

Technical Memo:

Baseline Assessment for EDGE 2020 Update

To: Jerry Bologna, Executive Director, JEDCO

From: Allison DeJong, Project Manager, GCR Inc.

May 21, 2015

I. Introduction

In 2009, when Jefferson EDGE 2020 was first developed, the parish was on the front lines of disaster recovery. Several years had passed since Katrina, yet the parish's future was very much at stake. Community and business leaders wanted the EDGE to encompass a broader set of issues that were of critical importance to the future of Jefferson Parish: Beautification, Crime Abatement, Economic Development, Public Education, Fat City Redevelopment, Flood Protection, Hospitals & Health Care, and Insurance. In the years since 2009, JEDCO and the parish have made significant strides in many of these areas. Others have seen drastic shifts in economic conditions as national and international markets have changed. JEDCO decided to refocus the EDGE plan to assess the economic development opportunities that can maximize JEDCO's impact on the parish economy over the next five years.

As GCR works with JEDCO to develop a 2015 update to the Jefferson EDGE 2020 economic development strategy, it is of critical importance to base the strategy and recommendations on a foundation of relevant data and analysis. With the economic conditions of the Parish having changed significantly since the last EDGE analysis in 2009, this baseline assessment reexamines many indicators of economic conditions, as well as the current status of action items developed in original EDGE 2020 and updated in 2012. As we move forward through the planning process, the findings from this assessment will guide the development of the strategy with feedback from JEDCO staff and stakeholders.

Specifically, this memo includes:

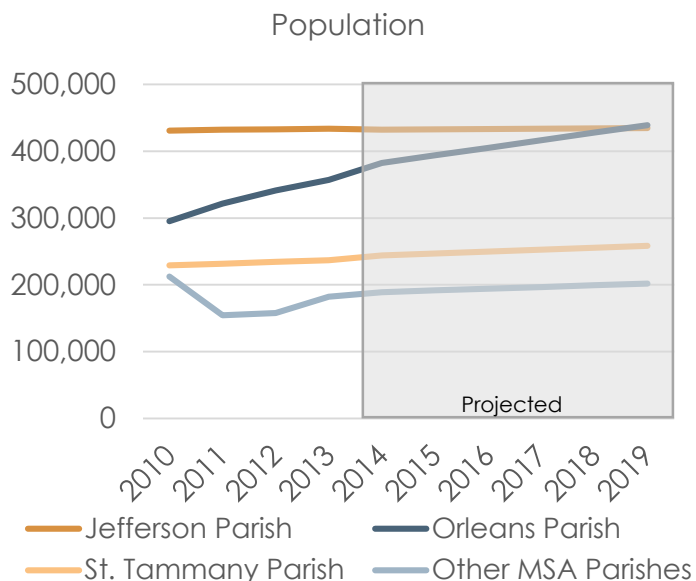
- An overview of demographic and economic data
- An updated cluster analysis for Jefferson Parish
- A review of the Comprehensive Economic Development Strategy (CEDS) for the New Orleans region
- An updated status on EDGE 2020 economic development action items since 2012.

II. Demographic and Economic Data

This section highlights key demographic and economic indicators.

Population

The US Census Bureau reported that Jefferson Parish had 433,477 residents in 2013, a 0.2% increase over 2012. This continues a growth rate that has averaged 0.2% between 2010 and 2013. Esri Business Analyst projections show a discrepancy in the current population of Jefferson Parish, but nonetheless they project a similarly flat growth rate into the future of 0.1% annual growth. This population growth is in contrast to the region as a whole that continues to grow more rapidly at 1.2%. Esri Business Analyst estimates that this growth is expected to continue and projects a 1.3% annual growth rate. This growth is primarily fueled by Orleans Parish, whose population is projected to exceed that of Jefferson by 2019.

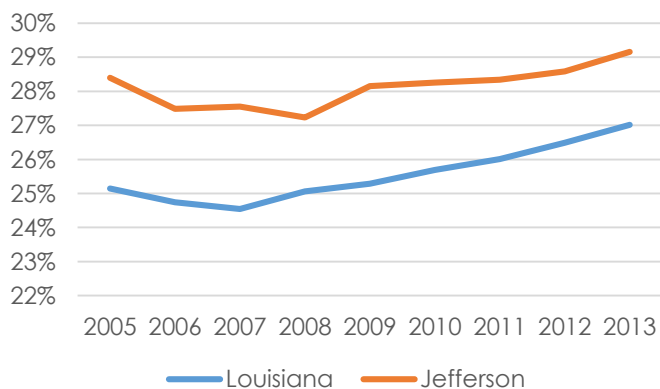


Source: 2005-2013, US Census Bureau: ACS; 2014, 2019, Esri
 ESource: US Census Bureau: ACS 2005-2013

Education

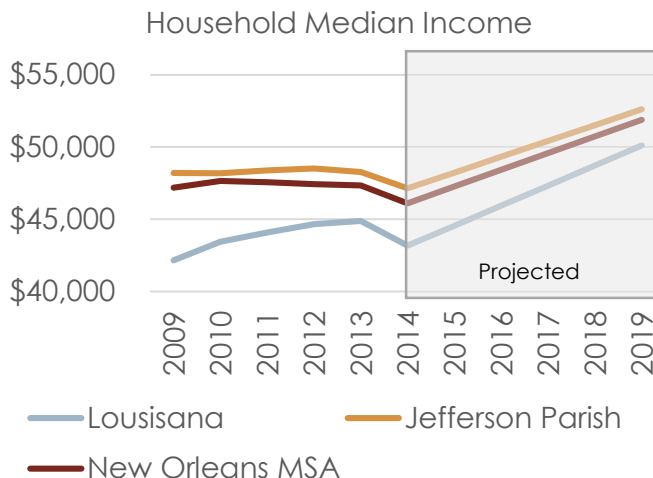
Jefferson Parish has a higher percentage of residents over the age of 25 with an Associate's degree or higher than the state overall. This is a positive trend as it indicates that **the workforce is becoming more skilled and positioned for better jobs in the parish**. However, Jefferson is not increasing the number of college graduates in the population as quickly as Orleans Parish, where 34% of residents over 25 have a bachelor's degree compared to 24% in Jefferson Parish.

Percent of Residents Over 25 with Associate's Degree Or More



Household Median Income

The median household income in Jefferson Parish is higher than the average for both the New Orleans Metropolitan Statistical Area (MSA) and Louisiana. Over the past five years, household median incomes have not grown substantially in Jefferson Parish, following trends at the state and regional level. Household incomes for the MSA have declined as well, while the state averaged a 1.0% annual growth in wages. However, Esri Business Analyst projections indicate annual household income will increase by between 2.0% and 2.5% each year through 2019.

