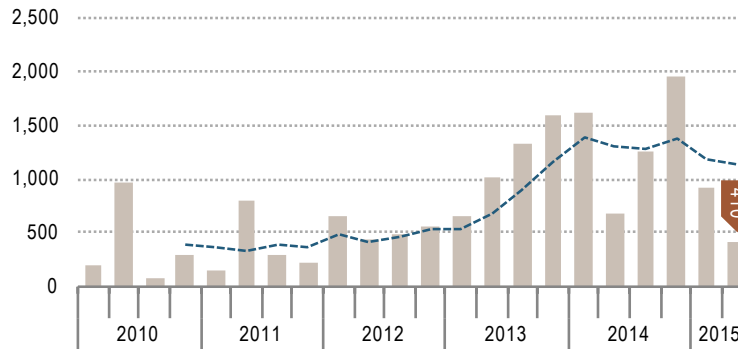


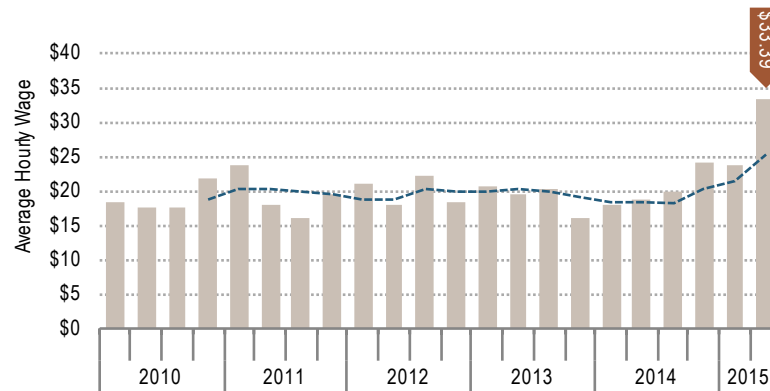
### JOBS ANNOUNCED BY ASSISTED COMPANIES

There were 410 assisted jobs added to Nevada's economy in the second quarter of 2015. These jobs were brought in by 13 companies; 11 are new to Nevada and two are existing companies expanding operations. Of the 13, seven are manufacturing operations.



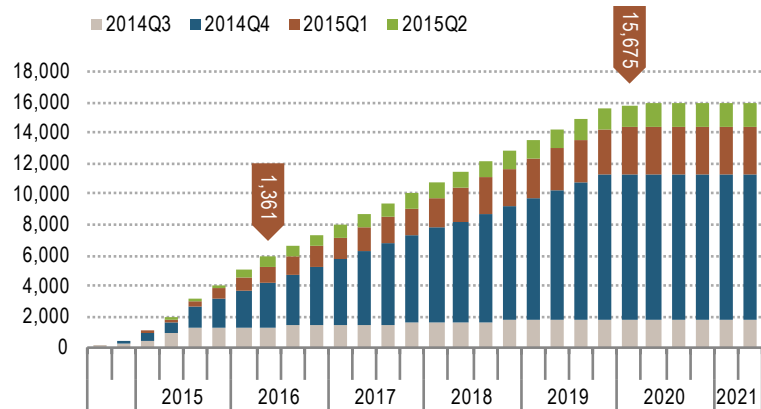
### WAGES PAID BY ASSISTED COMPANIES

The average hourly wage paid by assisted companies jumped by \$9.72 to \$33.39 in the second quarter. This increase was largely driven by the 20 very high-paying Fidelity National Financial jobs. If that company were removed from this quarter's statistic, the average wage would have been \$19.42.



### PROJECTED JOBS FROM ASSISTED COMPANIES

For the year ending June 2015, there were 77 assisted companies slated to add 5,702 jobs to Nevada's economy. These jobs are expected to come online within one year of announcing expansion or relocation. Once they are fully staffed, the five-year projected build-out job count is expected to be 15,023.



