

Idaho Employment

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Volume 23.10
C.L. "BUTCH" OTTER, GOVERNOR

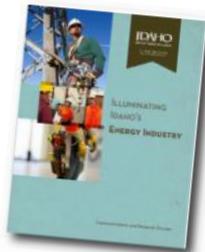
October 2011 Issue
ROGER B. MADSEN, DIRECTOR

Idaho's Energy Industry Generates Jobs through Recession

The number of jobs in Idaho's core energy economy grew 4 percent between 2007 and 2010, according to a report released this month by the Idaho Department of Labor, and those jobs account for 7 percent of the of the 606,000 nonfarm jobs in Idaho.

Continued job growth is projected within the energy industry, according to the report, "Illuminating Idaho's Energy Industry."

Find this report online at http://labor.idaho.gov/publications/Energy_Report_f.pdf.



FOCUS ON MANUFACTURING

MANUFACTURING RESURGENCE IN NORTH CENTRAL IDAHO

Since the recession officially ended in June 2009, American manufacturing has been on the leading edge of the recovery. Production has surged, and manufacturing employment grew almost every month since the end of 2009.

North central Idaho's manufacturing sector has enjoyed even stronger growth and will surge by 60 jobs in the next month as Pullman-based Schweitzer Engineering Laboratories opens a plant in Lewiston.

Since the recession ended, north central Idaho added 290 manufacturing jobs, an 8 percent increase. Pay grew even faster - 14 percent - because manufacturing employees also have been working more hours than they did during the recession. North central Idaho residents also are finding manufacturing jobs just across the border at Schweitzer's campus in Pullman, where employment has grown from 1,400 to 1,800 in the last two years.

As a high-paying sector that brings in dollars from the outside world, manufacturing has significant impact on economic growth. It often results in building industrial clusters that help local supply networks grow.

The average manufacturing worker in north central Idaho earned \$46,646 a year in 2010; that's 50 percent higher than the \$31,126 earned by the average worker in all other sectors. Manufacturers also tend to offer generous benefits packages that include health insurance, paid leave and retirement and career ladders that let workers develop new skills and earn more.

REASONS FOR MANUFACTURING SURGE

American manufacturing productivity, which normally falls in a recession, soared during the recent recession. Manufacturers emerged from the reces-

sion more efficient and profitable - making more valuable products using fewer people.

U.S. manufacturing has proved its resilience, adapting to smaller quantities and higher value-added production. It increasingly uses technology and Lean processes to produce efficiently and compete in the global economy. ATK, the ammunition maker in Lewiston, grew throughout the recession, partly because of its high emphasis on continuous improvement processes that engage workers in reducing costs and lead times. It employs 1,100 in Lewiston.

America is still the world's innovation leader because of its superior research and development that allows it to make things that other countries cannot. Today "Made in USA" is more likely to be stamped on heavy equipment or the circuits that go inside other products than on TVs, toys, clothes and other items.

Biketronics, which makes electronic accessories for Harley Davidson motorcycles, knows a lot about innovation. It survived the recession by introducing a new product about every three months. It will help other people innovate when it opens the Idaho FabLab in January inside its Moscow plant, providing north central Idaho residents access to manufacturing equipment, training and idea-sharing that will help create new products and companies. For about \$100 a month, FabLab members will have access to soldering irons, socket wrenches, a laser cutter and a computerized, numerically controlled — CNC — milling machine along with other tools.

American manufacturers benefited from the fall in the dollar's value in the last three years. When the dollar falls, American-made goods become cheaper for foreigners and foreign-made goods become more expensive for Americans - so both foreigners and Americans increase their spending on American-made goods. Expanding sales to the rest of the world has helped American manufacturers make up for the reticence of American consumers.

The Idaho Forest Group mill in Grangeville has brought its employment to 160, slightly higher than its pre-recession level, in part because of its expanded sales in Asia. With U.S. housing starts remaining at extremely low levels, the ability to sell in Japan and China has helped it restore production.

HIRE ONE ENCOURAGES JOB CREATION



Hire One is a tax credit program that employers qualify for when they hire new employees who fill newly created positions and make at least \$12 an hour plus benefits in counties with unemployment rates of 10 percent or higher and \$15 an hour plus benefits in counties with unemployment rates under 10 percent.

The new employee must work for nine consecutive months before the employer can claim the tax credit. The credit is claimed in the tax year when the new hire became qualified.

The Hire One Tax Credit was approved by the 2011 Legislature.

More details are available online at <http://business.idaho.gov/TaxCredits.aspx>.

Many Idaho sawmills are benefiting from the decrease in the American dollar relative to the Canadian dollar, which has reduced some of Canada's competitive edge. Idaho Sewing for Sports in Grangeville has found it easier to sell its customized padding for ski lifts and sports arenas in Canada in the last couple of years. That is one of the factors that will help the company double production and employment to nearly 40 jobs in the next year or so.

The Snake River boat builder consortium continues its initiative to expand sales to Europe. With domestic demand still below its pre-recession levels, expanding into international markets is helping strengthen the jet boat industry. The consortium recently hosted trade specialists from Germany, Spain, Turkey and Belgium. The builders are preparing to earn certification from the European Community for their jet boats, a critical step to selling in Europe. The exchange rate between the dollar and euro is expected to help sales in Germany and other European markets. Angela Turrin, a trade specialist based in Spain, says, "Everybody wants to buy American."

In the last two years, offshoring - moving jobs from the U.S. to foreign markets - has become a little less common while onshoring - moving jobs back from foreign locales such as China - has become a little more common. Other companies that were buying components overseas are switching to U.S. suppliers for several reasons. Wages in China and other developing countries have risen sharply in the past few years while U.S. wages increased only slightly - just keeping up with inflation. The fall in the dollar's value also has reduced some of the economic benefits of offshoring. Some companies are moving back to American suppliers because of the poor or inconsistent quality of goods produced overseas. Others worry about China's lack of respect for intellectual property that could lead to the loss of precious trade secrets. Onshoring allows more control over the supply chain, reducing lead times and simplifying logistics. It also brings assembly closer to engineers, suppliers and customers, guaranteeing quality production and allowing more responsiveness to the needs of customers.

The new Ende Foundry is an example of onshoring. Its owner Ed Endebrock encountered difficulties with Chinese parts for his Hydraulic Warehouse plant in Lewiston. Concerned about escalating costs, long turnaround times and unpredictable quality, he decided to build a loss-foam foundry to make the parts here. Clearwater Economic Development Association created a business park in Craigmont for the new foundry. Turnaround time for Hydraulic Warehouse pieces now will be two weeks, compared with five to six months for China. Quality will be superior. In addition, less capital is tied up. The Chinese factories don't start making the parts until they have half their payment.

Other Idaho companies also are switching from Asian suppliers to American suppliers. Disappointed in the lower quality of vinyl now available from its Korean suppliers, Idaho Sewing for Sports may switch to American-made vinyl, which would also reduce waiting time that currently averages 12 weeks. After the price of plastics it imported from China rose sharply in the last couple of years, Biketronics in Moscow is finding American plastics more affordable.

THREATS TO AMERICAN MANUFACTURING

New orders for manufacturing goods grew rapidly in 2010 and early this year. But in the last four months, as fears of another world recession have grown, signs suggest that a global manufacturing slowdown may be under way. European manufacturing began contracting in July. Manufacturing in China, South Korea, Taiwan and Australia also slowed.

The dollar is strengthening, rising more than 6 percent in September to reach its highest level since January against a trade-weighted basket of currencies. Rival currencies like the euro and pound are expected to remain under pressure, which makes it likely that the dollar will rise still further. If it continues to strengthen, it will reduce American manufacturing activity.

Another constraint on U.S. manufacturing could be difficulty finding skilled workers. Despite high unemployment, American manufacturers are increasingly reporting a shortage of skilled workers, especially welders, CNC operators, machinists, technicians and information technology experts. During the recession, manufacturers accelerated the long-term move toward greater automation, laying off more of their lowest-skilled workers and replacing them with cheaper labor abroad. Now they are looking to hire people who can operate sophisticated computerized machinery, follow complex blueprints and demonstrate higher mathematics proficiency than was previously required of the typical assembly line worker. The retirement of baby boomers is contributing to the skill shortage too. An estimated 2.7 million U.S. manufacturing employees, nearly a quarter of the total, are 55 years or older. In north central Idaho, about 20 percent of manufacturing workers are 55 or older.

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NORTHERN IDAHO'S DIVERSIFIED MANUFACTURING MAKES FOR SUSTAINABLE ECONOMY

Manufacturing's share of northern Idaho employment broadened over the past 20 years, moving from a deeply rooted wood products industry to a more diversified industrial mix.

In 1991, wood product manufacturing comprised nearly 40 percent of industry employment in Kootenai County. By 2010, that number dropped to just over 15 percent. It is not that wood product manufacturing is a dying industry. It still is the largest employer. It is just changing as the economy becomes more globalized.

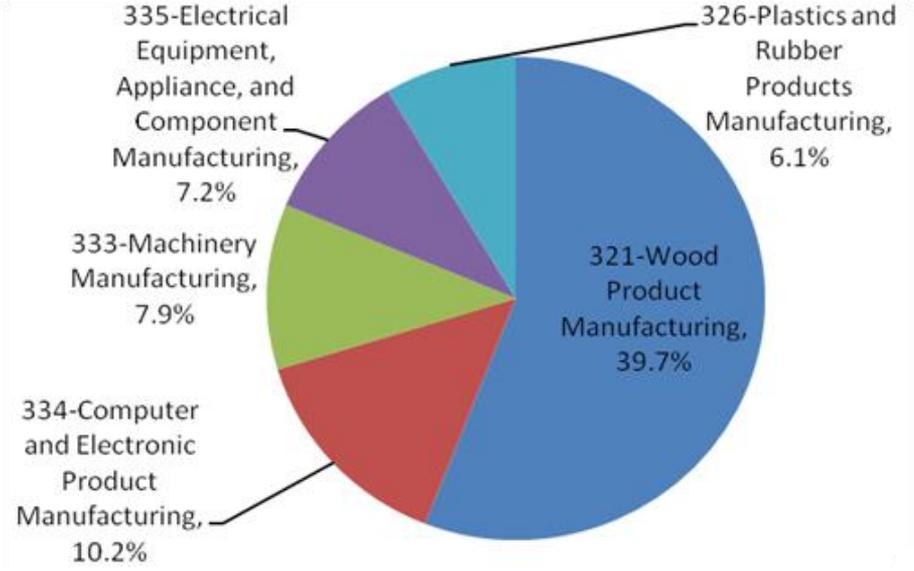
Fabricated metal product manufacturing has shaped its way from the bottom half of the industrial mix in 1991 to second by 2010. Industry employers have molded themselves into a diverse subsector well positioned for ever changing market demands.