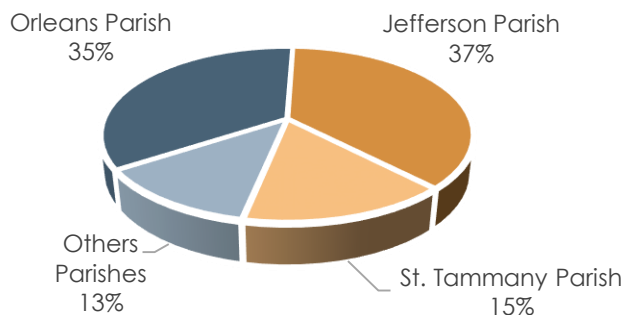


Source: 2005-2013, US Census Bureau: ACS; 2014, 2019, Esri Business Analyst; 2015-2018 Calculated by GCR, Inc.

Employment

The number of people working in Jefferson Parish has been steady over the last five years while employment in the region has been slowly increasing from 2009 to 2013. In particular, Orleans and St. Tammany Parishes have performed better during this period, adding 12,000 and 5,000 people that are employed in

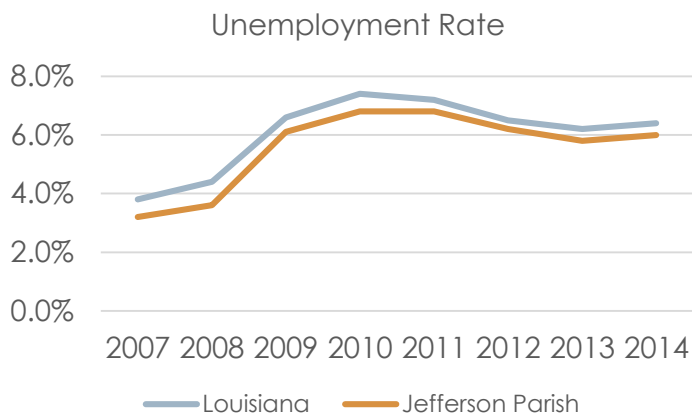
2013 New Orleans MSA Employment



Source: Bureau of Labor Statistics: QCEW

the parishes, respectively. Jefferson Parish lost 2,000 employees during this same period, but continues to employ more people than any of the other parishes in the MSA.

Unemployment in Jefferson Parish is stable at an average of 6.0% in 2014. This is slightly below the state and national average of 6.4% and 6.1% respectively.

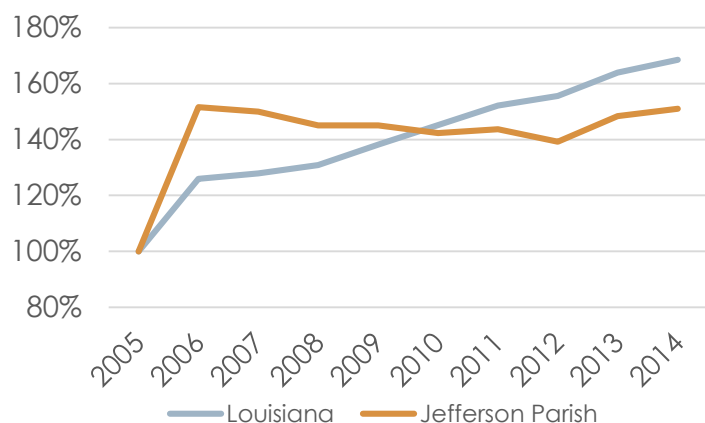


Source: Bureau of Labor Statistics: QCEW

FDIC Deposits

Any bank that is insured by the Federal Reserve must report the deposits that occur at every one of their branches. In Jefferson Parish, FDIC deposits spiked dramatically following Katrina, but since then, growth has tapered off and reflects the growth of the state. The five banks with the highest number of deposits in the parish are concentrated around the larger business centers in the vicinity of the Metairie CBD and Elmwood. Nearly a third of the bank deposits in the MSA occur in Jefferson Parish and about half are in Orleans Parish.

FDIC Deposits as % of 2005 Deposits

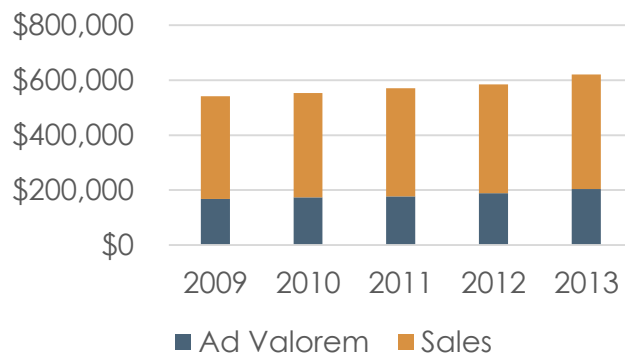


Source: Federal Deposit Insurance Corporation: SOD

Tax Collections

There has been steady growth in revenues within the parish over the last five years. Sales tax revenue continues to bring in about half as much revenue as ad valorem (property) taxes and the two revenue sources increased at roughly the same rate between 2009 and 2013.

Jefferson Parish Tax Revenue (in thousands)



Source: JEDCO Annual Report 2013

III. Cluster Analysis

This section examines the Jefferson Parish economy through the lens of industry clusters, showing which groupings of industries provide the most employment in the parish and are projected to grow over the next ten years.