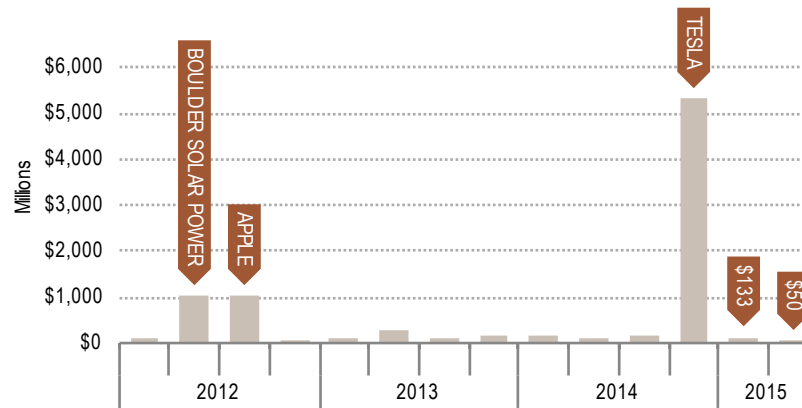
### ANNUAL ASSISTED COMPANY STATISTICS

With the assistance of economic development agencies across the state, 34 companies added 1,326 jobs to Nevada's economy in the first half of Calendar Year 2015. Although these metrics are below those measured in the same period last year, the average wage has improved significantly.

Year	COMPANIES	ASSISTED JOBS	AVG. WAGE
2009			
	29	1,198	\$17.29
2010			
	32	1,556	\$18.45
2011			
	42	1,472	\$18.48
2012			
	74	2,156	\$19.93
2013			
	113	4,612	\$18.70
2014			
	97	5,484	\$20.65
2015YTD			
	34	1,326	\$26.68

### ASSISTED COMPANY INVESTMENT

Capital investment by assisted companies came in at \$50.2 million in the second quarter. Over 56 percent of that investment was made by Natural Resource companies, followed by Manufacturing at 18.5 percent.

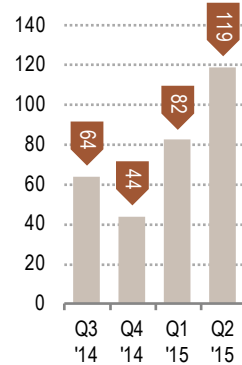


### RECRUITMENT ACTIVITY

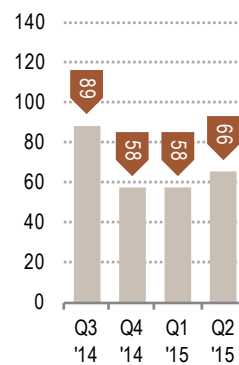
#### 2014 Q2 - 2015 Q2

The number of wins were down in the second quarter, while activity reported in the earlier stages of the recruitment pipeline continued to improve. This sends a positive signal for future job and investment growth.