The top five manufacturing industries today, in order, are wood products, fabricated metal, computers and electronics, furniture and plastics and rubber products.

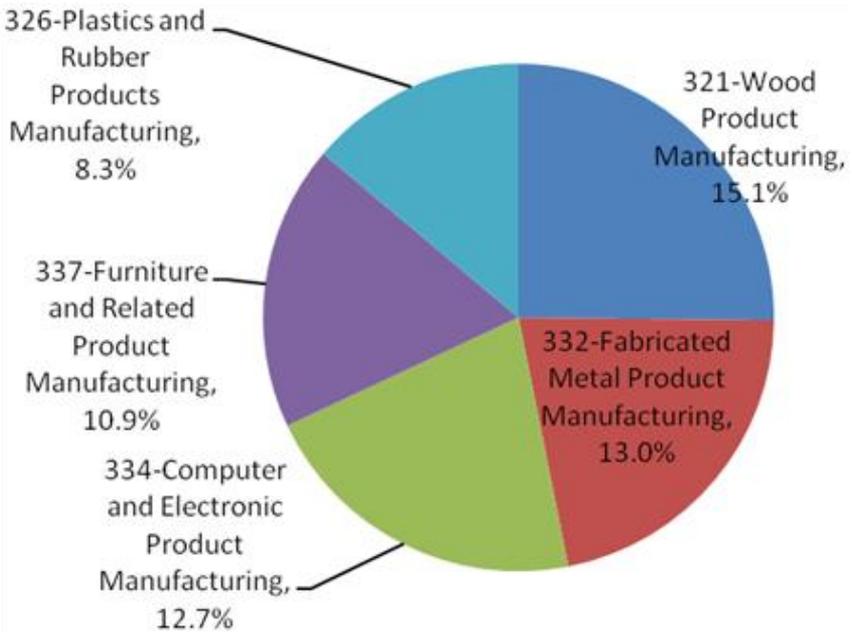
Average annual employment has fluctuated dramatically throughout the past decade, declining through the 2001 recession and falling to levels as low as 3,900 before peaking in 2007 at nearly 4,800, the highest manufacturing employment in over 20 years.

Manufacturing Distribution in Northern Idaho, 1991 and 2010

1991



2010



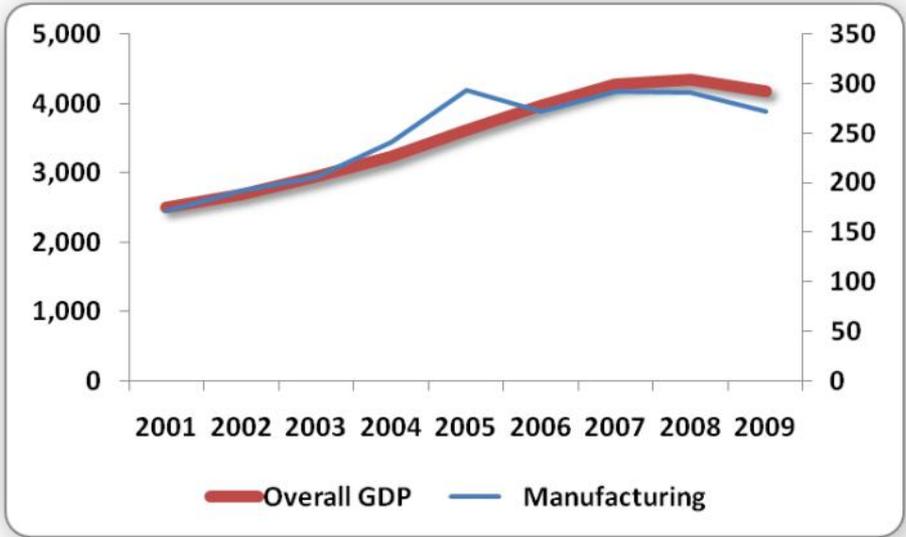
The recession that began in December 2007 brought on an even longer and deeper degradation, but the industry is bouncing back. With fewer employers, employment in manufacturing still increased 6.9 percent from the first quarter of 2010 to first quarter 2011.

Manufacturing and manufacturing jobs play an important role in the economy.

In terms of gross domestic product, manufacturing averaged \$285 million a year over the past five years, holding its market share and keeping pace with the overall economy in Kootenai County. It peaked beyond the general economy during the expansion years and dipped below through the most recent recession.

When assessing the size and importance of the manufacturing sector, it is vital to recognize that many other sectors such as transportation, finance, telecommunications, wholesale and retail trade and accounting depend on a strong manufacturing base.

Overall GDP Compared to Manufacturing GDP, Kootenai County



While manufacturing itself is the fourth largest sector in Kootenai County, its impact on the overall regional economy is much larger when this multiplier effect is taken into account. Being a heavily export-oriented industry, manufacturing has a multiplier of 2.42, the average over the top five subsectors. That means that for every 10 jobs created in manufacturing another 14.2 jobs are created in other sectors and subsectors. Wood products has the highest individual multiplier at 3.49 followed by aircraft manufacturing. For every 10 jobs created in wood products production nearly 25 more are created in other industries.

Due to the high multiplier, manufacturing generates a strong positive impact on the regional economy. For comparison, the average employment multiplier for the remaining top subsectors of each industry is 1.66 with leisure and hospitality one of the lowest at 1.38.

While the general public perceives the manufacturing sector as marked primarily by a loss of jobs, the facts paint a different picture. Manufacturing is complex, and its production processes increase demand for raw materials, energy, construction and services from a broad array of supplying industries.

Manufacturing still pays premium wages and benefits and supports much more economic activity per dollar of production than other sectors. The average wage is almost 19 percent higher than wages in other sectors of the local economy – \$37,500 compared to \$31,600 in other sectors. Employees typically receive health care insurance and retirement benefits as well.

Another major indicator of the importance of manufacturing to the strength of the economy is its key role in driving innovation and technology. U.S. inventors still account for more than half of all patents granted in the United States, and the nation outpaces its rivals in terms of industrial research and development. Besides, the technology and advanced processes

developed in manufacturing consistently spill over into productivity growth in the service and other sectors.

Like most of the Idaho economy, the industrial landscape is made up of mostly small and medium-sized firms. Smaller companies are nimbler in managing their businesses and may offer better opportunities for internal advancement for their workers. This is one consistent sign of innovation, dynamism and change that characterizes the Idaho economy. A large number of small establishments means that entrepreneurship is alive and well.

But like the nation, the regional economy is not keeping pace with global competitors in the development of human capital and the skills needed to maintain leadership in the national and global economies. With the workforce aging and a lack of interest from the upcoming generations, the region is not producing enough production workers much less the more highly skilled engineers and scientific researchers, who are the foundation of advanced technology intensive manufacturing.

With demand for manufacturing growing as the U.S. dollar weakens and U.S. exports rise at least in the short-term, it in turn spurs the creation of jobs, investments and innovations across many other sectors.

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GRANT WILL HELP MANUFACTURERS OBTAIN GOVERNMENT CONTRACTS

The Clearwater Economic Development Association recently received a \$2.5 million Small Business Teaming Pilot grant that will build manufacturing capacity in north central Idaho and southeastern Washington. The association applied for this grant to support the American Manufacturer Network created last year to funnel hundreds of thousands of dollars in military and other contracts to local manufacturers. It was one of only 11 organizations to receive funding from over 300 applicants nationwide.

The association and the Northwest Intermountain Manufacturers Association along with the Washington State University Center for Entrepreneurial Studies, the University of Idaho, the South East Washington Economic Development Association and Valley Vision launched the American Manufacturer Network to address obstacles that preclude small, rural manufacturers from successfully penetrating government contracting and original equipment manufacturer markets. To establish the network, they used a \$160,000 grant from the U.S. Economic Development Administration.

When the manufacturers association surveyed its members a few years ago, local manufacturers said they wanted to expand sales by exporting more and by learning to contract with the government. At that time, only 5 percent were selling to any level of government – federal, state or local. The network was established to develop their capacity to handle government contracts.

The Clearwater Economic Development Association will work with three contractors – the manufacturers association, Logistics Specialists Inc. and TechHelp - to fully develop the network. They will build teams, select appropriate bid opportunities, teach local manufacturers about the contracting process, develop and submit bids and ensure quality systems are in place. If a

procurement opportunity is too large for an individual manufacturer, the network will find partners that can help it fulfill its contract. The network can act as a government certified contractor for teams of manufacturers organized through subcontracts that lack the individual resources to independently manage government contracting. It could then bid on behalf of small companies that might not be able to afford the certification and documentation process the government demands.

The network currently operates in the five counties of north central Idaho and the four counties of southeastern Washington. Over time, the network is expected to expand into the other regions of Idaho.

Currently, it includes 53 manufacturers. A pilot program for getting into government contracting is being tested by Hillco Technologies in Nezperce and JETCO Custom Machine and Fabrication. The pilot program is funded by a \$40,000 grant from Washington State University.

President Lenny Hill of Hillco, which manufactures leveling systems for everything from combines to military equipment, says Hillco is considering expanding its product line. Its machining and metal fabricating equipment might make parts for armament or tanks. JETCO, a full-service machine shop, also sees potential to expand and diversify by becoming involved with government contracting.

The Clearwater Economic Development Association and the manufacturers association are hiring four people to assist with contracting. The consulting team for the network should be in place by late November.

Funding partners for the network include Valley Vision, the Washington State University Center for Entrepreneurial Development, USDA Rural Development and the Idaho National Laboratory. The University of Idaho is providing partial funding for an AmeriCorp Volunteer who will help with a marketing strategy and business planning for the manufacturers network. Other partners instrumental in establishing the network include the Port of Clarkston and the Nez Perce Tribe.

Initially, the focus will be on contracting with military installations to supply problem parts. The Defense Department has hundreds of aging airplanes, tanks and ships needing replacement parts. To create replacements for obsolete parts, it contracts to have them reengineered and manufactured. Eventually, it will expand to other federal contract opportunities and to work with large commercial manufacturers.

The American Manufacturing Network has the potential to create many jobs in the region. For every \$100,000 of government contracts landed by local manufacturers, economic developers expect about one job to be created.

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ISU'S START PROGRAM OFFERS ADULTS A SECOND CHANCE AT A DEGREE

Securing a high school diploma has been a rite of passage from teenage into adulthood. Beyond its cultural implications, a high school diploma is not only a requirement for many entry level jobs but also for a higher education.