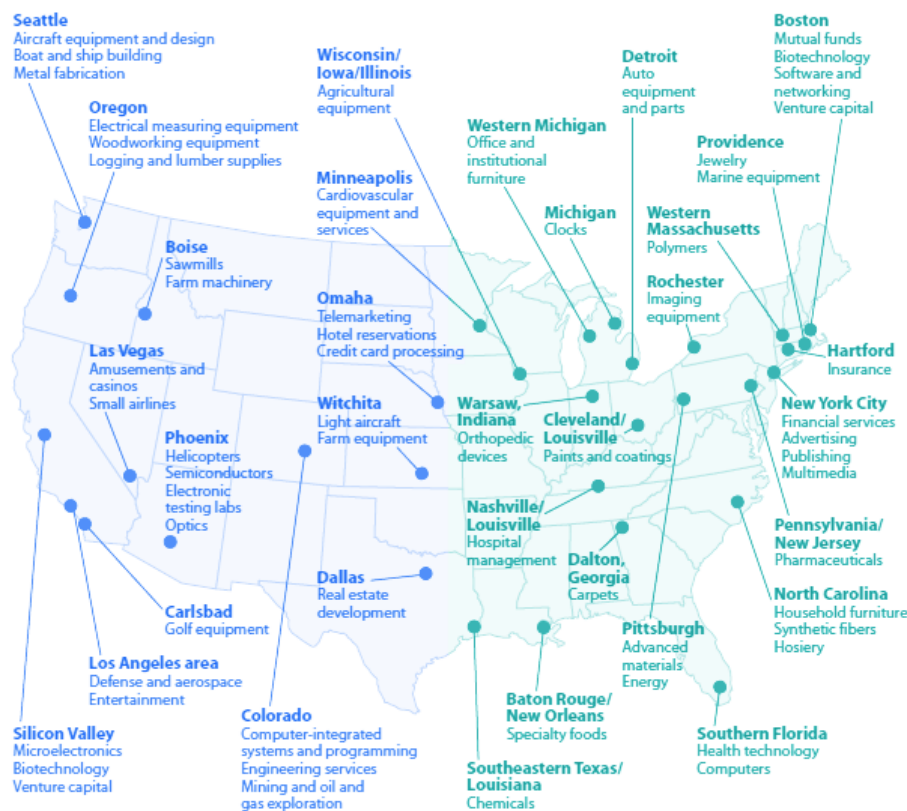
Overview – what is a cluster?

Industry clusters are a commonly used tool for data analysis in economic development. The concept was originally developed by Michael Porter at Harvard University in the early 1990s, and is now a feature of many major economic development strategies.

Because economies cross geographic boundaries, the industry cluster concept was developed to capture the regional concentrations of related businesses. Clusters comprise many facets of an industry. For example, a health services cluster contains not just doctors' offices and hospitals, but the educational institutions that train nurses and laboratory researchers, the suppliers of medical equipment, and even the food and laundry services purchased or provided by inpatient institutions. Examining employment concentrations across clusters, rather than just looking at major employers, allows for a comprehensive view at the unique economic strengths of a region or area.

The figure below shows some nationally prominent industry clusters, from the US Cluster Mapping Project (www.clustermapping.us).

A Sample of Prominent Industry Clusters in the US

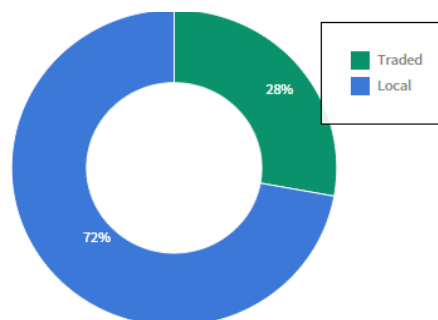


Source: US Cluster Mapping Project

Clusters can also be divided into two types: traded and local. Whether a cluster is traded or local depends on the customers. Traded clusters primarily serve external markets and customers; the clusters in the national map above are all traded clusters. Because the customers are external to the region, traded clusters make regions more competitive and dynamic by bringing in additional capital to a region.

Local clusters primarily serve local markets; the set of local clusters is the same in every region. Local clusters include the types of industries and companies that every region needs: doctors, elementary schools, grocery stores, real estate, and more. At the national level, 36% of jobs are in traded clusters, while 64% of jobs are in local clusters. Local clusters are major employers in every region in the country, and Jefferson Parish is no exception. Local clusters are 72% of jobs in Jefferson Parish, while traded clusters are 28% of jobs – a stronger concentration of local jobs than at the national level.

Traded vs. Local Clusters in Jefferson Parish



Source: US Cluster Mapping Project's Jefferson Parish Data

Traded Clusters

Because traded clusters are critical to the growth of the economy as a whole, looking at the major clusters by the number of jobs, as well as their projected employment growth or decline, offers a snapshot into the major industry strengths of Jefferson Parish.

Table 1: Jefferson Parish Top Ten Traded Clusters by Employment

Cluster	2014 Jobs	Current Wages, Salaries, & Proprietor Earnings	Projected Growth 2015-2024	Projected % Growth 2015-2024
Business Services	10,795	\$69,997	2448	22%
Distribution & Electronic Commerce	10,021	\$66,421	161	2%
Hospitality and Tourism	4,427	\$59,949	-580	-14%
Water Transportation	4,223	\$69,472	-1297	-33%
Insurance Services	2,861	\$78,064	-290	-11%
Construction Products & Services	2,607	\$64,330	-73	-3%
Transportation & Logistics	2,028	\$44,914	172	9%
Oil & Gas Production & Transportation	1,745	\$107,768	-550	-34%
Food Processing & Manufacturing	1,425	\$43,362	33	2%
Financial Services	1,290	\$58,205	264	20%

Source: EMSI

Business Services is the major employer in Jefferson Parish. This is a broad category, includes businesses and jobs like engineers, architects, computer programmers, management consultants, and other professional services. The cluster also includes businesses like executive search services,

telemarketing bureaus, payroll services, limousine services, and other businesses that exclusively serve other businesses.

Distribution and Electronic Commerce is another major employer in Jefferson. This cluster is comprised mainly of wholesale distributors. Water Transportation includes both the actual transporting of goods via barge or other waterborne vessel, but also ship and boat building and repair, the major source of jobs in this cluster in Jefferson Parish. The Transportation & Logistics cluster rounds out other modes of freight, like air, rail, and truck.

While many of these traded clusters employ thousands of people, they are not all projected to grow over the next decade. **Water Transportation, one of Jefferson’s most specialized clusters, is expected to lose fully one third of its jobs, as is Oil & Gas Production and Transportation.** These are major losses that would have significant ripples throughout the economy, especially given the high average wages in these industry clusters.

Local Clusters

A look at the local clusters similarly shows trends in the industries that comprise the majority of employment in Jefferson Parish.