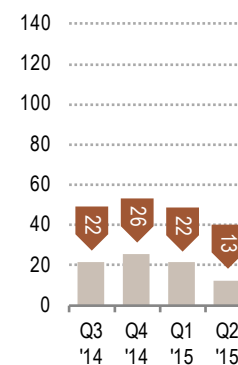
#### NEW LEADS



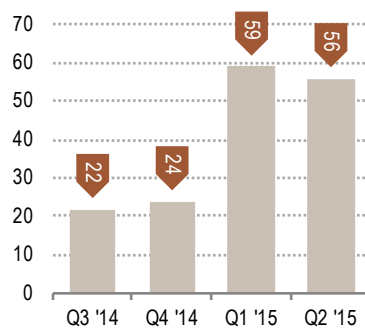
#### NEW PROSPECTS



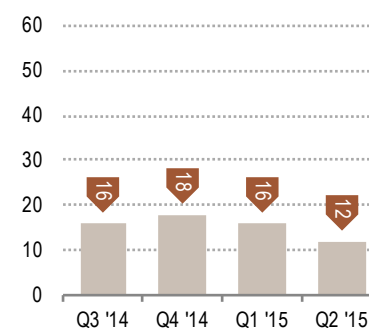
#### NEW WINS



#### CUMULATIVE LEADS



#### CUMULATIVE PROSPECTS



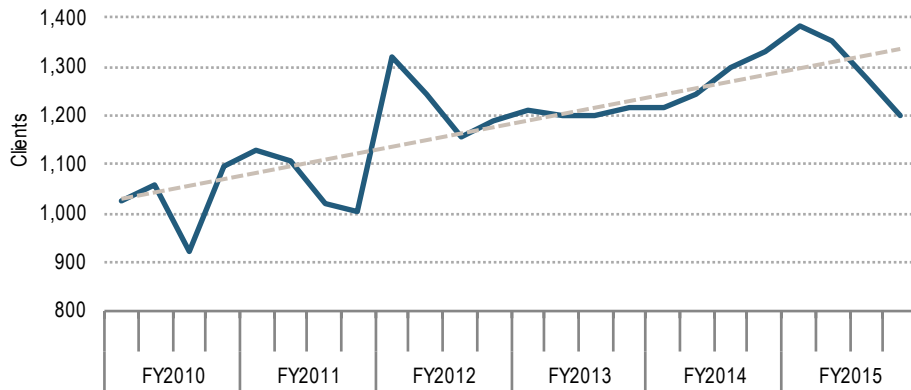
### GLOBAL RECRUITING

In the second quarter of 2015, there was a slight decline in the cumulative number of Global leads and prospects as there were less generated in the current period than became inactive from previous periods. In total there are currently 56 active leads and 12 verified prospects.

### INTERNATIONAL TRADE

- » In April, GOED's Director of International Trade traveled to Ireland, England, Poland, Germany, and Italy to meet with representatives and delegates in preparation for the Governor's European trade mission held in July. To date, this was the most complex trade mission facilitated by GOED.
- » During the months of May and June, GOED's International Division focused its attention on preparing the Governor's European trade mission which included six different tracks and five countries: the Governor's track, Education and Workforce Development, Nevada Commission on Tourism, Las Vegas Convention and Visitors Authority, the Nevada Water Center of Excellence, and international trade.

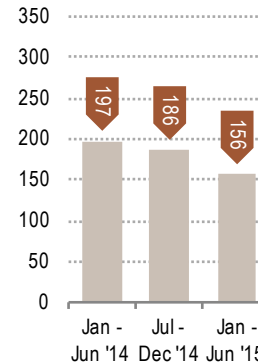
**PROCUREMENT TECHNICAL ASSISTANCE CENTER**



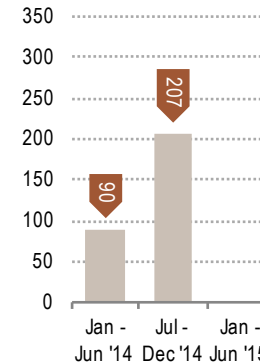
	CLIENTS	PRIME CONTRACT AWARDS			SUBCONTRACT AWARDS		
		NO.	AMOUNT	AVERAGE	NO.	AMOUNT	AVERAGE
FY 2012	1,191	215	\$26,203,583	\$121,877	46	\$27,207,340	\$591,464
FY 2013	1,217	247	\$69,553,216	\$281,592	23	\$4,013,194	\$174,487
FY 2014	1,330	325	\$45,340,593	\$139,510	47	\$6,030,228	\$128,303
FY 2015 YTD	1,200	300	\$52,737,575	\$175,792	31	\$7,260,074	\$234,196

