenticeships, and summer employment programs.</p> <p>CEDA will dedicate staffing to continue the Clearwater Basin Collaborative Youth Conservation Program that provides summer workplace learning opportunities in natural resource management.</p> <p>Stakeholders will increase high school students' awareness of apprenticeship programs through connectivity with counselors, providing information/educational materials, social media.</p>	<p>Workplace learning opportunities such as student internship, apprenticeship, and summer employment programs increase by 20 percent in the region.</p>

	<p>CEDA and NIMA will develop promotional plan and materials to market the NIMA Machining and Fabrication Federal Apprenticeship Program to launch the program that provides students 16 – 18 years of age to get work experience in machining or fabrication.</p> <p><u>Partners</u> ID Department of Labor School Districts Higher Education Inland Northwest Workforce Council NIMA Valley Vision Local ED Professionals</p>	
<p><i>By 2022, the regional will have collaborative marketing strategies for training and education for the highest-in-demand occupations in the District.</i></p>	<p><u>Tasks</u> Stakeholders will hold four job fairs per year, two targeted at students, two targeted at adult workers.</p> <p>CEDA and partners will continue coordination of the annual Dream It Do It Here Youth Conference which reaches five hundred tenth and eleventh grade students each year.</p> <p>CEDA will implement an 8th Grade Career Awareness Workshop and the DIDI 500 STEM Education competition to connect students to regional employers, industries, and potential careers.</p>	<p>Decrease in open in-demand positions in the region by 10 percent.</p>

	<p>Stakeholders will host professional development workshops to address immediate workforce/industry needs.</p> <p>CEDA will continue support of the Lewiston School District and Lewis-Clark State College expansion of CTE programs through grant writing and administration.</p> <p><u>Partners</u> Inland Northwest Workforce Council ID Dept of Labor Higher Education High Schools Industry Partners Valley Vision Rural ED Professionals</p>	
<p align="center">Healthy Communities Objective</p> <p align="center"><i>Access to quality amenities such as healthcare is integral to community vitality</i></p>		
Strategy	Tasks	Benchmarks
<p><i>By 2022, the region will develop a campaign to fill critical paid and volunteer Fire/EMS services in rural areas of the five counties of the region.</i></p>	<p><u>Tasks</u></p> <p>Stakeholders will Identify best practices/case studies to rural Fire/EMS volunteers.</p> <p>Stakeholders will seek to implement best practices/case studies to rural Fire/EMS volunteers as applicable to the region.</p> <p>Stakeholders will create rural Fire/EMS providers mentor programs and promote in local papers and social media.</p>	<p>Increase in number of rural Fire/EMS volunteers over 2020 level.</p>

	<u>Partners</u> Counties Cities Rural Fire/EMS Providers	
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Strengthen Communities Goal: Inspire community vitality, develop infrastructure solutions, and galvanize regional collaboration thereby enhancing our communities' unique characteristics, strengths, and assets to improve economic competitiveness.

Education and Workforce Development Objective

Education is crucial in meeting the needs of residents, industries and governments

Strategy	Tasks and Partners	Benchmarks
<i>By 2023, elected and civic leaders will have access to professional development opportunities designed to build leadership pipelines.</i>	<u>Tasks</u> CEDA and economic partners will support, and assist, when possible, current and future Chambers of Commerce Leadership programs to facilitate growth in young professionals, promote career education, and create pipelines regional employment. CEDA will utilize the Rural Community Development Initiative to increase awareness of public policy, planning, and leadership. <u>Partners</u> CEDA Chambers Community Development Initiative Inland NW Partners Civic/Fraternal Organizations Municipalities	Increase in the number of people volunteering and/or running for city councils and county commissions. Increase in the number of civic organization volunteers.

	Counties	
<p align="center">Infrastructure Objective</p> <p align="center"><i>Livable communities provide service options and support infrastructure to contribute to economic vitality</i></p>		
Strategy	Tasks and Partners	Benchmarks
<p><i>Ongoing, increase community capacity for live-ability and development through planning, utilities, infrastructure, emergency services facilities and equipment, community services, green space, and park improvements.</i></p>	<p><u>Tasks</u></p> <p>CEDA will assist communities to develop, fund, and implement community improvement projects such as water/wastewater upgrades, fire stations, community meeting space, hospital building expansions, childcare and after-school facilities, performing arts facilities, park development, and other projects as identified.</p> <p>CEDA will provide planning development support and assistance with land plans for those community that do not employ community planners.</p> <p><u>Partners</u></p> <p>CEDA Rural Communities</p>	<p>Four community development/improvement projects are completed annually.</p>
<p><i>Beginning in 2021, CEDA will host an annual housing summit to share information on financing, funding, home ownership, and housing availability.</i></p>	<p><u>Tasks</u></p> <p>CEDA will host an annual Housing Summit with partners such as Idaho Financing, HUD, and USDA.</p> <p>CEDA and economic partners will annually convene realtors, economic developers, community stakeholders, and elected officials to aggregate financing, funding, and home ownership information.</p>	<p>Participation in annual Housing Summits increases by 5 percent annually.</p>

	<u>Partners</u> CEDA Economic Developers Rural ED Professionals Realtors Business/Land Developers Idaho Housing and Finance Association Affected Businesses	
<i>By 2021, additional Park & Ride lots throughout the region increase shared commutes to and from employment.</i>	<u>Tasks</u> Stakeholders will survey interest, identify potential park, and ride locations. Stakeholders will survey employers for commuter partnerships. Stakeholders will partner with Idaho Transportation Departments, municipalities, counties, and landowners to develop park and ride spaces to meet the need of workforce commuters. <u>Partners</u> Regional Public Transit Providers Major Employers Counties & Municipalities	Regional Park & Ride options increase by 25 percent. Shared commutes increase by 10 percent.
<i>By 2022, regional housing advocacy partners will educate the private sector, local governments, potential developers, economic developers, financiers and other stakeholders on best practices to increase availability and diversity of available housing stock.</i>	<u>Tasks</u> CEDA's REV Up Program will build community knowledge of housing resources and what the community role is in promoting and improving housing availability. CEDA and economic partners will execute Housing Roundtables with local governments, developers, financiers and stakeholders to share and discuss	Increased understanding of regional housing weaknesses and viable solutions. Participation in regional Housing Roundtables. Identification of one community to complete a workforce house project based upon best practices and regional needs.

	<p>identified best practices and ability to implement in the region.</p> <p>CEDA and economic partners will identify one community for consideration for execution of identified best practice(s) and next steps for implementation.</p> <p><u>Partners</u> Economic Developers Local ED Professionals Municipalities Land Developers Realtors/Realtor Associations USDA Idaho Housing and Finance Association Moscow Housing Trust Habitat for Humanity</p>	
<p><i>By 2025, existing capacity will be leveraged to develop a robust middle mile and last mile system that provides sufficient redundancy and bandwidth to ensure critical communication services are maintained.</i></p>	<p><u>Tasks</u> Identify and aggregate anchor institutions (industry, education, libraries, and healthcare) for collaborative opportunities.</p> <p>Identify existing and/or develop new financing and funding for development, operation, and maintenance of middle and last mile infrastructure.</p> <p>Encourage joint-use agreements (such as utility pole sharing).</p> <p>Facilitate agreements between providers to agree on methodology to demonstrate payback and timeframes of options.</p>	<p>Increase redundancy and/or bandwidth in one or more North-Central Idaho communities based upon evaluation of existing broadband systems.</p> <p>Increase use of existing or new financing/funding for development, operation, and maintenance of middle and last mile infrastructure.</p>

	<p>Facilitate partnerships with local, state, federal for providing service and infrastructure for redundancy.</p> <p><u>Partners</u> Nez Perce Tribe Idaho Transportation Department Counties Municipalities Department of Commerce Idaho State Broadband Taskforce State of Idaho Private industry CEDA</p>	
<p align="center">Healthy Communities Objective <i>A healthy community reflects a sense of mental and physical well-being which contributes to economic vitality.</i></p>		
Strategy	Tasks and Partners	Benchmarks
<p><i>By 2023, the region will have an expanded knowledge of mental/behavioral health services for youth and adults.</i></p>	<p><u>Tasks</u> Stakeholders will create strategic partnerships to address the needs of those challenged behavioral/mental issues and generational poverty.</p> <p>Stakeholders will conduct family engagement surveys at school to identify awareness of mental/behavioral health services for youth and adults.</p> <p>Regional focus groups will identify potential resource conduits and increase awareness of those services.</p>	<p>Referrals for mental/behavioral health services for youth increase by 10 percent and adults by 5 percent.</p>

	<p>Stakeholders will create or provide education and information of existing mental/behavioral health services for youth and adults; disseminate information for youth through schools/counselors.</p> <p><u>Partners</u> School districts Region II Health District Region II Behavioral Health Board Community Action Partnership Boys & Girls Club Counseling Clinics/Mental Health Providers Juvenile Centers Northwest Children’s Home</p>	
<p><i>By 2024, the region will expand medical clinics and/or pharmacies in rural communities.</i></p>	<p><u>Tasks</u> Stakeholders will create task force of medical providers, economic developers, community stakeholders and others to research best practices/case studies on rural health care clinics.</p> <p>Stakeholders will identify communities in most need of a clinic and/or pharmacies.</p> <p>Stakeholders will investigate the Bengal Pharmacy Kiosk in Kendrick, Idaho as a potential rural delivery system.</p> <p>Stakeholders will inventory infrastructure, buildings, and broadband in communities with the most need.</p> <p>Incorporate telehealth options in all newly constructed clinics.</p>	<p>Two new clinics and/or pharmacies are constructed in the region.</p>

	<u>Partners</u> Hospitals Clinics Municipalities Economic Developers Civic Organizations Community Stakeholders	
<i>By 2024, access to medical and mental healthcare via broadband and telehealth increases.</i>	<u>Tasks</u> Stakeholders will inform and educate users on how and what telehealth is through workshops, presentations, printed materials. Stakeholders will seek changes from insurance providers to recognize and reimburse telehealth, especially for those living in rural communities. Stakeholders will advocate legislative change to expand funding for telehealth access. <u>Partners</u> Healthcare Providers Mental Healthcare Providers Clinics Region II Department of Health & Welfare Internet Providers Economic Developers	Increase in of availability of telehealth programs in North Central Idaho. Increase in number of telehealth program users in North Central Idaho. Increased state funding for telehealth programs in Idaho.
<i>By 2025, pedestrian and bike safety will increase throughout the region, encouraging healthy lifestyles for the region's citizens.</i>	<u>Tasks</u> Stakeholders will encourage transportation planning in all communities. Stakeholders may utilize TAP to implement transportation projects in their communities. Sponsor information and education workshops.	Bike and pedestrian trails increase in the region by 15 percent over current access.

	<p>Advocate for implement of rails-to-trails to get bikes off state highways for safety.</p> <p><u>Partners</u> Local Highway Technical Assistance Council Idaho Transportation Department Bike/Ped Clubs Civic Organizations Municipalities Counties Landowners</p>	
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Chapter 5 - The Regional Action Plan

The regional action plan consists of the prioritization of the regional economic development strategies and an overview of statewide agency initiatives that support the economic development efforts of the District.

The task force reviewed and prioritized fifteen strategies identified as being CEDA led based upon greatest economic impact for the region, available resources, partnerships and organizational capacity. Five strategies were identified as high priority and two more strategies were ranked as secondary. Work plans will be developed for implementation of each prioritized strategy; yearly updates to the Comprehensive Economic Development will contain progress reports for each strategy. CEDA's Economic and Community Development Council will regularly review the plan and reprioritize strategies as initiatives and projects are implemented.

Strategies were prioritized as:

- 1. Strategy: *Beginning in 2020, CEDA will host an annual housing summit to share information on financing, funding, home ownership, and housing availability.***
 - Resources: CEDA, Economic Development Organizations, Realtors, Idaho Housing & Finance
 - Desired Outcome: Increased knowledge of regional housing issues, develop collaborative solutions leading to expands housing availability.
- 2. Strategy: *By 2022, the Region will convene a coalition of regional stakeholders to develop and implement a regional workforce and business attraction strategy.***
 - Resources: Private Industry, Higher Education, Economic Development Organizations, Chambers
 - Desired Outcome: A unified attraction strategy identifying the region's assets, industry and business clusters, and quality of life will draw interest to the region.
- 3. Strategy: *By 2022, local governments and community leaders will understand private and public ownership/operation options for broadband infrastructure to encourage public/private partnerships leading to broadband infrastructure development and deployment.***
 - Resources: CEDA, Broadband Providers, Elected Officials, Counties, Municipalities
 - Desired Outcome: Broadband infrastructure ownership awareness leads to new broadband infrastructure development.

4. Strategy: By 2022, the Region will have collaborative marketing strategies for training and education for the highest-in-demand occupations in the District.

- Resources: CEDA Dream It Do It Council, ID Department of Labor, Higher Education, High Schools, Industry Partners
 - Desired Outcome: Industries will be able to fill the highest-in-demand positions as potential employees, students, parents, career guidance counselors, and educators will have knowledge of the potential careers, jobs, and training available in the area.

5. Strategy: By 2023, elected and civic leaders will have access to professional development opportunities designed to build leadership pipelines.

- Resources: CEDA, Chambers, Community Development Initiative, Northwest Community Development Institute
 - Desired Outcome: Leadership training leads to robust communities and civic organizations through a strong and ever-growing volunteer base.

State Agency Initiatives

Recognizing that regional economic development supports state economic development efforts, the six economic development districts of Idaho, the Idaho Department of Commerce and the University of Idaho have consolidated the various goals and objectives of major state agencies in efforts to align regional plans and support statewide initiatives and programs. The following are goals and/or objectives that support three broad goals adopted by the economic development districts and Idaho Department of Commerce – *Elevating Industry, Advancing Individuals* and *Strengthening Communities*.

	Elevate Industry	Advance Individuals	Strengthen Communities
Idaho Department of Commerce	Idaho companies and industries are the drivers of the state's economy. Idaho makes it a priority to help them succeed by supporting their growth, reducing	Creating talent pipelines – pools of highly qualified people able to step into Idaho's key industries – is critical to accelerating the state's economy.	Help communities leverage their strengths to attract businesses and increase tourism while retaining their character. Infrastructure is critical to an expanding economy. Our roads,

	<p>their costs, and advancing their technological capabilities.</p> <p>To succeed, companies must be able to focus on their core business. Idaho offers a hassle-free business environment, streamlined and responsive government services, and fair and consistent regulatory requirements.</p> <p>Technology and innovation advance existing industries and continually create new ones. Idaho can harness modern technologies and embrace new innovations.</p>	<p>Education is a top priority for Idaho, specifically supporting education and training that span “K-through-Career.”</p> <p>For Idaho to remain competitive, we must increase the number of high-paying jobs that provide a livable wage.</p>	<p>bridges, airports and our water, sewer, and power sources must have the capacity to serve future growth. Idaho must accelerate our technical infrastructure – like broadband and high-speed wireless – to be competitive to industry.</p> <p>The spirit of collaboration can elevate communities, industries, and the entire state. Drawing Idaho’s communities and industries together with competitive regional strategies momentum that will continue for generations.</p>
Idaho Department of Labor	<p>Connect business, education and workforce.</p> <p>Implement a demand driven approach, which meets the needs of business and invests dollars in employer/industry focused programs that train candidates for specific positions that employers need today and in the future.</p> <p>Utilize Workforce Development Training Fund to provide training resources to employers for new</p>	<p>Connect business, education and workforce.</p> <p>Implement a demand driven approach, which meets the needs of business and invests dollars in employer/industry focused programs that train candidates for specific positions that employers need today and in the future.</p> <p>Utilize Workforce Development Training Fund to provide training resources to employers for new</p>	

	<p>full-time employees with needed skills or to upgrade the skills of current employees at risk of permanent layoff.</p> <p>Provide a mobility focused transportation system that drives economic opportunity.</p>	<p>full-time employees with needed skills or to upgrade the skills of current employees at risk of permanent layoff.</p> <p>Link job seekers with employers through the federal Wagner-Peyser Act funds, Workforce Investment Act funds, and labor market and career information.</p>	
Idaho Transportation Department	<p>Provide a mobility focused transportation system that drives economic opportunity.</p>	<p>Become the best organization by continually developing employees and implementing innovative business practices.</p>	<p>Commit to having the safest transportation system possible.</p>
Idaho Department of Environmental Quality	<p>Maintain efficient and protective environmental permitting programs.</p>		
Idaho Parks and Recreation	<p>Expand revenue generating opportunities within Idaho State Parks in the form of new retail items like firewood, ice cream and the rental of equipment.</p>		<p>Expand educational offerings within state parks and Idaho classrooms.</p> <p>Protect and expand access to Idaho's motorized and non-motorized recreation trails.</p>
Idaho State Board of Education	<p>Improve the ability of the educational system to meet the educational needs and allow students to transition into the</p>	<p>Set policy and advocate for increasing access for individuals of all ages, abilities, and economic</p>	<p>Increase research and development of innovative ideas into solutions that benefit society.</p>

	workforce efficiently and effectively.	means to Idaho's P-20 educational system. Increase the educational attainment of all Idahoans through participation and retention in Idaho's educational system. Improve the processes and increase the options for re-integration of adult learners into the education system.	Ensure educational resources are used efficiently.
Idaho Department of Agriculture	Continue to support the growth and sustainability of Idaho's agriculture industry. Foster confidence in Idaho's agriculture industry and market transactions.		Protect the public, plants, animals, and environment using regulation and education. Be a pro-active resource to quickly adapt to new challenges and opportunities facing Idaho.