Even for those holding a high school diploma, finding a good paying job can be very difficult. According to the U.S. Bureau of Labor Statistics, workers over 25 years old without a high school diploma had an unemployment rate nationally of 14.9 percent in 2010. Those with a diploma were unemployed at a rate of 10.3 percent.

However, unemployment is not the only issue facing workers who did not finish high school. Often they qualify only for jobs requiring short-term on-the-job training, and those jobs on average pay \$11.27 an hour. A worker with a bachelor's or master's degree and work experience is paid on average \$34.22 an hour in Idaho.

Clearly, education matters in the job market.

Low educational attainment can hinder economic development. Increasingly, companies looking to come to Idaho want highly skilled and educated workers.

"Knowledge and workforce skills are the true source of wealth creation in the new economy," says economic development expert Don Holbrook, who wrote "The Little Black Book of Economic Development."

A new program at Idaho State University's main campus in Pocatello is giving people without that diploma a second chance. The Successful Transitions and Retention Track, or START, at the College of Technology is funded with a grant from the J.A. & Kathryn Albertson Foundation.

The foundation and several organizations including Idaho State and the Idaho Department of Labor are encouraging people to consider postsecondary education and training opportunities. In addition to the START program, the foundation has begun the "Go On" media campaign, which urges young people to pursue education or training beyond high school.



The START program, which began just five months ago at Idaho State, offers a promising way to move adults without high school educations toward college degrees. Traditional high school graduates are not accepted into the program.

"The results have been wonderful so far," START Director J. Vincent Nix said. "We accepted 30 into the first cohort, and 23 into the second cohort; to date, we've retained 44 out of the 53 students."



These students are participants in the new Successful Transitions and Retention Track program at Idaho State University. *Photo provided by START.*

The START program – open to students without diplomas or with GEDs – provides tutoring and special remedial classes and then helps participants deal with the life challenges faced by many nontraditional students. Mentors and counselors help these students make the transition to college-level coursework, and students have access to a special college success workshop and workshops on academic resources and financial aid and special scholarships. Career counseling helps them connect their academic achievement to their career goals and general success.

Students have access to emergency funds for health care, child care, transportation or for other circumstances that can impede their studies.

Admission to the START program is based on:

- A suitable level of academic achievement
- A desire for more education
- A solid work ethic
- A desire for an improved future
- A GED or progress towards a GED

Nix heads a team of educators from diverse backgrounds and with experience working with non-traditional students.

Mathematics Instructor Don Allen worked in the meat packing industry before receiving his master's degree in physics from Idaho State. Raushanna Byington, is a skilled GED instructor and tutor. Amy Christensen is a licensed mental health counselor with experience in literacy education and the Head Start program.

Nix is optimistic about the program, “which is changing so many people's lives” and having an impact on the quality of the workforce of southeastern Idaho. More information on START is online at www.isu.edu/start.

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SOUTH CENTRAL IDAHO REPORTS MORE JOB OPENINGS FIRST HALF OF 2011

There are a number of economic indicators that are widely assessed monthly, quarterly, annually. Yet the one receiving the most attention lately is job creation.

Closely tied to this is the job openings listed with Idaho Department of Labor, which is not all encompassing since many employers choose to hire by word-of-mouth, through newspapers or industry periodicals advertisements, with headhunters or staffing agencies or through the Internet.

The Labor Department records the voluntary job listings submitted by national and local businesses, part-time and full-time, temporary and permanent. Of most interest currently are full-time, permanent jobs.

The most current data for the first half of 2011 shows an uptick in listings compared to the average for the first half of the last seven years statewide and at two of the three Idaho Labor local offices in south central Idaho. Blaine County was lagging.

The cause of this uptick may be the arrival of the department's Business Solution Specialists in the field, encouraging employers to take advantage of the free job listing service.

**Job Openings – Full-Time, Permanent Jobs
1st Half of Year 2005-2011**

	South Central	State
2011 All Jobs	1,653	11,734
2005-2011 Avg. Openings	1,161	11,277
% Diff. above Average	42.4%	4.1%

Source: Idaho Dept of Labor, IdahoWorks

On the other hand, many of these employers are the same ones that used the system before, during and after the recession so it is likely there has been some increase in demand for labor because of opportunities businesses see in the near term since the recession claimed some competitors and as they move back to prerecession operating levels. Even increased population may be escalating demand.

Some baby boomers who had been riding the fence on retirement are finally making the leap, creating job openings, and there is some evidence of upward mobility within companies and competition from other companies for skilled workers that are creating vacancies. That competition for workers could increase wages providing impetus for existing workers to move to other employers.

Minidoka and Cassia counties have seen the most heightened percentage increase of job openings due in large part to the tremendous vacuum created in the years after J.R. Simplot closed its potato processing plant in Heyburn in 2003. The site, now a large-scale industrial park, is once again processing potatoes among other diversified activities. Job openings were fairly flat through most of the decade but for 2008 when several national companies opened in Burley. The area experienced higher-than-average postings in manufacturing but only in the category of \$13- to \$17-an-hour jobs.

**Job Openings - Full-Time, Permanent
1st Half of Year '05-'11**

	2005	2006	2007	2008	2009	2010	2011	Average 2005-2010	% Change
Blaine Local Office	356	492	339	173	58	84	113	231	-51.0%
Mini-Cassia Local Office	139	243	241	402	283	272	528	301	75.3%
Magic Valley Local Office	577	768	671	523	349	502	1012	629	60.9%

Source: Idaho Dept. of Labor, Idaho Works System

The Magic Valley local office in Twin Falls experienced a solid number of job prospects so far in 2011 with much of the growth in the social assistance and health care sector. While nationally much has been made of gains in both retail and health care, Twin Falls has surprisingly not seen large volume job openings for a city considered the region's retail hub.

Full-time job growth in retail has not materialized in Idaho at all, likely due to the fallout of the housing industry. New vehicles and furniture are the large-scale purchases that would require full-time sales people, and the sales are just not there. Compounding that situation is the many part-time jobs in clothing, grocery and miscellaneous goods.

The educational sector has seen restrained growth coming from community colleges, charter schools and moderate population growth affecting the secondary schools. Other services like repairs have fared well in the Magic Valley and in the Mini-Cassia area although the numbers were not large to begin with. Repairs and maintenance businesses should benefit from a time when consumers want to extend the life of cars. Even reupholstering furniture and repairing shoes are more commonplace.

The Wood River Valley extending down to include Camas County continues to show very low activity. Job openings are down from the seven-year average by over 50 percent and most of the decline has been in what was considered at one time a robust construction and real estate market. In the first half of 2006, the Blaine County Office posted 95 jobs in the \$8- to \$11-an-hour category while the first half of 2010 saw only two such listings. Even Camas County and the small communities of Picabo and Carey, which felt the boom earlier, have been hit hard in the service sector. This industry can be fairly diverse including finance and insurance, real estate, retail and professional services such as landscaping, architectural, legal services and accounting.

Overall, there is some pent up demand for hiring. Buried beneath the data runs a thread of discontent with the skills gap along with secondary skills that encourage a worker to be prompt, reliable and have a strong work ethic. But employers are wondering why they are not getting a large pool of applicants in an environment of high unemployment.

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GREEN JOBS MAKE UP SIZABLE PORTION OF 2011'S JOB OPENINGS



The industries identified by the Idaho Department of Labor as green in the 2010 Idaho Green Job Survey ([http://lmi.idaho.gov/Portals/13/Research%20Projects/Green/Idaho Green Jobs Survey 2010 FINAL.pdf](http://lmi.idaho.gov/Portals/13/Research%20Projects/Green/Idaho%20Green%20Jobs%20Survey%202010%20FINAL.pdf)) account for nearly 27 percent of the job openings listed with the department so far in 2011, and those industries identified as the greenest accounted for the majority of the listings.

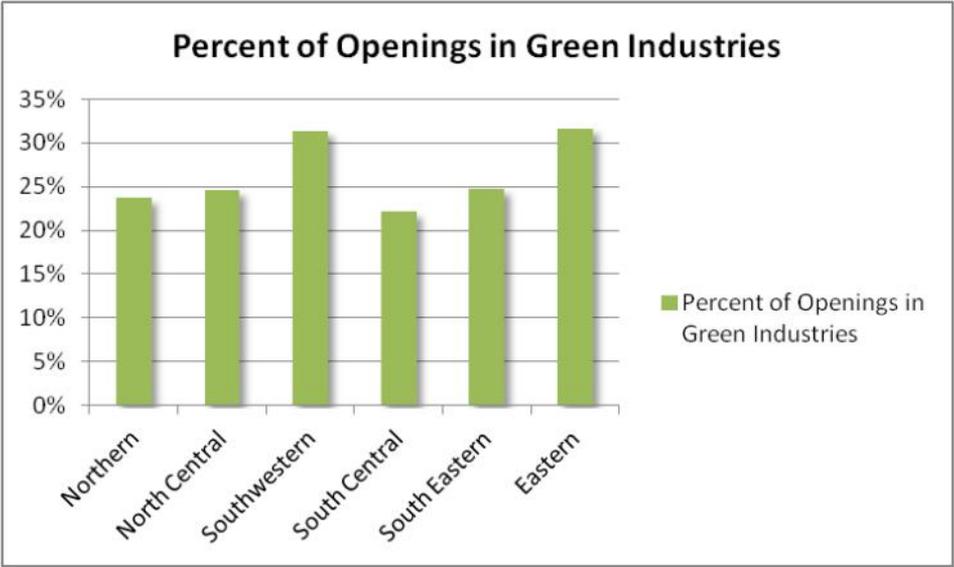
The median salary for green positions is almost three dollars an hour higher than the state's median wage for all jobs. The openings for 2011 follow that trend. Over 30 percent offer a starting salary of more than \$11 an hour compared to 27 percent for all jobs, and four of every five green listings are for permanent jobs.

Professional, scientific and technical services is one of Idaho's greenest industries, making up almost 32 percent of all green job postings. Religious,

Industry Title	Openings
Professional, Scientific, and Technical Services	3,302
Religious, Grant Making, Civic, Professional and Similar Organizations	1,101
Support Activities for Agriculture and Forestry	1,064
Crop Production	877
Construction of Buildings	659

civic, professional and similar organizations accounted for 10 percent of the openings to match the share from support activities for agriculture and forestry.