**EMERGING SMALL BUSINESS PROGRAM**

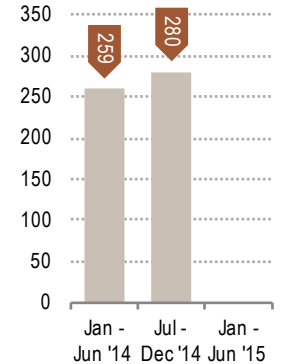
**BUSINESSES CERTIFIED**



**BUSINESSES SOLICITED**



**CONTRACTS AWARDED**



	BUSINESSES	BUSINESSES	CONTRACTS		
	CERTIFIED	SOLICITED	NO.	AMOUNT	AVERAGE
January - June 2014	197	90	259	\$919,458	\$3,550
July - December 2014	186	207	280	\$1,847,251	\$6,597
January - June 2015	156	NA	NA	NA	NA

EMERGING SMALL BUSINESS PROGRAM

**OVERVIEW**

- » The current number of Certified Emerging Small Businesses has expanded by 40.7 percent since the end of last year and now stands at 539.
- » Local Government agencies have until the end of September to report the number of solicitation or contract metrics. Soon after those are received the annual ESB activity report of both state and local agencies will be sent to the Governor's Office, the Legislative Council Bureau, and posted on the GOED Web site.

PROCUREMENT TECHNICAL ASSISTANCE CENTER

**ACCOMPLISHMENTS FY2015**

- » The number of active Procurement Technical Assistance Center (PTAC) clients dropped by 9.8 percent from a year ago, while contract amounts have increased by 16.8 percent over the same period.
- » PTAC met or exceeded all their current quarter and annual goals as established by the Defense Logistics Agency.
- » Regular communication, consistent outreach, and quality events by PTAC staff continue to improve the active client base and their access to government markets.

## NEVADA FILM OFFICE

### NEVADA FILM OFFICE ANNUAL PRODUCTION REVENUE

FISCAL YEAR	NO. OF PRODUCTIONS	REVENUE
2005	789	\$120,208,978
2006	776	\$102,945,418
2007	425	\$113,748,400
2008	436	\$82,727,400
2009	361	\$91,900,600
2010	367	\$81,130,250
2011	479	\$102,525,600
2012	520	\$88,783,700
2013	559	\$67,571,708
2014	370	\$58,716,755
2015	499	\$65,139,732



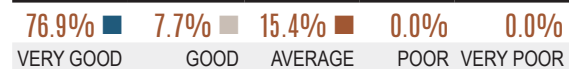
#### AVAILABILITY



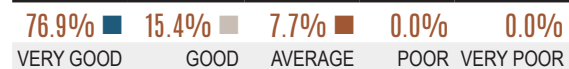
#### RESPONSIVENESS



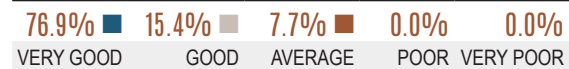
#### KNOWLEDGE



#### WILLINGNESS TO HELP



#### OVERALL



### CLIENT SATISFACTION SURVEY

Customer responses to the Nevada Film Office Client Satisfaction Survey were well above average in the second quarter. The majority of respondents, 85 percent, rated their experience as either "good" or "very good" on availability, responsiveness, knowledge, willingness to help, and overall level of service.

### COMMUNITY DEVELOPMENT BLOCK GRANTS

	NO. OF GRANTS	ALLOCATION
2010	24	\$2,895,981
2011	32	\$2,612,161
2012	27	\$2,170,726
2013	22	\$2,445,704
2014	24	\$2,439,168
2015	20	\$2,544,500

#### 2015 GRANTS

- » 13 Economic Opportunity grants totaling \$2,129,086
- » 6 Suitable Living Environment grants totaling \$365,414
- » 1 Housing grants for \$50,000