Economic Development Planning Resources

North Central Idaho has access to a wide array of resources to address economic development opportunities and challenges.

FEDERAL PARTNERS

- **US Department of Commerce** leads the federal economic development agenda by promoting innovation and competitiveness and preparing American regions for growth and success in the worldwide economy. Region X, Seattle Regional Office, serves the Clearwater Economic Development District. The Economic Development Administration (EDA) provides important grant funding resources for economic development. Clearwater Economic Development Association is the conduit to this funding source.
 - www.eda.gov
 - www.eda.gov/PDF/2009%20SRO%20Contacts.pdf

- www.clearwater-eda.org
- **USDA Rural Development** provides funding sources for businesses and cooperatives, housing and community facilities, and utilities. The Clearwater Economic District is served by the State of Idaho and Coeur d'Alene Office.
 - www.rurdev.usda.gov
 - www.rurdev.usda.gov/id
 - www.rurdev.usda.gov/id/area.htm
- **U.S. Department of Housing and Urban Development (HUD)**
 - www.hud.gov
- **U.S. Department of Transportation:**
 - Federal Aviation Administration (FAA): www.faa.gov
 - Federal Transit Administration (FTA): www.fta.dot.gov
 - Federal Highway Administration (FHWA): www.fhwa.dot.gov

STATE PARTNERS

- The **Economic Development Districts of Idaho (EDDI)** link the planning organizations for the six, Idaho-based US Department of Commerce Economic Development Districts and include Region I - *Panhandle Area Council*; Region II - *Clearwater Economic Development Association*; Region IV - *Region IV Development Association*; Region V - *Southeast Idaho Council of Governments*; and Region VI - *East Central Planning and Development Company*.
- **Idaho Department of Commerce** provides connection to resources for business, innovation, communities, travel, media, and career opportunities. IDC administers three major funding programs: the Idaho Community Development Block Grant, the Rural Community Block Grant, and the GEM Grant. The Idaho Business Network provides services to assist businesses in government contracting.
www.commerce.idaho.gov

- **Idaho Department of Labor** is an integral partner in linking workers and businesses to each other. IDL provides workforce training programs, job seeker information, labor market information and analysis, as well as access to grant resources. www.labor.idaho.gov
- **Association of Idaho Cities** aids in governance and management to Idaho cities. www.idahocities.org
- **Idaho Association of Counties** aids in governance and management to the counties of Idaho. www.idcounties.org
- **Idaho Nonprofit Center** assists non-profit organizations in development, governance, and management. www.idahononprofits.org
- **Boise State University Environmental Finance Center (EFC)** is a site for **US EPA Region 10**. EFC's mission is to provide help to those facing the "how to pay" challenges of environmental protection. www.efc.boisestate.edu/efc
- **Idaho Economic Development Association** links local economic development associations to address common interests. www.ieda.biz
- **Idaho Rural Partnership** links public and private resources for collaboration to address rural community and business challenges. www.irp.idaho.gov
- **Idaho Rural Water Association** provides technical assistance and training to the water and wastewater systems in Idaho. www.idahoruralwater.com

REGIONAL PARTNERS

- **Clearwater Economic Development Association (CEDA)** assists businesses and communities by acting as a conduit to needed resources for economic and community development. CEDA's small business financing program provides funding for start-up and emerging businesses unable to secure conventional financing. CEDA assists communities in developing, financing, and managing development projects and programs. The CEDA office is located in Lewiston, Idaho. www.clearwater-eda.org
- **Clearwater Resource Conservation & Development (Clearwater RC&D)** provides leadership in building local collaborations for sustainable community and resource development to improve the quality of life for residents of North Central Idaho. The Clearwater RC&D is a non-profit organization established and run by volunteer elected and civic leaders who plan and conduct projects for resource conservation and community development in Clearwater, Idaho, Latah, Lewis, and Nez Perce counties. The RC&D office is located in Moscow, Idaho. www.clearwaterrcd.org

- **North Central Idaho Travel Association (NCITA)** promotes travel opportunities and develops and implements programs related to tourism in the five counties of North Central Idaho. www.northcentralidaho.info
- **Northwest Intermountain Manufacturers Association (NIMA)** serves the manufacturers in Clearwater, Idaho, Latah, Lewis, and Nez Perce counties of Idaho and Asotin, Garfield, Whitman, and Columbia counties of Washington. NIMA provides technical assistance and links manufacturers to existing resources. www.northima.org
- **Nez Perce Tribe Economic Development** assists the Nez Perce Tribe in economic, community, and transportation planning. www.nezperce.org/Official/economiccommunitytransportationplanning.htm
- Washington State University and the University of Idaho, in partnership with the Latah and Palouse Economic Development Councils, make up **the Palouse Knowledge Corridor (PKC)**. The PKC combines the resources of the two research land-grant institutions located eight miles apart to offer courses and conduct research. The vision of the PKC is to create a diverse, vibrant, and sustainable economy that respects the social fabric of our communities and our natural environment. www.palouseknowledgecorridor.com
- **The University of Idaho** has established the University of Idaho Economic Development Council that is responsible for overseeing how the University of Idaho promotes and provides support to economic development opportunities. One of the programs providing North Central Idaho resources for economic development is the Office of Technology Transfer (OTT). The mission of the OTT is to promote the transfer of commercially valuable knowledge and information developed at the University to the businesses most capable of reducing them to practice. www.uo.uidaho.edu/ott
- The **Two Degrees Northwest Where Art Meets the Land Initiative** is being guided by the University of Idaho Department of Agricultural Economics and Rural Sociology. The strategy is to help communities identify, enhance, and market their unique sites, heritage, culture, and products by developing trails, guides, and services for very rural communities. www.2dnw.org
- **Lewis-Clark State College Programs** that assist the region in development include:
 - The **Idaho Small Business Development Center at Lewis Clark State College** helps small businesses determine direction, find solutions, and make an impact. The Idaho SBDC is committed to providing quality business and technical consulting, as well as research and training services to small businesses and manufacturers throughout North Central Idaho. Idaho SBDC assistance is available to anyone interested in starting or expanding a for-profit small business in Idaho. This includes small business owners and

managers, home-based businesses, inventors with a product to develop and market, manufacturers, retailers, wholesalers, service companies, and agriculture or natural resource ventures. www.lcsc.edu/ISBDC

- **Lewis-Clark State College Workforce Training** provides for the educational needs of individuals in the workforce. Classes offer information and knowledge employees need to remain current in their fields or to move up the career ladder. Teachers are industry subject matter experts who are eligible for occupational specialist teaching certificates in the state of Idaho. They provide training at times and locations to meet the needs of students and employers and have online offerings. www.lcsc.edu/wft

COUNTY PARTNERS

- **Partners for Economic Prosperity (PEP)** is a private, nonprofit 501(c)(6) corporation located in Moscow. PEP's goal is to bring business, government, education, and community leadership together for the purpose of strengthening the Latah County economy through the retention, and recruitment of new business activity. www.pepedo.org
- **Clearwater County Economic Development Council's (CCEDC)** mission is to foster a thriving business climate by facilitating initiative-taking partnerships and leveraging available resources for the benefit of existing, start-ups, and new businesses countywide. www.clearwatercounty.org/?EconomicDevelopment
- **Ida-Lew Economic Development Council (Ida-Lew)** works to retain and expand existing businesses, recruit new businesses that can benefit from Idaho's favorable business climate, and aids entrepreneurs that are establishing new businesses. www.ida-lew.org

COMMUNITY PARTNERS

- **Valley Vision** serves the border communities of Lewiston, Idaho, and Clarkston, Washington. Its focus includes business recruitment, retention, and expansion. www.lewis-clarkvalley.com
- **Framing Our Community (FOC)**, a 501(c)(3) nonprofit organization, was founded in 1999 by community members in the non-incorporated community of Elk City to develop economic opportunities. www.framingourcommunity.org
- **City of Moscow – Community Development's** mission is to be responsive and sensitive to the needs of the public and to preserve and promote Moscow's distinctive character and foster a well-balanced, high-quality living and working environment through long-range planning and code administration. www.moscow.id.us

- **The Moscow Urban Renewal Agency** promotes and supports projects that achieve sustainable economic growth, vitality, and which enhance the community. The URA oversees two Districts, Legacy Crossing, and the Alturas Technology Park. www.moscowura.com
- **City of Lewiston – Community Development:** provides services in planning and zoning, building inspections and plan review, permits, business licensing, code enforcement, and economic development. www.cityoflewiston.org
- **The City of Lewiston Urban Renewal Agency** administers the Tax Increment Financing revenues to stimulate economic development and eliminate blight. www.cityoflewiston.org

Chapter 6 - Performance Measures

Performance measures are a valuable tool that allows the region to measure the progress in implementing the CEDS and its impact on the regional economy over time. Clearwater Economic Development Association's Economic and Community Development Council and staff will be responsible for periodically evaluating the CEDS to ensure that regional economic development goals and strategies are being accomplished. The CEDS Annual Review will be completed on an annual basis and provides an opportunity to determine the efficacy of the plan, identify mid-course adjustments, and otherwise refine and focus on ongoing implementation efforts.

What are we Measuring and Why?

The performance measures selected for this CEDS are based on what is important to the District; what conditions in the region need to be reversed or created, and what regional assets can be leveraged. The performance measures mirror the Economic Development Administration's preferred core performance measurements.

The development and analysis of the core metrics provides two benefits to regional economies; an informed leadership with an understanding about our regional economy and what drives income and prosperity; and a basis to understand what drives specific goals for the region.

Traditional metrics will be used to evaluate the CEDS process; these include:

- Number of jobs created after implementation of the CEDS
- Number of jobs retained in the region
- Increases in average wage and per capita income
- Changes in the economic environment in the region

The region will also employ nontraditional measurements such as:

- Changes in housing insecurities in the region
- Increases in GDP with attention to value-added agricultural products
- Broadband implementation and adoption in the region
- Infrastructure improvements such as water/wastewater upgrades supporting industry growth and/or development

CEDA will collaborate with regional stakeholders to monitor and evaluate the progress of the CEDS. The primary goal of the performance measures is to oversee the goals, objectives, strategies and associated actions. CEDA will:

1. Monitor all action strategies on a quarterly basis:
 - a. Identify status of each initiative
 - b. Report findings to CEDA board and stakeholders

2. CEDA Economic & Community Development Committee will meet quarterly:
 - a. Identify which initiatives have been successfully implemented
 - b. Review status of long-term initiatives
 - c. Identify and seek resolution of obstacles
 - d. Recommend changes to enable continued progress

At the end of each year, CEDA staff will prepare an assessment of the goals and strategies contained in the CEDS. Evaluations will include the status of projects and initiatives during this planning period, trends in economic indicators, and any significant changes in the economy.

Appendices

- A. 2020 CEDS Planning Team
- B. 2020 CEDS Survey and Survey Results

Appendix A – 2020 CEDS Planning Team

CEDA 2020 – 2025 CEDS Planning Team

Name	Representing
Adena Burnette	Hillco Technologies
Alan Nygaard	City of Lewiston
Amber Dahmen	Clearwater Economic Development Association
Angie Edwards-Kuskie	Clearwater Economic Development Association
Art McIntosh	McIntosh Farms, Lindsay Creek Winery
Bill Bellknap	City of Moscow
Bill Goesling	Idaho State Legislator
Bob West	Lewis County Emergency Management
Cari Miller	City of Lewiston
Carol Moehrle	Idaho Public Health, NC ID District
Carolyn Nilsson Troy	Idaho State Legislator
Chad Steinbraker	Army Corps of Engineers
Charity Goodell	Tristate Memorial Hospital
Chris Blankenship	Latah County
Chris St. Germaine	Clearwater County Economic Development Council
Christine Frei	Clearwater Economic Development Association
Cody Wilkinson	St. Mary's & Clearwater Valley Hospitals
Courtney Kramer	Beautiful Downtown Lewiston
Crystal White	Appaloosa Museum
Dan Ewart	University of Idaho, Partners for Economic Prosperity
Dan Johnson	Idaho State Legislator
Daniel Gray	SMART Transit

Darlene Burke	Lewiston Transit
David Brown	City of Potlach
David Nelson	Idaho State Legislator
Deb Smith	Clearwater Economic Development Association
Debbie Baker	Valley Vision Economic Development
Dennis Ohrtman	Citizen
Diane Hairston	Idaho Department of Labor
Dodd Snodgrass	Clearwater Economic Development Association
Don Gardner	City of Orofino
Douglas Zenner	Nez Perce County
Dylan Canaday	City of Grangeville
Erin Cassetto	Lewis-Clark State College
Gavin Lewis	Ida-Lew Economic Development Association
Ged Randal	City of Lewiston
Gina Taruscio	Partners for Economic Prosperity
Greg Johnson	Lewis County
Hayden Zawane	College Student
Heidi Hardin	Catalyst Medical Center
Helen LeBoeuf	Citizen
Henrienne Westberg	Latah County
Jacqui Gilbert	City of Lewiston
Jason Hanson	KME Specialties
Jaynie Bentz	Port of Lewiston
Jeff Cirka	Potlatch School District #285
Jeff Ober	Lewis-Clark State College

Joel Plaskon	City of Lewiston
John Cardwell	ID Department of Environmental Quality
John Lane	Clearwater Economic Development Association
John Mangiantini	University of Idaho
John Smith	City of Lewiston
Joyce Dearstyne	Framing Our Community
Judi Davis	City of Potlatch
Karen Braun	City of Stites
Karl Dye	Valley Vision Economic Development
Kathie LaFortune	Latah County
Kathryn Tacke	Idaho Department of Labor
Kay Seven	Nez Perce Tribe
Kimberly Eimers	Lewiston School District
Kimberly Johnson	St. Mary's & Clearwater Valley Hospitals
Laura VonTersch	City of Lewiston
Linda Strickland	Lewis-Clark State College
Liz Weldy	Lewis-Clark State College
Marge Kuchynka	Weippe Discovery Center
Melinda Davis	University of Idaho
Michelle Bly	TD&H Engineering
Michelle Fuson	Latah County
Michelle Stamper	Tristate Memorial Hospital
Mike Ryan	Clearwater County
Paul Pence	Dworshak State Park
Philip Liggins	Lewis-Clark State College

Polly Taylor Dennler	KJ7 Community Development
Rhonda Schmidt	City of Nezperce
Salena Dugger	Wells Fargo Bank
Shelly Cannon	Idaho Cedar Sales
Tanna Zawene	Clearwater Enterprises
Tate Smith	Lewis-Clark State College
Ted Lindsley	Grangeville Super 8, Gateway Inn
Terry Summerfield	Piece - Weippe Chamber of Commerce
Todd Marek	N.W. Insurance
Todd Perry	City of Orofino
Tyler Palmer	City of Moscow

NOTE: This list is not inclusive of survey respondents which were confidential and did not require participant identification.

Appendix B – 2020 CEDS Survey and Survey Results

**Clearwater Economic Development Association
Comprehensive Economic Development Strategy (CEDS)
Region II Survey
Government & Economic Development**

Name of City, County, Tribal Nation or ED Organization:

Are you:

- Elected Official
- Appointed Official
- Manager
- Employee
- Other: _____

Age Range:

- 18-29
- 30-39
- 40-49
- 50-59
- 60+

Asset Mapping

Assets can provide information about the resources of a community or region that can help uncover solutions to fostering community and economic development. Of the items listed below, please select only those that you think are the top assets in your jurisdiction.