Regionally, eastern Idaho has the highest concentration of job listings for green industries, and southwestern Idaho is a close second. The main industry posting openings in eastern Idaho is the religious, professional and similar organizations while the primary sector in southwestern Idaho is professional, scientific and technical services. The remaining regions of the state have a similar concentration of green openings, right around 23 percent.



Three occupations – conservation workers, customer service representatives and agricultural laborers – had more than 600 posted openings this year.

Once green industries were identified, they were arranged based on the concentration of green jobs in each. Level 3 includes industries with the highest concentration of green jobs while Level 2 industries have a moderately high concentration and Level 1 industries have a concentration higher than the state’s average.

Occupation Title	Openings
Forest and Conservation Workers	694
Customer Service Representatives	652
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	632
Tax Preparers	520
Heavy and Tractor-Trailer Truck Drivers	462

This month the Idaho Department of Labor launched its Future Ready website at lmi.idaho.gov/futureready with the findings of the 2010 Idaho Green Job Survey. The survey, funded by the American Recovery and Reinvestment Act of 2009, tries to establish the kinds of green jobs and their number in Idaho. Related research enriched the survey by adding information on training and education, incentives and state projections for green jobs and industries.

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EASTERN IDAHO HOUSING MARKET SHOWS SLOW IMPROVEMENT

The U.S. Census Bureau and U.S. Department of Housing and Urban Development found a 6.1 percent increase in nationwide sales of new single-family homes between August 2010 and August 2011. The housing market continues to smolder following rapid increases in homes sales during the early 2000s and subsequent collapse after 2007. Eastern Idaho was an active participant in the national housing market boom and bust.

Multiple-listing services throughout Idaho track market statistics, which provide a local perspective on what many consider the catalyst of the most severe recession since the Great Depression. In eastern Idaho, monthly homes sales through realtors are tracked by Snake River Multiple-Listing Service and are available for Bonneville, Jefferson, Madison and Fremont counties.

The four-county region posted just 136 home sales in August 2011, the second lowest number for that month in at least eight years. The lowest was in August 2010 at just 119. A more than 14 percent sales increase in the last year could be positive news for an industry that has suffered in recent years. At the

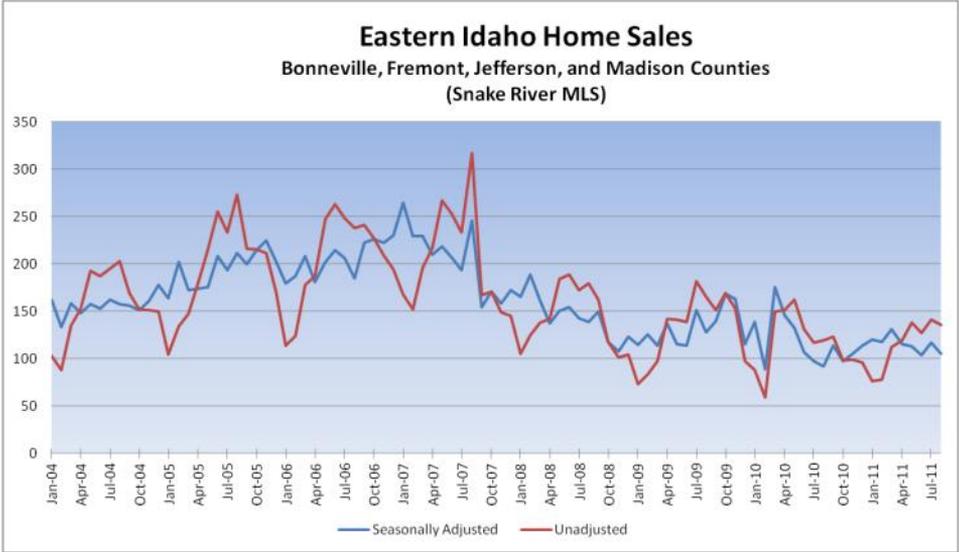
August Median Home Price		
County	2010	2011
Bonneville	\$147,950	\$140,100
Fremont	\$186,300	\$177,000
Jefferson	\$157,500	\$152,000
Madison	\$154,000	\$145,000
U.S.	\$221,800	\$209,100

same time the median price of homes for the combined region decreased by an average of 4.9 percent. The median price of new homes sold nationwide in August 2011 decreased by 5.7 percent over the previous year.

Data from as far back as 2004 show a gradual increase in home sales in the four eastern Idaho counties through the end of 2007. The data also reveal drastic seasonality – much higher home sales in the summer months followed by low winter sales. These seasonal effects can often mask the actual trends that occur in this industry, but statistical methods can smooth the peaks and troughs, making month-to-month comparisons possible.

At first glance August 2007 had the highest sales with 319 homes sold in one month. Without any adjustment for seasonality it looks like this was the

start of the housing crash in eastern Idaho. After adjusting for seasonality the peak actually occurred in January - seven months earlier. Understanding when the housing market decline began in eastern Idaho becomes relevant when the nationwide recession officially started in December of 2007 – almost a year later.



It is easy to pick out the effect of the first time home buyer tax incentive during 2009 and 2010. The sudden increase of sales was followed by a sharp decline once the credit expired. The credit was temporarily reinstated which once again increased the urgency to buy homes. Since then, seasonally adjusted homes sales have showed little change and have decreased slightly in the second and third quarter.

Home sales in March 2011 were at least 22 percent lower than the average for the previous seven

Marches and as much as 34 percent lower in July compared to the average for the previous seven Julys.

The return to a seven-year average is still a long way off, but signs of stability are starting

to appear. That is welcome news for an industry blamed for starting the worst recession in 70 years.

Eastern Idaho Home Sales				
Month	Average 2004 - 2011	2007	2011	% change from Avg.
January	104	168	76	-27%
February	105	152	78	-26%
March	144	196	112	-22%
April	161	217	119	-26%
May	193	267	138	-29%
June	193	253	127	-34%
July	190	233	141	-26%
August	204	317	136	-33%
September	176	167	*	*
October	164	171	*	*
November	153	149	*	*
December	137	145	*	*

Bonneville, Fremont, Jefferson and Madison counties.

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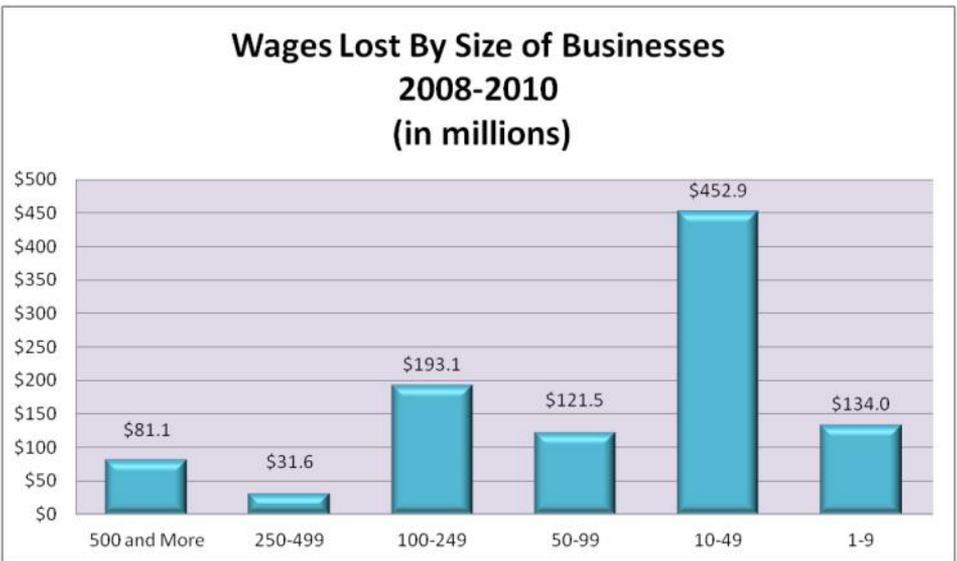
SMALL EMPLOYERS HIT HARDEST BY RECESSION

During the depths of the Great Recession – from 2008 through 2010 – Idaho lost 2,600 employers, 48,000 jobs and over \$1 billion in wages, and the state’s smaller businesses bore the brunt.

Those businesses with payrolls from 10 to 49 made up 22 percent of all businesses in Idaho in 2008, but they suffered nearly a third of the net business losses. By 2010 they accounted for just over 21 percent of Idaho’s diminished 45,000 businesses.

Even more of the smallest businesses – those with fewer than 10 employees – closed during the downturn, but they did not have the payrolls that those slightly larger enterprises lost. Excluded from the count are the tens of thousands of businesses in Idaho that have no employees. While many businesses closed, some cut employees enough to drop to lower size classifications, but the net loss of businesses was significant.

Businesses with 10 to 49 employees cut their labor forces by 8 percent, nearly 17,000, to save 7 percent in wages, almost a half billion dollars.



There was a net loss of businesses in every size class except those with 1,000 or more employees. Idaho had 25 businesses that size in 2008 and 25 in 2010. Over that period, however, those businesses shed 2,350 employees, a 4.4 percent decline. The 51,200 workers who remained on those payrolls made \$92 million more in 2010 than the larger number of workers did in 2008, primarily due to the return of year-end bonuses in the high technology sector.

But the wage gain in the largest businesses was more than offset by losses in those with payrolls between 500 and 1,000. Businesses of that size cut over 9 percent of their workers and shaved wages by 11 percent.

Cuts of a similar magnitude were made among businesses with 250 to 499 workers. Those with fewer than 10 workers suffered somewhat less. Workforces declined by under 6 percent and payrolls contracted less than 4 percent.

Before the recession, Idaho’s businesses with 10 to 49 workers employed 31 percent of all workers and paid 28 percent of all wages. But during the re-

Recessions Impact on Idaho Businesses

# of Employees	2010			Change from 2008			Percentage Change from 2008		
	Bus	Workers	Wages	Bus	Workers	Wages	Bus	Workers	Wages
500 and up	76	86,882	\$4,271,753,326	-6	-6,039	-\$81,140,208	-7.3%	-6.5%	-1.9%
250-499	125	43,009	\$1,665,138,014	-14	-4,985	-\$31,588,645	-10.1%	-10.4%	-1.9%
100-249	588	85,367	\$2,770,529,368	-45	-6,449	-\$193,101,222	-7.1%	-7.0%	-6.5%
50-99	1,324	89,423	\$2,912,790,003	-106	-7,402	-\$121,517,716	-7.4%	-7.6%	-4.0%
10-49	9,590	191,038	\$5,985,564,005	-815	-16,808	-\$452,889,744	-7.8%	-8.1%	-7.0%
1-9	33,038	107,102	\$3,436,208,469	-1,593	-6,318	-\$133,974,187	-4.6%	-5.6%	-3.8%
Total	44,741	602,821	\$21,041,983,185	-2,579	-48,002	-\$1,014,211,722	-5.4%	-7.4%	-4.6%

Source: Idaho Quarterly Census of Employment and Wages

cession those businesses suffered a disproportionate share of the losses – 35 percent of the workers and 43.5 percent of the wages.