#### GRANT PROGRESS

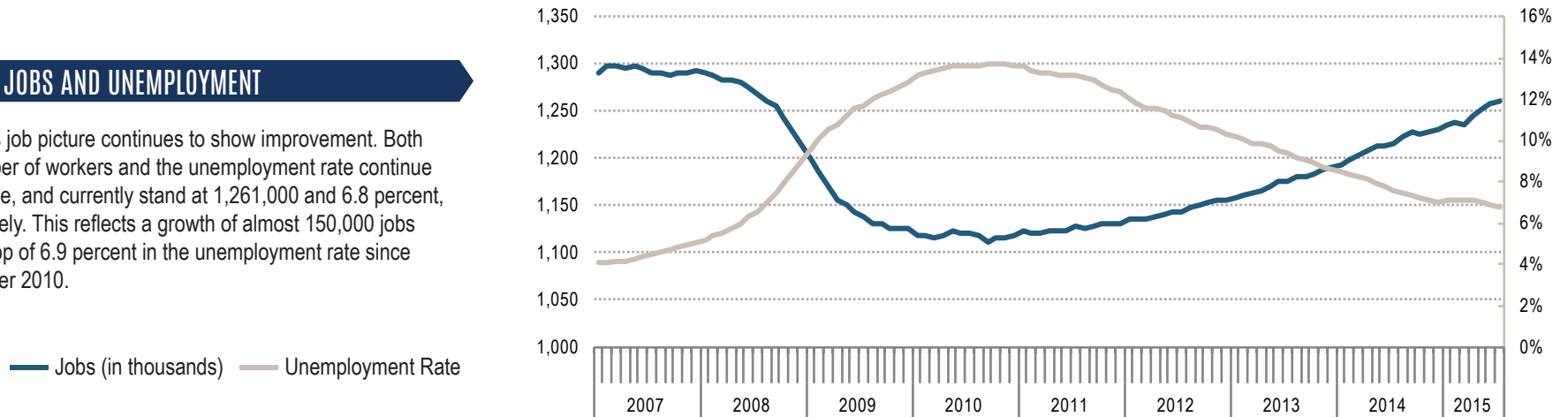
- » During Program Year 2014-2015 (July 1 - June 30), 21 grants were successfully completed and closed. • In the quarter, four grants representing \$273,095 in CDBG funds were successfully completed and closed.
- » Closed grants in the quarter assisted 20,782 beneficiaries, 53 percent of which were Low and Moderate Income (LMI).
- » There are currently 31 open grants: 9 from 2013, and 22 from 2014 funds.

#### 2015-2019 CONSOLIDATED PLAN

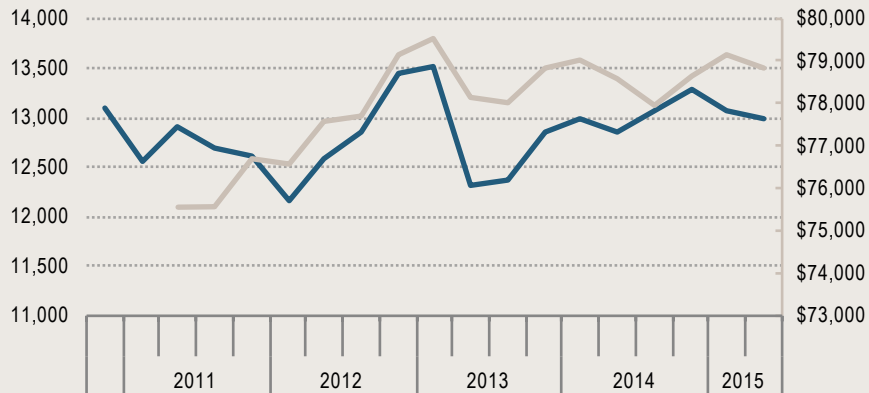
Every five years, the Department of Housing and Urban Development (HUD) requires submission of a five-year Consolidated Plan for CDBG programs. The 2014 CDBG Program Year ended June 30, 2015, and is the last year covered in the 2010-2014 Consolidated Plan. In May, the Nevada CDBG 2015-2019 Consolidated plan was submitted to HUD with the following priorities: economic development, public facility, planning, building and housing rehabilitation, water and sewer, and public service needs. The 2015 grants are included in this new plan.