- Area aquifers (e.g., Palouse Basin, Grande Ronde, Wanapum)
- Natural environment (lakes, rivers, mountains, land, animals, plants)
- Social networks (e.g., churches, elder care, non-profits, etc.)
- Transportation infrastructure (e.g., highways, airports, rail)
- Historical buildings
- Citizen advocacy on political issues

Individual/group creativity to overcome challenges

Higher education (UI, LCSC, WSU, WWCC)

Rural communities

Utilities (e.g., electric, gas, solar)

Population Centers

Climate

Opportunity/Hub Zones

Agriculture-based economy

Support for education

Technical skills of individuals

Service clubs (e.g., Rotary, Lions, Elks, Kiwanis)

Accessibility to politicians

Citizen involvement/engagement

Access to funding agencies/foundations

Economic Development organizations

Entrepreneurship

Charity of people

Constructed infrastructure (water, sewer, roads, broadband)

Health care

Public safety services

Business & industry clusters

Other (please specify)

The purpose of questions 3-6 will be to analyze the strengths, weaknesses, opportunities and threats (SWOT) of the Region as a whole.

Please select up to five (5) from the following that you think best characterize the greatest assets or strengths in your jurisdiction.

Well-trained workforce

Customized workforce training

Constructed infrastructure (roads, water/sewer, rail, port, broadband)

Transportation network

Technology/communications

Quality of school system/higher education

Natural resources/raw materials

Renewable energy

Strong existing businesses

Strong community leadership

Tourism assets

Natural Resource Management

Local resources for capital business loan funds

Housing availability

Attractive, livable communities

Health care facilities

Place-based economic incentives

Regional political influence at State and Federal levels

Other (please specify)

Please select up to five (5) from the following that you think are the most significant weaknesses or constraints hindering economic development in your jurisdiction.

- Well-trained workforce
- Customized workforce training
- Constructed infrastructure (roads, water/sewer, rail, port, broadband)
- Transportation network
- Technology/communications
- Quality of school system/higher education
- Natural resources/raw materials
- Renewable energy
- Strong existing businesses
- Strong community leadership
- Tourism assets
- Natural Resource Management
- Local resources for capital business loan funds
- Housing availability
- Attractive, livable communities
- Health care facilities
- Place-based economic incentives
- Value-added agriculture
- Other (please specify)

Please identify up to five (5) economic opportunities that provide the most potential for your community.

- Skilled labor force
- Population growth
- Anchor industries or clusters
- Youth
- Proximity to institutions of higher education
- Tourism attractions
- Available land
- Virtual workplaces
- Access to transportation (air, highway, rail)
- Retirees
- Vibrant downtown
- Natural resources
- Regional Partnership
- Broadband capacity
- Attractive communities/quality of life
- Public transportation options
- Automation/Robotics
- Changing consumer demands
- Other (please specify)

Please select five (5) from the following list that you think most threaten or limit the economic development potential for your jurisdiction.

- Lack of affordable housing
- Loss of high-skilled workers
- Infrastructure deficiencies (roads, water/sewer, rail, broadband)
- Mismatch between education and training to labor market needs
- Lack of developable land and/or suitable buildings
- Exiting youth/younger generation
- Vacant Main Streets, downtowns, town centers and/or shopping areas
- Low wages
- Declining industries
- Urbanization
- Volatility of business cycle
- Ineffective existing government (local, state, federal)
- Aging population and workforce
- Lack of collaboration between public and private sector
- Substance abuse/opioid crisis
- Wage differential with neighboring communities/states
- Cultural, financial and/or career counseling impediments
- Depopulation of rural area
- Changing long-term weather conditions and patterns
- Other (please specify)

Technical Assistance

What community projects are envisioned or planned over the next five (5) years?

Does your community have a current comprehensive plan? What year was the comprehensive plan updated?

Does your jurisdiction have an economic development plan in place?	Yes	No
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If you checked yes, please provide the name of the plan, date of the plan, and contact person in the space below:

If you would like assistance from CEDA to help your community develop a project or initiative, please describe your need, what assistance is needed, and who CEDA should contact about the project or initiative.

**Clearwater Economic Development Association
Comprehensive Economic Development Strategy (CEDS)
Region II Survey
Industry & Community**

Name of City/County where you live: _____

Are you:

- Community Member
- Entrepreneur
- Business Owner/Representative
- Human Services Agency Representative
- Educator
- Other: _____

Age Range:

- 18-29
- 30-39
- 40-49
- 50-59
- 60+

Asset Mapping

Assets can provide information about the resources of a community or region that can help uncover solutions to fostering community and economic development. Of the items listed below, please select only those that you think are the top assets in your county.

- Area aquifers (e.g., Palouse Basin, Grande Ronde, Wanapum)
- Natural environment (lakes, rivers, mountains, land, animals, plants)
- Social networks (e.g., churches, elder care, non-profits, etc.)
- Transportation infrastructure (highways, airports, rail)

Historical buildings

Citizen advocacy on political issues

Individual/group creativity to overcome challenges

Higher education (UI, LCSC, WSU, WWCC)

Rural communities

Utilities (e.g., electric, gas)

Population Centers

Climate

Opportunity/Hub Zones

Agriculture-based economy

Support for education

Technical skills of individuals

Service clubs (e.g., Rotary, Lions, Elks, Kiwanis)

Accessibility to politicians

Citizen involvement/engagement

Access to funding agencies/foundations

Economic Development organizations

Entrepreneurship

Charity of people

Constructed infrastructure (water, sewer, roads)

Health care

Public safety services

Business & industry clusters

Other (please specify)

The purpose of questions 3-6 will be to analyze the strengths, weaknesses, opportunities and threats (SWOT) of the Region as a whole.

Please select up to five (5) from the following that you think best characterize the greatest assets or strengths in your county.

Well-trained workforce

Customized workforce training

Constructed infrastructure (roads, water/sewer, rail, port, broadband)

Transportation network

Technology/communications

Quality of school system/higher education

Natural resources/raw materials

Renewable energy

Strong existing businesses

Strong community leadership

Tourism assets

Natural Resource Management

Local resources for capital business loan funds

Housing availability

Attractive, livable communities

Health care facilities

Place-based economic incentives

Regional political influence at State and Federal levels

Other (please specify)

Please select up to five (5) from the following that you think are the most significant weaknesses or constraints hindering economic development in your county.

Well-trained workforce

Customized workforce training

Constructed infrastructure (roads, water/sewer, rail, port, broadband)

Transportation network

Technology/communications

Quality of school system/higher education

Natural resources/raw materials

Renewable energy

Strong existing businesses

Strong community leadership

Tourism assets

Natural Resource Management

Local resources for capital business loan funds

Housing availability

Attractive, livable communities

Health care facilities

Place-based economic incentives

Value-added agriculture

Other (please specify)

Please identify up to five (5) economic opportunities that provide the most potential for your community.

Skilled labor force

Population growth

Anchor industries or clusters

Youth

Proximity to institutions of higher education

Tourism attractions

Available land

Virtual workplaces

Access to transportation (air, highway, rail)

Retirees

Vibrant downtown

Natural resources

Regional Partnership

Broadband capacity

Attractive communities/quality of life

Public transportation options

Automation/Robotics

Changing consumer demands

Other (please specify)

Please select five (5) from the following list that you think most threaten or limit the economic development potential for your community.

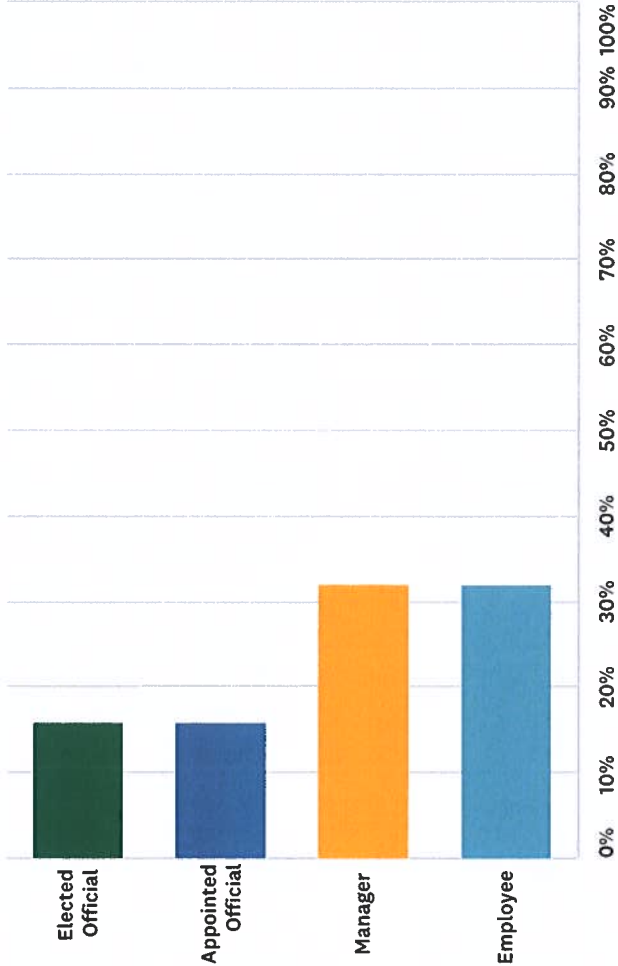
- Lack of affordable housing
- Loss of high-skilled workers
- Infrastructure deficiencies (roads, water/sewer, rail, broadband)
- Mismatch between education and training to labor market needs
- Lack of developable land and/or suitable buildings
- Exiting youth/younger generation
- Vacant Main Streets, downtowns, town centers and/or shopping areas
- Low wages
- Declining industries
- Urbanization
- Volatility of business cycle
- Ineffective existing government (local, state, federal)
- Aging population and workforce
- Lack of collaboration between public and private sector
- Substance abuse/opioid crisis
- Wage differential with neighboring communities/states
- Cultural, financial and/or career counseling impediments
- Depopulation of rural area
- Changing long-term weather conditions and patterns
- Other (please specify)

If you are not on the existing CEDS Committee but interested in participating in the development of regional strategies, please provide your contact information below:

Name
Company
Address 1
Address 2
City
State
Zip
Email
Phone

Q2 Are you:

Answered: 25 Skipped: 0



ANSWER CHOICES	RESPONSES
Elected Official	16.00% 4
Appointed Official	16.00% 4
Manager	32.00% 8
Employee	32.00% 8
TOTAL	25

Q2 Are you:

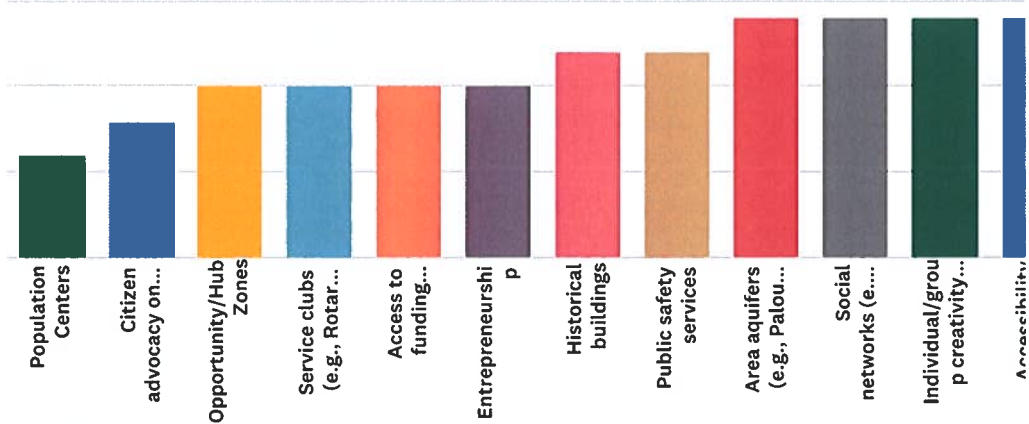
Answered: 29 Skipped: 0



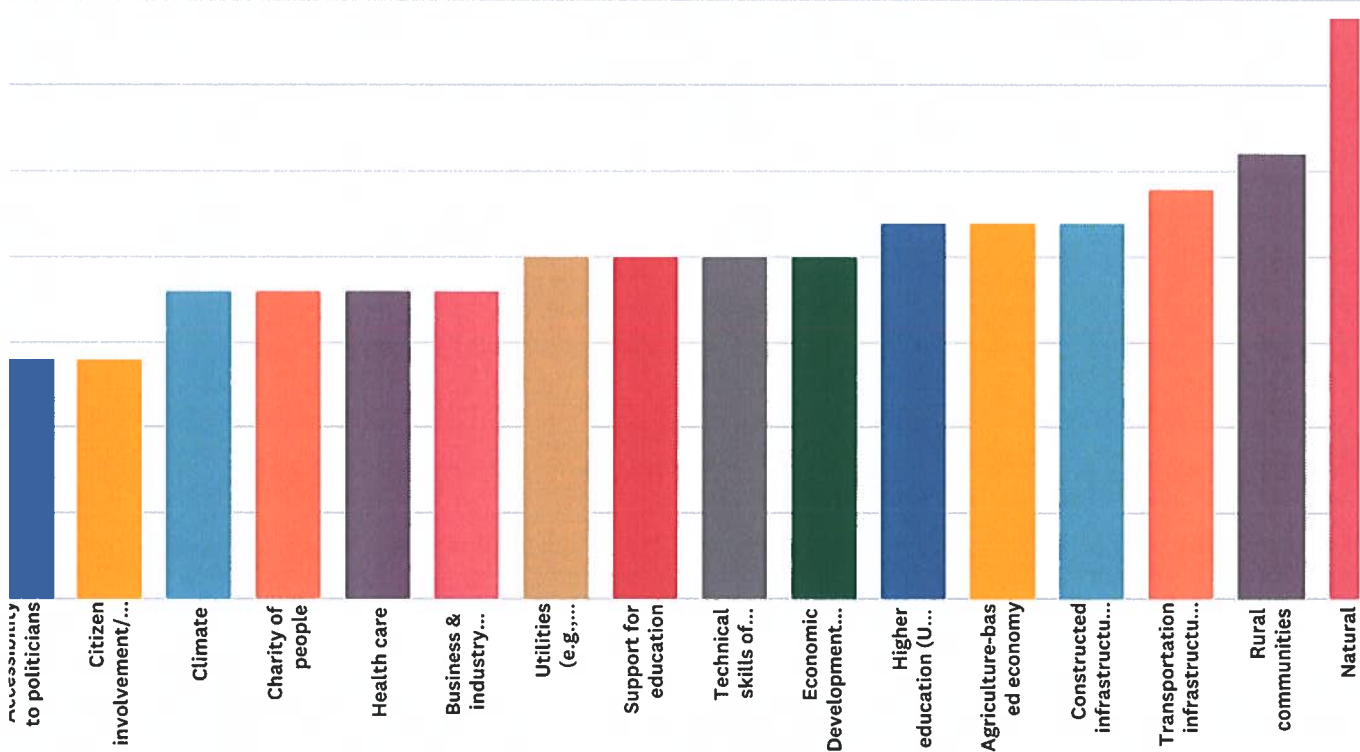
ANSWER CHOICES	RESPONSES
Community Member	9 31.03%
Entrepreneur	0 0.00%
Business Owner/Representative	12 41.38%
Human Services Agency Representative	0 0.00%
Educator	5 17.24%
TOTAL	29

Q4 Assets can provide information about the resources of a community or region that can help uncover solutions to fostering community and economic development. Of the items listed below, please select only those that you think are currently the most important assets in your jurisdiction.