Table 2: Local Clusters in Jefferson Parish

Local Cluster	2012 Employment	2012 Average Wages
Local Health Services	28,229	\$50,113
Local Hospitality	19,142	\$16,026
Local Real Estate, Construction, and Development	16,679	\$47,221
Local Commercial Services	15,593	\$37,210
Local Retail	10,650	\$17,031
Local Food and Beverage Processing and Distribution	7,540	\$29,757
Local Motor Vehicle Products and Services	6,571	\$39,263
Local Financial Services	5,826	\$51,096
Local Community and Civic Organizations	5,788	\$20,149
Local Personal Services (non-medical)	3,903	\$23,922
Local Logistical Services	3,485	\$39,150
Local Entertainment and Media	2,626	\$22,311
Local Household Goods and Services	2,268	\$28,280
Local Utilities	2,161	\$61,823
Local Education and Training	2,121	\$28,329
Local Industrial Products and Services	627	\$44,406

Source: US Cluster Mapping Project

Local Health Services is the largest cluster, either traded or local, in Jefferson Parish. This is owing to the major presence of Ochsner as well as East Jefferson and West Jefferson Medical Centers. This local cluster also has one of the highest average wages.

The second largest cluster, Local Hospitality, employs nearly 20,000 people but the average wage is very low at around \$16,000 – the lowest average wage of any cluster. Similarly, local retail employs over 10,000 people but at very low wages, around \$17,000.

Across the board, local cluster average wages are lower than traded cluster average wages. However, a few industries like Financial Services and Utilities are in similar ranges as traded cluster wages. This could be because financial services institutions often have both local and external customers.

Water Management: A Special Case

A special cluster that comprises elements of multiple traded clusters is Water Management, a strong specialization for both Jefferson Parish and the greater New Orleans region. The major industries or subclusters are:

- Engineering Services
- Fabricated pipe manufacturing
- Heavy and civil engineering construction
- Power and communication line construction
- Water and sewer line construction
- Industrial building construction, and other professional and scientific services.

This industry cluster has been a focus post-Katrina and was defined through case-making research from Deloitte that was commissioned by Greater New Orleans, Inc. (GNO Inc). Water Management has also been the focus of multiple regional and state plans, including the Greater New Orleans Urban Water Plan and the state's Coastal Master Plan. Both of these plans would provide tens of billions in economic impact for the region if they were to be fully funded and implemented. The cluster is also one of five areas of special consideration for economic resilience in the Comprehensive Economic Development Strategy (CEDS) prepared by the New Orleans Regional Planning Commission (RPC) and discussed in the next section of this memo. The Data Center has also conducted some research in this cluster, showing projected job growth of over 7,500 new jobs in the region through 2020. Many of those jobs share skills and projects with other clusters in our region, like Energy and Petrochemical, Construction, and Engineering.

Water Management in Jefferson Parish is already a prominent cluster. Below are some highlights of the cluster's current performance using EMSI data:

- Over 10,165 jobs in 2015
- Employment is projected to grow 16% to 11,751 by 2024
- Average wage of \$72,867
- The largest subcluster is Engineering Services, with nearly 3,000 jobs

When examined this way, Water Management is the second-largest traded cluster in Jefferson Parish.

Summary of Analysis

Jefferson has strong traded clusters, but many of the strongest specializations are facing projected job losses, showing that retention of these employers will be critical. Other clusters are projected to grow slowly, but relative to stable population growth, slow job growth is less of a cause for concern.

The parish's strong local clusters, particularly health services, have the potential to strengthen the economy in the same way as traded clusters by finding external customers. Medical tourism is a strategy that has worked well for other regions with specialized care facilities and is already a focus of Ochsner. Other strategies for local clusters may be similarly effective.

There are also significant overlaps between local and traded clusters. Food and Beverage Processing and Manufacturing industries have both local and external customers, as do Transportation & Logistics and Finance & Insurance. The presence of these clusters in both categories, traded and local, indicates strong assets and workforce that should be leveraged to grow the Jefferson Parish economy.

IV. CEDS Analysis

To ensure that JEDCO's economic development strategy is aligned with regional priorities, this baseline assessment examines the region's economic development planning. JEDCO participates in regional planning efforts, and this update to the EDGE plan will seek to further align the organization's activities with regional trends and priorities.

The U.S. Economic Development Administration (EDA) requires routine updates to an Economic Development District's (EDD) five-year Comprehensive Economic Development Strategy (CEDS). The New Orleans Regional Planning Commission (RPC) is the designated EDD which only includes five parishes comprising the RPC: Jefferson, Orleans, Plaquemines, St. Bernard, and St. Tammany. The CEDS also includes analysis for all seven parishes within the Metropolitan Statistical Area (MSA) which has the previous five parishes, plus St. Charles and St. John the Baptist parishes. All EDA applications must reference how their project fits with the relevant CEDS. Other relevant features of the CEDS include:

- Last updated for 2014-2018
- Used for regional-local alignment for any EDA application by JEDCO
- Any project by applicants for EDA funding must reference their fit in the CEDS

The CEDS uses a vision and a set of goals to frame the five year plan. For the 2014-2018 edition, those included:

VISION: "Greater New Orleans will be a thriving, resilient, sustainable, prosperous and equitable region"

GOALS:

1. Achieve Economic Growth
2. Leverage Workforce Needs to Upgrade Region's Growth
3. Improve Economic Equity
4. Enhance the global competitiveness of the Region
5. Develop the Region's infrastructure
6. Promote Regional Collaboration

Each of these goals has a several objectives and an associated performance measure to track progress over time.

Plan of Action

Included in the CEDS is a Plan of Action that includes the following regional priorities:

1. Workforce Development
2. Leverage Strength within the Region
3. Maintain & Repurpose Assets
4. Develop Innovation
5. Enhance Infrastructure for Economic Development
6. Improve Quality of Life

The Plan of Action also includes many priority projects and identified as action for one or a few parishes or for all parishes. The table below highlights the priorities specifically identified for Jefferson Parish:

Table 3: Summary of Jefferson Parish Priority Projects

Plan of Action: Regional Priorities	Priority Projects for Jefferson Parish Only
<u>Aerospace & Advanced Manufacturing</u>	<ul style="list-style-type: none"> • Delgado, Avondale Campus <i>Part of "Facilities with a Purpose" to create an Advanced Manufacturing Center of Excellence by renovating and expanding an existing facility which will respond to the demands of business and industry for a skilled workforce. The Center will create a sustainable long term solution to critical workforce shortages and provide a pipeline of skilled workers</i>
<u>Capacity Building</u>	<ul style="list-style-type: none"> • Cluster analysis for City of Kenner <i>To examine potential to build strengths in a particular industry or industries</i>
<u>Energy Production, Petrochemical & Plastics</u>	<ul style="list-style-type: none"> • Delgado, Advanced Technology <i>One "Facilities with a Purpose" building , the Advanced Technology Building and campus expansion will serve the needs of the oil, gas and chemical industry workforce needs with instrumentation, chemical technician, engineering and deep water oil production programs</i>
<u>Enhancing Quality of Life</u>	<ul style="list-style-type: none"> • Redeveloping Fat City • Fairfield <i>Planning & Development of the Fairfield area of the Westbank of the Mississippi River in Jefferson Parish</i> • Industrial Corridor Revitalization <i>Reuse/Redevelopment of industrial corridors including the Harvey Canal and Huntington-Ingalls shipyard and in Old Jefferson</i>
<u>Entrepreneurial & Small Business Support</u>	<ul style="list-style-type: none"> • Churchill Technology & Business Park <i>Expansion of entrepreneurial support activities</i>
<u>Green & Environmental Technology</u>	<ul style="list-style-type: none"> • Establishment of a wetlands mitigation bank(s) <i>Wetlands mitigation and drainage solutions are critical to the sustainability of our coastal region.</i>
<u>Higher Education</u>	<ul style="list-style-type: none"> • Delgado, Blair Campus <i>A campus renovation and expansion will provide a state-of-the-art classroom and laboratory facility in Metairie</i>

<p><u>International Trade & Logistics</u></p>	<ul style="list-style-type: none"> • Delgado, River City Campus <i>One "Facilities with a Purpose" building, the River City Campus, will be located in the Churchill Technology & Business Park. The campus will accommodate training programs to support commerce along the Mississippi River to include transportation/logistics, maritime, marine engine, engineering and automotive technology in the growth area of West Jefferson parish.</i> • Expansion of Warehousing & Distribution <i>The Huey P Long Bridge improvements have opened up portions of the West Bank of Jefferson Parish as ideal locations for warehousing and distribution uses, leveraging and expanding the predominately developed Elmwood area which is already a warehousing and distribution hub</i>
<p><u>Regional Economic Development Districts</u></p>	<ul style="list-style-type: none"> • Churchill Technology & Business Park <i>Infrastructure Improvements to enable the Phase II expansion of the Business Park</i>
<p><u>Tourism</u></p>	<ul style="list-style-type: none"> • Enhancement of Rivertown <i>Enhancements to the Rivertown district in the City of Kenner, including LaSalle's Landing pier and venue for outdoor retail events, to attract tourists and adjacent properties such as the Old Kenner High School</i> • Development of Laketown <i>Enhancements to the existing conference center and surrounding properties and the addition of mixed-use developments to enhance the conference center as a tourism destination.</i> • Westwego Riverboat Landing <i>Improvements to the landing and/or adjacent infrastructure to support use the landing for a river boat cruise line</i>

Source: Comprehensive Economic Development Strategy: Priority Projects Memo, September 2014

Regional Cluster Analysis Findings

Similar to the cluster analysis described and conducted in Section III of this memo, the CEDS contains an analysis of traded and local clusters for the region. A summary of these clusters is provided in Table 4 below. The Location Quotient (LQ) shown in this table is a relative measure of the number of jobs in that clusters within the New Orleans region compared to the number of jobs in that cluster nationally. A LQ of 1 indicates a greater proportion of jobs in the region and is considered a regional strength with economic benefits. The clusters are grouped by Regional Specialties (LQ > 1.3), Regional Strengths (LQ = 1 to 1.3) and potentially strong Clusters (LQ = 0.5 to 1.0). For reference, the cluster's rank by number of jobs in Jefferson Parish alone is also included.

Table 4: Traded Clusters in the New Orleans MSA

	Cluster	Location Quotient (LQ)	Rank in Jefferson
Specialties	Water Transportation	10.4	4
	Upstream Chemical Products	4.9	-
	Oil & Gas Production & Transportation	3.8	8
	Fishing & Fishing Products	2.9	-
	Video Production and Distribution	2.4	-
	Construction Products & Services	1.8	6
	Hospitality & Tourism	1.8	3
	Performing Arts	1.5	-
	Environmental Services	1.4	-
Strengths	Education & Knowledge Creation	1.2	-
	Vulcanized & Fired Material	1.2	-
	Jewelry & Precious Metals	1.0	-
	Distribution & Electronic Commerce	1.0	2
Potentially Strong	Leather & Related Products	1.0	-
	Food Processing & Manufacturing	1.0	9
	Business Services	0.9	1
	Transportation & Logistics	0.7	7
	Music & Sound Recording	0.7	-
	Insurance Services	0.7	5
	Financial Services	0.6	10
	Downstream Chemical Products	0.6	-
	Downstream Metal Products	0.6	-
Lighting & Electrical Equipment	0.5	-	

Source: *Comprehensive Economic Development Strategy for the New Orleans Region, 2014*

Additionally, Nascent Clusters, shown in the table below, demonstrate promising activity whether from strong companies, growing momentum, or underutilized local assets (e.g. Michoud and Avondale).

Table 5: Nascent Regional Traded Clusters

Cluster	Location Quotient (LQ)
Aerospace Vehicles & Defense	0.20
Information Technology & Analytical Instruments	0.18
Biopharmaceuticals	0.04

Source: *Comprehensive Economic Development Strategy for the New Orleans Region, 2014*

Emerging Clusters, shown in the table below, do not yet exist or fit cluster methodology, yet present promise.

Table 6: Emerging Regional Traded Clusters

Cluster
Emerging Environmental, Sustainable Industries
Disaster Response & Resiliency
Costal Restoration
Water Management
Bio-Medical or Bio-Sciences
Advanced Manufacturing
Digital Media
International Trade

Source: Comprehensive Economic Development Strategy for the New Orleans Region, 2014

V. Status of Previous Economic Development Action Items

The previously developed EDGE 2020 plan was released in May 2009. This plan had 19 action items in the economic development focus area. An update to the plan, released in 2012, added an additional five items for a total of 24 action items in economic development.

The action items had a wide range of topics, many of which included infrastructure or other special projects. Since 2012, the national and regional economic landscape has shifted significantly, especially in the following areas:

- Oil Prices – crude has dropped significantly, while natural gas fluctuations have led to a boom in facilities that use LNG as a manufacturing input
- State Budget – continued challenges with the state’s budget have affected higher education and health care
- Transportation Priorities – earlier action items identified specific projects as priorities, and those are no longer aligned with current community concerns and planned improvements
- Medical Facilities – East Jefferson and West Jefferson Medical Centers are in the process of being leased to private operators, a development that was not anticipated in 2012

Certain action items dealt with topics or projects that are still of concern today, including:

- The development of the Fairfield area and Churchill Park
- Workforce development in Jefferson Parish
- Business retention and expansion
- State tax credits for the film industry
- The reuse of Avondale Shipyard
- Support for entrepreneurs and small businesses

The current status of the 24 economic development action items is provided in Attachment A.