Administrative and support services was hit extremely hard compared to employers with larger and smaller payrolls in that sector. The nearly \$15 million in lost wages between 2008 and 2010 posted by businesses with payrolls of 10 to 49 was more than offset by a gain of over \$14 million in other size businesses. That group also bore the brunt of losses of jobs and employers in the administrative and support services sector.

But construction was responsible for a majority of the lost wages for employers with 10 to 49 workers at nearly a quarter billion dollars and 41 percent, or 7,000, of the lost workers.

Retail trade accounted for 13 percent of the wage loss and 14 percent of the employment loss while 11 percent of the wage loss came in wholesale trade and 6 percent of the employment loss.

A full-view version of the table below is on page 18.

Recession Impact on Businesses with 10-49 Employees

	2010			Change from 2008			Percent of Losses of All Employers		
	Wages	Jobs	Employers	Wages	Jobs	Employers	Wages	Workers	Employers
All Employers	\$5,694,792,076	183,717	9,257	-\$468,445,013	-17,118	-831	43.5%	34.9%	31.0%
Agriculture, Forestry	\$258,032,521	9,062	468	-\$13,289,817	-495	-23	119.3%	46.4%	64.2%
Mining	\$39,796,755	610	29	-\$8,700,409	-313	-16	84.6%	65.3%	94.1%
Utilities	\$78,949,561	1,327	68	\$11,549,950	27	6	18.0%	4.6%	56.8%
Construction	\$484,359,156	12,105	671	-\$247,834,766	-7,058	-367	48.8%	50.3%	21.5%
Manufacturing	\$413,597,569	10,517	498	-\$22,354,106	-1,117	-55	6.9%	11.2%	45.9%
Wholesale Trade	\$474,097,254	10,830	546	-\$51,551,338	-886	-29	94.5%	40.5%	16.4%
Retail Trade	\$657,631,967	26,251	1,404	-\$62,349,431	-2,857	-151	39.2%	37.3%	52.7%
Transportation and Warehousing	\$232,370,974	6,425	312	-\$10,973,694	-485	-18	37.2%	38.6%	26.4%
Information	\$145,924,722	3,923	189	\$4,502,585	111	4	-8.3%	-4.3%	-57.7%
Finance and Insurance	\$380,451,146	7,542	426	-\$29,522,532	-810	-36	70.5%	63.6%	25.7%
Real Estate and Rentals	\$74,508,736	2,513	135	-\$17,046,508	-730	-42	37.5%	49.3%	14.9%
Professional, Scientific, Technical Services	\$447,894,689	9,632	527	-\$30,137,577	-925	-41	99.6%	37.1%	53.7%
Management of Companies	\$89,391,803	1,470	70	-\$32,116,130	-222	-8	37.3%	15.9%	133.3%
Administrative and Support	\$242,494,208	8,209	407	-\$14,704,355	-1,170	-60	258.3%	44.8%	104.3%
Private Educational Services	\$361,490,094	12,405	442	\$4,655,188	179	4	14.0%	46.1%	8.7%
Health Care and Social Assistance	\$746,147,877	22,337	1,125	\$53,414,484	1,209	44	22.8%	28.2%	19.5%
Arts, Entertainment, Recreation	\$51,304,810	3,102	152	-\$4,351,912	-79	0	83.1%	17.5%	0.0%
Accommodation and Food Services	\$384,136,424	30,170	1,471	\$15,407,644	-948	-8	-54.7%	21.6%	-31.9%
Other Services	\$132,211,810	5,288	318	-\$13,042,289	-548	-37	63.4%	58.3%	490.0%

Source: Quarterly Census of Employment and Wages

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Recession Impact on Businesses with 10-49 Employees

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Source: Quarterly Census of Employment and Wages

NORTHERN IDAHO

Benewah, Bonner, Boundary, Kootenai & Shoshone counties

REGIONAL DEVELOPMENTS

- Center Partners has moved 350 employees from its site in Coeur d'Alene to Liberty Lake, Wash. About 250 workers remain at the Coeur d'Alene site. The Post Falls location and Coeur d'Alene site near U.S. 95 and Prairie Avenue were unaffected by the move. The company has a continuous hiring cycle due to turnover and expansions. According to the Coeur d'Alene Press, the typical starting wage for customer service representatives is \$9.50 an hour. It employs about 1,000 people in northern Idaho and 4,000 people companywide.



A new state-of-the-art carbon fiber manufacturing plant in Moses Lake, Wash., officially opened in September. The joint venture of German-based companies SGL Automotive Group and BMW will produce a carbon fiber-reinforced plastic for BMW's new line of lighter, more energy efficient electric cars. The \$100 million project sits on 60 acres and includes a 110,308-square-foot processing building and a 46,781-square-foot office and warehouse. It could grow by another 60 acres to accommodate six buildings and 12 production lines over the next five years. The plant has hired about 50 people so far and should employ about 80 by the end of the year, bringing about \$6.7 million in new earnings and wages to Grant County.

- Providence Sacred Heart Medical Center has broken ground on an \$18.6 million emergency department expansion and remodeling. The construction is expected to take about 18 months and add more than 14,000 square feet of space. The expansion will include another 15 emergency examination rooms; seven rooms that will serve as holding areas for people with mental illness; a psychiatry triage room for children; larger waiting areas; an atrium and a coffee bar.

BENEWAH COUNTY

- Hospice of Benewah County has approximately 11 active volunteer caregivers. Additional volunteers are needed in outlying areas. Training classes began at Valley Vista to become a hospice volunteer or to help family and friends. Topics include care for the caregiver, family dynamics, physical therapy, overview of grief and bereavement and coping with a fatal illness.

BONNER COUNTY

- More than 40 businesses set up booths for this year's Business Networking Alliance's Business Fair at the Sandpoint Business and Events Center.

KOOTENAI COUNTY

- Enrollment is up for another year on higher education campuses in Coeur d'Alene. North Idaho College's head count rose from 6,347 in the fall of 2010 to this year's fall enrollment of 6,751. The increase of 404 students represents a 6.4 percent hike for the community college. For this year's fall semester, the most program growth was in professional-technical enrollment, up 21.2 percent from 780 to 945. College officials attribute much of that growth to new certificate options in the program on electronic medical records adoption for health care practices.
- Lewis-Clark State College's Coeur d'Alene campus has also experienced dramatic growth. The branch has 467 students enrolled for the fall semester, up from 429 in the fall of 2010, an 8.8 percent gain. Enrollment is up 37 percent since the fall of 2007 when there were 341 students. The school offers a dozen baccalaureate degrees including business administration, nursing, elementary and secondary education and communication. This year's largest enrollment increase was in the business division, 21.3 percent to 171 students. The University of Idaho's branch campus in Coeur d'Alene saw a more modest increase, 5 percent this fall to 529 students.
- The University of Idaho is introducing a new program aimed at Idaho businesses, startups, entrepreneurs and inventors. The Laboratory for Applied Science Research at the University of Idaho Research Park in Post Falls will assist corporate research and development projects by providing university experts and infrastructure.
- Gov. C.L. "Butch" Otter made two stops in Kootenai County in early October to attend a groundbreaking ceremony for the Kootenai Technical Education Campus and Ground Force Manufacturing's future site of UnderGround Force, a manufacturer of mining equipment. The professional-technical high school will serve the Post Falls, Coeur d'Alene and Lakeland school districts. Ground Force also plans to lease the Coeur d'Alene Tribe's 55,000-square-foot manufacturing building in Plummer for its water tank division. Ground Force purchased machinery from Echelon, which formerly occupied the site. About 35 people will work there. With the expansion at UnderGround, the company plans to expand its workforce by 200 over the next several years.

SHOSHONE COUNTY



The Route of the Hiawatha bike trail set a new attendance record, reporting 12,844 visits in August alone, up 4.4 percent from the same month last year. This summer, the momentum continued into September with a record Labor Day weekend crowd of just over 3,000 riders. August 2011 was the biggest single month since 1999.



A \$263.4 million three-year settlement with Hecla Mining Co. resolves one of the nation's largest Superfund lawsuits and all claims of the United States, the Coeur d'Alene Tribe and the state of Idaho against Hecla Limited for historic environmental liability in the Coeur d'Alene Basin Superfund Site. The initial payment of \$167 million was made Oct. 8.

OPENINGS

- Orlando's Mexican Drive-Up in Coeur d'Alene
- Studio 33 Photography in Coeur d'Alene
- A new Burger King location in Post Falls – employs 60
- Barefoot Bella's in Priest River
- Dave Smith Motors state-of-the-art Chrysler service center in Kellogg

RELOCATED

- Performance Offroad, an ATV and snowmobile business, to Bonners Ferry

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NORTH CENTRAL IDAHO

Clearwater, Idaho, Latah, Lewis and Nez Perce counties

REGIONAL DEVELOPMENTS



The farm sector is a bright spot in north central Idaho's economy. Harvest ended in mid-September, about three weeks later than normal because of a rainy, cool summer. Still yields were higher than normal. More than 70,000 acres went unplanted this year because fields were too muddy to plant spring wheat, but most of the resulting losses were covered by federal crop insurance. Soft white wheat prices hovered above \$7 a bushel this September, about \$2 higher than the same month the year before. Hay prices also are high because drought in the Southwest has caused a national shortage of hay. High hay prices and a lack of suitable pasture and water for cattle have resulted in many Southwest ranchers culling their herds. In the last year, U.S. cattle producers have sold off about one in every 20 heifers tagged for reproduction. Selling off calves and cows of calf-bearing age means it will take many years to rebuild the herd. Cattle prices, which already are near all-time highs, are expected to skyrocket in the next few months because of culling. Strong exports - especially to Japan, China and India - also have helped bolster beef prices this year.

CLEARWATER COUNTY

- The National Guard will not open a youth challenge program in Pierce next summer as expected because it does not have the \$200,000 in matching funds required from the state. After the Legislature indicated last year it would not put money toward the program, the governor sought private donations, but so far that has not worked out. The boot camp-style program for young people at risk of not completing high school would create 50 badly needed jobs in a county suffering from long-term high unemployment. The camp would have two 22-week classes of 100 teens every year. A public affairs officer for the National Guard said although the program will not be opening anytime soon in the old Pierce elementary school, it remains a priority for Idaho Gov. Butch Otter and the guard. The Clearwater County Economic Development Council reports that the youth challenge program still could open as early as October 2012, a delay of just a few months.