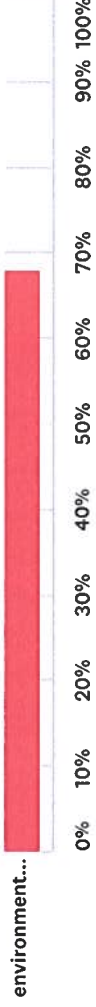
Answered: 25 Skipped: 0



North Central Idaho Economic Strategy Survey



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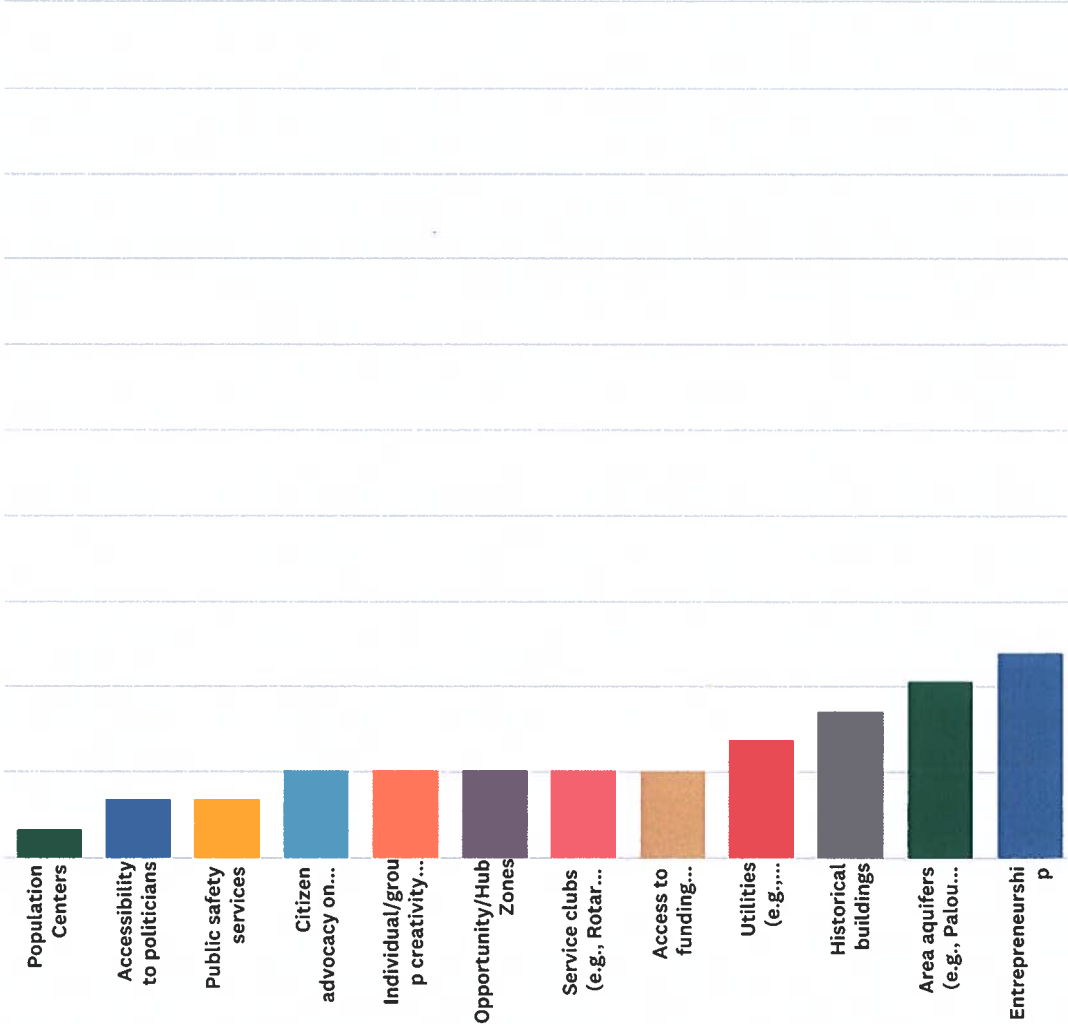
ANSWER CHOICES	RESPONSES
Population Centers	12.00%
Citizen advocacy on political issues	16.00%
Opportunity/Hub Zones	20.00%
Service clubs (e.g., Rotary, Lions, Elks, Kiwanis)	20.00%
Access to funding agencies/foundations	20.00%
Entrepreneurship	20.00%
Historical buildings	24.00%
Public safety services	24.00%
Area aquifers (e.g., Palouse Basin, Grande Ronde, Wanapum)	28.00%
Social networks (e.g., churches, elder care, non-profits, etc.)	28.00%
Individual/group creativity to overcome challenges	28.00%
Accessibility to politicians	28.00%
Citizen involvement/engagement	28.00%
Climate	36.00%
Charity of people	36.00%
Health care	36.00%
Business & industry clusters	36.00%
Utilities (e.g., electric, gas, solar)	40.00%
Support for education	40.00%
Technical skills of individuals	40.00%
Economic Development organizations	40.00%

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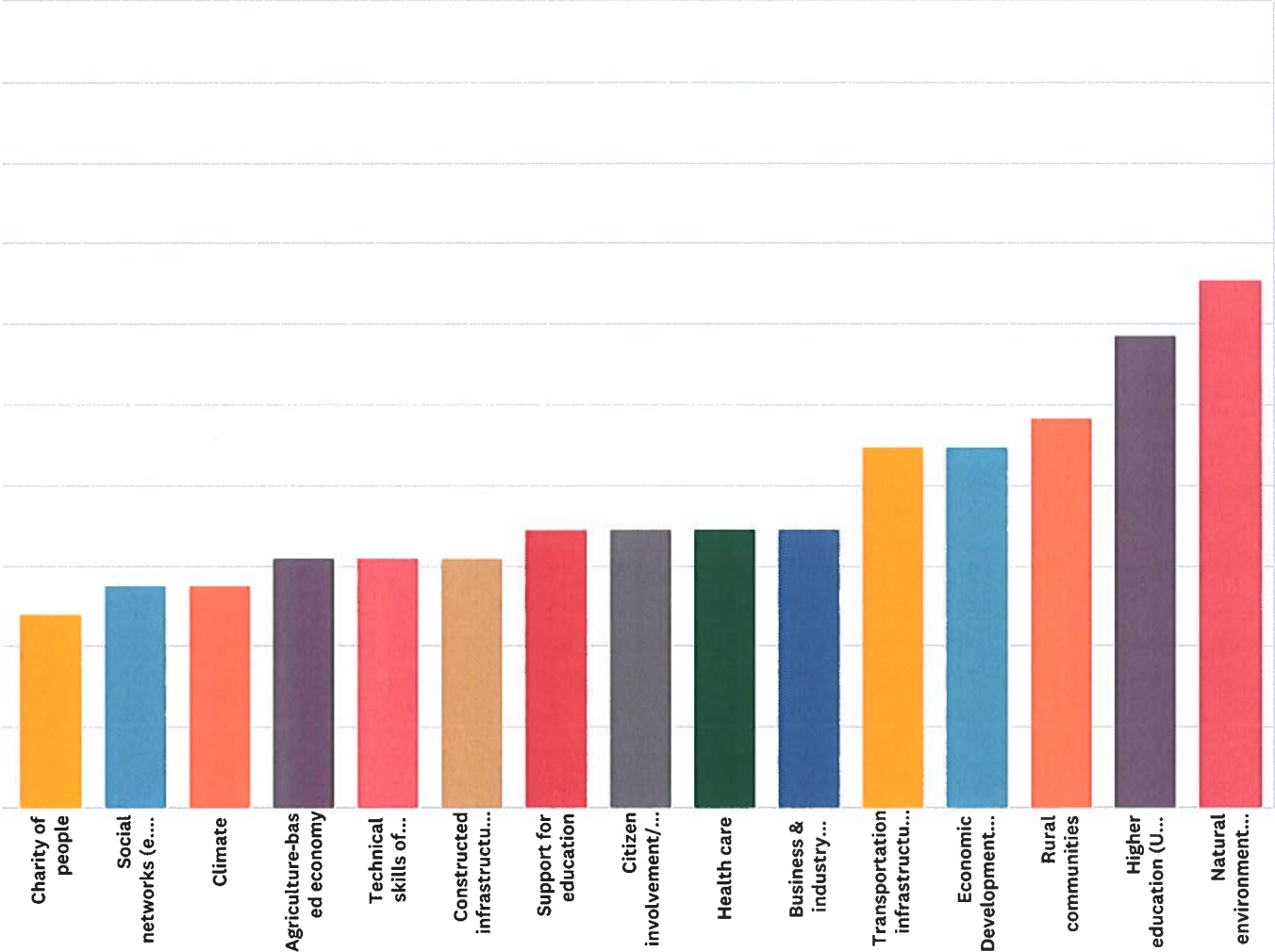
Higher education (UI, LCSC, WSU, WWCC)	44.00%	11
Agriculture-based economy	44.00%	11
Constructed infrastructure (water, sewer, roads, broadband)	44.00%	11
Transportation infrastructure (e.g., highways, airports, rail)	48.00%	12
Rural communities	52.00%	13
Natural environment (lakes, rivers, mountains, land, animals, plants)	68.00%	17
Total Respondents: 25		

Q3 Assets can provide information about the resources of a community or region that can help uncover solutions to fostering community and economic development. Of the items listed below, please select only those that you think are currently the most important assets in your county.

Answered: 29 Skipped: 0



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0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

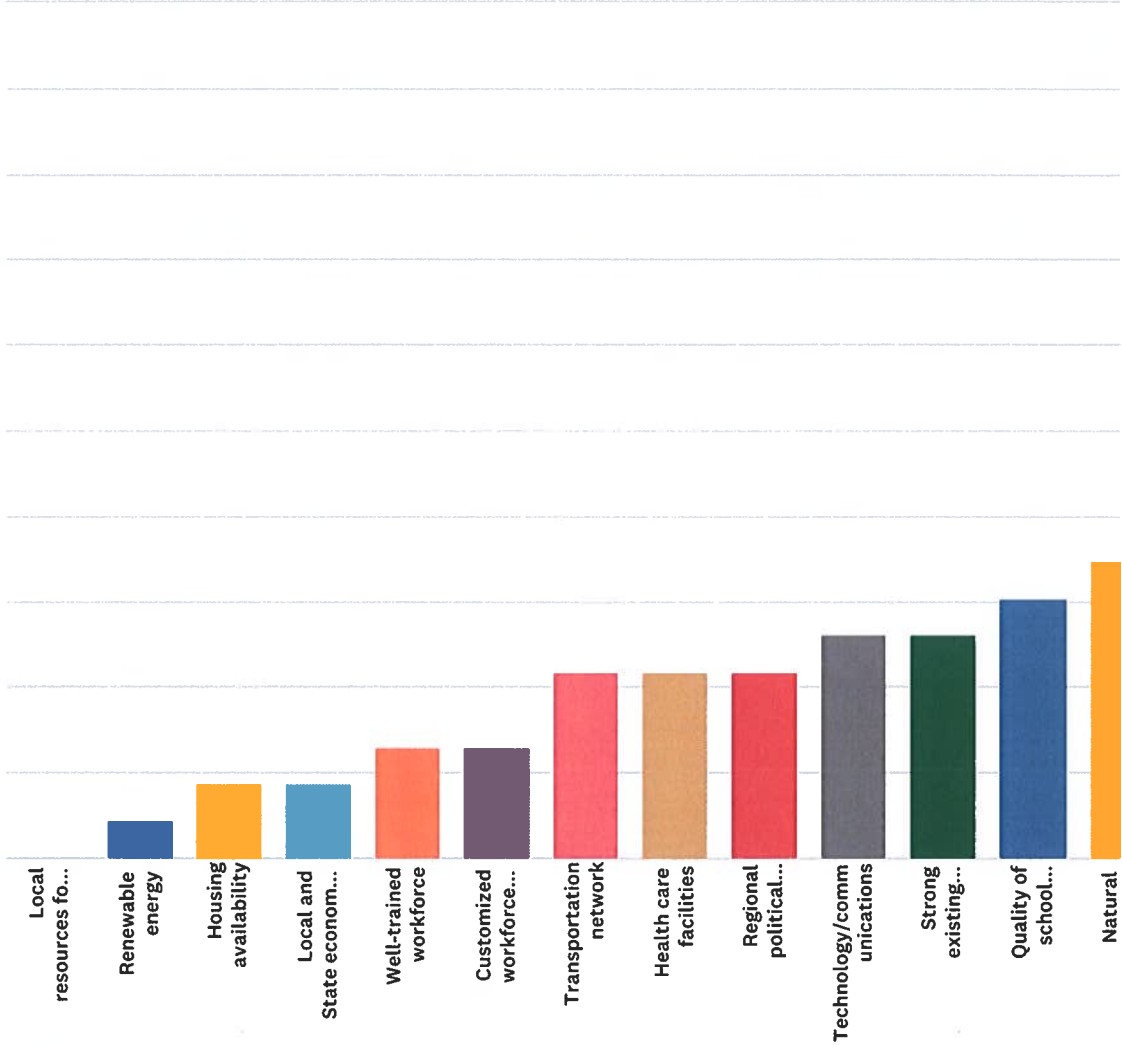
ANSWER CHOICES	RESPONSES
Population Centers	3.45% 1
Accessibility to politicians	6.90% 2
Public safety services	6.90% 2
Citizen advocacy on political issues	10.34% 3
Individual/group creativity to overcome challenges	10.34% 3
Opportunity/Hub Zones	10.34% 3
Service clubs (e.g., Rotary, Lions, Elks, Kiwanis)	10.34% 3
Access to funding agencies/foundations	10.34% 3
Utilities (e.g., electric, gas, solar)	13.79% 4
Historical buildings	17.24% 5
Area aquifers (e.g., Palouse Basin, Grande Ronde, Wanapum)	20.69% 6
Entrepreneurship	24.14% 7
Charity of people	24.14% 7
Social networks (e.g., churches, elder care, non-profits, etc.)	27.59% 8
Climate	27.59% 8
Agriculture-based economy	31.03% 9
Technical skills of individuals	31.03% 9
Constructed infrastructure (water, sewer, roads, broadband)	31.03% 9
Support for education	34.48% 10
Citizen involvement/engagement	34.48% 10
Health care	34.48% 10
Business & industry clusters	34.48% 10

North Central Idaho Economic Strategy Survey - Business and Community

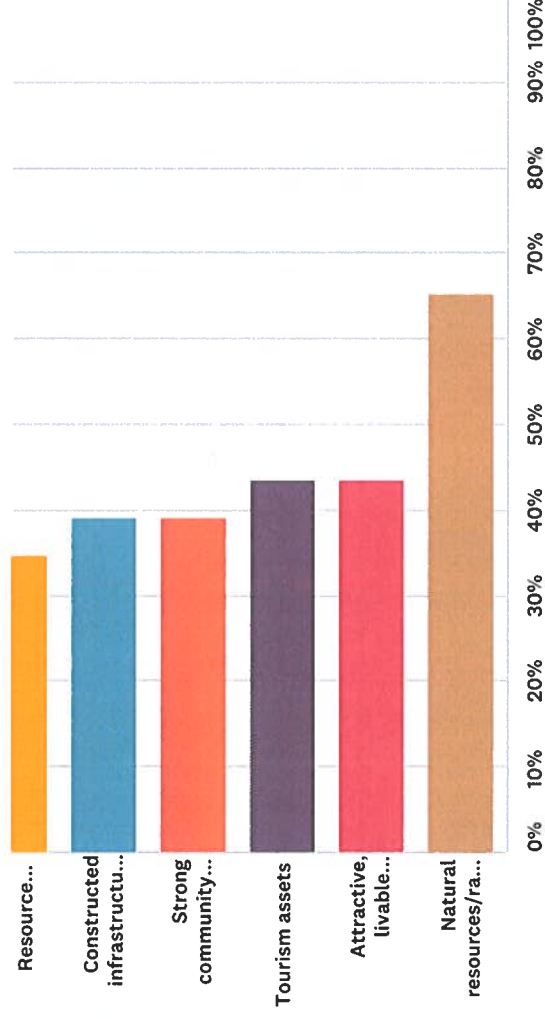
Transportation infrastructure (highways, airports, rail, ports)	44.83%	13
Economic Development Organizations	44.83%	13
Rural communities	48.28%	14
Higher education (UI, LCSC, WSU, WWCC)	58.62%	17
Natural environment (e.g., lakes, rivers, mountains, land, animals, plants)	65.52%	19
Total Respondents: 29		

Q5 Please select up to five (5) from the following that you think best characterize the greatest assets or strengths in your jurisdiction.