Attachment A: Jefferson Edge 2020 Action Items: Economic Development

2012 Status Updates Originally Prepared by GCR, Inc.

ED = Economic Development

Action Item		Original Timeline	2012 Progress	Current Status
ED1	Modify land use regulations and invest in infrastructure to develop an "Elmwood West" commercial and industrial node	Issue RFP or initiate study in 2010; initiate regulatory changes/improvements in 2011, 2012	Jefferson Parish retained UNO and Digital Engineering to complete a strategic plan for the area known as "Fairfield." The focus of the plan is future land use and infrastructure and was driven by stakeholder input, led by JEDCO.	The plan is currently under review by Jefferson Parish Planning and it will go to the council for adoption.
ED2	Collaborate with the Airport and the City of Kenner to facilitate the redevelopment of "buyout" properties	Complete and issue RFP in 2009. Complete redevelopment plan in 2010.	A draft cooperative endeavor agreement (CEA) is under review between the City of Kenner, the Airport, and the City of New Orleans. A disposition of the properties is also being postponed until a study is completed by UNO concerning the properties. The study will recommend the optimal land uses, any zoning changes, whether rights of way need to be rescinded, and whether properties should be bundled vs. being sold off individually.	The UNO study is completed. Properties are in the process of being appraised and will be auctioned in October.
ED3	Continue to aggressively market the first 90 acres of the Churchill Technology and Business Park	On-going	The land has been entirely cleared, but the land filling operation (to make parcels development ready) is not yet complete. This process began in December of 2011. Patrick F. Taylor Science & Technology Academy and Conference Center has been completed.	Delgado is starting construction on 10.5 acre campus in the summer, with an estimated enrollment of 3,000 students. This will hopefully start to drive retail demand in the area, which will assist in recruiting businesses to the park.
ED4	Identify partners and potential funding sources for Phase II development of the remaining 50 acres at the Churchill Technology and Business Park.	Identify funding and timetable by 2011	Fill continues to be deposited in the available land and JEDCO continues to seek funds to develop an access road into the rear of the park. Louisiana Economic Development (LED) and EDA were examined as funding sources.	A grant for the access road, through LED's site certification (EDRED) program, was denied. JEDCO's Phase II priority is still the heavy access haul road in the rear of the park.
ED5	Build upon existing efforts of GNO Inc. and commission a comprehensive study and action plan for the workforce development infrastructure in the New Orleans region	Initiate this phase of workforce development study before year end, 2010	GNO Inc.'s administers the local job search site, worknola.com. The site provides a marketing tool and a simple, comprehensive, and free resource for the Greater New Orleans area. In 2011 and 2012, the average monthly job postings totaled 106 and 167 respectively, an increase of 58%. GNO Inc. has hired Ginger Powers as an educational liaison to engage the institutions of higher education in economic development and	JEDCO joins forces with GNO, Inc. on certain initiatives and is a supporting entity of the organization. Worknola.com is a successful initiative. March 2015 has seen nearly 400 job postings, compared to averages between 100 and 200 in 2011 and 2012. JEDCO's strategic operating plan outlines tasks that include compiling workforce resources and creating a

Attachment A: Jefferson Edge 2020 Action Items: Economic Development

2012 Status Updates Originally Prepared by GCR, Inc.

	Action Item	Original Timeline	2012 Progress	Current Status
			workforce issues; they also invited the presidents of a number of two- and four-year institutions of higher education to serve as ex-officio members of the Board of Directors.	<p>package for business owners that showcases apprenticeships, internships, training programs, and other opportunities. JEDCO is also involved in the Harvey Canal Industrial Association's career development efforts.</p> <p>JEDCO has not specifically commissioned a study or action plan for workforce development infrastructure in the region.</p>
ED6	Support the development of a passenger rail line from New Orleans to Baton Rouge, with a stop in Jefferson Parish	Secure funding for study in 2010, 2011; initiate study in 2011, 2012; initiate capital program in 2014	<p>The CONNECT coalition, a project of the Center for Planning Excellence (CPEX), continues to build support within the New Orleans-Baton Rouge "super region" for a passenger rail connection between the two core cities. CONNECT recently sponsored their second annual policy forum, an event that brought together transportation officials from the state and the two regions.</p> <p>Jefferson Parish Planning Department and Jefferson Transit are institutional partners of the CONNECT Coalition. CONNECT was instrumental in successfully pushing the adoption state legislation creating a Louisiana Super Region Rail Authority to oversee and advance the passenger rail project.</p>	This effort was dormant, but efforts from CONNECT led to a new rail corridor study that was completed and released in February 2014. That study was funded by the Regional Planning Commission, Capital Region Planning Commission, and Baton Rouge Area Foundation. However, since the feasibility study's release, there have been no further efforts towards implementation.
ED7	Support the implementation of transportation projects of regional significance, such as a light rail line to the Airport; improvement to the Earhart Expressway, and the construction of I-49	Timelines vary by transportation project; aim to have studies underway for all key transportation projects by 2011	<p>Given the extremely high cost of the I-49 extension project, DOTD is re-evaluating and re-scoping projects along the corridor, choosing to take on implementable pieces based on available funding.</p> <p>For the Earhart flyover, there may be enough funding to design at least one phase of the project. This project would be managed by DOTD. The Earhart/Causeway interchange has stalled due to the absence of a funding source. However, the RPC is examining ways to design the project in advance of any external funding becoming available.</p> <p>There has been no momentum on the proposed light rail between the Airport and Downtown New Orleans.</p>	<p>The transportation issues that are currently the most relevant are all related to freight rail: the Gretna (NO & GC) railroad relocation on the West Bank, the New Orleans Rail Gateway project on the East Bank, and the coal terminal trains on the West Bank.</p> <p>The Earhart/Causeway interchange has been studied for several years. A supplemental environmental assessment dealing only with the Airline-to-Causeway southbound ramp widening is underway, expected to be completed this summer. The estimated design completion is scheduled for summer 2017 and the estimated cost is \$60 million, most likely to be built in phases.</p>