IDAHO AND LEWIS COUNTIES

- A \$1.9 million project to reduce falling rock on U.S. Highway 95 on White Bird Hill began in September. The grade, lined by rock faces up to 180 feet high, frequently experiences rock falls and occasional landslides. Contractor Midwest Rockfall Inc. of Henderson, Colo., began removing loose and hazardous rocks from the slopes. The next part of the 105-day project includes rock bolting, tree removal and excavation. Then it will place a cable mesh over the surface and secure softer spots with concrete. If winter weather delays project completion, the final work will resume in March.
- Lewis County celebrated its centennial during its fair in late September including a parade featuring a float with current and former county officials. There was also good economic news to celebrate. Despite the recession and a slow and painful recovery, Lewis County has added payroll jobs since 2007. It was one of the five Idaho counties that added jobs between 2007 and 2010, and it looks like its employment this year will be 4 percent to 6 percent higher than last year.
- The Federal Emergency Management Agency has awarded Idaho \$1 million to upgrade the North Idaho Correctional Institute near Cottonwood. Matched with \$400,000 from the state, the work will mitigate wildfire and storm hazards and provide more reliable power and lighting that will enhance security.

LATAH COUNTY

- Over 500 high school students from across the region explored career options at a fair sponsored by the Idaho Department of Labor in Moscow Sept. 27. Juniors and seniors from 13 high schools learned about 72 different careers in the Kibbie Dome parking lot and the Student Union Building. They tried various activities including carpentry, pouring cement, riding in a bucket truck, running a steamroller and donning a smokejumper's field rig. The fair was held in conjunction with the University of Idaho Career Center and the Latah County Youth Advocacy Council.
- Enrollment at the University of Idaho remained virtually unchanged this fall at just over 12,300. A 6 percent increase in the number of freshman from Idaho was offset by a decline in out-of-state enrollments caused by tuition increases.
- Washington State University welcomed the largest freshman class ever this fall. The 4,174-member class was 40 percent larger than the freshmen class in the fall of 2010. Total enrollment on the Pullman campus increased by about 1,000 to 21,016. The university accepted more students this fall so tuition from new students could help offset state budget cuts. The school also increased in-state tuition 16 percent this fall. The university already was dealing with a \$112 million reduction in its 2011-2013 state appropriation when it learned it should brace for an additional cut of up to \$27 million. Large increases in research funding have helped the university keep faculty. From 2008 to 2011, research grants and contracts have grown from \$154 million to \$237 million, an increase of 54 percent. The school received the largest single gift in its history in September. The \$27 million endowment from the Washington Tree Fruit Re-

search Commission will support research on apples and pears over the next eight years. The endowment is funded through a \$1-per-ton assessment from state apple and pear growers.

- The U.S. Department of Agriculture recently awarded \$80 million in grants to consortiums led by Washington State University and the University of Washington to research the conversion of wood and forest residues into biofuels for jets. Washington State University will lead a consortium of universities and businesses in a \$40 million project to research the potential for using residual wood after logging and forest thinning for aviation fuel while the University of Washington will lead another \$40 million project to research converting poplar trees that are grown on plantations to aviation fuel, diesel and gasoline. The Washington State project will evaluate biofuels from planting through growing, harvest and conversion to ensure an economically viable industry that could replace some of the natural resource jobs lost in recent years. University of Idaho researchers will participate, focusing on training the future bioenergy workforce with targeted programs at the elementary, secondary, undergraduate and graduate levels.
- The University of Idaho's Idea Network of Biomedical Research Excellence received the Moscow and Pullman Chambers of Commerce STAR Award in September. The award goes to businesses that make outstanding contributions to the local economy by attracting visitors to the area. The Idea Network brings about 200 visitors to the area for its annual conference, boosting tourism. It gives Idaho undergraduates opportunities to earn money while working on biomedical research projects throughout the state during the summer. The network also provides forums for seminar presentations from researchers and workshops geared for teachers, faculty, graduate students and undergraduates. Participating institutions include the University of Idaho, Idaho State University, Boise State University, Brigham Young University-Idaho, the College of Southern Idaho, Lewis-Clark State College, College of Idaho, North Idaho College, Eastern Idaho Technical College, Northwest Nazarene University, the Boise Veterans Affairs Medical Center and Mountain States Tumor and Medical Research Institute.
- About 175 employers participated in a career expo for college students and recent graduates at Washington State University's Beasley Coliseum in October. The Career Expo is a joint effort by the College of Engineering and Architecture and the Center for Advising and Career Development. The number of participants may have been boosted by the Wall Street Journal rating the university among the top 25 colleges in the nation in terms of its graduates' preparedness. Technical companies also spent a day on the University of Idaho campus to recruit engineering students.

NEZ PERCE AND ASOTIN COUNTIES

- Precision Machine in Lewiston recently landed a \$16.9 million contract from the U.S. Bureau of Reclamation to help retrofit and upgrade the Hoover Dam over five years. The company will rehabilitate nine 50-foot-tall pressure-relief valves that protect 30-foot-diameter pipes that deliver water to the turbines. About two-thirds of the estimated 80,000 hours of

work will be done in Lewiston. Precision just hired five people, bringing its total employment to 65 with about half in Lewiston and the other half in Spokane. A few Precision technicians will travel to Hoover Dam, 30 miles south of Las Vegas, to redo portions of the valves embedded in the dam.

- Howell Machine added 25 jobs in the last year and expects to add up to another 40 in the next year as it completes a \$10 million expansion in Lewiston. The company expects to finish converting 7,500 square feet of warehouse space in downtown Lewiston for shell case manufacturing by the end of this year. A few months later, it will complete remodeling two buildings on South Port Way into a bullet-making factory and a plant that rebuilds spent ammunition. Howell also plans to construct a new 14,000-square-foot building on South Port for making bullets and warehousing.
- Valley Medical Center is building an urgent care clinic in Clarkston, which should open right after New Year's Day. Express Care, which will treat minor injuries and illnesses without appointment, will employ two physicians and support staff at the clinic near the Quality Inn and Walmart. Valley Medical, which is a physician-owned clinic with 32 providers, operates an express care clinic in Lewiston. Valley Medical employs about 200 people at its main office in Lewiston.
- Enrollment at Lewis-Clark State College rose to a record 4,693 this fall, 3.3 percent higher than last fall. The enrollment growth partly reflects efforts to retain students who enrolled last fall. President Tony Fernandez said that the college is approaching the upper limit for the number of students it can handle without increased support from the state. The college recently demolished a complex that contained six student housing units just east of the main campus and is in the process of turning it into a park that will be used as a gathering area for college and community events. Restoring the units that were over 30 years old and in poor condition would have cost more than they were worth. The college received \$60,000 from the state's Permanent Building Fund for the demolition and landscaping.
- The Lewiston Planning and Zoning Commission gave a green light to a hot-mix asphalt plant just east of the city limits. The proposed Knife River plant on 12 acres in the McHargue Industrial Park has already been permitted by the Idaho Department of Environmental Quality. Three people would work at the plant at any given time, providing support to truck drivers. Up to 100 trucks a day would go to the plant for a large highway project while smaller local projects would involve about 25 trucks. During a large project, the plant would employ about 25 people.
- Clearwater Paper in Lewiston has discontinued a line of cedar siding and molding. Its primary market was custom-built, upper-end homes in the Northeast. With housing starts remaining low since the recession began and increased competition from China, that product line no longer is profitable. Twelve people worked in the cedar department. They have been assigned to other open positions. The company still employs about 1,600 people in Lewiston including 300 who make wood products.

OPENINGS

- MV Prints, offering drafting, blueprint and other printing services in Grangeville
- Tara's Elegance, a designer clothing boutique in Mall 21 in Lewiston

CLOSINGS

- Mountain Motor Sports, a 15-year-old retailer in Orofino
- The Style Shop, a clothing store in Orofino for more than 60 years

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SOUTHWESTERN IDAHO

Ada, Adams, Boise, Canyon, Elmore, Gem, Owyhee, Payette, Valley & Washington counties

REGIONAL DEVELOPMENTS

- Foreclosures increased in August but sales improved. According to Realty-Trac, Idaho foreclosures rose by 20 percent in August from the previous month but were 36 percent lower than August of last year. Ada and Canyon counties make up almost half of all of Idaho's filings. New home sales increased in Ada County by 128 percent from August 2010. Sales of homes of \$500,000 or more increased even more at 150 percent. Sales were up in Canyon County for existing homes, especially in the lower price range. Sales of homes under \$69,999 rose 94 percent over a year ago.
- The Idaho Public Utilities Commission approved an average rate decrease of 5.3 percent for Intermountain Gas starting Oct. 1. Monthly household gas bills should decrease by \$2.17 on average because of lower demand and higher supplies.
- D.L. Evans Bank received a new \$30 million loan from the U.S. Treasury Department to both repay its TARP obligation and increase lending to small businesses. The loan is at the same interest rate, 5 percent, as the TARP money, but has provisions to decrease the interest rate if certain thresholds on lending are achieved. D.L. Evans has added three new loan officers to its seven Treasure Valley locations.

ADA COUNTY

- ProService plans to open a call center in Meridian that will employ five managers and supervisors with another 30 to 50 employees hired between late October and mid-January. The center will initially provide service to customers of Balsam Hill, which sells artificial Christmas trees and other holiday decorations and accessories. Entry-level workers would earn \$10 to \$12 hourly.
- Blue Cross of Idaho is opening a kiosk at Boise Towne Square Mall to take advantage of provisions in the 2010 federal health reform law. One encourages people to purchase health insurance on their own, and the other provision allows those covered by Medicare to choose a plan. The kiosk will be staffed by licensed health insurance agents.
- Sixteen Idaho companies have been recognized by Inc. magazine as among the 5,000 fastest growing in the country. Scentsy of Meridian was

the top Idaho company ranked at 85. Others in southwestern Idaho were BaliHoo at 264, Bodybuilding.com at 2,134, Fisher's Document Systems at 3,490 and Flying Pie Pizzeria at 4,563. Inc. said that the 16 Idaho companies added 1,400 jobs during the three-year period used to rank companies. Rankings are based on a percentage growth in revenue between 2007 and 2010 for privately held companies.