Answered: 23 Skipped: 2



North Central Idaho Economic Strategy Survey

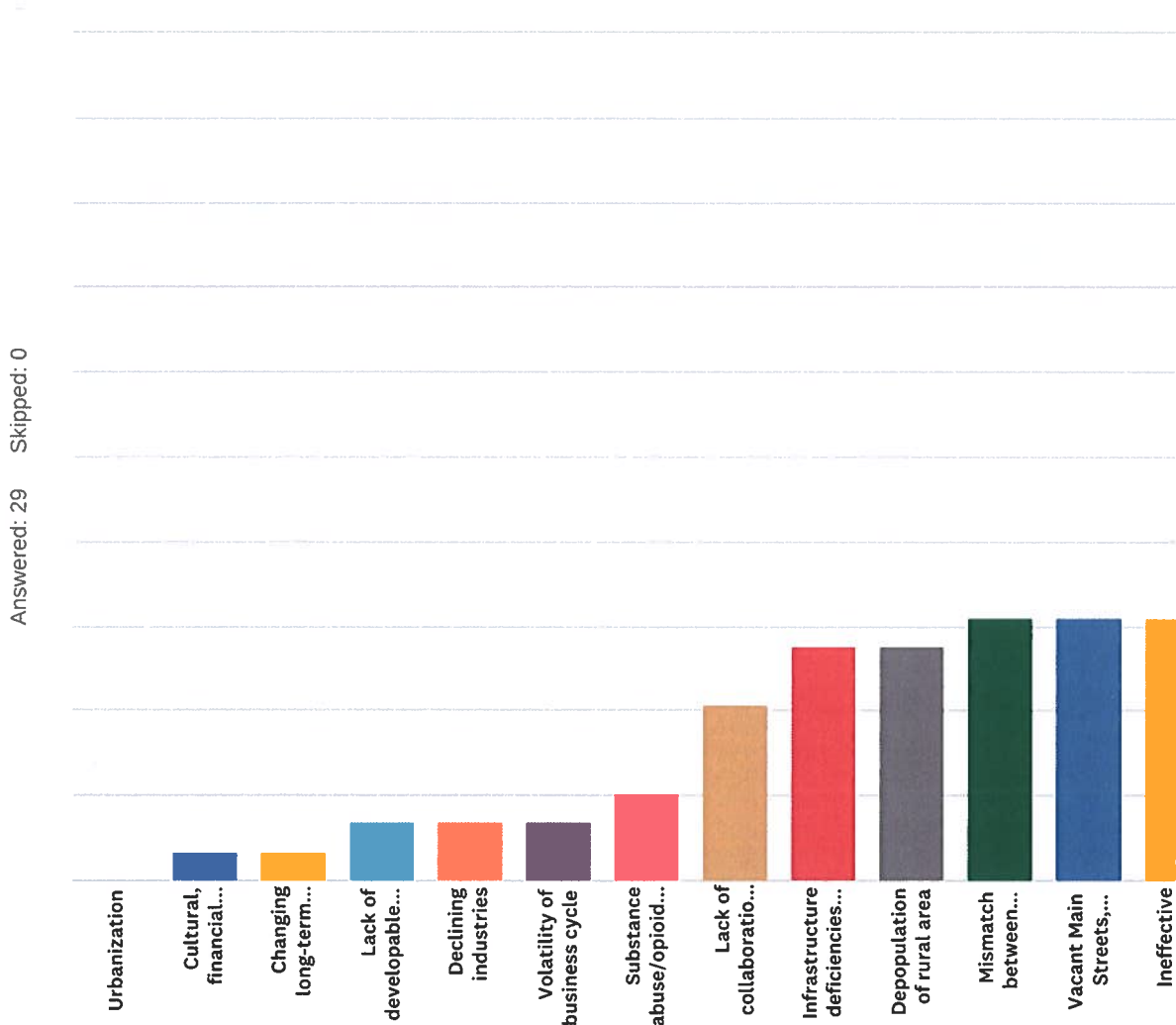


ANSWER CHOICES	RESPONSES
Local resources for capital business loan funds	0.00% 0
Renewable energy	4.35% 1
Housing availability	8.70% 2
Local and State economic incentives	8.70% 2
Well-trained workforce	13.04% 3
Customized workforce training	13.04% 3
Transportation network	21.74% 5
Health care facilities	21.74% 5
Regional political influence at State and Federal levels	21.74% 5
Technology/communications	26.09% 6
Strong existing businesses	26.09% 6
Quality of school system/higher education	30.43% 7
Natural Resource Management	34.78% 8

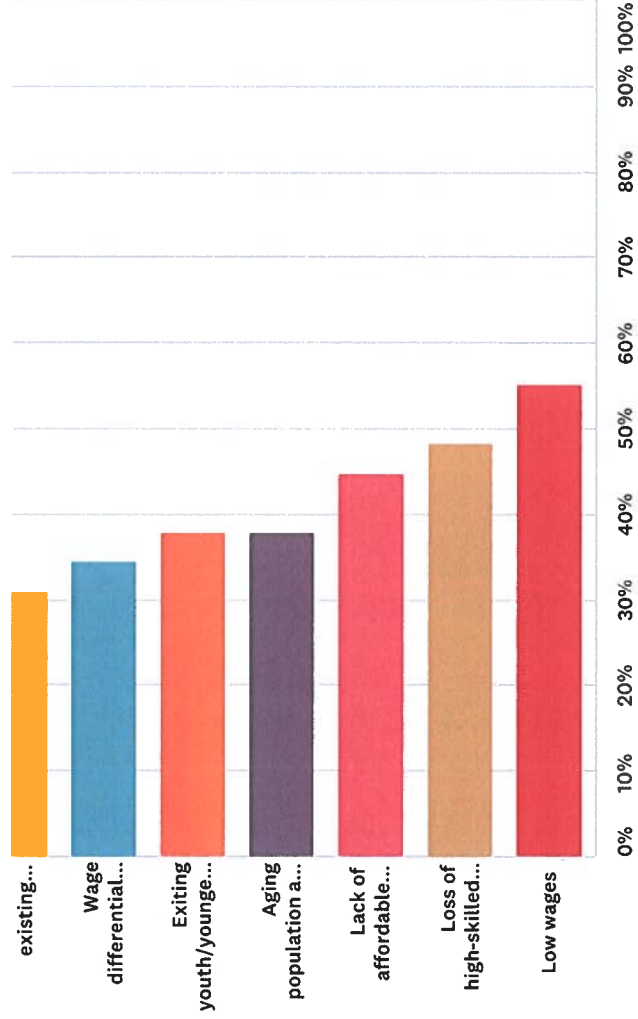
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Constructed infrastructure (roads, water/sewer, rail, port, broadband)	39.13%	9
Strong community leadership	39.13%	9
Tourism assets	43.48%	10
Attractive, livable communities	43.48%	10
Natural resources/raw materials	65.22%	15
Total Respondents: 23		

Q7 Please select five (5) from the following list that you think most threaten or limit the economic development potential for your community.



North Central Idaho Economic Strategy Survey - Business and Community



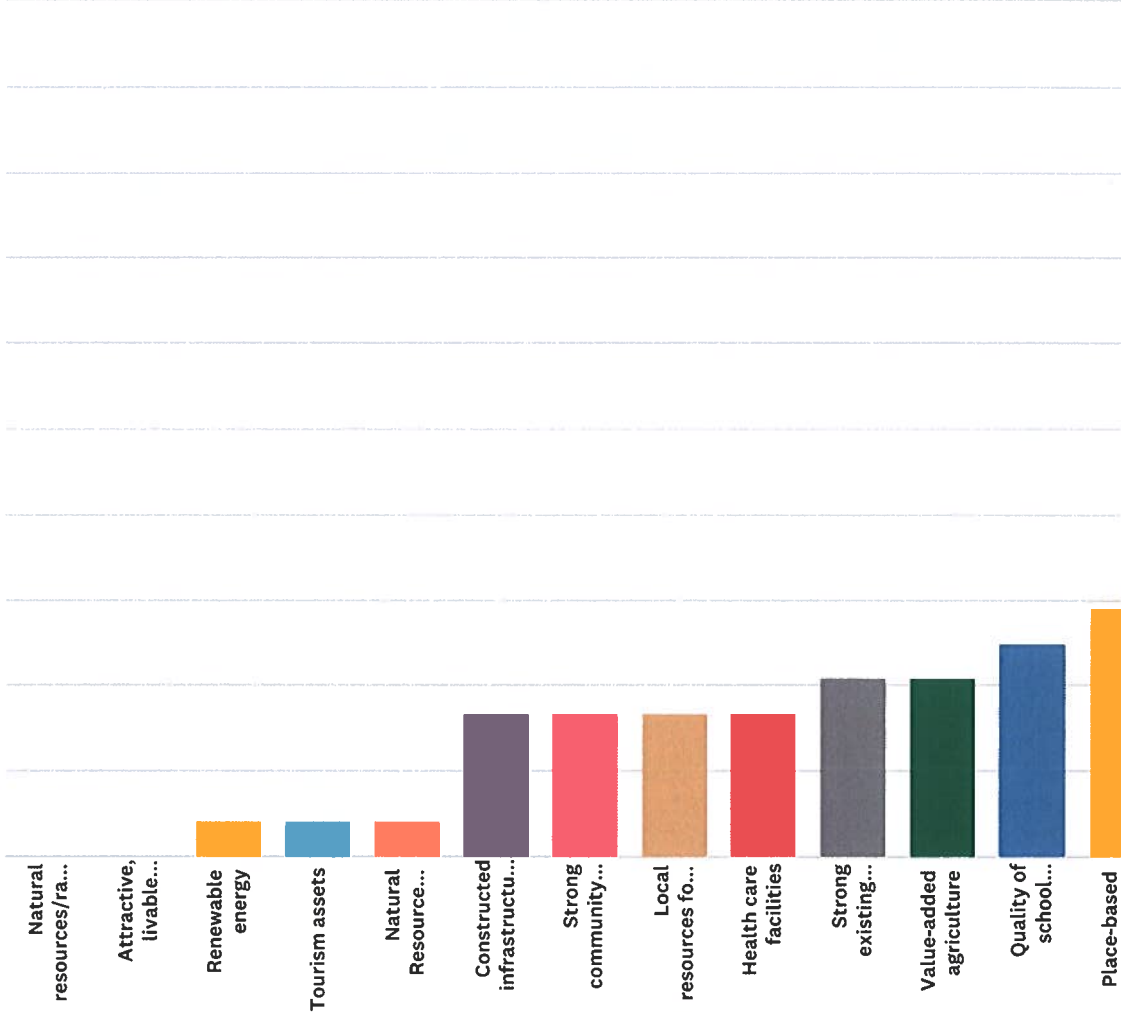
ANSWER CHOICES	RESPONSES
Urbanization	0.00%
Cultural, financial and/or career counseling impediments	3.45%
Changing long-term weather conditions and patterns	3.45%
Lack of developable land and/or suitable buildings	6.90%
Declining industries	6.90%
Volatility of business cycle	6.90%
Substance abuse/opioid crisis	10.34%
Lack of collaboration between public and private sector	20.69%
Infrastructure deficiencies (roads, water/sewer, rail, broadband)	27.59%
Depopulation of rural area	27.59%
Mismatch between education and training to labor market needs	31.03%

North Central Idaho Economic Strategy Survey - Business and Community

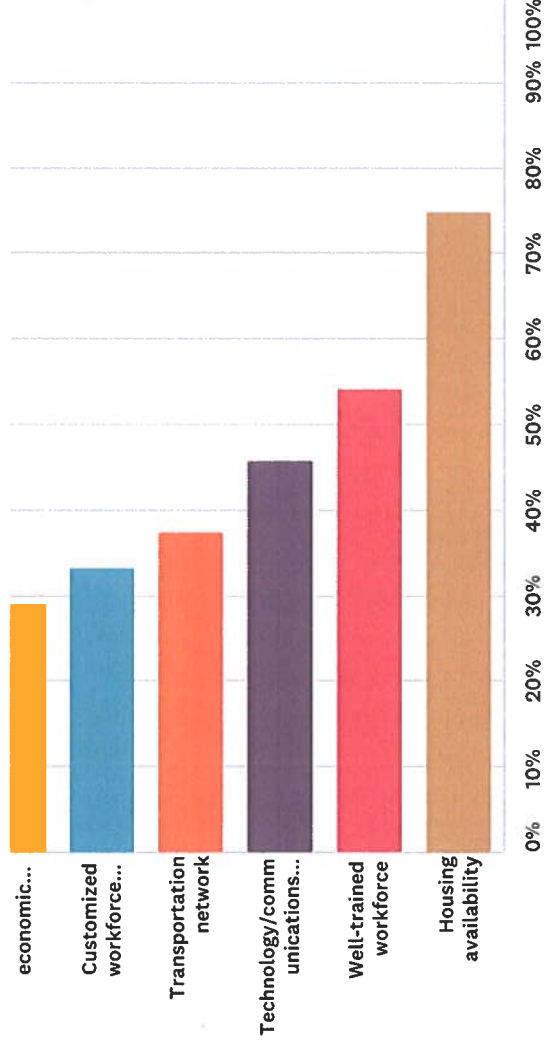
Vacant Main Streets, downtowns, town centers and/or shopping areas	31.03%	9
Ineffective existing government (local, state, federal)	31.03%	9
Wage differential with neighboring communities/states	34.48%	10
Exiting youth/younger generation	37.93%	11
Aging population and workforce	37.93%	11
Lack of affordable housing	44.83%	13
Loss of high-skilled workers	48.28%	14
Low wages	55.17%	16
Total Respondents: 29		

Q6 Please select up to five (5) from the following that you think are the most significant weaknesses or constraints hindering economic development in your jurisdiction.

Answered: 24 Skipped: 1



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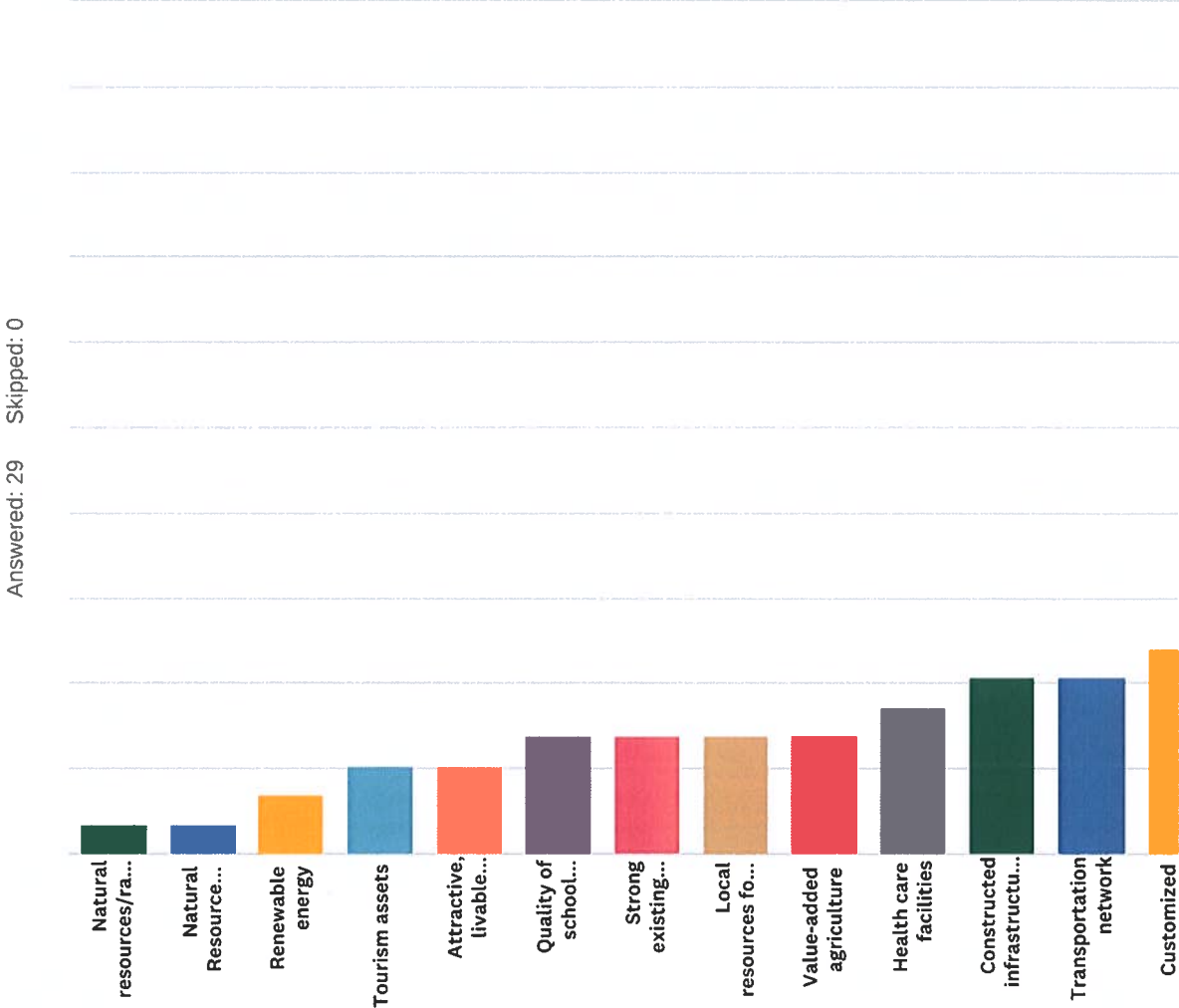