### NEVADA JOBS AND UNEMPLOYMENT

Nevada's job picture continues to show improvement. Both the number of workers and the unemployment rate continue to improve, and currently stand at 1,261,000 and 6.8 percent, respectively. This reflects a growth of almost 150,000 jobs and a drop of 6.9 percent in the unemployment rate since September 2010.

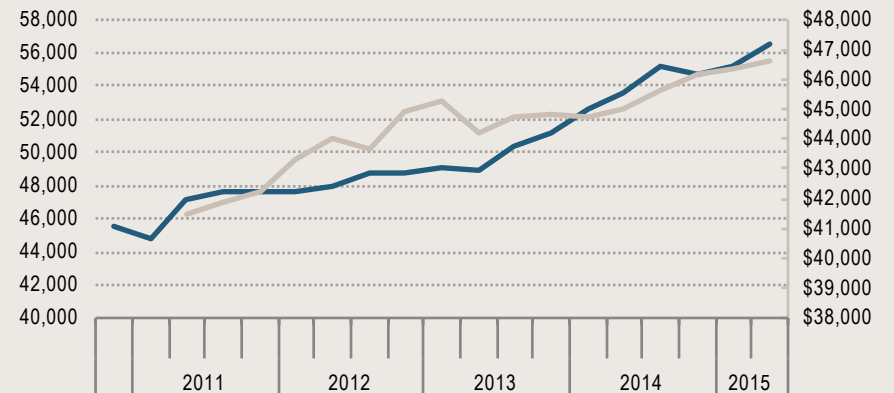


### AEROSPACE AND DEFENSE



There was a loss of 70 jobs in Nevada's Aerospace and Defense sector in the second quarter. Annual earnings also slipped slightly, falling by \$300 mostly from the loss of a few, high paying aircraft manufacturing jobs. There are currently 13,000 Nevadans employed in this sector with average annual earnings of \$78,900.

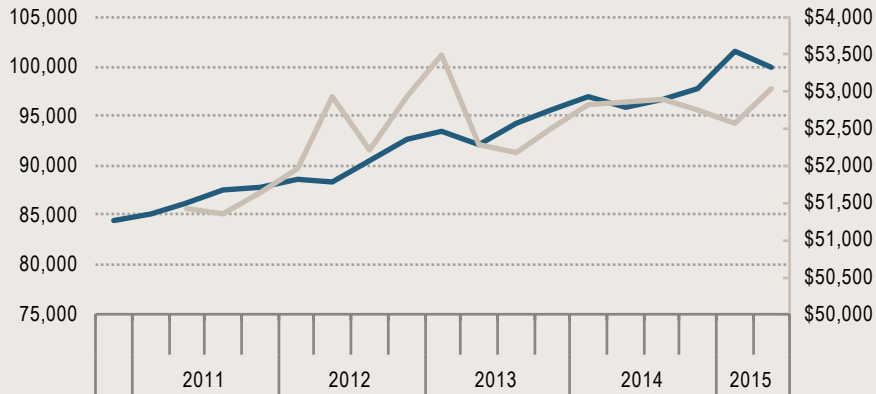
### BUSINESS INFORMATION TECHNOLOGY



Both earnings and job counts improved in the Business Information Technology sector in the second quarter. An additional 1,300 jobs were added to the sector for a total of 56,500 employees making an average of \$46,600 per year.