- Zion's Bank is building of a new 15-story Idaho headquarters in downtown Boise. The Gardner Co. will co-own the building, which is slated to start construction next spring. After completion, the building is expected to employ 60 to 100 people.
- The Home Federal Bank announced the closing of six branches – two in Ada County, which will close in late December and early January. Twenty people will be laid off from the closures and changes in the bank's mortgage operations. The changes are expected to save the bank \$1 million next year.

CANYON COUNTY

- St. Alphonsus Regional Medical Center opened a new Cancer Care Center in Nampa. It is staffed by a doctor and two nurses to allow patients to be treated closer to home.

ELMORE COUNTY

- U.S. Air Force personnel returned to Mountain Home last month from the Middle East. More than 300 men and women of the 366th Fighter Wing returned home after a six month deployment.
- Mountain Home's Planning and Zoning Commission unanimously approved a \$3 million Cedar Crest nursing care center expansion. The 20,500-square-foot expansion would be only the second business in the community licensed to offer 24 hour nursing care. If the project stays on track, it will break ground in December and open in late 2012.

OWYHEE COUNTY

The South Board of Control received a \$300,000 matching grant to convert laterals into gravity pressurized irrigation. This two-year project will convert between 600 and 700 acres of farm ground to a pressurized irrigation system. The benefit to the area includes an increase in the land that can be farmed, an increase in the water that can be used, better water quality due to the decrease in chemicals, less maintenance and reduced electricity costs for farmers.



Two city buildings in Homedale and one in Marsing have been upgraded to produce and use solar power. The upgrades were financed with \$393,000 of a \$978,385 federal stimulus grant. The roof top solar arrays allow the buildings to generate their own operating power. City buildings in Parma, Greenleaf, Notus and Mountain Home have also had solar modifications under the grant.



EXPANSIONS

- CTA Architects Engineers added seven staff to its Boise office

OPENINGS

- EmbroidME, a custom embroidery, garment printing and promotional products store, in Boise

- Tax Solutions Northwest, a tax preparation firm, in Meridian with two employees
- Organizational Services LLC, which manages daily necessities to elderly individuals, in Ada County
- Borron Family Medicine in Meridian
- Paw Spa, a pet grooming salon, in Meridian with two employees
- Victory Dental in Boise with three employees
- Kohl's in Boise with 130 employees
- BX Drilling Supply in Boise

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SOUTH CENTRAL IDAHO

Blaine, Camas, Cassia, Gooding, Jerome, Lincoln, Minidoka and Twin Falls counties

COUNTY DEVELOPMENTS

BLAINE COUNTY

- The city of Sun Valley is proposing a \$14.5 million bond issue to finance road improvements, a new fire truck and equipment and protective gear for firefighters. The city wants to take advantage of low interest rates on the bonds and lower construction costs. The bond requires two-thirds voter approval. It will cost the owner of a home valued at \$300,000 an additional \$135 a year in property taxes for 15 years.
- The Blaine County School District has approved \$1.154 million to convert the existing auditorium at the Community Campus in Hailey into a performing arts center by next January. The project is being financed by receipts from a 2009 bond issue to upgrade facilities. The higher-than-expected cost of the Hailey project should be offset by improvements in Carey coming in below budget.

JEROME COUNTY

- Family Health Services had an open house for its new office in Jerome. The new clinic provides medical, dental and mental health services in twice the size of the former facility.
- The Jerome County Commissioners approved a 3 percent employee pay raise even after hearing about a dismal downturn in tax receipts. Commissioner Cathy Roemer voted against the raise, which in effect increases the pay of county commissioners as well. Roemer said she would not accept the raise in her pay.
- The U.S. Environmental Protection Agency is suing Jerome Cheese Co. for allegedly violating the Clean Water Act. The EPA maintained that from 2006 to 2010 Davisco Foods International, dumped waste water containing pollutants from its Jerome plant



Several people turned out for the grand opening of the Family Health Services new office in Jerome.

into a waterway that empties into the Snake River. The pollutants include phosphorus and ammonia over the amounts allowed by the company's permit. The penalty for violating the Clean Water Act is up to \$37,500 per day in fines. Jerome Cheese is a division of Davisco Foods International.

MINI-CASSIA

- Cassia County adult probation will open and manage its own urinalysis testing lab, saving the county approximately \$36,000 in contracting costs for the tests. The test results will also be available sooner.
- Minico High School in Rupert and Mountain View Elementary School in Burley were among the top 5 percent of Idaho schools in bridging the gap between the school's population as a whole and those groups that have a learning disadvantage such as students for whom English is their second language. The State Board of Education awards required the schools to make Adequate Yearly Progress for two consecutive years and reduce the proficiency gap between their school's total population and subgroups based on test scores. School officials say improvements are tied to more thorough initial screenings of each disadvantaged student followed by individual instruction. In addition, Minico High School's graduation rates have increased by 3.6 percentage points to 91.5 percent between 2010 and 2011.

TWIN FALLS COUNTY

Jayco is implementing a new Sustainability Initiative after joining a business group called the Sustainability Coalition. As a company, Jayco is striving to recover waste and be landfill free by 2015, significantly reduce fresh water used in testing and other processes while increasing use of reclaimed rainwater and reduce overall energy use by 40 percent from current levels by 2014.



- The Twin Falls City Council has cleared the way for new College of Southern Idaho student housing near the campus. Traffic continues to be an issue on and around the campus with the recent construction of the new hospital, a new high school and Walmart on the Washington Street corridor.
- The Twin Falls School District recorded an increase of 102 students this year to a total of 7,102. That was 40 students below projections, but the increase still required a part-time kindergarten teacher to be hired and a teacher transferred between two of the elementary schools.
- Buhl's Trout Festival served roast sturgeon this year. A local breeder contributed one of the huge fish that can weigh up to 200 pounds. The white sturgeon is the largest and longest living freshwater fish in North Amer-

<i>School</i>	<i># of Students</i>	<i>School</i>	<i># of Students</i>
Sawtooth	546	O'Leary MS	913
Perrine	660	Robert Stuart MS	760
Harrison	521	Twin Falls HS	1,044
Morningside	608	Canyon Ridge HS	1,120
Lincoln	458	Magic Valley HS	125
Oregon Trail	630	Bridge Academy	72
Bickel	326	Juvenile Detention	18

ica. Some sturgeon can live up to 100 years and grow to over 12 feet long. It can take a female sturgeon up to 20 years to become reproductively mature. Some species of sturgeon are listed as endangered and cannot be fished.

NEW BUSINESSES

- Siren Operated Sensors relocated from Twin Falls to Buhl
- Rasberry's restaurant in Hailey
- Jerome Drug, a pharmacy next to the new Family Health Services clinic, in Jerome

LAYOFFS

- Plum TV has permanently laid off the five workers for its local operations in Sun Valley due to financial problems. Fifty people were laid off nationally.

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SOUTHEASTERN IDAHO

Bannock, Bear Lake, Bingham, Caribou, Franklin, Oneida & Power counties

COUNTY DEVELOPMENTS

BANNOCK COUNTY

- While the jobless rate in Pocatello is below the national and state averages, many people are still unemployed or looking for better jobs. More than 600 people attended the Sept. 22 information session by Allstate Insurance, which is opening a customer information center in Chubbuck and is expected to hire up to 600 this fall. The event at the Idaho Department of Labor's Pocatello office included a presentation about Allstate and its career opportunities. While the company did not accept applications or conduct interviews, officials did meet personally with all those who attended the presentation.
- Hoku has entered the second phase of construction on its polysilicon plant, and spokeswoman Amy Burks says the Pocatello facility will be fully operational within a few weeks. The company expects to begin filling commercial orders by the end of this year.
- Monsanto Corporation, a major employer in Caribou and southern Bannock counties, awarded \$7,000 to Lava Elementary School in September to purchase white boards, projectors and document cameras for every classroom.

BEAR LAKE COUNTY

- According to the Bear Lake Regional Commission, Bear Lake reached its capacity level of 5,921 feet in early September. Heavy snowmelt and above average precipitation during the spring and summer caused flooding around the lake. Several popular tourist attractions, most on the Utah side, were closed or damaged by flooding. Most Idaho attractions were not adversely affected and actually saw an increase in traffic due to the closures on the Utah shore. Commission Director Mitch Poulson said the lake will be watched closely this winter and water released as needed for flood control.

BINGHAM COUNTY

- Gen. Alan Gayhart of the Idaho National Guard was the keynote speaker at the Sept. 27 town hall meeting to welcome back members of the guard's 116th Brigade Combat Team from Iraq. The Idaho Department of Labor, Blackfoot Chamber of Commerce and the Idaho National Guard hosted the event at which Gayhart praised the returning troops and spoke about the hurdles soldiers face on their return. Employers and others at the event were given information about Idaho's Hire One Vet program and the Uniformed Services Employment and Reemployment Right Act.

FRANKLIN COUNTY

- Local businesses have come together to continued the Preston Christmas-time tradition of the Festival of Lights, which had been threatened by economic problems. Some of planned activities for the revitalized festival include a community dinner, bed race, parade, fireworks and the traditional visit from Santa Claus. "The Festival of Lights is not about making a profit for the downtown businesses," City Councilwoman Sandra Hubbard said. "It's about bringing people to see what a great community we have."
- Smithfield's Strategy 5 LLC has purchased 167 acres on the Utah-Idaho border near Franklin for an equine center complete with an upscale hotel, restaurants, retail sites, horse boarding and training centers and an arena equipped with TV and Internet capabilities. The \$80 million project still requires local approval to move forward.

POWER COUNTY

- The Power County Planning and Zoning Commission has approved a one-year extension for Power County Advanced Energy's special use permit to build a coal gasification plant two miles west of American Falls. The county approved the permit in 2008, but funding issues have prevented construction of the proposed plant, which will produce commerce grade fertilizer. Company officials hope to move forward with construction as early as next spring.

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EASTERN IDAHO

Bonneville, Butte, Clark, Custer, Fremont, Jefferson, Lemhi, Madison & Teton counties

REGIONAL DEVELOPMENTS

- Potato prices have remained low despite a late harvest because Idaho shippers boosted preharvest shipments. The low prices could also be the result of decreased demand along the East Coast. Idaho Russet Norkota prices have fallen to \$3 per hundredweight for 10-pound film bags and \$9 per hundredweight for 70-pound cartons. Recent wet weather with early snow has pushed back harvest even more. Over the last month some potato prices have dropped by 65 percent.
- Jackson Hole Airport has reported a 2 percent drop in passenger boardings so far this year. But during June, July and August, the airport posted

126,037 passengers, less than half a percent decline from the same period in 2010.