ANSWER CHOICES	RESPONSES
Natural resources/raw materials	0.00% 0
Attractive, livable communities	0.00% 0
Renewable energy	4.17% 1
Tourism assets	4.17% 1
Natural Resource Management	4.17% 1
Constructed infrastructure (roads, water/sewer, rail, ports)	16.67% 4
Strong community leadership	16.67% 4
Local resources for capital business loan funds	16.67% 4
Health care facilities	16.67% 4
Strong existing businesses	20.83% 5
Value-added agriculture	20.83% 5
Quality of school system/higher education	25.00% 6
Place-based economic incentives	29.17% 7

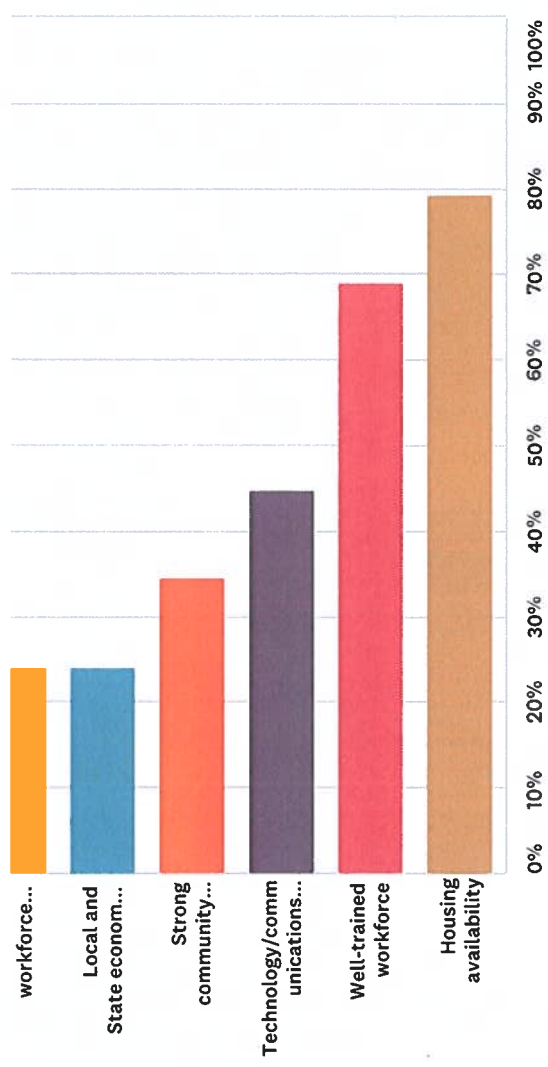
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Customized workforce training	33.33%	8
Transportation network	37.50%	9
Technology/communications (e.g., broadband, high-speed internet, 5G, etc.)	45.83%	11
Well-trained workforce	54.17%	13
Housing availability	75.00%	18
Total Respondents: 24		

Q5 Please select up to five (5) from the following that you think are the most significant weaknesses or constraints hindering economic development in your county.



North Central Idaho Economic Strategy Survey - Business and Community



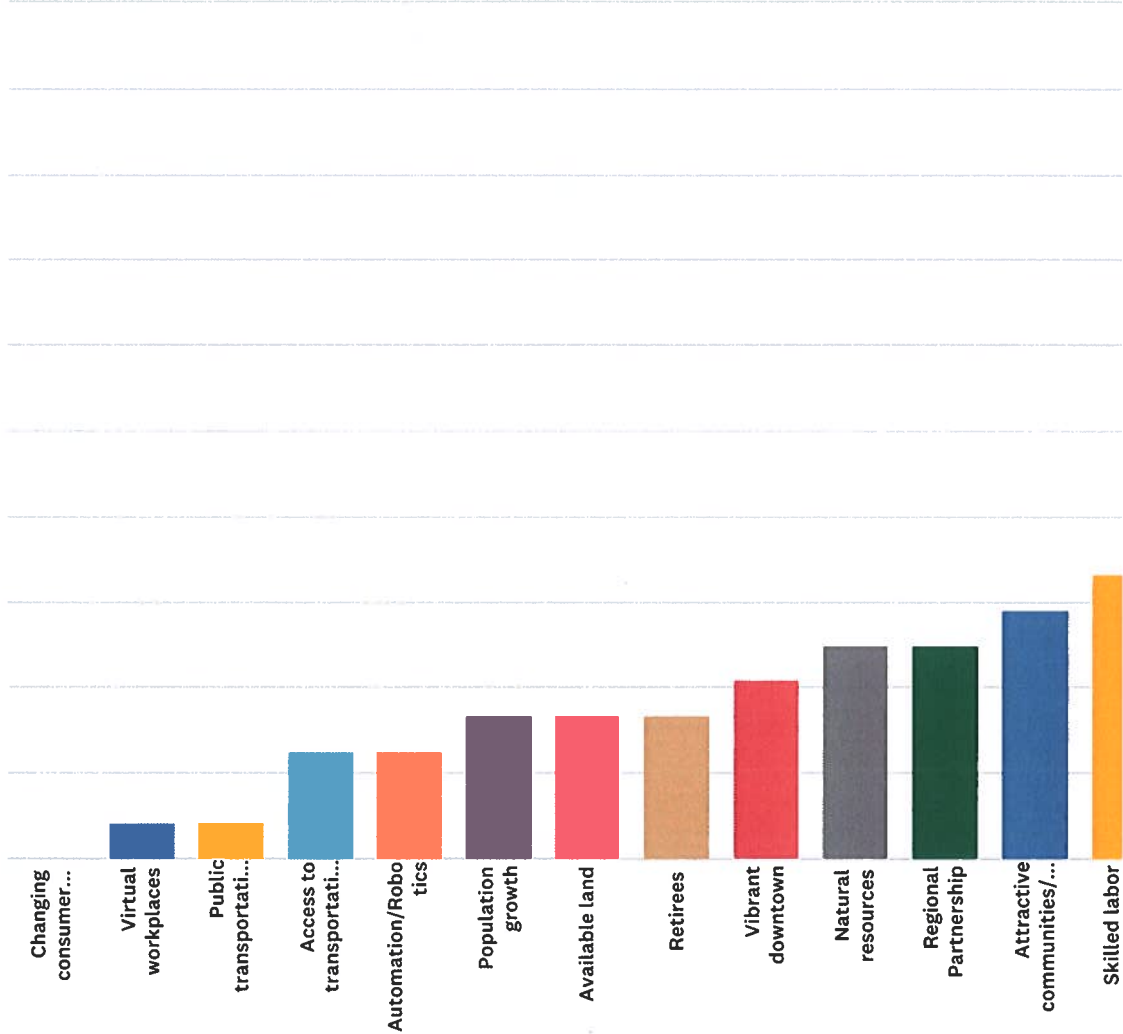
ANSWER CHOICES	RESPONSES
Natural resources/raw materials	3.45%1
Natural Resource Management	3.45%1
Renewable energy	6.90%2
Tourism assets	10.34%3
Attractive, livable communities	10.34%3
Quality of school system/higher education	13.79%4
Strong existing businesses	13.79%4
Local resources for capital business loan funds	13.79%4
Value-added agriculture	13.79%4
Health care facilities	17.24%5
Constructed infrastructure (roads, water/sewer, rail, ports)	20.69%6
Transportation network	20.69%6
Customized workforce training	24.14%7

North Central Idaho Economic Strategy Survey - Business and Community

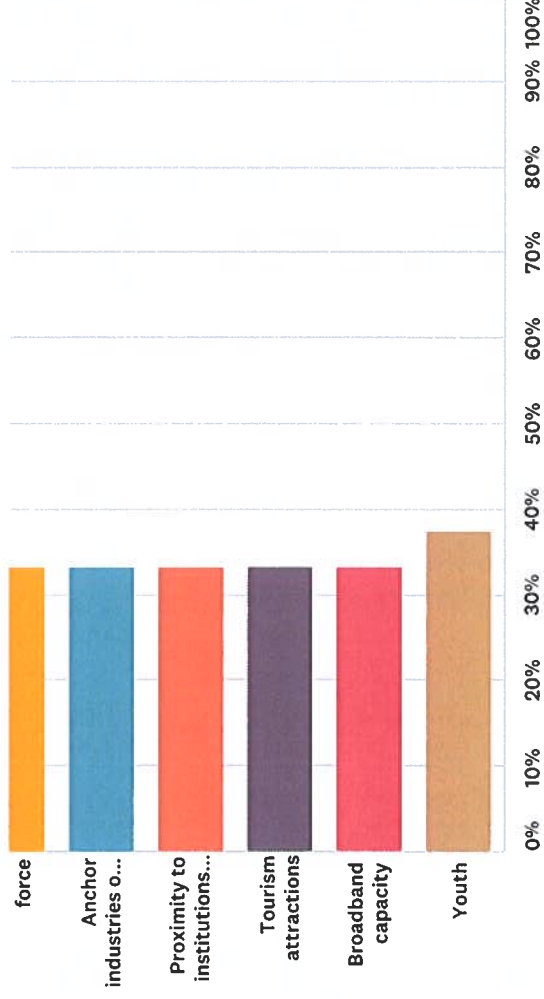
Local and State economic incentives	24.14%	7
Strong community leadership	34.48%	10
Technology/communications (e.g., high-speed internet, broadband, 5G, etc.)	44.83%	13
Well-trained workforce	68.97%	20
Housing availability	79.31%	23
Total Respondents: 29		

Q7 Please identify up to five (5) economic opportunities that provide the most potential for your community.

Answered: 24 Skipped: 1



North Central Idaho Economic Strategy Survey



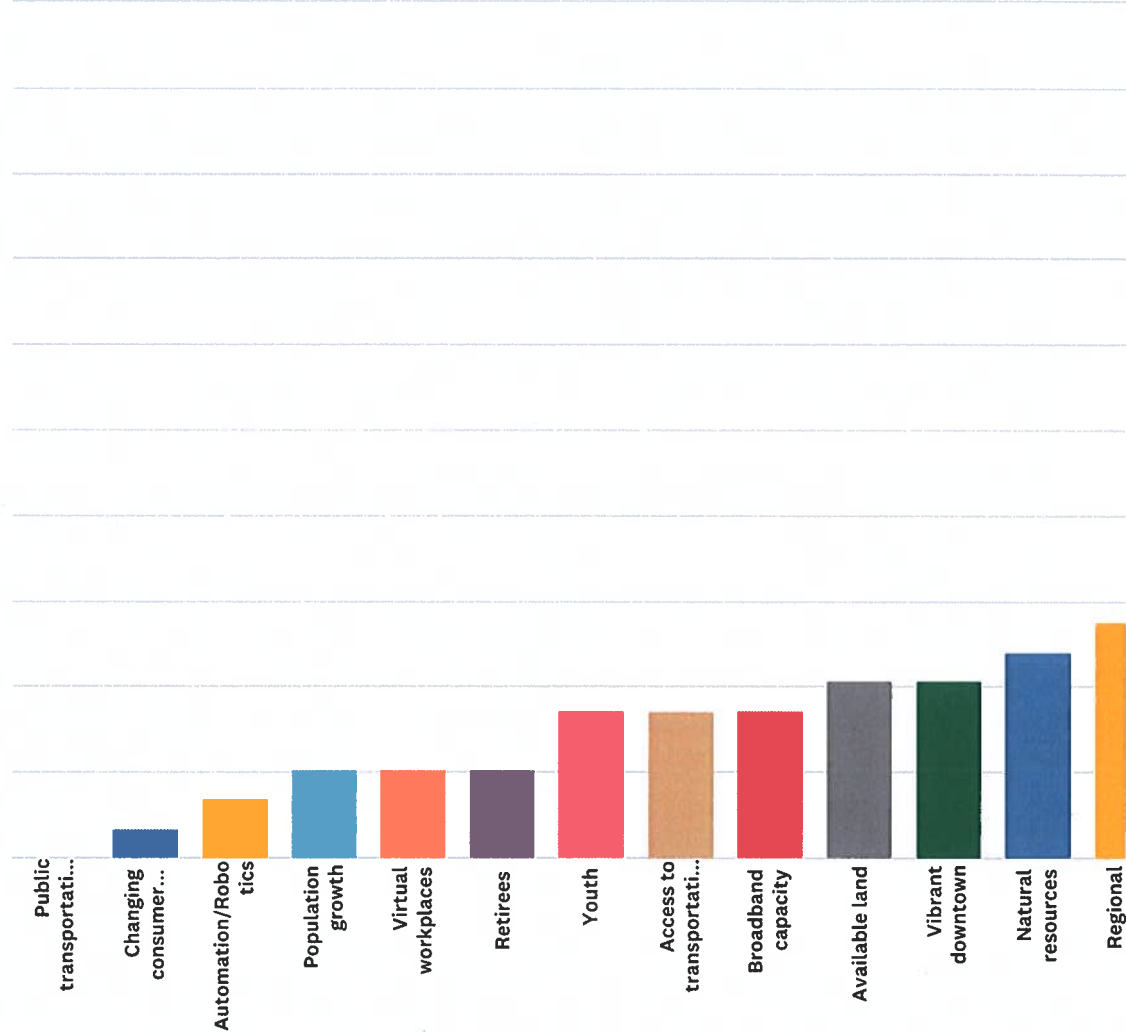
ANSWER CHOICES	RESPONSES
Changing consumer demands	0.00%
Virtual workplaces	4.17%
Public transportation options	4.17%
Access to transportation (air, highway, rail)	12.50%
Automation/Robotics	12.50%
Population growth	16.67%
Available land	16.67%
Retirees	16.67%
Vibrant downtown	20.83%
Natural resources	25.00%
Regional Partnership	25.00%
Attractive communities/quality of life	29.17%
Skilled labor force	33.33%

North Central Idaho Economic Strategy Survey

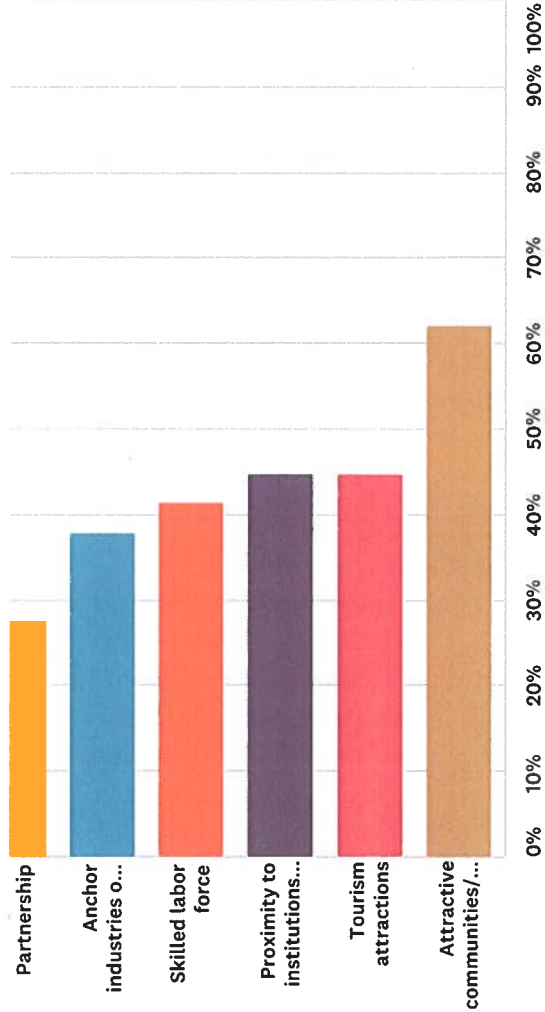
Anchor industries or clusters	33.33%	8
Proximity to institutions of higher education	33.33%	8
Tourism attractions	33.33%	8
Broadband capacity	33.33%	8
Youth	37.50%	9
Total Respondents: 24		

Q6 Please identify up to five (5) economic opportunities that provide the most potential for your community.