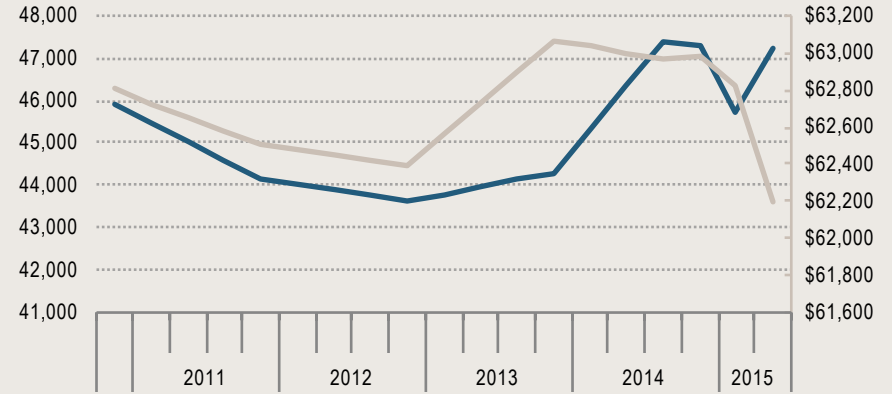
— Jobs — Average Earnings per Job

### HEALTH AND MEDICAL



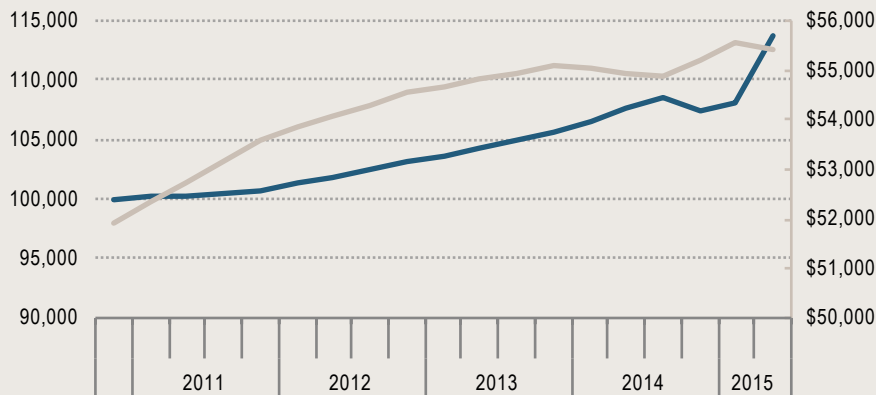
The number of jobs in Nevada's Health and Medical sector dipped slightly in the second quarter with the loss of 1,300 positions. Wages, on the other hand, moved up by \$240 per year. Currently, there are 56,500 people employed in the sector making an average annual wage of \$46,600.

### NATURAL RESOURCE TECHNOLOGIES



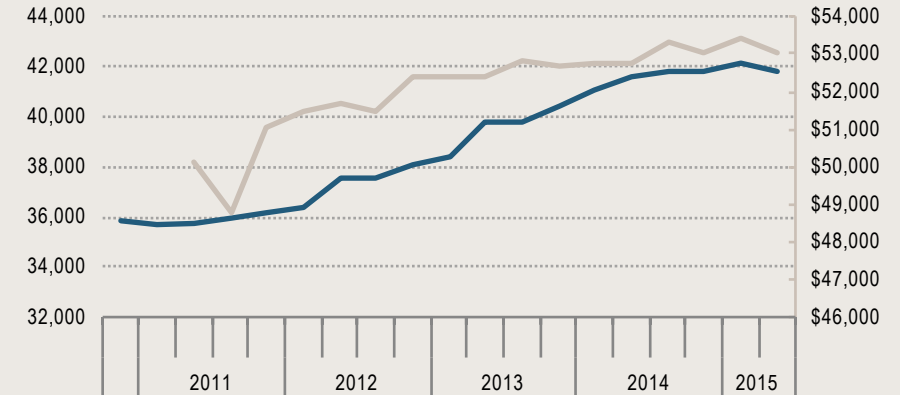
This is the first quarter we will be tracking the Natural Resource Technologies sector. It is an aggregation of what was the Agriculture and Clean Energy sector, with the addition of Water Technologies. Currently, the sector represents 47,200 jobs that pay an average annual wage of \$62,200.