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Action Item		Original Timeline	2012 Progress	Current Status
ED8	Collaborate with major railroads and the Regional Planning Commission to implement the New Orleans Rail Corridor Gateway Study	Secure funding for environmental assessment in 2010; initiate assessment in 2010, 2011; initiate capital improvements in 2013, 2014	The Environmental Impact Statement (EIS) for the Rail Corridor Gateway study is underway. Project scoping meetings were held in February, 2012; a draft EIS and public hearings have been ongoing; and the final EIS is anticipated in spring of 2014. A record of decision (ROD) is expected in the summer of 2014. Michael Baker Co. is the lead consultant, and the project is on schedule.	The timeline for the final EIS hearing and ROD has been extended by one year, into 2015. The Middle Belt Alternative has met resistance from neighborhood groups in New Orleans.
ED9	Work closely with EJGH, Ochsner Health System, and WJGH to facilitate the expansion of medical facilities throughout the Parish.	On-going	No further activity at this time. Refer to July, 2011 status report for more information on Ochsner's expansion plans and on-going capital projects.	JEDCO is working with Ochsner on a \$400M Capital Plan in Kenner and Jefferson. The Urban Land Institute (ULI) is facilitating a Technical Assistance Panel on the Jefferson Hwy. corridor. JEDCO is a sponsor of this initiative and a strong participant.
ED10	Oppose changes in the federal tax code that would discourage off-shore oil and gas exploration	Initiate outreach in 2009; continually monitor federal tax policy to preserve existing tax breaks for oil and gas exploration	<p>In response to the slowdown in offshore activity following the 2010 BP oil spill, GNO Inc. has pushed for a number of measures to increase energy exploration and production activity. Two proposals were the "Putting the Gulf by to Work Act" and the "Domestic Jobs, Domestic Energy, and Deficit Reduction Act" in Congress. Both of the measures passed the House of Representatives but stalled in the U.S. Senate.</p> <p>GNO Inc. continues to publish the Gulf Permitting Index (GPI), a recurring assessment of permit and drilling activity relative to pre-spill levels. GNO Inc. has also continued to work with the state government and Mineral Board to reduce royalty rates for offshore activity. The 2010 oil spill delayed these efforts, but in May of 2011, the La Dept. of Natural Resources released a draft proposal for a new royalty policy. This draft is still under review, with potential action by the State Mineral Board later in 2012.</p>	As of 2013, the pace of permitting had leveled off. The decline in crude prices in late 2014 and early 2015 is now driving the pace of permitting, rather than a moratorium or other federal-level factors.
ED11	Work to preserve funding in the federal defense budget for weapons systems that are produced in Jefferson Parish and in the New Orleans region	Initiate outreach in 2009; continually monitor federal spending and defense policy to preserve existing weapons programs in Jefferson and the New Orleans area	The primary focus of regional efforts regarding weapons systems has been to preserve jobs at Avondale Shipyards whose planned closure was announced in the summer of 2010. While GNO, Inc., JEDCO, and other stakeholders have continued their efforts to preserve jobs and repurpose the facility, no major breakthroughs have occurred since the last status report was completed in July, 2011. Huntington Ingalls continues to examine other suitors for the site. See ED16 for a further description of progress in re-using Avondale.	As of late 2014, no new tenants or work has been found for the Avondale Shipyard. Huntington Ingalls attempted to work with Kinder Morgan on a partnership for more oil and gas fabrication work, but that deal fell through within the last several weeks. JEDCO has always marketed the Avondale site, but the potential listing of the site with a broker would ease this process.

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ED12	Collaborate with Jefferson's state legislative delegation to renew the state motion picture, digital media, music production, live theater, and motion picture infrastructure tax credits.	Pass legislation in 2009, 2010 at the latest	Action complete. For more information, refer to October, 2009 status update.	With the state's budget in crisis, the legislature is once again looking at modifying these credits in 2015. Whether they do so in a manner that would be detrimental to Jefferson's film industry is still in question. Another state program, the Enterprise Zone, might also be altered this session. Jerry Bologna sits on the board of LIDEA, which is paying close attention to this potential change.
ED13	Identify major national growth industries and the potential for locally based companies to capitalize on emerging economic opportunities	Analyze LED study and coordinate with GNO Inc. in 2010; initiate analysis of and outreach to relevant local and national businesses in 2010, 2011	According to JEDCO, the State and GNO Inc. have backed away from certain conclusions from the "blue ocean" study that was completed by LED several years ago to identify promising industries for growth. Certain industries, though, such as the sustainable industry subsector, have remained a point of emphasis in recruitment and retention efforts. In the case of Jefferson Parish, JEDCO focused their retention efforts on companies that had the potential to fall into these blue ocean categories with little success. JEDCO is now focusing much of its marketing efforts on national site selectors. The natural gas boom elsewhere in Louisiana has led to increased attention from industries looking to capitalize on the abundance of natural gas and accompanying low prices.	LED's blue ocean industries were not well-defined by NAICS codes, which made for a scattershot approach to business attraction. LED also identified "economic drivers" – companies with over 50 employees, employment and revenue growth over the past 3 years, and not in a retail or service industry. Those companies are targeted through retention strategies. With the latest Jefferson EDGE update, JEDCO hopes to identify industry clusters for business attraction and retention strategies.
ED14	Partner with the Port of New Orleans, GNO Inc., and the Baton Rouge Chamber of Commerce (BRAC) to expand opportunities for international shipping and trade	Analyze international trade study upon completion in 2009; coordinate with and offer technical assistance to GNO, Inc. and other agencies in the implementation of the study's recommendations	Over the past year, there has not been major progress on this initiative beyond what was reported in the last status report from July of 2011. Infrastructure tax credits for investments in port facilities were extended through 2017, thanks to legislation sponsored by Senator Appel in the 2011 legislative session. Also, periodic trade junkets to other countries (such as Brazil) have taken place over the past year.	The state established the Louisiana International Commerce Board, and JEDCO is one of the nominating entities. JEDCO approached the Port of New Orleans about the Avondale site, but the Port did not have the available funding to transform the site into a port facility.
ED15	Aggressively market Jefferson Parish as a	Complete internal marketing strategy in 2009, 2010; initiate targeted outreach	As of the last status report, in July 2011, JEDCO had met with the Marine Well Containment Company, the joint venture of the major oil companies, to discuss basing their worldwide operations at the Avondale shipyards	In a post-BP oil spill and post-crude oil price crash world, this entire strategy needs revision. JEDCO plans to target and market to companies with offshore leases and