Answered: 29 Skipped: 0



North Central Idaho Economic Strategy Survey - Business and Community



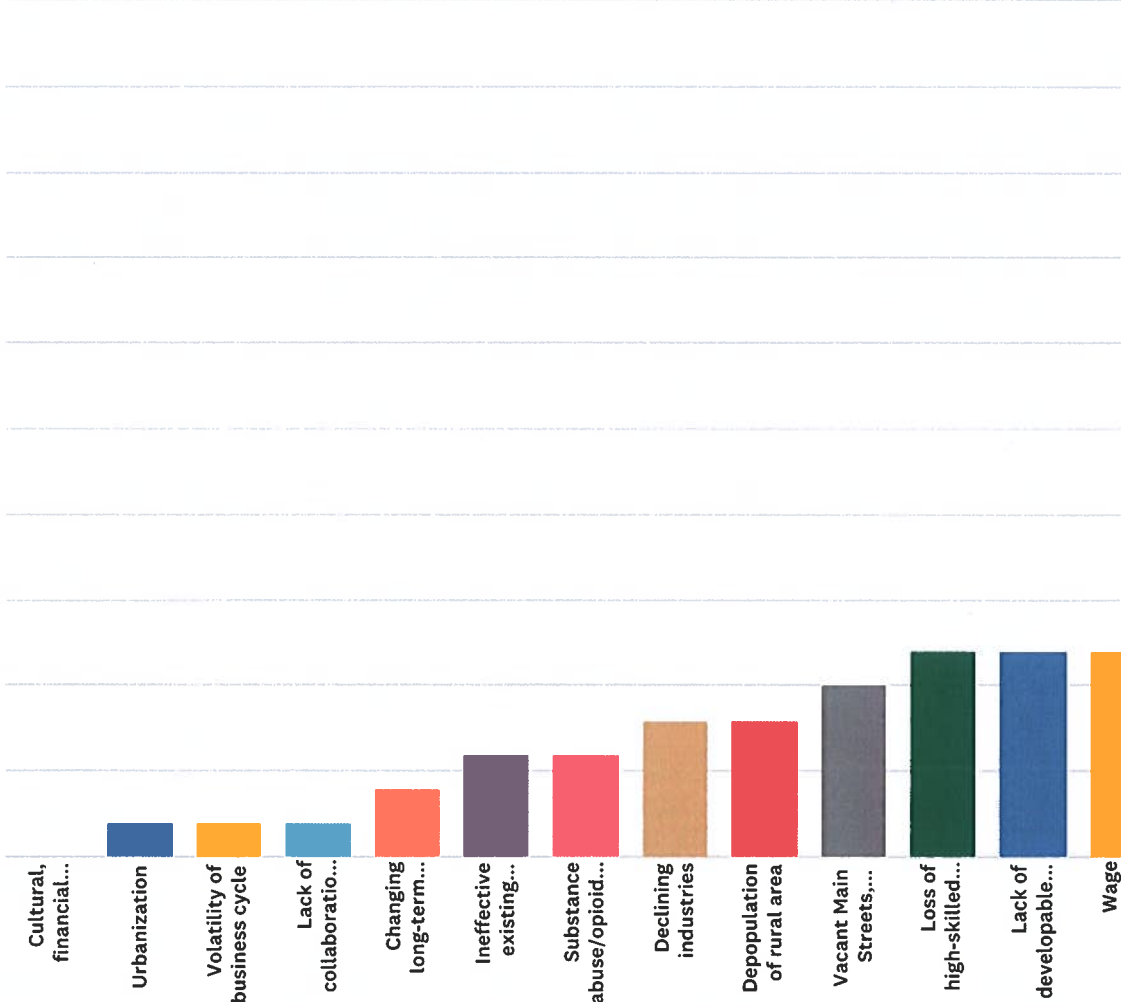
ANSWER CHOICES	RESPONSES
Public transportation options	0.00%0
Changing consumer demands	3.45%1
Automation/Robotics	6.90%2
Population growth	10.34%3
Virtual workplaces	10.34%3
Retirees	10.34%3
Youth	17.24%5
Access to transportation (air, highway, rail)	17.24%5
Broadband capacity	17.24%5
Available land	20.69%6
Vibrant downtown	20.69%6
Natural resources	24.14%7
Regional Partnership	27.59%8

North Central Idaho Economic Strategy Survey - Business and Community

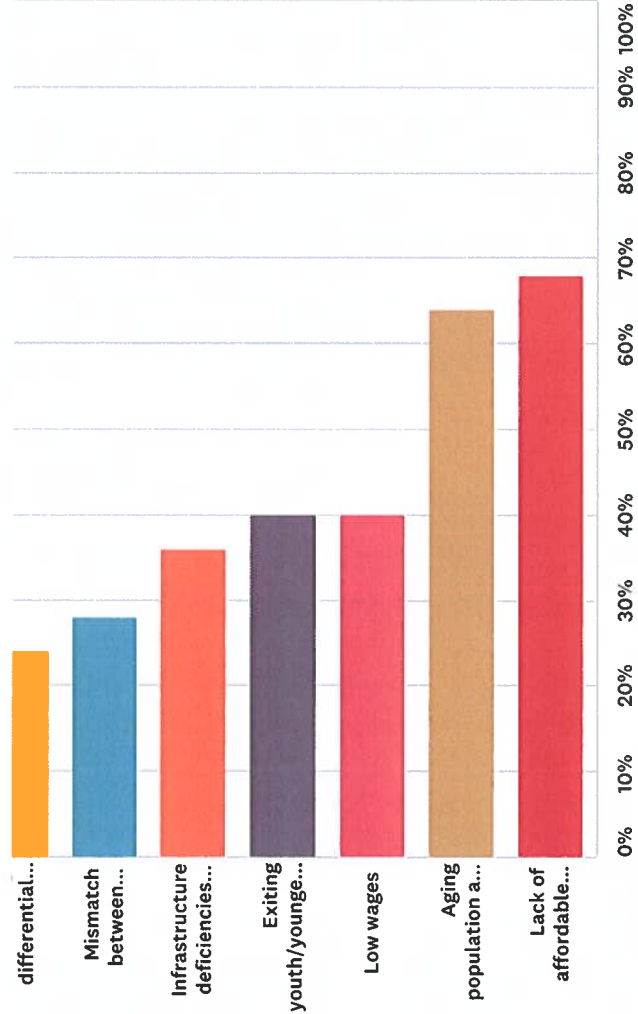
Anchor industries or clusters	37.93%	11
Skilled labor force	41.38%	12
Proximity to institutions of higher education	44.83%	13
Tourism attractions	44.83%	13
Attractive communities/quality of life	62.07%	18
Total Respondents: 29		

Q8 Please select five (5) from the following list that you think most threaten or limit the economic development potential for your jurisdiction.

Answered: 25 Skipped: 0



North Central Idaho Economic Strategy Survey



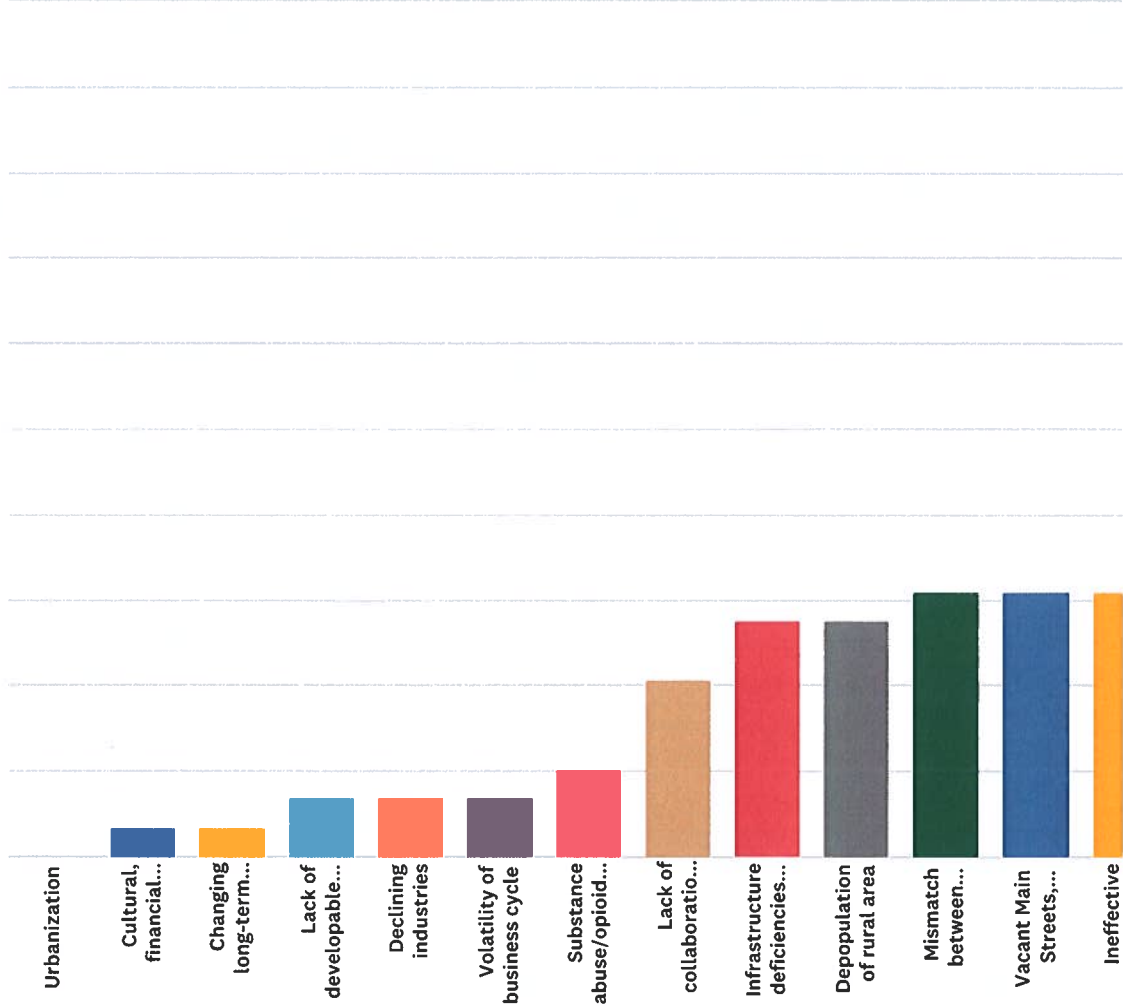
ANSWER CHOICES	RESPONSES
Cultural, financial and/or career counseling impediments	0.00%
Urbanization	4.00%
Volatility of business cycle	4.00%
Lack of collaboration between public and private sector	4.00%
Changing long-term weather conditions and patterns	8.00%
Ineffective existing government (local, state, federal)	12.00%
Substance abuse/opioid crisis	12.00%
Declining industries	16.00%
Depopulation of rural area	16.00%
Vacant Main Streets, downtowns, town centers and/or shopping areas	20.00%
Loss of high-skilled workers	24.00%

North Central Idaho Economic Strategy Survey

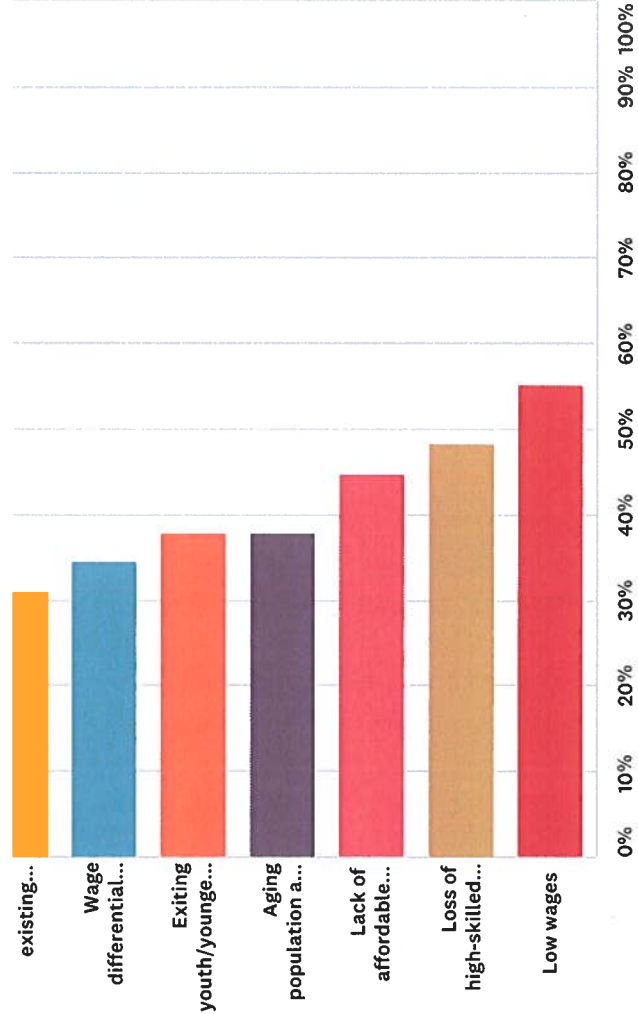
Lack of developable land and/or suitable buildings	24.00%	6
Wage differential with neighboring communities/states	24.00%	6
Mismatch between education and training to labor market needs	28.00%	7
Infrastructure deficiencies (roads, water/sewer, rail, broadband)	36.00%	9
Exiting youth/younger generation	40.00%	10
Low wages	40.00%	10
Aging population and workforce	64.00%	16
Lack of affordable housing	68.00%	17
Total Respondents: 25		

Q7 Please select five (5) from the following list that you think most threaten or limit the economic development potential for your community.

Answered: 29 Skipped: 0



North Central Idaho Economic Strategy Survey - Business and Community



ANSWER CHOICES	RESPONSES
Urbanization	0.00%
Cultural, financial and/or career counseling impediments	3.45%
Changing long-term weather conditions and patterns	3.45%
Lack of developable land and/or suitable buildings	6.90%
Declining industries	6.90%
Volatility of business cycle	6.90%
Substance abuse/opioid crisis	10.34%
Lack of collaboration between public and private sector	20.69%
Infrastructure deficiencies (roads, water/sewer, rail, broadband)	27.59%
Depopulation of rural area	27.59%
Mismatch between education and training to labor market needs	31.03%

North Central Idaho Economic Strategy Survey - Business and Community

Vacant Main Streets, downtowns, town centers and/or shopping areas	31.03%	9
Ineffective existing government (local, state, federal)	31.03%	9
Wage differential with neighboring communities/states	34.48%	10
Exiting youth/younger generation	37.93%	11
Aging population and workforce	37.93%	11
Lack of affordable housing	44.83%	13
Loss of high-skilled workers	48.28%	14
Low wages	55.17%	16
Total Respondents: 29		

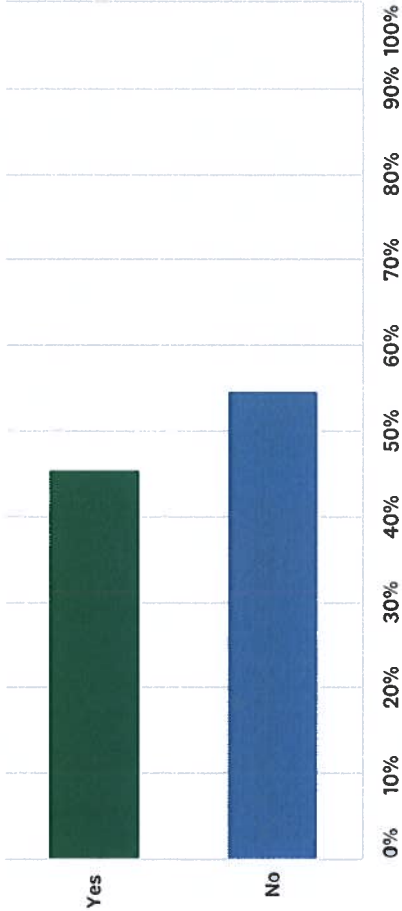
Q9 What community projects are envisioned or planned over the next five (5) years?