TETON COUNTY

- The Teton County Hospital Board is converting the county run hospital into a nonprofit. As part of the proposal, Bingham Memorial Hospital would take control of operations. The process is expected to take between 12 and 18 months and could cost \$250,000.

BONNEVILLE COUNTY

- The Idaho National Laboratory has made some changes to its transportation system. A new park and ride system in Idaho Falls will allow workers to park in town to board buses. The change is expected to increase efficiency with savings expected to reach 100,000 gallons of fuel.

The Nuclear Regulatory Commission issued a license to AREVA Enrichment Services to build a multi-billion dollar enrichment facility. The application was originally submitted in 2008. Construction will take about six years. Once completed the facility will be 650,000 square feet and should employ around 1,000 construction workers.



LEMHI COUNTY

- Construction of the Idaho Cobalt Project is again under way following a short delay caused by the Salt forest fire nearby. Construction crews were evacuated as a precaution but allowed back a few days later. The Forest Service placed some limitations on travel, which included specific travel times and 25 mph speed limits.
- Summit National Bank received approval to provide full-service banking in Salmon just northwest of the river. Summit had been operating a Loan Production Office in Salmon, specializing in agriculture and real estate lending. Now it will also offer home mortgages, commercial and consumer lending along with teller windows and an ATM.
- Over 500 middle and high school students attended the Salmon Career Expo organized by the Rural Idaho Outreach Partners and the Idaho Department of Labor with help from Premier Technology, the Idaho National Laboratory, the Lemhi County Economic Development Association and the Salmon School District. Five colleges and 45 businesses and other exhibitors offered demonstrations and information to students from Salmon, Dubois, Challis, Mackay, West Jefferson and Leadore.

JEFFERSON COUNTY

- The city of Lewisville obtained a \$150,000 block grant for construction on a new community center. Bidding for the project officially began Oct. 4. The community center will be built west of the library and fire station. Construction will hopefully begin this year. City officials plan in the future to add a dedicated city office, storage for city records and a fenced playground.

MADISON COUNTY

- Two Rexburg hotels are being converted to apartments. The growing student population has put a strain on the current housing supply. The Day's Inn will be converted to housing for single men and the Magnusen Hotel

will be converted into community housing. Both conversions should be completed in January.

CUSTER COUNTY

- U.S. Postal Service officials in Salt Lake City recommend keeping the Ellis office open. The decision came along with the proposed wave of small post office closures around the U.S. Public comment will be taken on the proposed closure of offices in Clayton on Nov. 1 and Howe on Nov. 2. Postal officials have 30 days following the meeting to make their recommendations.

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State of Idaho Data – State Economic Indicators

Note: The U.S. Bureau of Labor Statistics will release the September 2011 state, counties, metro areas and some cities Oct. 21. The most recent rate and civilian labor force information is always posted on lmi.idaho.gov. Other current economic data is also posted regularly on the website.

	Aug 2011**	Jul 2011*	Aug 2010	% Change From	
				Last Month	Last Year
IDAHO LABOR FORCE ⁽¹⁾					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	759,000	761,400	757,800	-0.7	0.2
Unemployment	70,000	71,300	71,500	-2.9	-1.3
Percent of Labor Force Unemployed	9.2	9.4	9.4		
Total Employment	689,000	690,100	686,300	-0.4	0.3
<i>Unadjusted</i>					
Civilian Labor Force	763,000	769,000	763,100	-0.8	0.0
Unemployment	66,100	67,300	69,700	-7.9	-5.2
Percent of Labor Force Unemployed	8.7	8.7	9.1		
Total Employment	696,900	701,700	693,400	-0.1	0.5

U. S. UNEMPLOYMENT RATE⁽²⁾

	Sept 2011	Aug 2011	Sept 2010
	9.1	9.1	9.6

UNEMPLOYMENT INSURANCE

Claims Activities

	8,092	9,134	10,404	-11.4	-22.2
Initial Claims ⁽³⁾					
Weeks Claimed ⁽⁴⁾	55,529	78,204	72,366	-29.0	-23.3

Benefit Payment Activities⁽⁵⁾

	45,119	64,997	60,696	-30.6	-25.7
Weeks Compensated					
Total Benefit \$ Paid	\$10,353,456.30	\$14,707,660.34	13,856,872	-29.6	-25.3
Average Weekly Benefit Amount	\$229.47	\$226.28	228	1.4	0.5
Covered Employers	47,607	47,831	48,310	-0.5	-1.5
Total Benefit \$ Paid During Last 12 Months ⁽⁴⁾	\$234,437,203	\$237,940,618	\$306,125,739	-1.5	-23.4

U. S. CONSUMER PRICE INDEX⁽²⁾

	Sept 2011	Aug 2011	Sept 2010	% Change Month	% Change Year
Urban Wage Earners & Clerical Workers (CPI-W)	223.7	223.3	214.3	0.2	4.4
All Urban Consumer (CPI-U)	226.9	226.5	218.4	0.2	3.9

**Forecast data

* Preliminary estimate

(2) Source: U.S. Bureau of Labor Statistics – The July 2011 CPI Index will be released the Aug. 18.

(3) Includes all entitlements on intrastate and interstate agent, new and additional claims.

(4) Includes all entitlements, intrastate and interstate agent.

(5) Includes all entitlements, total liable activities.

Glossary of Labor Market Terms

Agriculture Employment: Persons on agriculture payrolls who work or receive pay for any period during the survey week. This includes owners, operators, unpaid family members who work at least 15 hours a week, and hired laborers.

Average Hourly Earnings/Average Weekly Hours: The average total money earnings earned by production or non-supervisory workers for selected industries. The average number of hours worked by production or non-supervisory workers including overtime, paid vacation, and sick leave. The data is collected for the week including the 12th of the month.

Average Weekly Earnings: Average Hourly Earnings multiplied by Average Weekly Hours.

Civilian Labor Force: A count of non-institutional persons 16 years of age and over residing within a specific geographic area, excluding members of armed forces, who are classified as employed, unemployed and seeking employment, or involved in a labor dispute.

Consumer Price Index (CPI): A national index measuring changes over time in the price of a fixed market basket of goods and services. There are two indexes—the All Urban Consumers (CPI-U) represents the buying habits of about 80 percent of the non-institutional population of the United States, and the Urban Wage & Clerical Workers (CPI-W) represents 40 percent of the population.

Covered Employers: Employers who are subject to state and federal Unemployment Insurance laws.

Durable Goods: Also known as “hard goods” because they include items manufactured or provided by wholesalers with a normal life expectancy of three years or more.

Employed: Individuals, 16 years of age or older, who worked at least 1 hour for pay or profit or worked at least 15 unpaid hours in a family business during the week including the 12th day of the month. Individuals are also counted as employed if they had a job but did not work because they were: ill, on vacation, in a labor dispute, prevented from working because of bad weather, or temporarily absent for similar reasons.

Initial Claim: Any notice of unemployment filed to request (1) a determination of entitlement to and eligibility for compensation or (2) a second or subsequent period of unemployment within a benefit year or period of eligibility.

Metropolitan Statistical Areas (MSA): A county or a combination of counties in which at least half the residents live in an urban center of 50,000 or more and the rest have significant commuting ties to that central county. The Office of Management and Budget designates the MSAs. Idaho has five MSAs: Boise MSA including Ada, Canyon, Boise, Gem and Owyhee counties; Bonneville MSA including Bonneville and Jefferson counties; Pocatello MSA including Bannock and Power counties; Lewiston MSA including Nez Perce County and Asotin County, Wash.; Coeur d’Alene MSA including Kootenai County.

Micropolitan Statistical Area (MicSA): Combinations of counties in which at least half the residents live in urban centers totaling at least 10,000—or 5,000 living in a single urban center—and the rest have significant commuting ties to that central county. The Office of Management and Budget designates the MicSAs. Idaho has three MicSAs: Burley MicSA including Cassia and Minidoka counties; Rexburg MicSA including Madison and Fremont counties; Twin Falls MicSA including Twin Falls and Jerome counties.

Glossary of Labor Market Terms (cont.)

Nonfarm Wage & Salary Employment: Persons on nonfarm establishment payrolls (including employees on paid sick leave, paid holiday, or paid vacation) who work or receive pay for any part of the week including the 12th of the month. It is a count of jobs by place of work. It does not include self-employed, unpaid volunteer or family workers, domestic workers in households, military personnel and persons who are laid off, on leave without pay, or on strike for the entire reference period.

Nondurable Goods: Also known as “soft goods” because they include items manufactured or provided by wholesalers that generally last for only a short period of time (three years or less).

Seasonally Adjusted: Data is seasonally adjusted to remove the impact of regular events that occur at the same time every year such as the effect of cold weather on outdoor activities, the Christmas holiday, or the summer influx of youth into the labor market.

Small Labor Market Areas (SLMA): Combinations of counties with significant ties through commuting patterns but no urban centers with populations of 10,000 or more. The Office of Management and Budget designates the SLMAs. Idaho has two SLMAs: Hailey SLMA including Blaine and Camas counties; Grangeville SLMA including Lewis and Idaho counties.

Unemployed: Those individuals, 16 years of age or older, who do not have a job but are available for work and actively seeking work during the week including the 12th of the month. The only exceptions to these criteria are individuals who are waiting to be recalled from a layoff and individuals waiting to report to a new job within 30 days—these, too, are considered unemployed.

Unemployment Insurance: Unemployment Insurance is a program for the accumulation of funds paid by employers, to be used for the payment of Unemployment Insurance to workers during periods of unemployment which are beyond their control.

Unemployment Rate: The number of persons unemployed expressed as a percentage of the labor force.

Weekly Benefit Amount: The amount payable to a claimant for a compensable week of total unemployment.

Weeks Claimed: The number of weeks that unemployed workers claimed Unemployment Insurance benefits.

Weeks Compensated: The number of weeks for which compensation was actually paid.

IDAHO EMPLOYMENT is published online monthly by the Idaho Department of Labor. All information is in the public domain and may be duplicated without permission; however, the Idaho Department of Labor should be cited as the source.

The source for all data tables and graphs is the Idaho Department of Labor, Communications & Research, except where noted.

IDAHO EMPLOYMENT is produced by the Idaho Department of Labor which is funded at least in part by federal grants from the U.S. Department of Labor. Costs associated with this online publication are available by contacting the Idaho Department of Labor. Questions and comments can be directed to Public Affairs by phoning (208) 332-3570, ext. 3220, or by email to janell.hyer@labor.idaho.gov or to the Regional Economists noted in each area news [section](#).

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