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	Action Item	Original Timeline	2012 Progress	Current Status
	headquarters for energy companies	efforts to energy companies in 2010, 2011	<p>site. This effort was unsuccessful and Huntington Ingalls is now looking at other suitors for the Avondale site. The previous report also discussed the acquisition of locally based energy firms by larger national firms— transactions that can result in the closure of local businesses. JEDCO has not yet finalized a strategy to reach out to these larger firms when transactions happen.</p> <p>Following the BP Horizon spill, new government inspection and regulatory positions were established, including many with the New Orleans region Bureau of Ocean Energy Management, Regulation and Enforcement (BOEMRE). The Elmwood office has increased the number of inspectors and their salaries over the past year, thereby diminishing the disparity in BOEMRE pay that had existed between the Houston and the New Orleans offices.</p>	encourage them to base their operations at the Harvey Canal. In Churchill Park, the businesses with the most likelihood of relocating are engineering and support services businesses, rather than energy headquarters.
ED16	Continue to aggressively reach out to businesses in Jefferson Parish to support business retention, expansion, and access to capital	On-going	<p>JEDCO recently secured commitments from Petrotech to move its headquarters to Elmwood and Revolution Foods to move a manufacturing location to Kenner. JEDCO is in advanced negotiations with a medical device manufacturer interested in moving their headquarters to the Churchill Technology and Business Park.</p> <p>Another major retention project is the attempt to preserve shipbuilding jobs at Avondale. Huntington Ingalls is in negotiations with a new operator for the facility, but no deals have been finalized.</p> <p>Following from the recommendation of the last status report (July 2011), JEDCO is working on two back office prospects that would create or retain up to 2,500 jobs in Jefferson. Two main issues still need to be resolved: 1) discussions with Nucor about placing office functions in Jefferson Parish and 2) creating greater structure in the use of the Parish's economic development fund.</p>	JEDCO has had some significant wins over the last few years, both in retention and attraction. In particular, Cornerstone Chemical, DynoNobel, Smoothie King, and 4 th Source have been major wins for investment and employment.
ED17	Ensure that the Louisiana Small Business Development Center maintains a presence at	Initiate outreach in 2009; secure a partnership in 2010	JEDCO has not entered into a formal CEA with the SBDC, but through a verbal agreement with JEDCO, the SBDC has occupied space at the JEDCO headquarters and has provided valuable services to developing businesses. These services include one-on-one counseling with incubator	The Jefferson UNO campus was sold, so JEDCO has reached out to the LSBDC to gauge their interest in moving to Churchill Park.

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	the Churchill Technology and Business Park		tenants and others. Additionally, they have held workshops and seminars for incubator tenants and the general public.	
ED18	Seek permanent financing and support for an on-going marketing effort for Jefferson Parish	Conduct outreach and secure multi-year funding commitments in 2009, 2010	<p>The public outreach campaign to support Jefferson EDGE 2020 has stalled in the past year due to budget shortfalls. Jefferson Life magazine, after a promising start, saw its advertising revenue wane. As a result, the magazine is on indefinite hold. Attempts to find a new publisher to purchase Jefferson Life have been unsuccessful to date.</p> <p>In the meantime, the Parish continues to maintain the www.opportunityliveshere.com website as well as a Facebook presence.</p>	The need for the magazine has waned. JEDCO continues to have a solid social media and web presence. The JEDCO Challenge during Entrepreneur Week is also used as a promotional and brand-building opportunity.
ED19	Conduct a review of the Jefferson Parish permitting office to improve performance and to make the permitting process more business friendly	Initiate review in 2011. Finalize recommendations and begin to implement recommendations in 2012.	<p>At the direction of JEDCO's economic development strike force, ED19 is a new action item that was added to the Economic Development plan in 2011. There was a growing sense that Jefferson did not offer a sufficiently efficient and user-friendly permitting process.</p> <p>Consequently, the Parish administration convened a group of stakeholders to review the permitting process and recommend strategies for improvement. JEDCO also commissioned GCR to prepare a report examining existing practices in Jefferson and best practices in other communities. As of June 2012, the Committee and the GCR report had completed their review and had finalized their recommendations. These will be presented to the administration in July, 2012.</p>	This action item was completed, and there has been significant improvement. A new study was completed and the permitting system is moving online.
ED20	Improve the process for monitoring and permitting film activity in Jefferson Parish	Complete and adopt permitting plan by summer 2012. Begin implementation by mid-2013. Full implementation by year end 2014.	Not part of 2012 status report	The plan was completed, but implementation progress is unclear.
ED21	Conduct a survey to monitor public awareness of JEDCO and to increase familiarity with the programs that JEDCO offers	Complete survey in spring/summer 2012; conduct follow-up surveys every year to two years thereafter	Not part of 2012 status report	<p>A few surveys have been done over the past 8 to 9 years, but the results were inconclusive. No survey has been done in the last two years.</p> <p>JEDCO has good name recognition, but many in the community do not understand what they do.</p>

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ED22	Assume an active role in the redevelopment of Louis Armstrong Airport	Participate in planning process through approximately 2014. Monitor construction and implementation through approximately 2020.	Not part of 2012 status report	JEDCO participated in meetings with Kenner Economic Development Committee, but not as much in the planning process. They have pushed the need for a study of drainage issues. It may be necessary for JEDCO to push the focus to development of the old terminal.
ED23	Provide support to the City of Kenner in implementing the <i>Kenner 2030</i> strategic plan	Monitor implementation on an on-going basis	Not part of 2012 status report	<p>Jerry Bologna is on the Laketown RFP selection committee and has provided recommendations for other participants. The City of Kenner received a matching grant from EDA/RPC to study the Veterans Corridor. JEDCO is on the project team for this study.</p> <p>Additionally, JEDCO is a member of the Rivertown Main Street board of directors and the Mayor's Economic Development Committee, as well as its Business Development Subcommittee. JEDCO works regularly with both the Esplanade Mall interim management and Simon Properties senior leadership to help boost mall traffic and connect prospective developments to the mall.</p>
ED24	Capitalize on the newly completed NOLA Motorsports Park to explore opportunities to grow the automotive industry in Jefferson Parish	Completion of internal assessment and strategy by mid-year 2013. Engage automotive industry starting in 2013, 2014.	Not part of 2012 status report	<p>The Indy Grand Prix of Louisiana took place at the park for the first time in April 2015. JEDCO marketed the conference center and the Andretti Group used it for the full week of the race.</p> <p>Nola Motorsports Park has been supportive of JEDCO and is beginning to utilize JEDCO services. Churchill Park hosted the validation center for the IndyCar race, with participants coming into the park constantly throughout the duration of the event.</p>