Answered: 20 Skipped: 5

#	RESPONSES	DATE
1	New administration building New health and wellness center New senior living facility Acquisition of new businesses	6/27/2019 11:17 PM
2	Sewer improvements, housing needs and a possible annexation.	6/25/2019 8:51 PM
3	affordable housing, clean communities, waterfront development	6/25/2019 8:15 PM
4	Economic development through Agriculture Economic development through Business Park for metal development.	6/24/2019 8:41 PM
5	possible wastewater improvements	6/24/2019 5:59 PM
6	Craft beer, local produce and livestock processing for commercial sale	6/20/2019 7:45 PM
7	sewer updates	6/19/2019 6:13 PM
8	Sidewalk, Rec District, DW improvements	6/18/2019 7:01 PM
9	Various infrastructure-roads, bridges and facilities.	6/18/2019 6:57 PM
10	For the Port, development of Confluence Riverfront Park and expanding the fiber optic network.	6/18/2019 6:35 PM
11	Remodeling and expansion of the small business incubator, affordable housing.	6/18/2019 6:11 PM
12	Wastewater upgrades, broadband enhancements, multi jurisdictional transportation planning, value added manufacturing, education system CTE developments match to industry needs, community food systems enhancement, recreation improvements, historic district designations & Nat'l Historic Register listings, workforce readiness, crisis center, homeless services & behavioral health programs, walkability enhancements, recreation based economy branding	6/18/2019 5:15 PM
13	Airport specific: Terminal upgrades in support of increased Air Service. Expanded parking at the airport. New business development ie, a restaurant on Bryden Canyon	6/18/2019 4:07 PM
14	entrepreneurship programs, industry tours for students, fiber expansion	6/18/2019 4:03 PM
15	that's a moving target; but currently, communication assets...	6/18/2019 3:52 PM
16	New/remodeled water and wastewater plants	6/18/2019 3:10 PM
17	Infrastructure services downtown, new high school and CTE center, expansion of broadband dark wire	6/18/2019 1:43 PM
18	Transportation Related Erosion Control Projects Fish Passage Barrier Removals Natural Resource Hazard Mitigation Projects Water Quality Improvement Projects Fish Habitat Restoration Projects	6/18/2019 1:11 AM
19	We are so burdened with addressing our EPA shortcomings we can't really address any other projects.	6/17/2019 11:59 PM
20	water	6/17/2019 10:12 PM

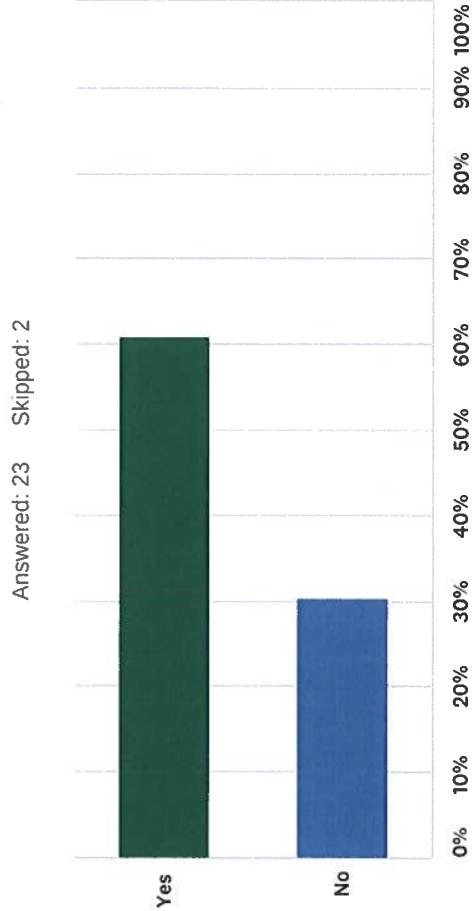
Q11 Does your jurisdiction have an economic development plan in place?

Answered: 22 Skipped: 3



ANSWER CHOICES	RESPONSES
Yes	45.45% 10
No	54.55% 12
Total Respondents: 22	

Q10 Does your community have a current comprehensive plan? What year was the comprehensive plan updated?



ANSWER CHOICES	RESPONSES
Yes	60.87%14
No	30.43%7
TOTAL	23

Q1 In your opinion, what are the five highest regional workforce development needs?

Answered: 9 Skipped: 0

ANSWER CHOICES		RESPONSES	
#1		100.00%	9
#2		100.00%	9
#3		100.00%	9
#4		100.00%	9
#5		100.00%	9

#	#1	DATE
1	Healthcare	8/15/2019 9:24 PM
2	healthcare	7/24/2019 5:21 PM
3	Tap into American Indian/Alaskan Native workforce with higher unemployment rate	7/22/2019 8:50 PM
4	We need Medical Assistants	7/22/2019 6:56 PM
5	Behavioral - communication skills development	7/18/2019 11:51 PM
6	Manufacturing	7/18/2019 11:15 PM
7	Raising public awareness of the opportunities already present	7/18/2019 8:15 PM
8	CTE Education in the Idaho Prisons	7/18/2019 6:44 PM
9	healthcare	7/18/2019 5:07 PM

#	#2	DATE
1	Technology	8/15/2019 9:24 PM
2	higher wages	7/24/2019 5:21 PM
3	Extension of college/university in rural communities	7/22/2019 8:50 PM
4	We need Nurses	7/22/2019 6:56 PM
5	lack of entry liveable wages for entry level, unskilled jobs	7/18/2019 11:51 PM
6	Electronic Service	7/18/2019 11:15 PM
7	Bridging the gap between government and business through incentives and partnerships	7/18/2019 8:15 PM
8	Mental health and homelessness for addicts and families	7/18/2019 6:44 PM
9	Easily accessed training	7/18/2019 5:07 PM

#	#3	DATE
1	Welding/Manufacturing	8/15/2019 9:24 PM
2	diversity in jobs (regional economy not tied to just one sector)	7/24/2019 5:21 PM
3	Living wage	7/22/2019 8:50 PM
4	We need our kids to return here and work.	7/22/2019 6:56 PM
5	Qualified applicants - skills and education	7/18/2019 11:51 PM
6	Diesel Technicians	7/18/2019 11:15 PM
7	Solving the health care professionals shortage	7/18/2019 8:15 PM

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8	Soft Skills education for prisoners to help recidivism rate	7/18/2019 6:44 PM
9	Ex-Offender reintegration	7/18/2019 5:07 PM
#	#4	DATE
1	Hospitality	8/15/2019 9:24 PM
2	more tech infrastructure, particularly in rural areas	7/24/2019 5:21 PM
3	Engage social/justice services w/ existing workforce development strategy	7/22/2019 8:50 PM
4	We need increase in reimbursement so we can competitive wages	7/22/2019 6:56 PM
5	Health Care industry labor supply	7/18/2019 11:51 PM
6	Nursing Care	7/18/2019 11:15 PM
7	Vocational training starting in Junior high that matches local needs	7/18/2019 8:15 PM
8	Legislative support for education programs for all individuals	7/18/2019 6:44 PM
9	Outreach to employers to create better understanding of current training available	7/18/2019 5:07 PM
#	#5	DATE
1	other trades/construction	8/15/2019 9:24 PM
2	more investment in education	7/24/2019 5:21 PM
3	Boot camps - employment readiness	7/22/2019 8:50 PM
4	We need better internet service so we can have staff work remote	7/22/2019 6:56 PM
5	Training programs, specific industries	7/18/2019 11:51 PM
6	Automotive Service	7/18/2019 11:15 PM
7	Addressing the low go-on rates in our region (higher-ed).	7/18/2019 8:15 PM
8	Loan forgiveness programs	7/18/2019 6:44 PM
9	Industry Recognized Certificates	7/18/2019 5:07 PM

Q2 Name up to five regional workforce development strengths.

Answered: 9 Skipped: 0

ANSWER CHOICES		RESPONSES
#1		100.00%
#2		88.89%
#3		77.78%
#4		55.56%
#5		55.56%

#	#1	DATE
1	CTE programs WWCC/LCSC	8/15/2019 9:24 PM
2	Improved pipeline for individuals entering Career Technical fields	7/24/2019 5:21 PM
3	Access to five college/university systems in bioregion	7/22/2019 8:50 PM
4	2 colleges in our town	7/22/2019 6:56 PM
5	Industries which need workers	7/18/2019 11:51 PM
6	Active CEDA group	7/18/2019 11:15 PM
7	CEDA, Valley Vision, and SEWEDA	7/18/2019 8:15 PM
8	Industry support for educational entities	7/18/2019 6:44 PM
9	LCSC	7/18/2019 5:07 PM
#	#2	DATE
1	Dream it Do it	8/15/2019 9:24 PM
2	Outstanding health sciences educational opportunities	7/24/2019 5:21 PM
3	Access to bioregional regional workforce development table	7/22/2019 8:50 PM
4	Workers looking for work	7/18/2019 11:51 PM
5	LC's CTE Programs	7/18/2019 11:15 PM
6	Higher-Ed, Econ. Dev., and IDOL partnerships on many projects	7/18/2019 8:15 PM
7	Industry connections to high school students	7/18/2019 6:44 PM

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8	U of I	7/18/2019 5:07 PM
#	#3	DATE
1	Education and Industry working together on career pipeline/education	7/24/2019 5:21 PM
2	Manufacturing collaboration	7/22/2019 8:50 PM
3	Rural life style	7/18/2019 11:51 PM
4	SEL in the community	7/18/2019 11:15 PM
5	Low cost of living	7/18/2019 8:15 PM
6	Financial support in grant opportunities for training high school students in CTE careers	7/18/2019 6:44 PM
7	WWCC	7/18/2019 5:07 PM
#	#4	DATE
1	Engaged economic/community development leaders	7/22/2019 8:50 PM
2	Diversity of industries	7/18/2019 11:51 PM
3	Low real estate costs relative to locations like Spokane/CdA	7/18/2019 8:15 PM
4	Support for the industries in our area	7/18/2019 6:44 PM
5	WSU	7/18/2019 5:07 PM
#	#5	DATE
1	Access to major employers	7/22/2019 8:50 PM
2	Education institutions	7/18/2019 11:51 PM
3	Relatively low tax burden on business (ID, NOT WA!)	7/18/2019 8:15 PM
4	The connections between industries, education institutions, and department of labor is phenomenal	7/18/2019 6:44 PM
5	ID Dept of Labor	7/18/2019 5:07 PM

Q3 What gaps, bottlenecks, or challenges are impeding workforce development?

Answered: 9 Skipped: 0

ANSWER CHOICES		RESPONSES
#1		100.00%
#2		100.00%
#3		88.89%
#4		77.78%
#5		66.67%

#	#1	DATE
1	Lack of workers	8/15/2019 9:24 PM
2	investment in education	7/24/2019 5:21 PM
3	Rural to metropolitan transit system	7/22/2019 8:50 PM
4	Competition amongst health care and hospitals can pay more for staff due to different reimbursement model.	7/22/2019 6:56 PM
5	low entry level wages	7/18/2019 11:51 PM
6	Many young people do not want to do manual labor	7/18/2019 11:15 PM
7	Transportation infrastructure (air, limited RR, and no freeways)	7/18/2019 8:15 PM
8	Fiscal challenges to support growth from the state of Idaho.	7/18/2019 6:44 PM
9	lack of students and or people	7/18/2019 5:07 PM
#	#2	DATE
1	Lack of younger people interested	8/15/2019 9:24 PM
2	high tech infrastructure (rural areas)	7/24/2019 5:21 PM
3	7/24 child care	7/22/2019 8:50 PM
4	Lots of jobs so people bounce around	7/22/2019 6:56 PM
5	small classes/training for demand occupations	7/18/2019 11:51 PM
6	Aging workforce	7/18/2019 11:15 PM
7	Demand for educated workforce exceeds supply	7/18/2019 8:15 PM

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8	Support for education and workforce training for prisoners	7/18/2019 6:44 PM
9	lack of holistic programs - those that address lack of skills, financial management, generational poverty	7/18/2019 5:07 PM
#	#3	DATE
1	Employer requirements	8/15/2019 9:24 PM
2	access for parents and adult learners to higher ed	7/24/2019 5:21 PM
3	Re-inigration or rehabilitation services (offenders/substance users)	7/22/2019 8:50 PM
4	Workforce leaving the area. Spokane/Pasco/Kennewick	7/18/2019 11:51 PM
5	Many potential workers do not want to get more education	7/18/2019 11:15 PM
6	Go-on rates to higher ed freakishly low	7/18/2019 8:15 PM
7	Mental health for all members of the community	7/18/2019 6:44 PM
8	low wages	7/18/2019 5:07 PM
#	#4	DATE
1	low wages	7/24/2019 5:21 PM
2	Online or audio-video conferencing ABE/GED, CTE, workforce training	7/22/2019 8:50 PM
3	Turnover of employees	7/18/2019 11:51 PM
4	Not enough people entering training areas	7/18/2019 11:15 PM
5	Lack of public knowledge about local industry	7/18/2019 8:15 PM
6	The State of Idaho recognizing and supporting the unique challenges that prevent the development the workforce in our rural communities.	7/18/2019 6:44 PM
7	pride in region	7/18/2019 5:07 PM
#	#5	DATE
1	transportation	7/24/2019 5:21 PM
2	Access to community learning Internet connected classrooms	7/22/2019 8:50 PM
3	Business intolerance of domestic needs employees have	7/18/2019 11:51 PM
4	The invisible but very real barrier between Washington and Idaho	7/18/2019 8:15 PM
5	The bottleneck that exists between Boise and northern Idaho.	7/18/2019 6:44 PM
6	lack of housing	7/18/2019 5:07 PM

Q4 What do you believe should be the top five workforce development goals of the region?

Answered: 9 Skipped: 0

ANSWER CHOICES		RESPONSES
#1		100.00%
#2		100.00%
#3		77.78%
#4		77.78%
#5		55.56%

#	#1	DATE
1	Outreach to High School Youth	8/15/2019 9:24 PM
2	create a stronger healthcare career pipeline	7/24/2019 5:21 PM
3	Community classrooms in existing K-12 buildings	7/22/2019 8:50 PM
4	Focus on healthcare retainment	7/22/2019 6:56 PM
5	Assist in developing health care industry workers	7/18/2019 11:51 PM
6	Promote educational programs for better jobs	7/18/2019 11:15 PM
7	Increase awareness of existing industry and opportunity to the public starting in elementary school throughout the lives of our residents	7/18/2019 8:15 PM
8	Providing more all around education and skills gaining for incarcerated individuals.	7/18/2019 6:44 PM
9	Develop holistic programs that 'cultivate' workers from the populations we have - ex offenders, underskilled, those with learning disabilities	7/18/2019 5:07 PM

#	#2	DATE
1	Outreach to Industry	8/15/2019 9:24 PM
2	continue to support manufacturing career pipeline	7/24/2019 5:21 PM
3	Workforce housing	7/22/2019 8:50 PM
4	Lobbying for better medicaid/medicare reimbursement	7/22/2019 6:56 PM
5	Advocate for training and developing the under/unemployed	7/18/2019 11:51 PM
6	Provide financial assistance to those who cannot afford training	7/18/2019 11:15 PM

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7	Make sure awareness of the advantages of doing business in the valley are well known throughout the country and the world	7/18/2019 8:15 PM
8	Providing more opportunity and access to mental health and housing for low income individuals so that they can obtain and keep a job.	7/18/2019 6:44 PM
9	Increase minimum wage	7/18/2019 5:07 PM
#	#3	DATE
1	investment in education	7/24/2019 5:21 PM
2	Improved transit system/schedules	7/22/2019 8:50 PM
3	Obtain feedback from private industry	7/18/2019 11:51 PM
4	To educate businesses to pay their workers better	7/18/2019 11:15 PM
5	Encourage residents to extend their education beyond high school to include certificates, baccalaureate and advanced degrees and where to get them	7/18/2019 8:15 PM
6	Continued work for the Dream It, Do It Youth conference and other events that support the connection of the youth to industries and educational entities.	7/18/2019 6:44 PM
7	Create affordable, accessible training programs for industries that are delivered to front line employees BUT that are also attached to wage increases with skill increases	7/18/2019 5:07 PM
#	#4	DATE
1	seek opportunities in the tech sector	7/24/2019 5:21 PM
2	Promote/develop skills stacking K-12/postsecondary	7/22/2019 8:50 PM
3	Discover and implement solutions	7/18/2019 11:51 PM
4	To help make medical costs more affordable to businesses	7/18/2019 11:15 PM
5	Lobby state, county and local governments to develop incentives to attract business to the region	7/18/2019 8:15 PM
6	Work with the new CTE center and school in the Lewiston School District and LCSC.	7/18/2019 6:44 PM
7	Create excitement about the industries we have - outreach not just to students but PR campaigns	7/18/2019 5:07 PM
#	#5	DATE
1	support arts in relation to growing wine culture/industry	7/24/2019 5:21 PM
2	Continue regional collaboration with high schools	7/22/2019 8:50 PM
3	Advocate for a 'liveable' wage	7/18/2019 11:51 PM
4	Develop more partnerships between econ. dev., higher ed, state government, and industry to bring more resources to the region.	7/18/2019 8:15 PM
5	Engage the chambers and trade associations	7/18/2019 5:07 PM