### MANUFACTURING AND LOGISTICS



This is also the first quarter we will be tracking the Manufacturing and Logistics sector. It is an aggregation of what was the Manufacturing sector and the Logistics and Operations sector. This is now the second largest strategic growth sector representing 113,700 jobs which pay an average annual wage of \$55,400.

### ALL MANUFACTURING

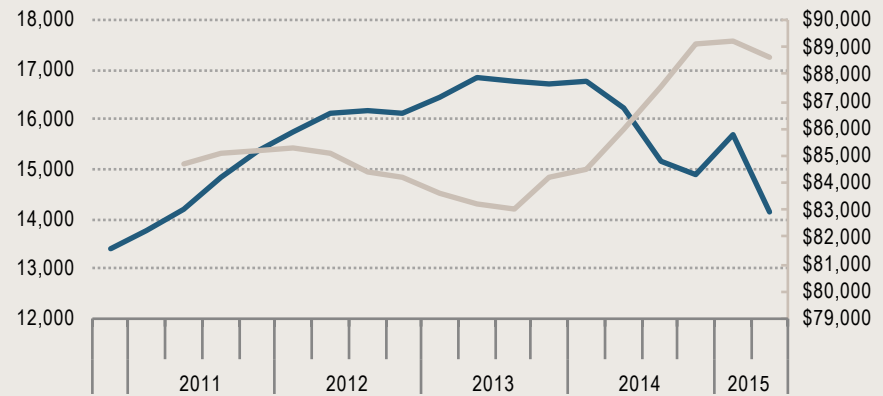


The Manufacturing Sector makes up almost 37 percent of the Manufacturing and Logistics sector. Job growth and wages were essentially flat in the second quarter with a slight loss of 326 jobs and \$327 in annual wages. Currently, there are 41,800 Nevadan's employed in the sector making \$53,000 per year.

— Jobs — Average Earnings per Job

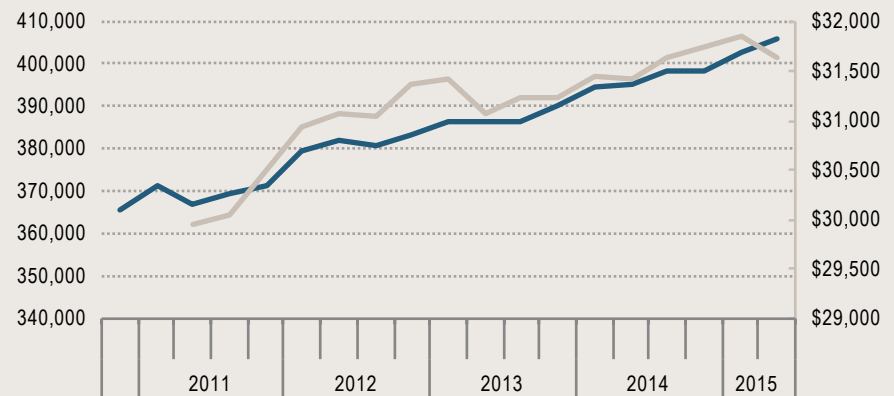
## MINING

Both earnings and jobs fell in Nevada's Mining sector in the second quarter. These losses can be traced directly back to the drop in gold prices, with the loss of 1,800 jobs specific to gold mining. The sector currently employs 14,100 workers who make an average annual wage of \$88,600.



## TOURISM, GAMING, AND ENTERTAINMENT

There were an additional 3,300 jobs added to Nevada's Tourism, Gaming, and Entertainment sector in the second quarter. This reflects an annualized growth rate of 3.2 percent and brings the total employment base to 406,000. Annual earnings, on the other hand, dropped slightly to \$31,600; a \$330 decrease from the previous quarter.



— Jobs — Average Earnings per Job